PBX Admin / Office Manager Guide

CONTENTS

PREFACE

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

Document Conventions

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

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

Glossary Conventions

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

1. ACCESSING THE ADMIN WEB PORTAL

Topics:

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

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

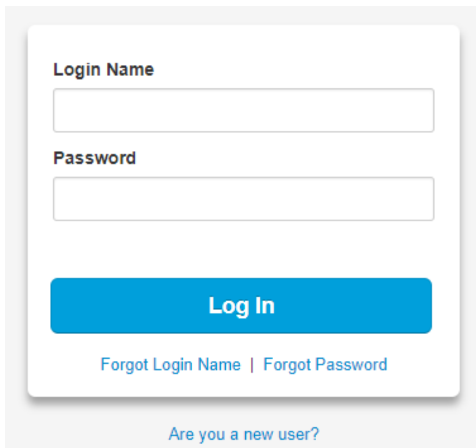
.

Logging in to the Web Portal

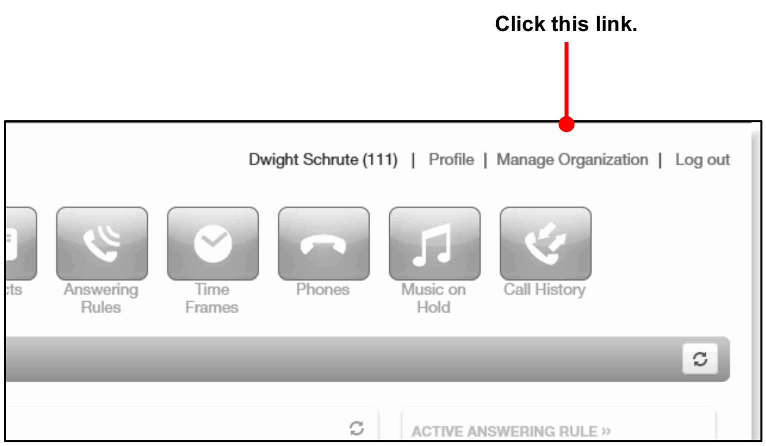
To log in to the web portal:

1. Launch a web browser.
2. Go to: https://portal.fountnetworks.com.
3. At the Login page:

- Enter the **Login Name** (ext@cust-id) and **Password**. If you do not know your Login Name or Password use the applicable **Forgot** Link.
- If you never received these details use the **New User** link.



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



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

Understanding the Admin Portal Interface

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

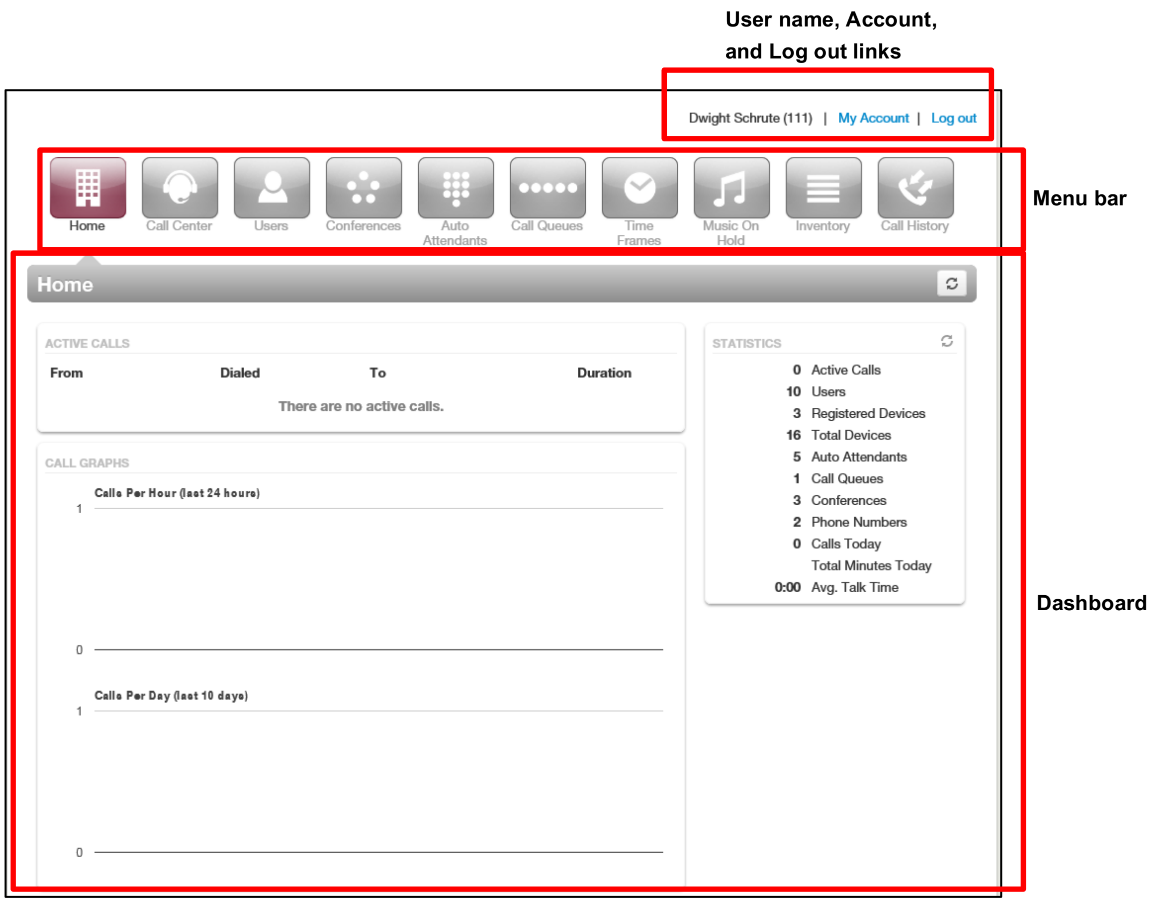
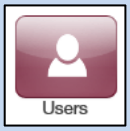
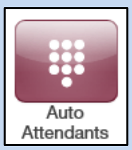
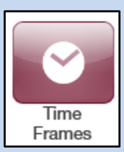
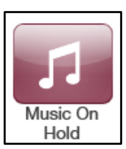


Table 1-1. Admin Menu Icons

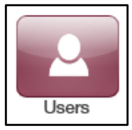
Menu Icon	Description	See Chapter
 Home	Shows active call information such as graphs and statistics.	3
 Users	Shows users configured in the system, and allows you to add, edit, and import users.	4
 Conferences	Shows conferences configured in the system, and allows you to edit, delete, join a conference,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

2. QUICK GUIDE TO COMMON TASKS

Topics:

This chapter describes frequently performed tasks.

Resetting a Password

1. On the menu bar, click 

.
2. Click the name of the user that needs a password change.

- Scroll down to the **Change Password** section, and then enter a new numeric password in the **New Password** and **Confirm New Password** fields.
- Click **Save**.

Replacing Employees

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

1. On the menu bar, click 

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

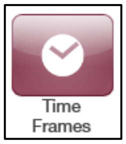
Moving a Phone

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

1. On the menu bar, click 

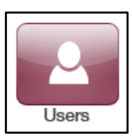
.
2. Click the **Phone Hardware** tab.
3. Click the MAC address of the appropriate phone.
4. In the pop-up window, reassign the extensions, and then click **Save**.

Changing Open Hours

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

Setting New Holidays

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

1. Set the time frame:
   a. On the menu bar, click 
.
   b. Click **Add Time Frame** to add a new time frame or click the **Name** of the time frame you want to edit.
   c. In the pop-up window, enter or edit the name for the holiday, click when it occurs, and use the check boxes, sliders, and text fields to adjust the rules, as appropriate.
   d. Click **Save**.
2. Set the user answering rules:
   a. On the menu bar, click 
.
   b. Click the **Name** of a user who needs the time frame applied to him.
   c. Click the **Answering Rules** link.
   d. Check to see whether the time frame already applies to that user. Otherwise click **Add Rule**.
   e. Using the **Time Frame** drop-down list, select the time frame you defined in step 1.
   f. Complete the other settings as appropriate (see
   g. Table 4-2 on page 27).

h. Click **Save**.

i. Reorder the time frames as needed to ensure the new rule will take precedence.

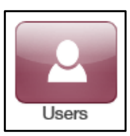
Setting Call Forwarding

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

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

6. Click **Save**.

Blocking a Caller

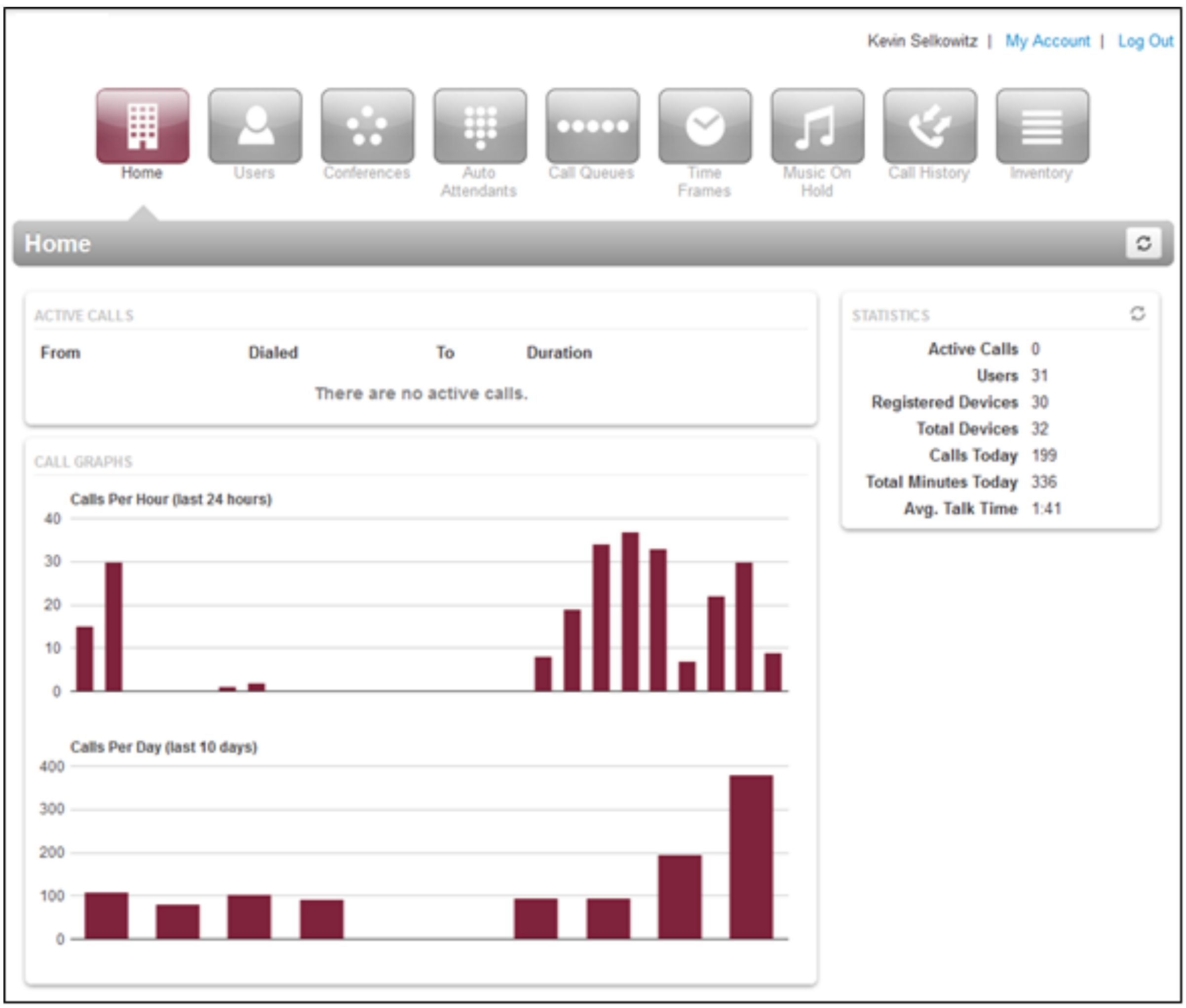
1. On the menu bar, click 
.
2. Click the name of the User that needs a block.
3. Click the **Answering Rules** tab.
4. Click the **Allow/Block** button.
5. In the pop-up window, enter the caller’s number under **BLOCKED NUMBERS**, and then click **+**.
6. Click **Done**.

3. WORKING WITH ACTIVE CALLS

Topics:

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

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



Active Calls Page

Call Graphs

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

Statistics Panel

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

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

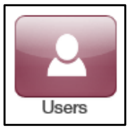
4. WORKING WITH USERS

Topics:

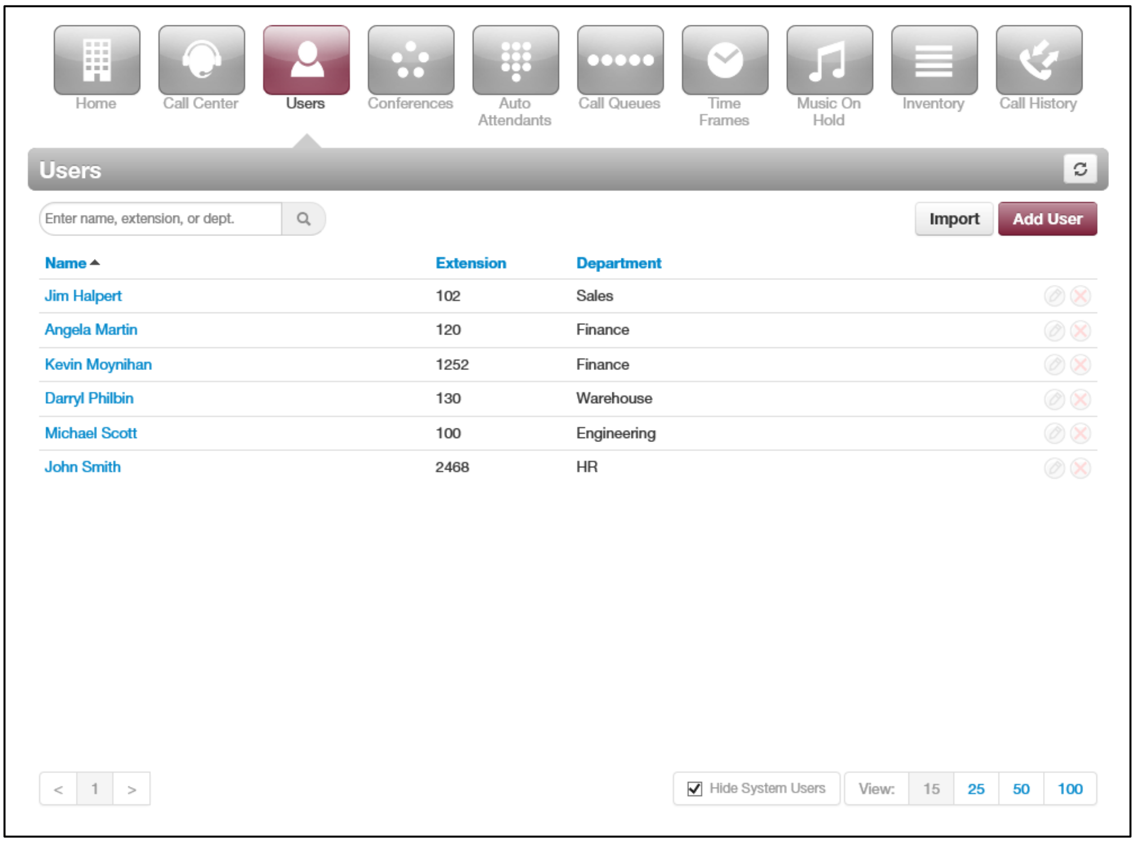
Users are the extensions on your system. This chapter describes how to add, edit, and import users to the system. System users are users associated with queues, auto attendants, and other system features.

Displaying the Users Page

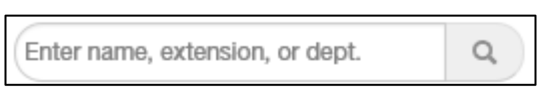
All user tasks are performed from the Users page. To display this page, click the **Users** icon on the menu bar:



The following figure shows an example of the Users page.



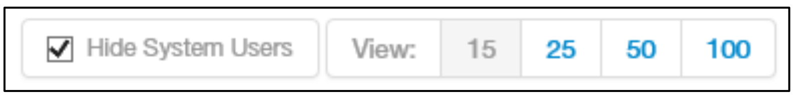
A search field at the top-left of the page allows you to search users by entering their name, extension, or department, and then clicking the magnifying glass icon:



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

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

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



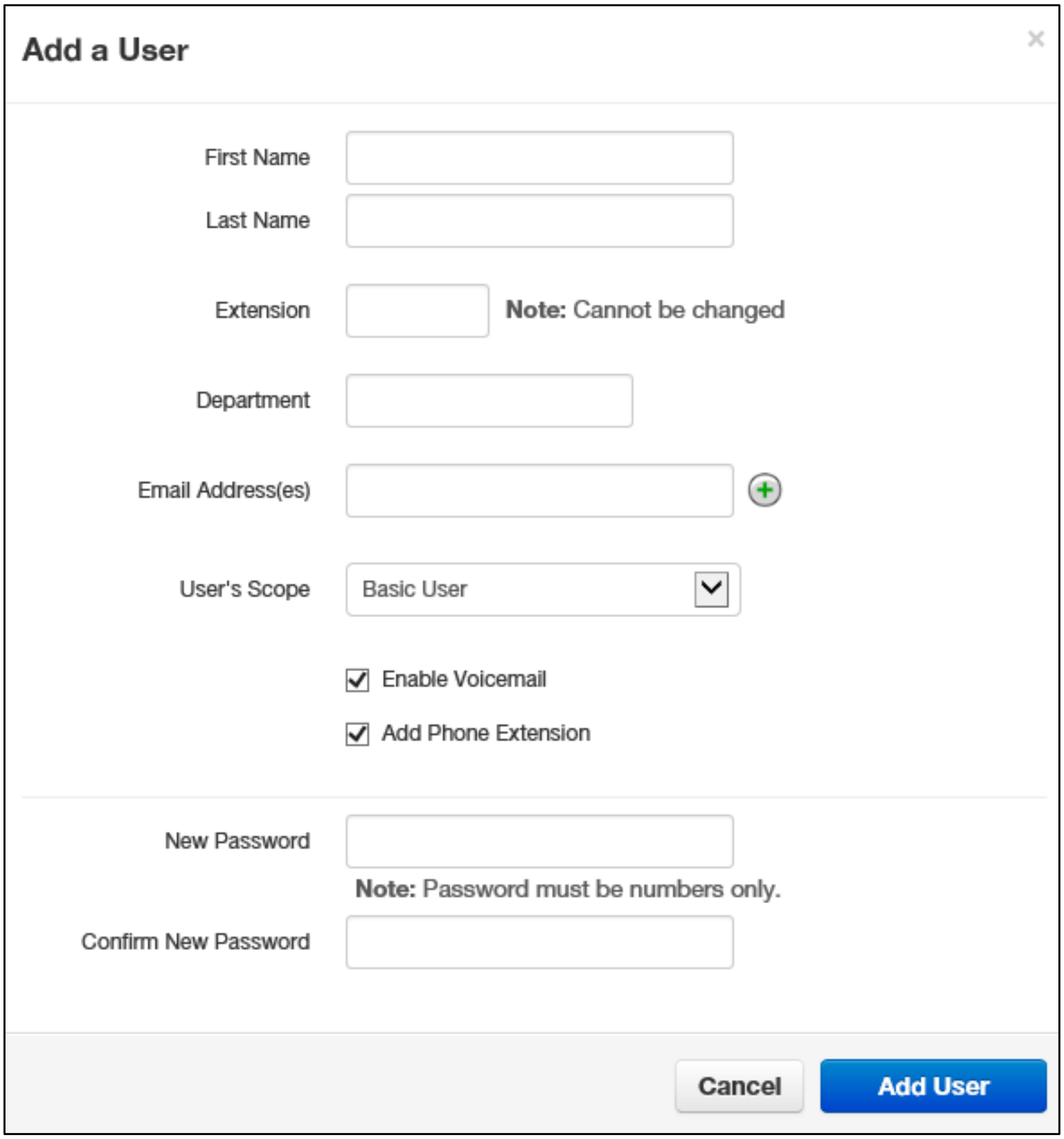
Where to go from here:

From the Users page, you can:

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

Adding Users

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



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

Table 4-1. Adding/Editing a User

Setting	Description
First Name	Enter the user's first name. The dial-by-name directory can match on this field, but will by default match Last Name.
Last Name	Enter the user's last name. The dial-by-name directory can match on this field.
Extension	Enter the user's extension.
Department	Enter the department to which the user belongs.
Timezone	Enter the user's time zone.
Email Address(es)	Enter the user's address used for email, password resets, etc. To add email addresses, click the green plus icon.
User's Scope	Select the user's access level. Choices are the following (your selections might be different): • Basic user • Office manager • Call center agent (may not appear in your drop-down list) • Call center supervisor (may not appear in your drop-down list)
Enable Voicemail	Enable or disable voicemail. Choices are: • Checked = enable voicemail. • Not checked = disable voicemail.
Add Phone Extension	This setting allows you to add a phone extension. Phone extensions allow users to be associated with a phone. A user can have one or more phone extensions. For example, user 111 could have three phones designated as 111a, 111b, and 111c. If you check this check box, you can then associate a phone to the user (see Table 10-3 on page 100). Choices are: • Checked = add phone extension. • Not checked = do not add phone extension.
New Password	Enter a new numeric login password for the user. For security, each typed password character is masked by a dot (●).
Confirm New Password	Enter the same numeric login password you entered in the New Password field. For security, each typed password character is masked by a dot (●).

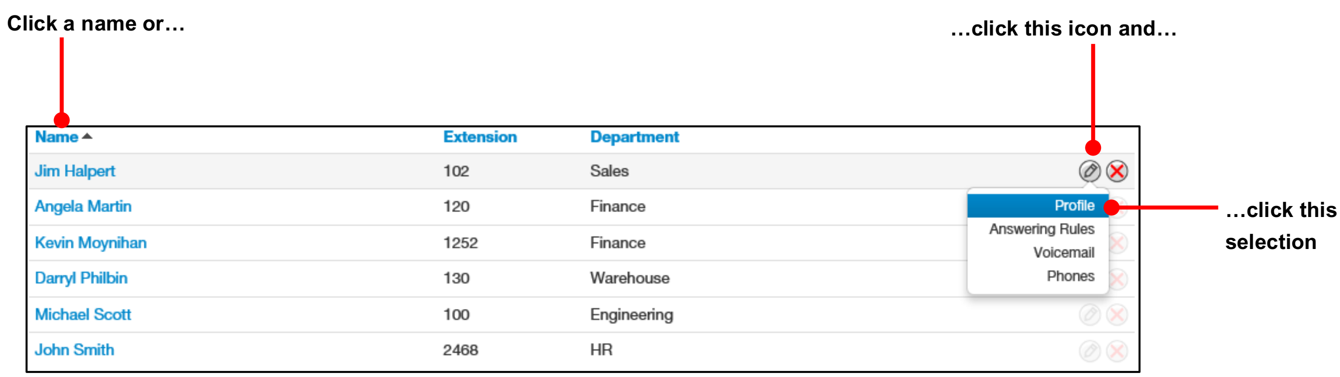
Editing Users

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

1. From the Users page, either:
   - Click a name

     OR

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



Where to go from here:

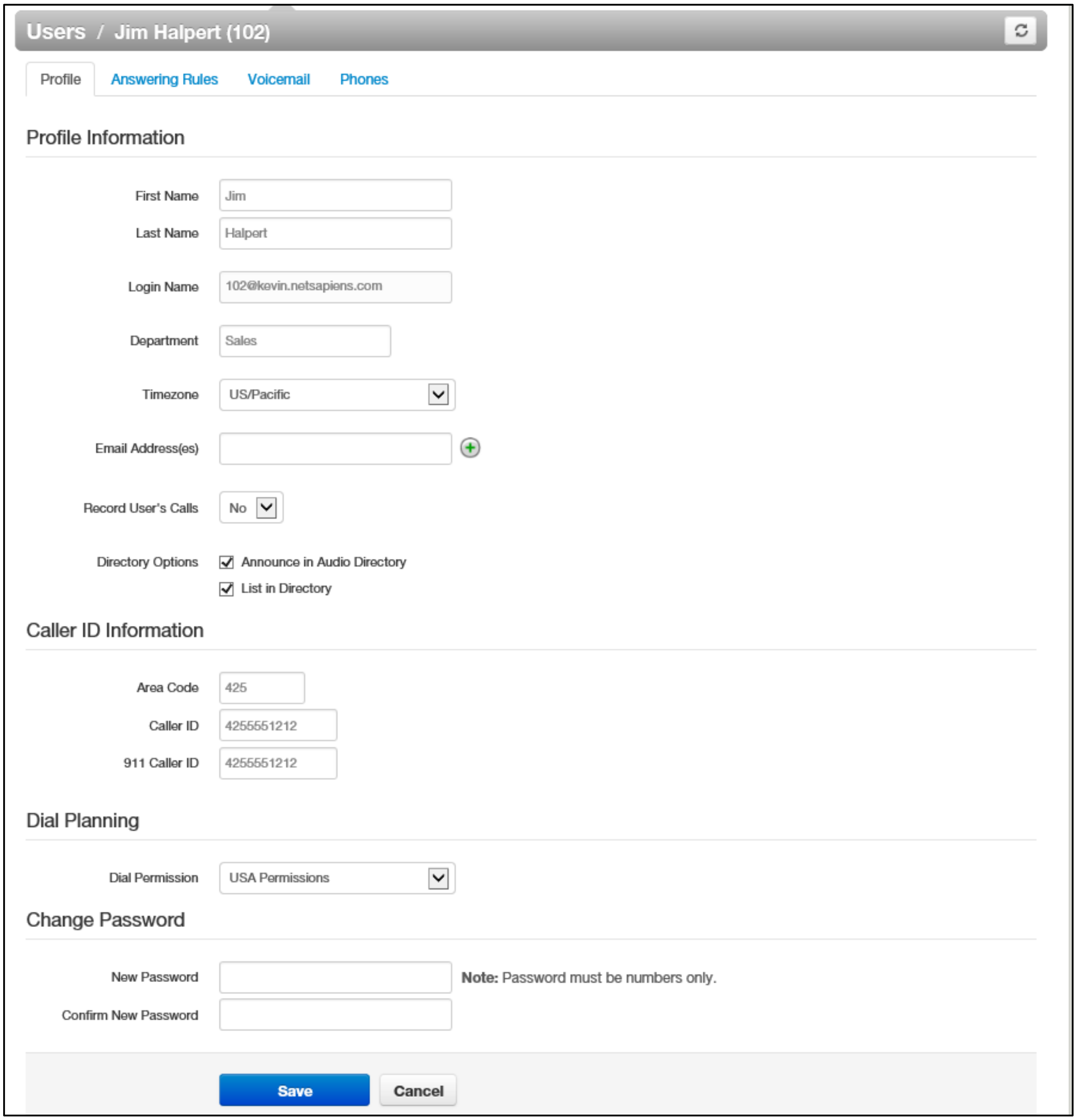
When a page similar to the following appears, use the tabs to configure the settings for this user:

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

Configuring the User Profile

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

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

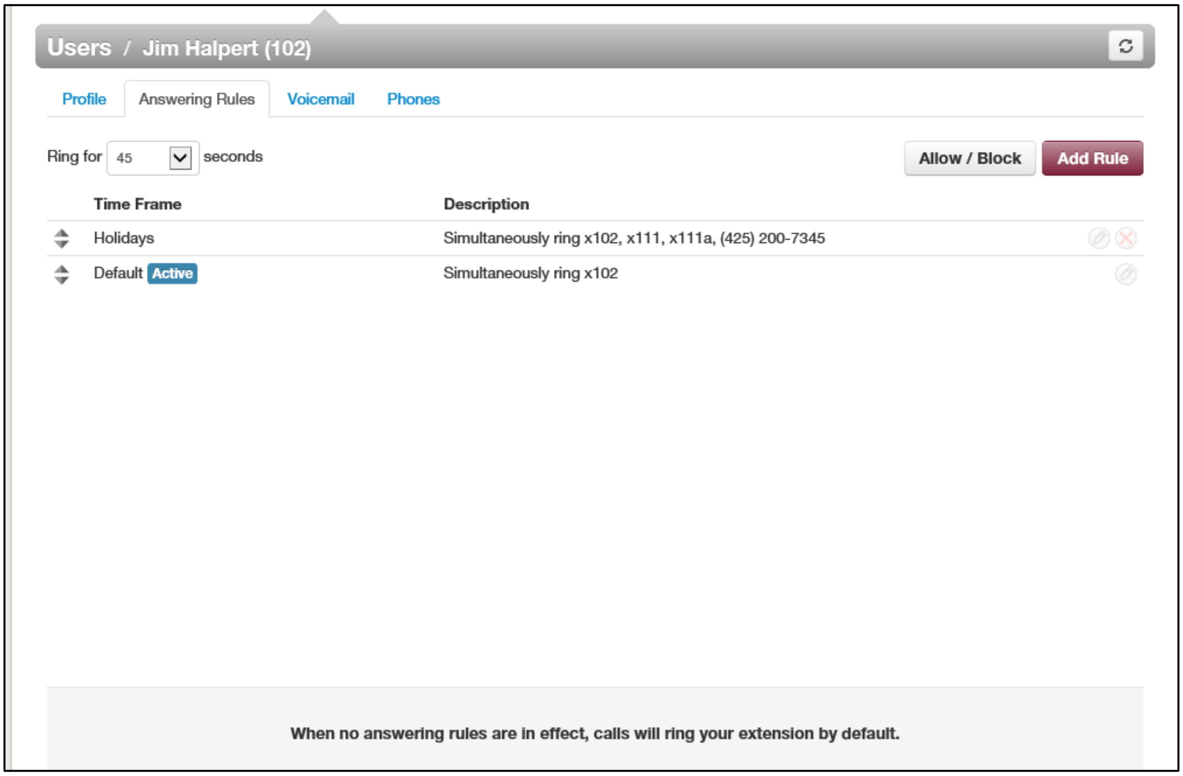


Setting	Description
Profile Information	
First Name	Enter the user's first name.
Last Name	Enter the user's last name. The user's last name is particularly important for the dial-by-name directory, as it matches on this field.
Login Name	Read-only field that shows the login name this user uses to log in to the portal.
Department	Enter the department to which the user belongs.
Timezone	Enter the user's time zone.
Email Address(es)	Enter the user's address used for email, password resets, etc. To add email addresses, click the green plus icon.
Record User's Calls	Select whether the calls for this user will be recorded (Yes) or not recorded (No).
Directory Options	Enables or disables announce in auto directory and list in directory features. • Announce in Audio directory = check to include the user in the dial-by-name directory. • List in Directory = check to add user to the internal extensions list (contacts).
Caller ID Information	
Area Code	Area code associated with the user.
Caller ID	Caller ID numbers that will be displayed for this user.
911 Caller ID	Caller ID number sent when calling 911. This may be different than your regular caller ID.
Dial Planning	
Dial Permission	Select the dialing permissions for the user.
Change Password	
New Password	Enter a new numeric login password for the user. For security, each typed password character is masked by a dot (●).
Confirm New Password	Enter the same numeric login password you entered in the New Password field. For security, each typed password character is masked by a dot (●).

Configuring User Answering Rules

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

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

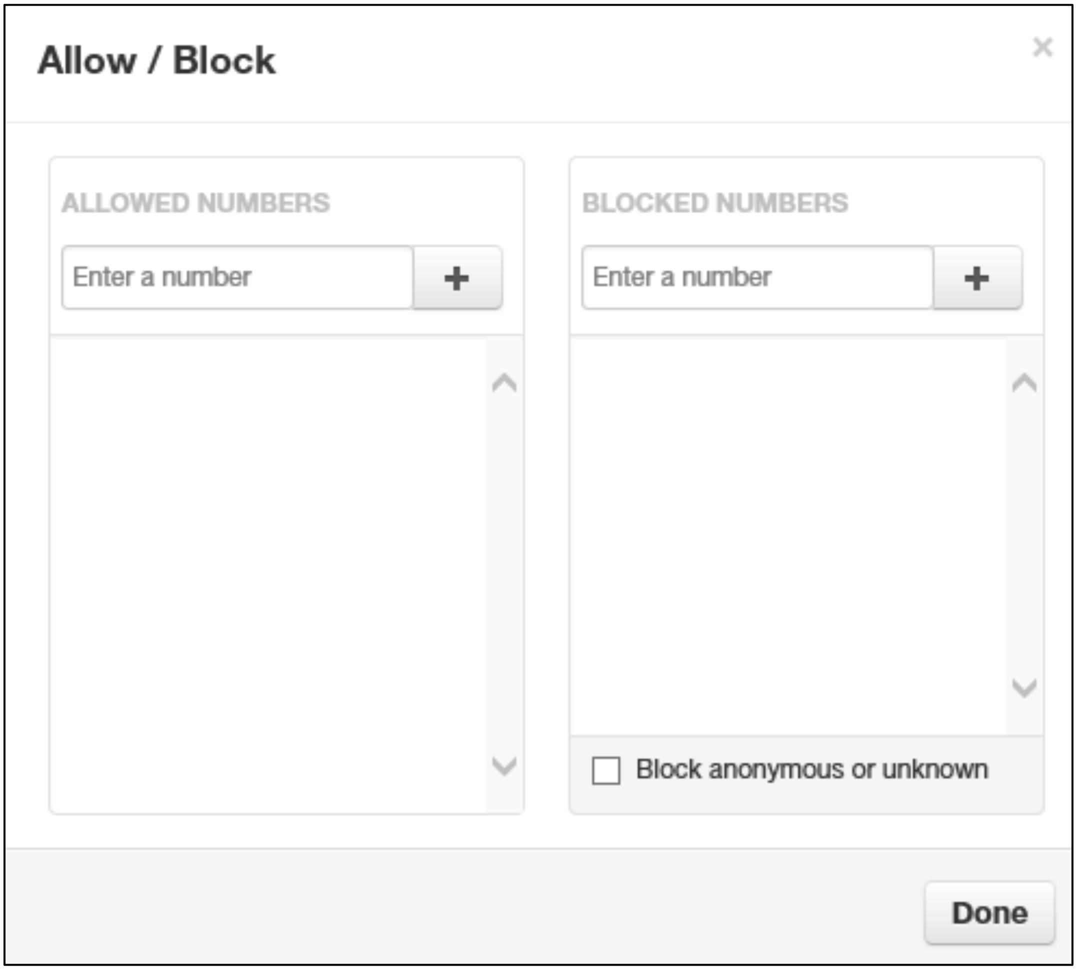


- Use the **Ring for** drop-down list to select the maximum number of seconds that incoming calls ring for this user before the system routes the call to the user's voicemail or the **Forward if Unanswered** option, if configured.
- From this page, you can:
  - Allow or block calls for this user (see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

Allowing or Blocking Calls

To allow or block calls for this user:

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

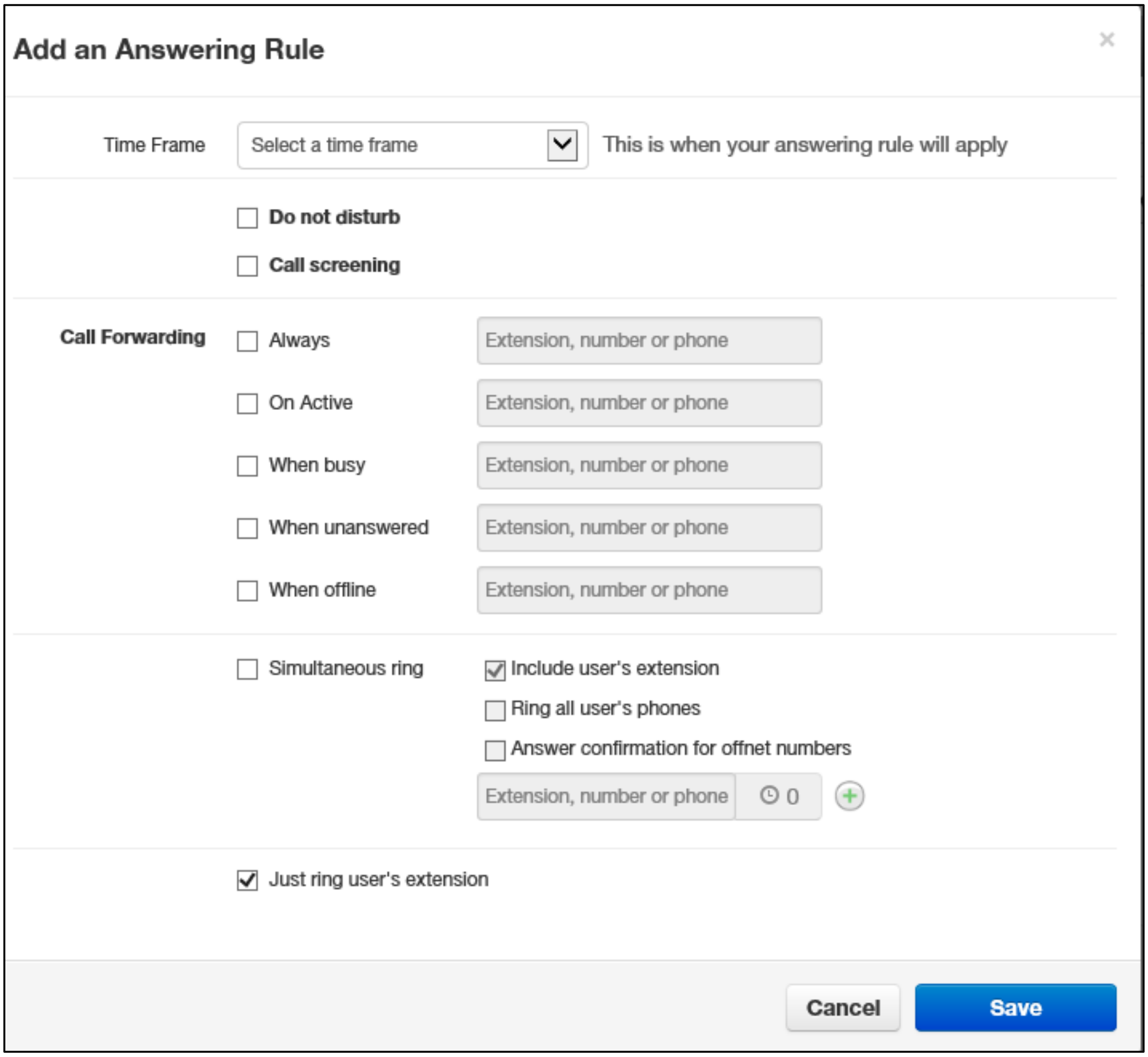


- Calls from allowed numbers bypass call screening and server side Do Not Disturb (not phone DND). To allow numbers for this user, enter a number in the **Enter a number** field under **ALLOWED NUMBERS**, and then click the plus sign next to this field. Repeat this step for each additional number you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

Adding Answering Rules

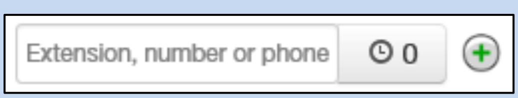
Adding additional answering rules allows you specify alternate call answering rules in a different time frame (for example, handle calls differently on a weekend than on a weekday). To add an answering rule for this user:

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



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

Table 4-2. Adding/Editing Answering Rules

Setting	Description
Time Frame	Select a time frame to which this answering rule will be applied. Choices shown are the ones previously configured using the procedure under “Adding Time Frames” on page 80.
Enabled	Add an answering rule: this check box does not appear. Edit an answering rule: enable (check) or disable (uncheck) this time frame for this user.
Do not disturb	Enables or disables the Do Not Disturb feature. Choices are: • Checked = enable Do Not Disturb. Send all calls directly to voicemail (if available), without ringing the phone. • Not checked = disable Do Not Disturb.
Call screening	Enables or disables the Call Screening feature. Choices are: • Checked = enable Call Screening. System prompts callers to say their name, and then lets you screen the call before accepting it. • Not checked = disable Call Screening.
Call Forwarding options	Select the following appropriate Call Forwarding settings. When entering another extension as a Call Forward option, a drop-down menu allows you to forward the call to specific resources associated with that extension (see Table 4-3). Some settings might not appear, depending on the features associated with the given extension. Choices are: • Always = immediately forward calls to the number specified in the text field. • When busy = forward calls to the number specified in the text field when your extension has used all available call paths. • When unanswered = forward calls to the number specified in the text field if the call is not answered after the specified ring timeout. • When offline = automatically forward calls to the number specified in the text field if your desk phone has lost communication (for example, during a power outage).
Simultaneous Ring	Simultaneous ring allows multiple phones to ring at the same time. Check boxes allow you to include the user’s extension, ring all user phones at the same time, and use answer confirmation for offnet numbers. • Include user’s extension = check to ring the phone with the same extension as the user. • Ring all user’s phones = ring all phones associated with this user at the same time. • Answer confirmation for offnet numbers = ensures when conducting a simring to a cell/landline that the answering party is a person instead of voicemail by requesting them to press 1 to accept the call.
	In this field, you can enter the extension of another telephone you want to ring. The clock icon allows you to specify a ring delay. A ring delay allows you to enter the amount of time before the call rings at the destination. To add other phones to the simring, click the green plus icon.

Setting	Description
Just ring user's extension	Enables or disables the ringing of your telephone only. • Checked = incoming call rings just your telephone. • Not checked = feature is disabled.

Table 4-3. Call Forward Selections

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

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

Changing the Active Answering Rule

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

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

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

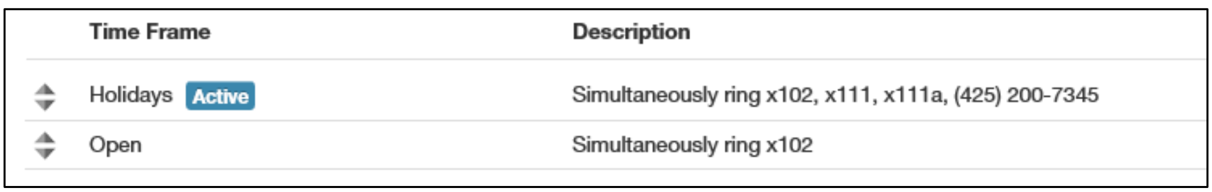
1. In the **Answering Rules** tab, find the rule you want to designate as the active rule.

- On the left side of the **Answering Rules** tab, hover the mouse over the up/down arrows for that rule (the pointer changes to a 4-headed arrow).

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

Message that active rule has been reprioritized

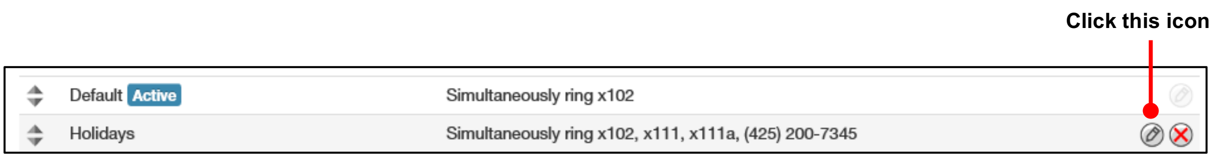
- Click **Save**. The **Active** designation appears next to the topmost time frame.



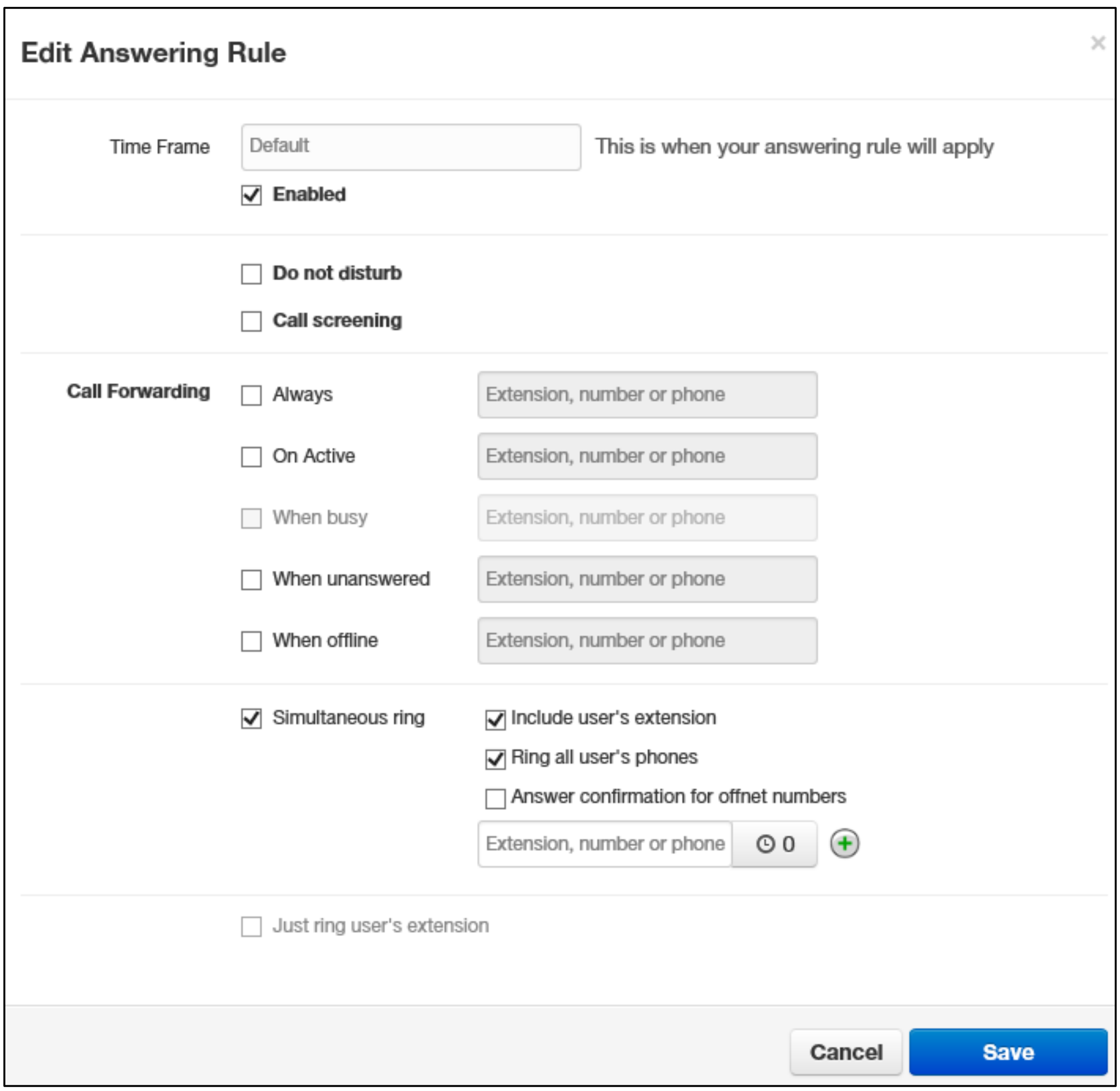
Editing Answering Rules

To edit an answering rule for this user:

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



The Edit Answering Rule pop-up window appears.



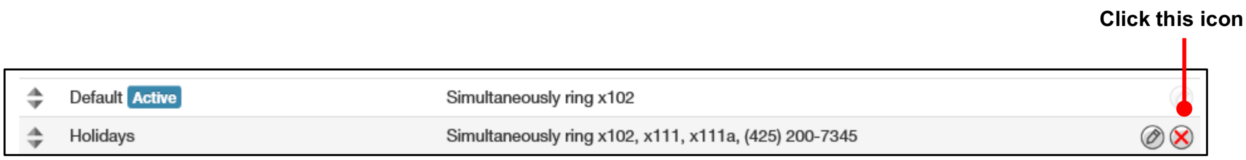
- Change the rule, as appropriate. For assistance, see Table 4-2 on page 27.

2. Click **Save**.

Deleting Answering Rules

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

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



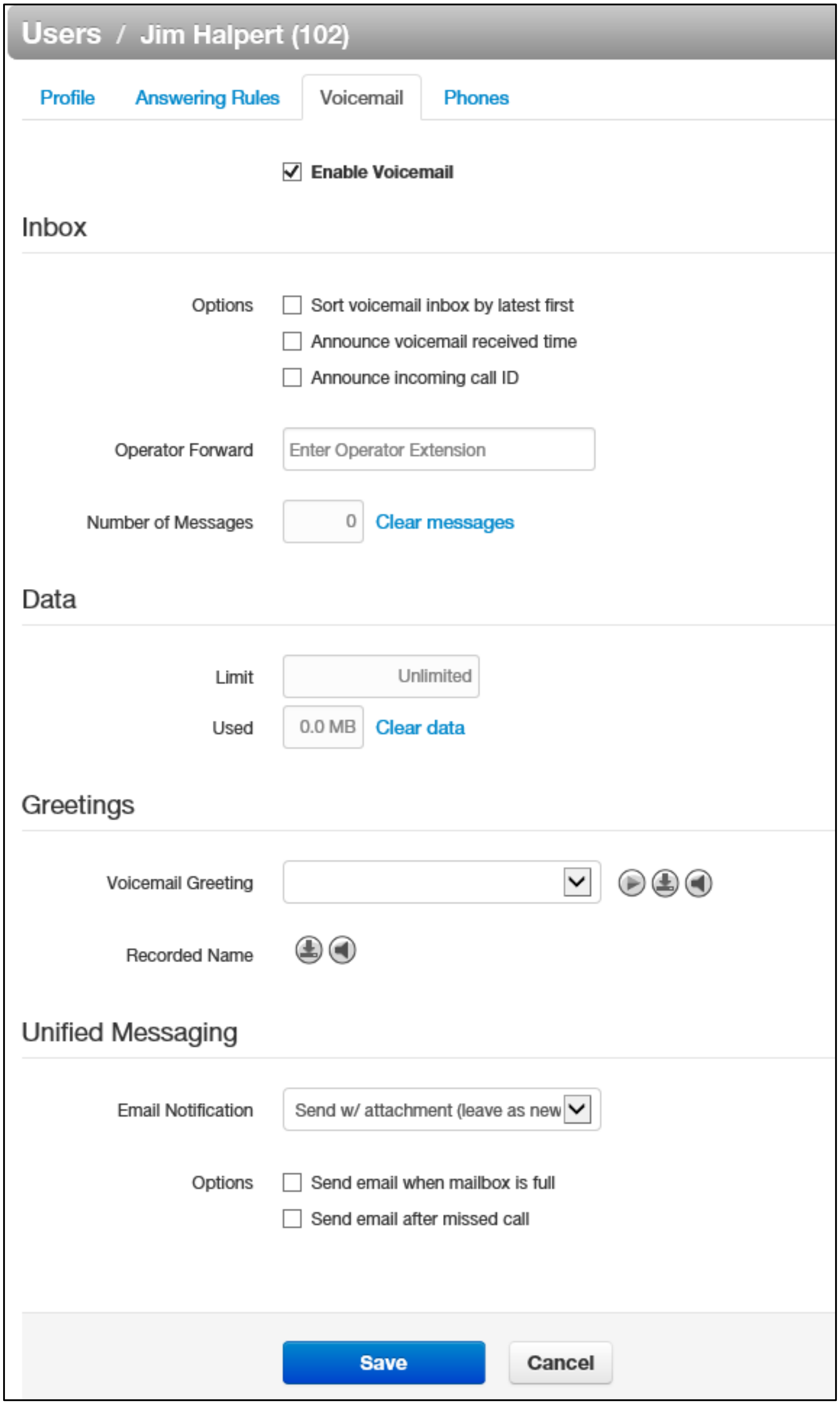
A confirmation prompt appears.

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

Configuring User Voice mail

To configure voice mail for the selected user:

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



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

Table 4-4. Voicemail Settings

Setting	Description
Enable	Enable (check) or disable (uncheck) voicemail.
Inbox	
Options	This setting affects audio voicemail (calling into voicemail), but does not affect the web portal voice messages. Check the appropriate inbox options. Choices are: • Sort Voicemail inbox by latest first = plays newest messages first. • Announce voicemail received time = plays the timestamp of the message. • Announce incoming call ID = plays the caller ID number if available.
Operator Forward	This setting determines where a call is sent if the caller presses 0 while the voicemail greeting is being played. When using this feature, tell callers near the beginning of your recorded voicemail greeting that they can press 0 to redirect their call.
Number of Messages	Read-only field that shows the current count of messages. Click the Clear messages link to delete messages, but leave greetings in place.
Data	
Limit	Read-only field that shows user's storage limit.
Used	Read-only field that shows user's used storage. Click the Clear data link to delete all messages, greetings, and the name recording.
Greetings	
Voicemail Greeting	To select an active voicemail greeting, click a greeting from the drop-down list. To play the selected greeting, click the  icon. To download the selected greeting, click the  icon. To upload or record a greeting, click the  icon to display the Manage Greetings pop-up window. Greetings must be in MP3 or WAV format. To upload a greeting: 1. Next to New Greeting, click Upload. 2. Use the Browse button to select the file. 3. In the Greeting Name field, enter a name for the greeting. 4. Click Save and Done. To record a greeting: 1. Next to New Greeting, click Record. 2. In the Call me field, enter number to call (either an extension or a telephone number such as your cell phone). 3. In the Greeting Name field, enter a name for the greeting. 4. Click Call. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording. 5. Click Done. (Or click Add Greeting to add another greeting.)

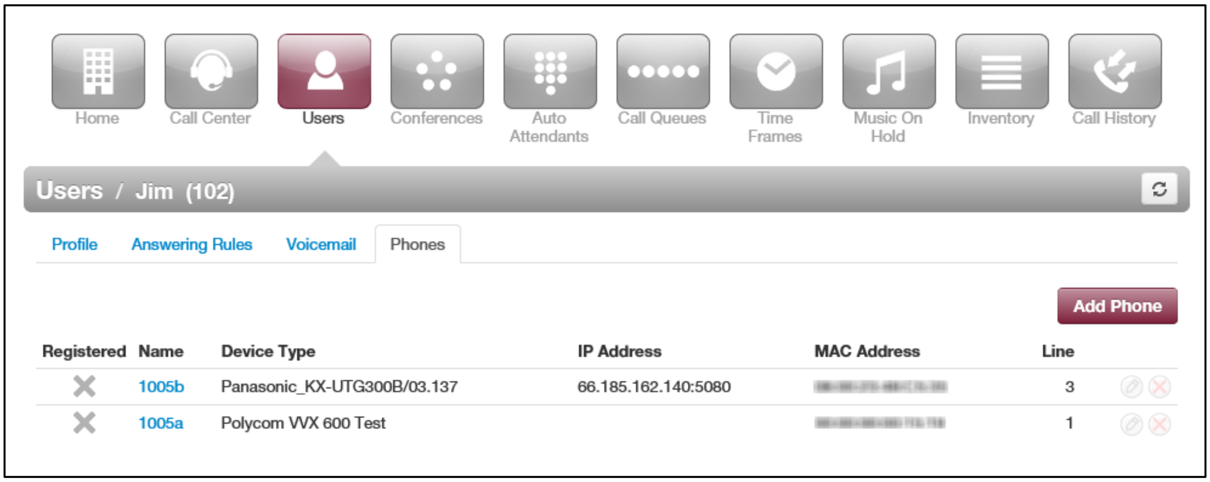
Setting	Description
Recorded Name	If your company has a dial-by-name directory, you must record your name to appear in the directory. Click the icon to listen to your current name recording on your computer or click the icon to upload or record a new greeting.
Unified Messaging	
Email Notification	Adjust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

2. Click **Save**.

Configuring Phones

To associate phones with the selected user:

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



Where to go from here:

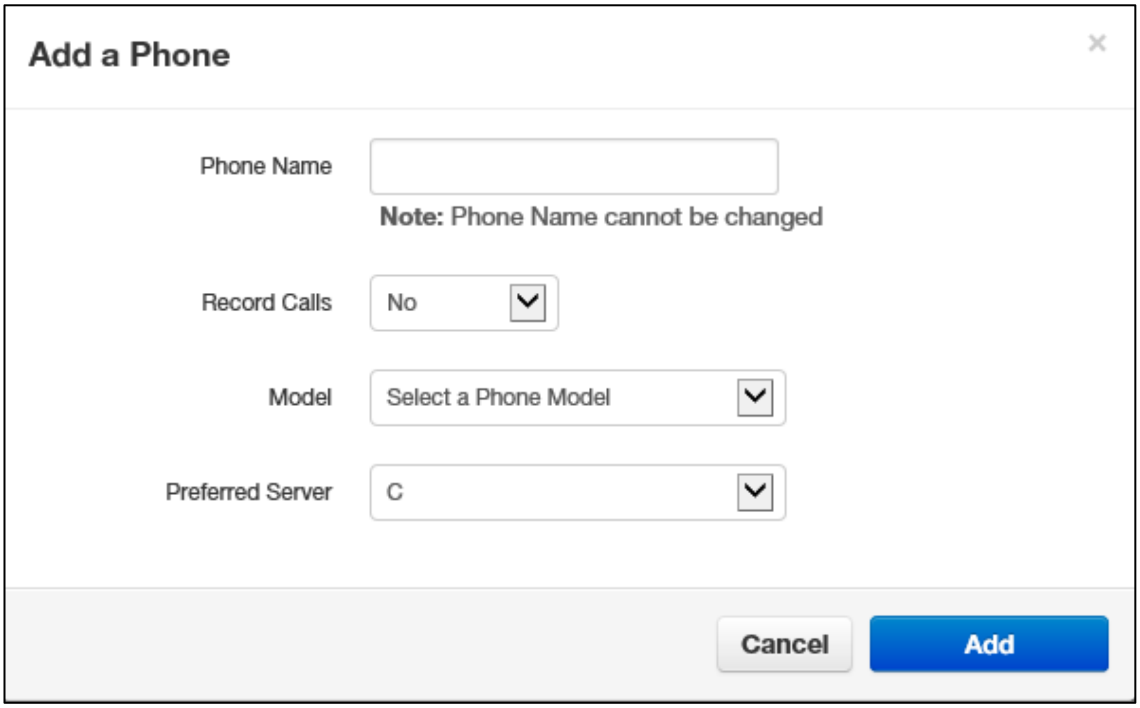
From the **Phones** tab, you can:

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

Associating Phones with This User

To associate phones with this user:

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



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

Table 4-5. Adding/Editing Phones

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

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

Editing Phones

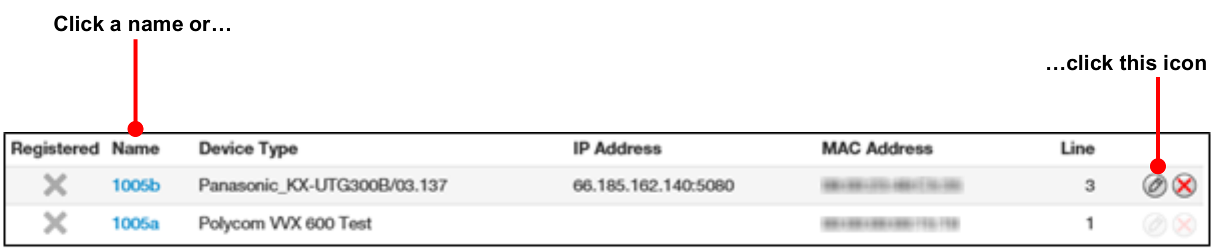
To edit a phone associated with this user:

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

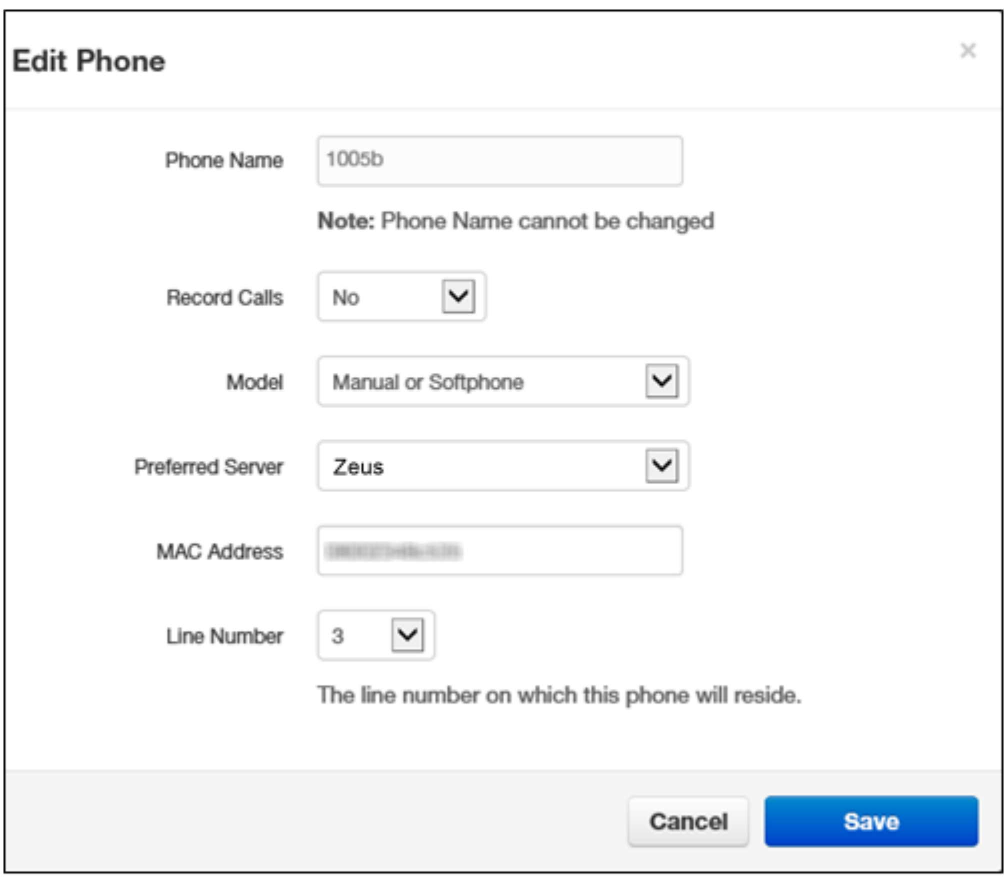
   – Click a name

   OR

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



Either step displays the Edit Phone pop-up window.

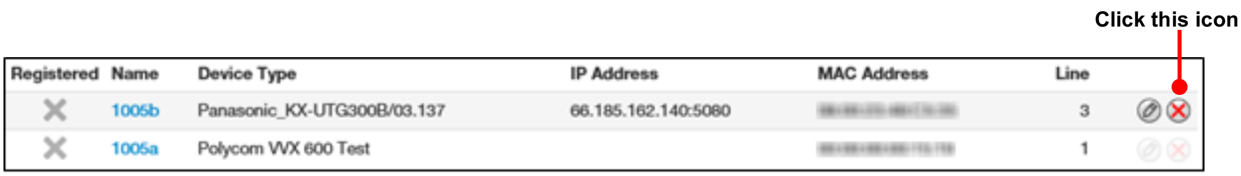


2. Change the phone settings, as appropriate. For assistance, see Table 4-5 on page 36.
3. Click **Save**.

Deleting Phones

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

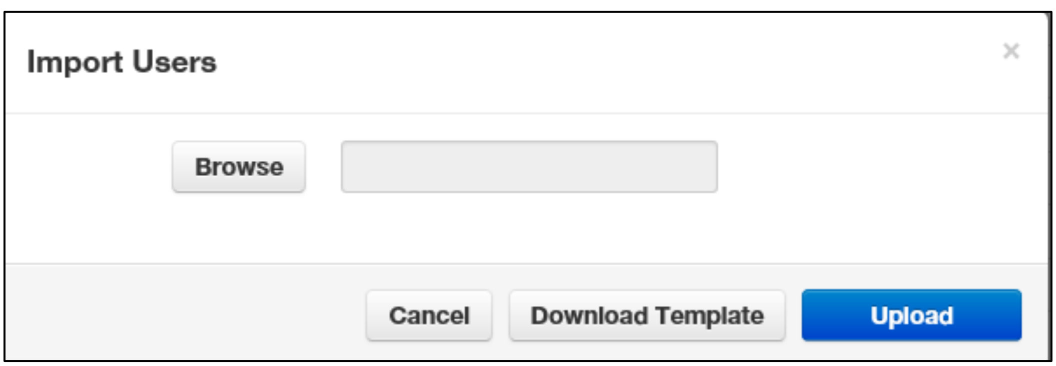
1. In the **Phones** tab, hover over the phone, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the phone or **No** to retain it.



Importing Users

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

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



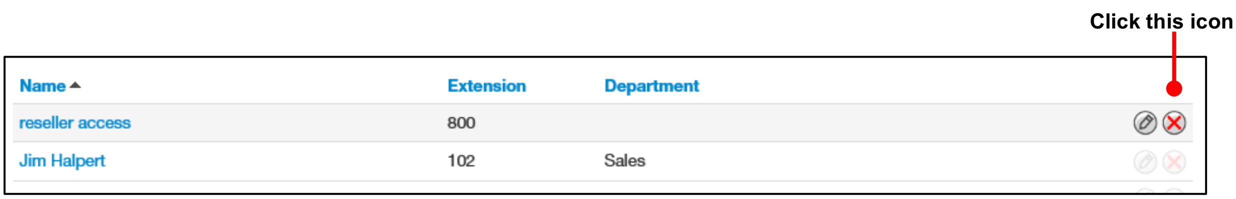
2. To download a template that you can populate and import into the system:
   a. Click the **Download Template** button.
   b. Save the template to an area you can access.
   c. Open the template, populate it with users, and then save the template.

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

Deleting Users

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

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



5. WORKING WITH CONFERENCES

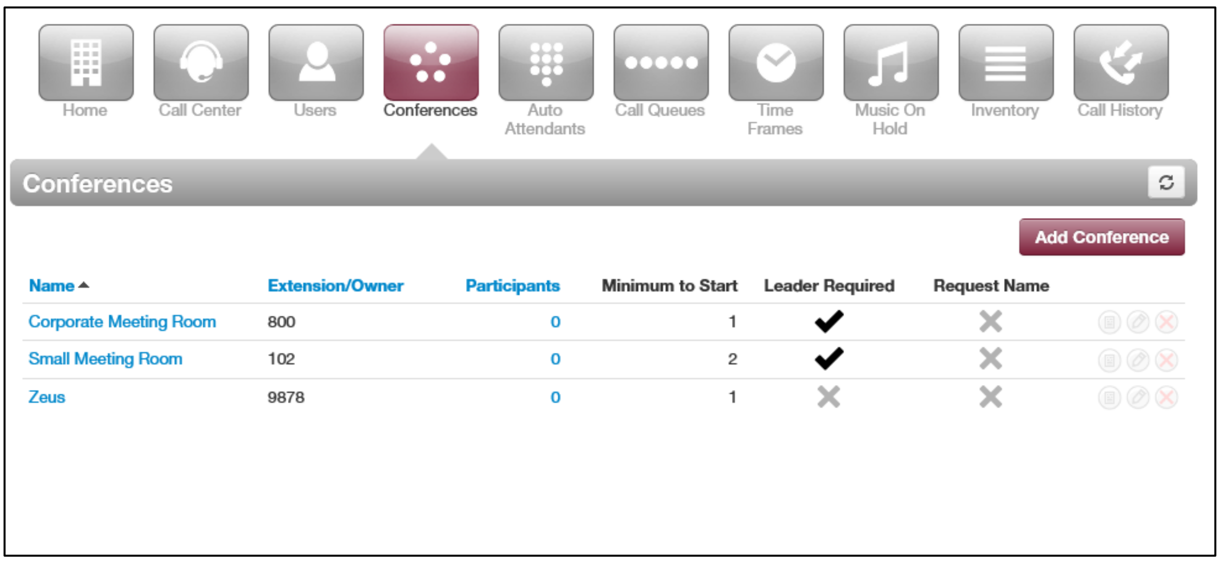
Topics:

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

Displaying the Conferences Page

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

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



Where to go from here:

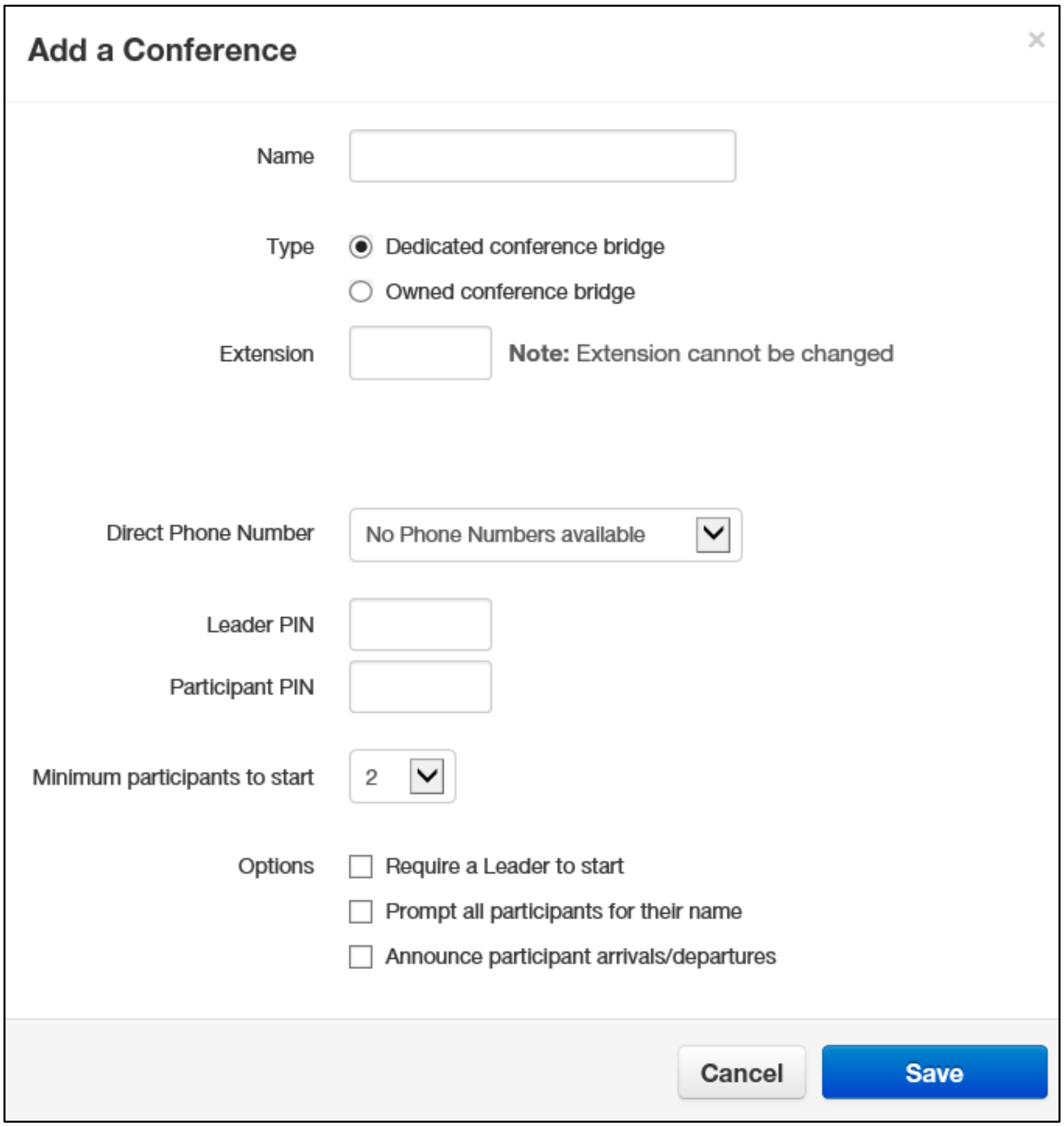
From the Conferences page, you can:

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

Adding Conferences

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

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



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

Table 5-1. Adding/Editing a Conference

Setting	Description
Name	Enter a name for this bridge. The name should allow you to differentiate this bridge from other bridges you configured.
Type	Select the conference type. Choices are: • Dedicated conference bridge = a shared bridge on its own dedicated extension. • Owned conference bridge = a bridge associated to a user on the system (for example, the bridge for user 111).
Extension	Adding a conference: select the extension used to join this conference. Editing a conference: read-only field that shows the extension.
Direct Phone Number	Select the phone number used to join the conference. Owned bridges also have a direct dial field, which is the number internal users can dial to access the bridge.
Leader PIN	Enter the personal identification number (PIN) that the leader will use to authenticate access when joining the meeting. This PIN is private and should be known by internal staff only.
Participant PIN	Enter the PIN that participants will use to authenticate access when joining the meeting. Distribute this PIN to all guests of the meeting.
Minimum participants to start	Select the minimum number of participants that must attend the conference before it can start.
Options	Select the following options: • Require a Leader to start = when checked, the system requires a leader to start the conference. If unchecked, the conference call will start when the first participant joins, regardless of whether a leader is present. • Prompt all participants for their name = when checked, the system prompts users for their name when they call in to the conference call. • Announce participant arrivals/departures = when checked, the system either beeps or announces when a participant joins or leaves the conference.

- Click **Save**.

Editing Conferences

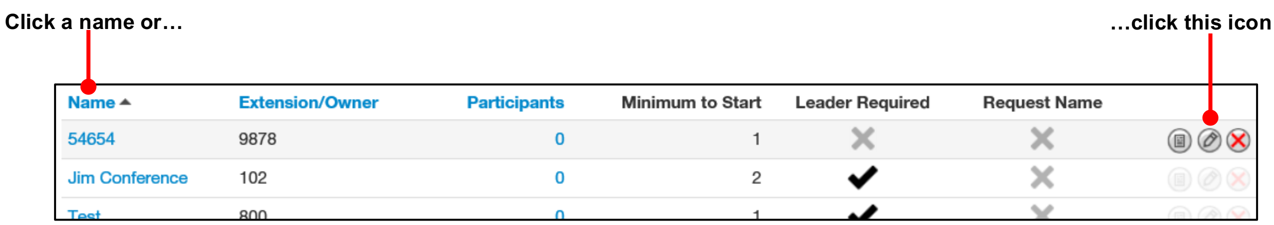
There might be times when you need to edit conferences. For example, you might want to change the leader or participant PIN.

1. From the Conferences page, either:

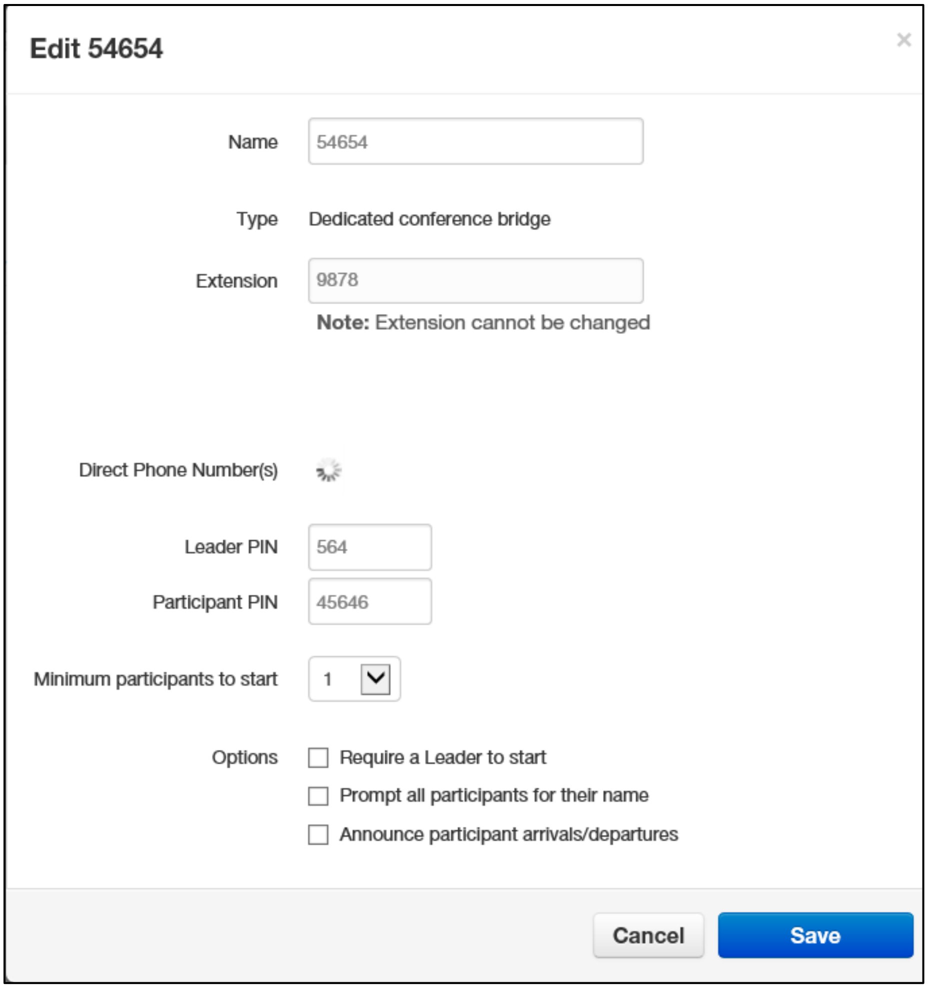
   – Click a name

     OR

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



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



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

Deleting Conferences

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

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

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

Joining a Conference

There are several ways to join a conference.

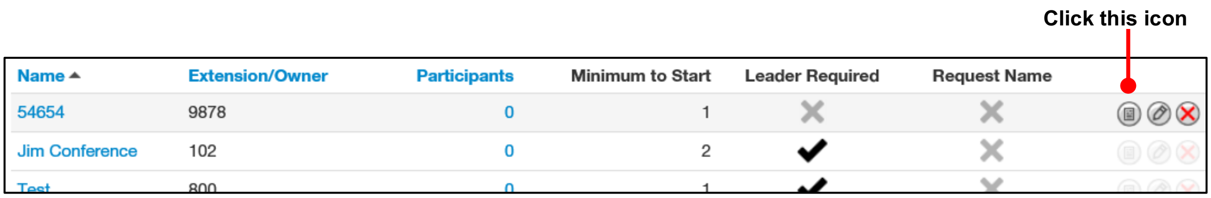
- Phones in your system can dial a dedicated bridge via the extension of the bridge. An owned bridge can be dialed by using the configured Direct Dial code.
- Set a Direct Inward Dial (DID) number to the bridge for inside and outside callers (see “Working with Inventory“ on page 92).
- Participants can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

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

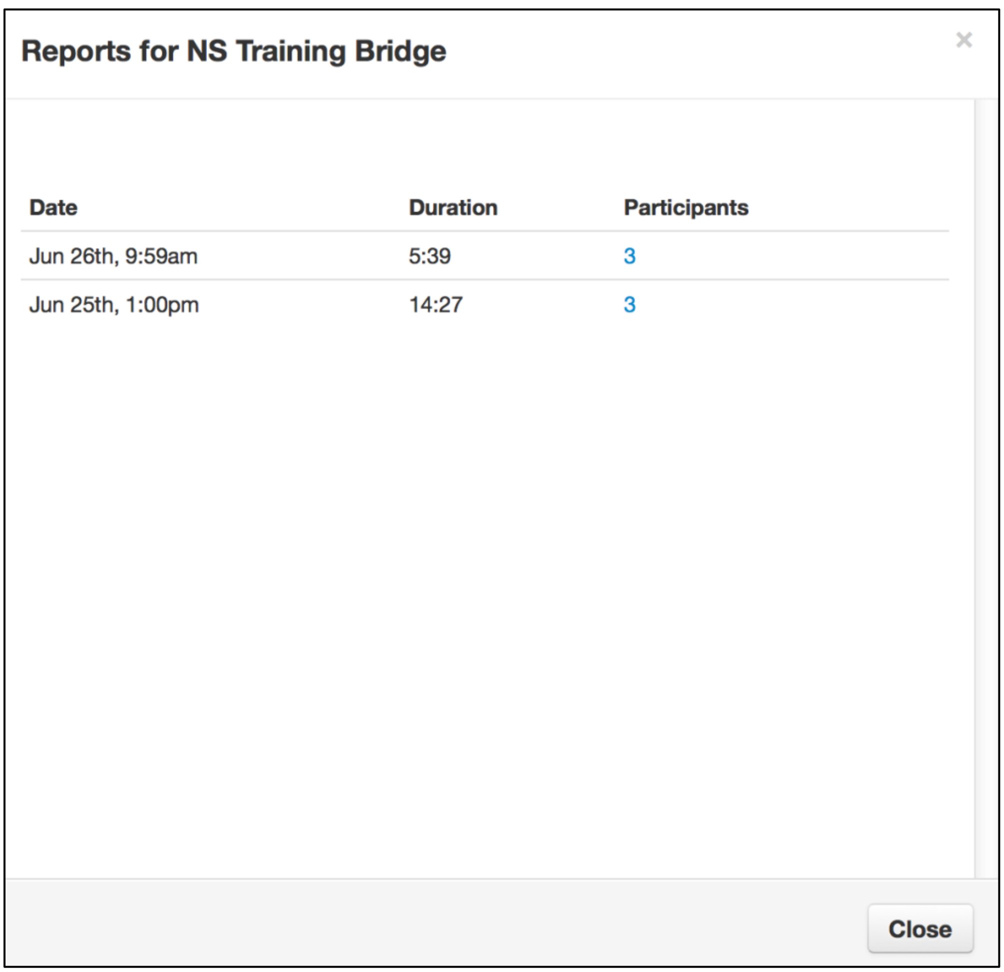
Viewing Conference Statistics

You can display historical information about your bridge.

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



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



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

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

6. WORKING WITH AUTOMATED ATTENDANTS

Topics:

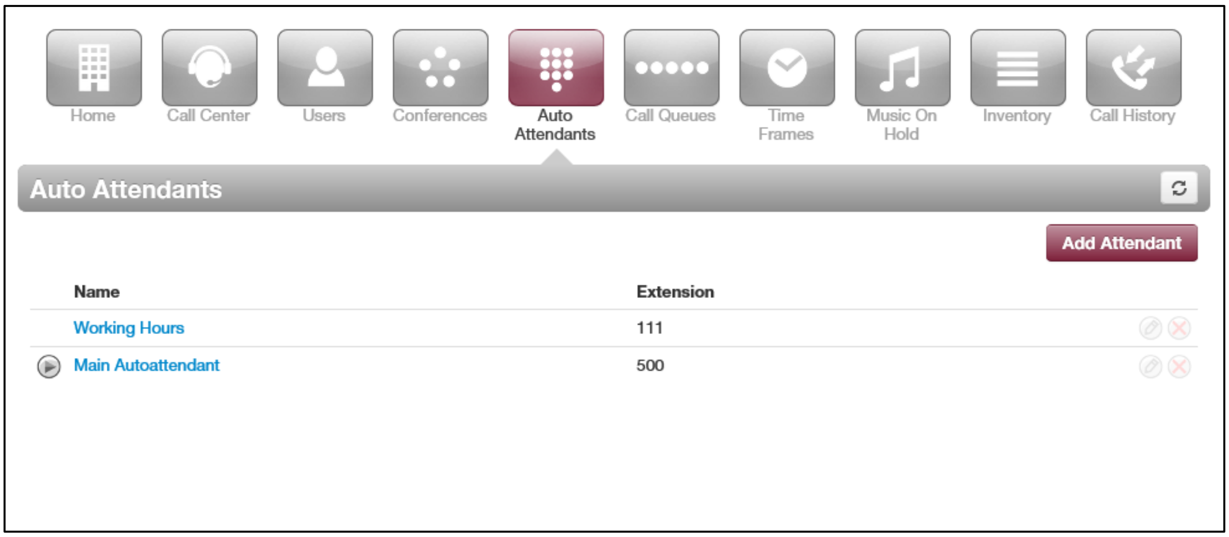
Automated attendants ("auto attendants") are automated greetings with options to route calls. The Cloud PBX system has an auto attendant builder that gives you easy access to change recordings and options anytime.

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

Displaying the Auto Attendants Page

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

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



Where to go from here:

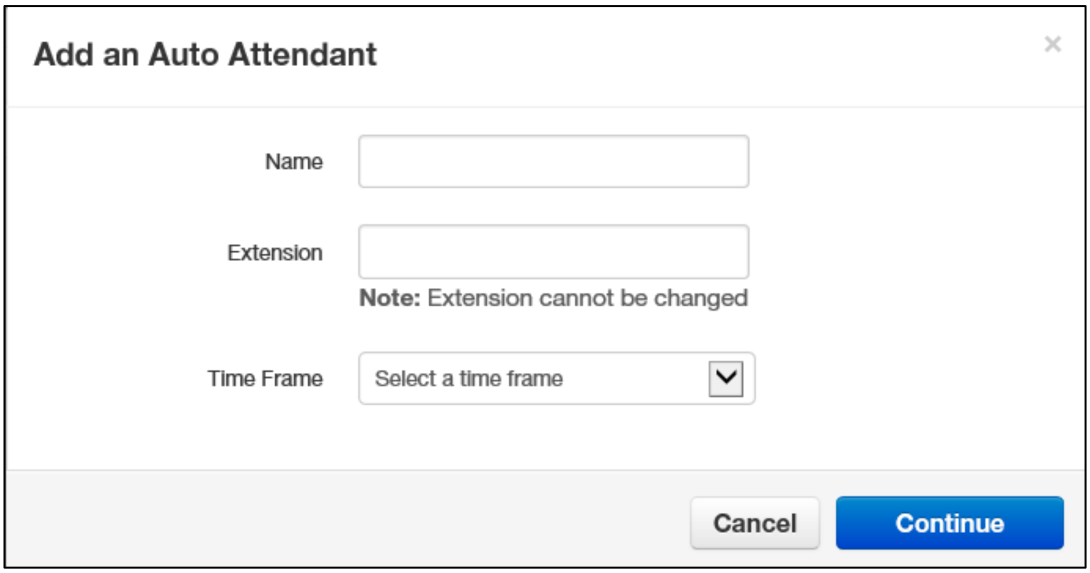
From the Auto Attendants page, you can:

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

Adding Auto Attendants

The following procedure describes how to add auto attendants.

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

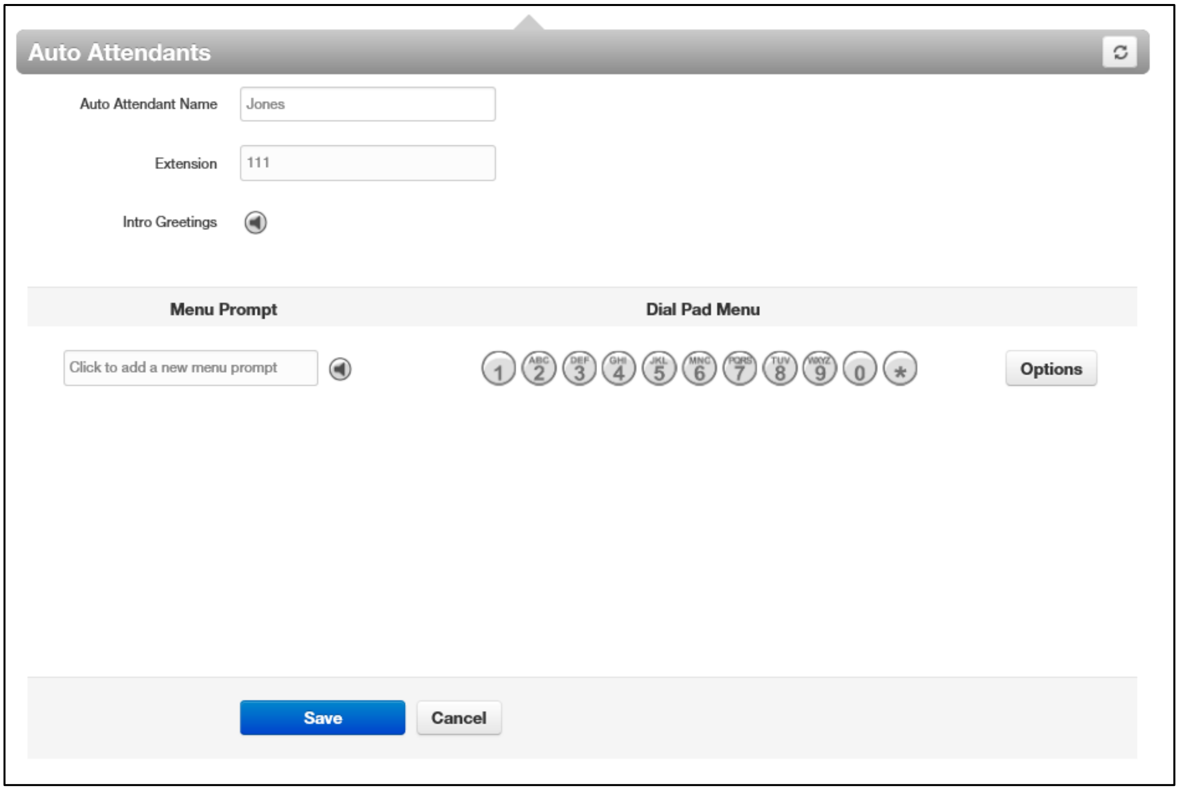


- Complete the fields (see Table 6-1).

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

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

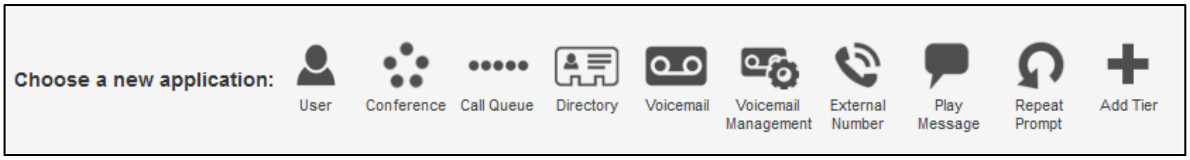
- Click **Continue**. A page similar to the following appears.



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

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

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

Dial Pad Menu	Routes calls to one of a variety of resources when a caller selects that option. Click a number, and then select an application from the following pop-up:  • User = goes to a user (extension). • Conference = goes to a conference bridge. • Call Queue = goes to a call queue. • Directory = goes to a dial by name directory. • Voicemail = goes to a specific mailbox. • Voicemail Management = allows outside staff to call in and retrieve voicemail. • External Number = forwards to an external telephone number (for example, to send caller to on-call staff). • Play Message = commonly used for hours and directions. • Repeat Prompt = replays the menu of options to the caller. Add Tier = adds a submenu with a new greeting and set of options.
Options	Click this button to open a pop-up window with the following options. Click Done when finished.: • Enable dial by extension = enable (check) or disable (uncheck) dial by extension. • If no key is pressed = sets the default action if no key is pressed. • If unassigned key is pressed = sets the action if an unassigned key is pressed.

- Click **Save**.

Recording Intro Greetings and Menu Prompts

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

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

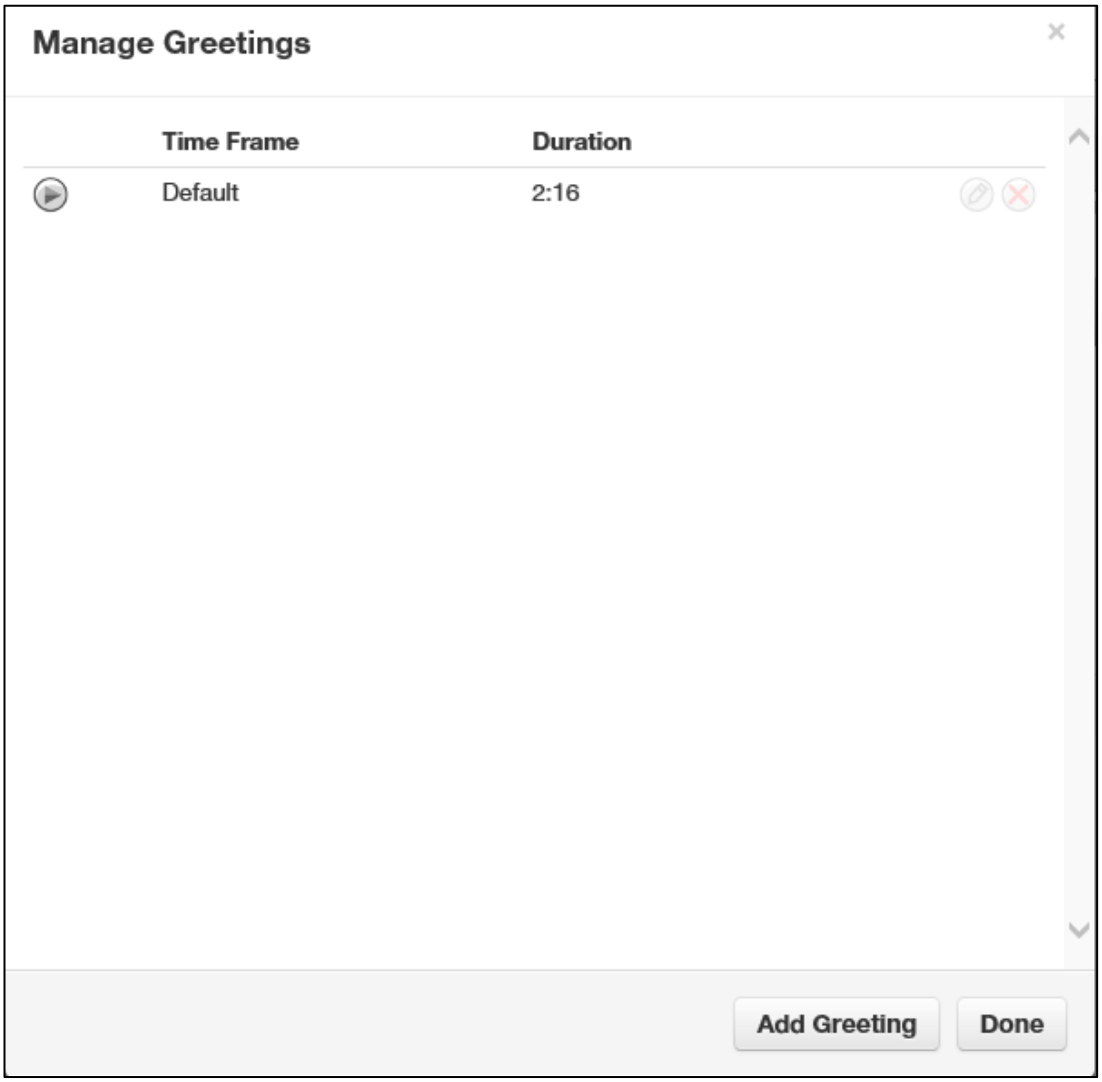
A menu prompt might be:

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

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

To record an intro greeting:

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



2. From this pop-up window:

   – To play a greeting, click the icon.

   – To upload a new greeting, hover over it, and then click the icon on the right side of the row. For **New Greeting**, click **Upload**. Click the **Browse** button, navigate to the MP3 or WAV file you want to use for your greeting, click the file, and click **Open**. Click **Upload**.

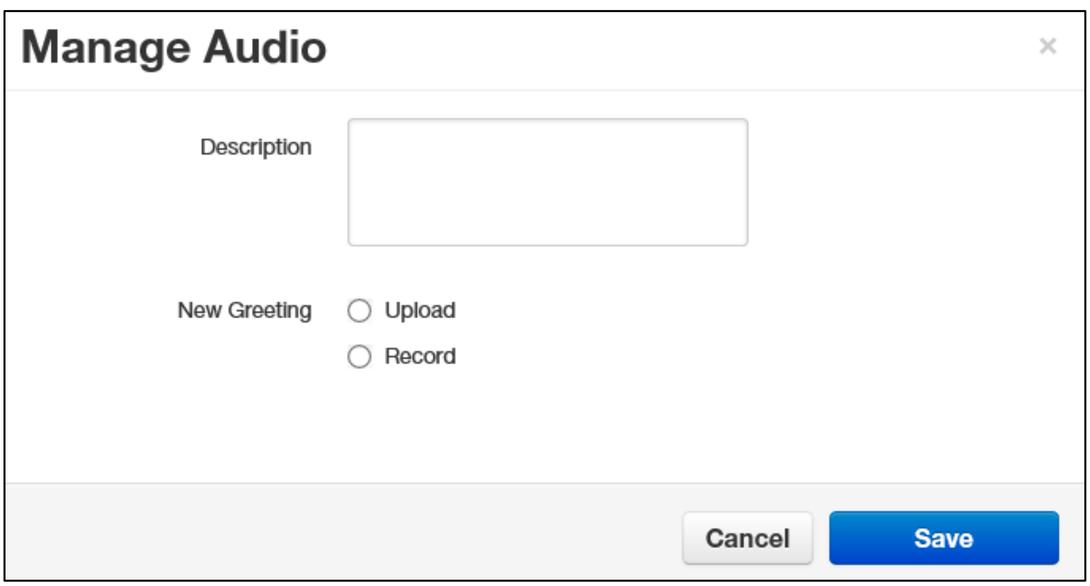
   – To record a new greeting, hover over it, and then click icon on the right side of the row. For **New Greeting**, click **Record**. In the **Call me at field,** enter the number to call (either an extension or a telephone number such as your cell phone) and click **Call**. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording.

   – To delete a recording, hover over it, and then click the icon at the far right of the row. At confirmation prompt, click **Yes** to delete the recording or **No** to retain it.

   – When you finish, click **Add Greeting** followed by **Done**.

To record a menu prompt:

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



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

Table 6-3. Manage Audio Settings

Setting	Description
Description	Enter a name for this greeting. The name should allow you to differentiate this greeting from other greetings you recorded.
New Greeting	Select whether to upload or record a greeting. Greetings must be in MP3 or WAV format. Choices are: • Upload = use this option to upload a file for use as your greeting. Click the Browse button. Navigate to the file, click the file, and click Open. Click Upload. • Record = if you select this option, enter the number to call (either an extension or a telephone number such as your cell phone) and click Call. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording.

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

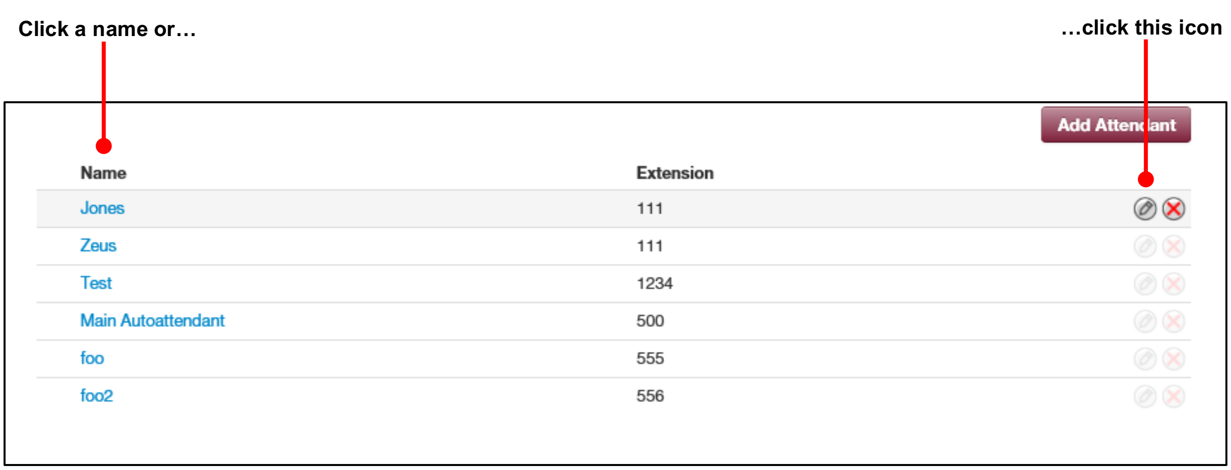
Editing Auto Attendants

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

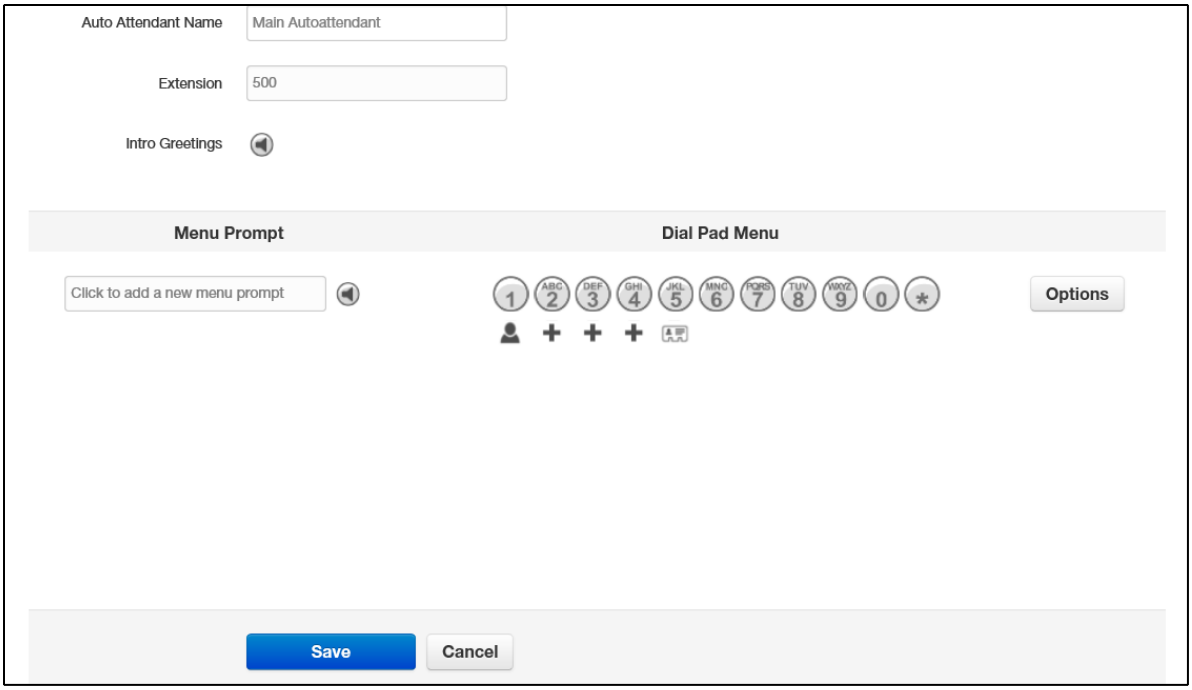
1. From the Auto Attendants page, either:
   - Click a name

     OR

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



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

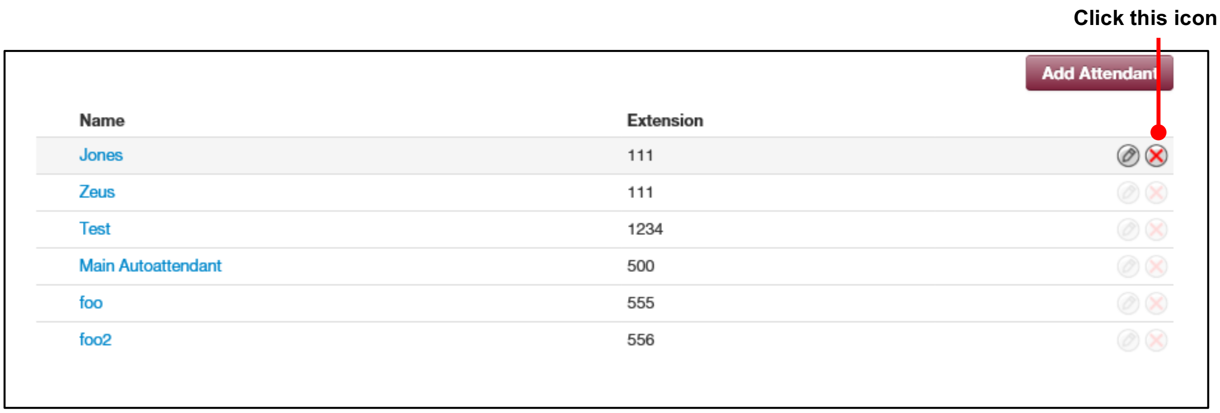


- Complete the fields (see Table 6-2 on page 52).
- Click **Save**.

Deleting Auto Attendants

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

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



Auto Attendant Best Practices

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

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

- "*For accounting, press 3.*"

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

7. WORKING WITH CALL QUEUES

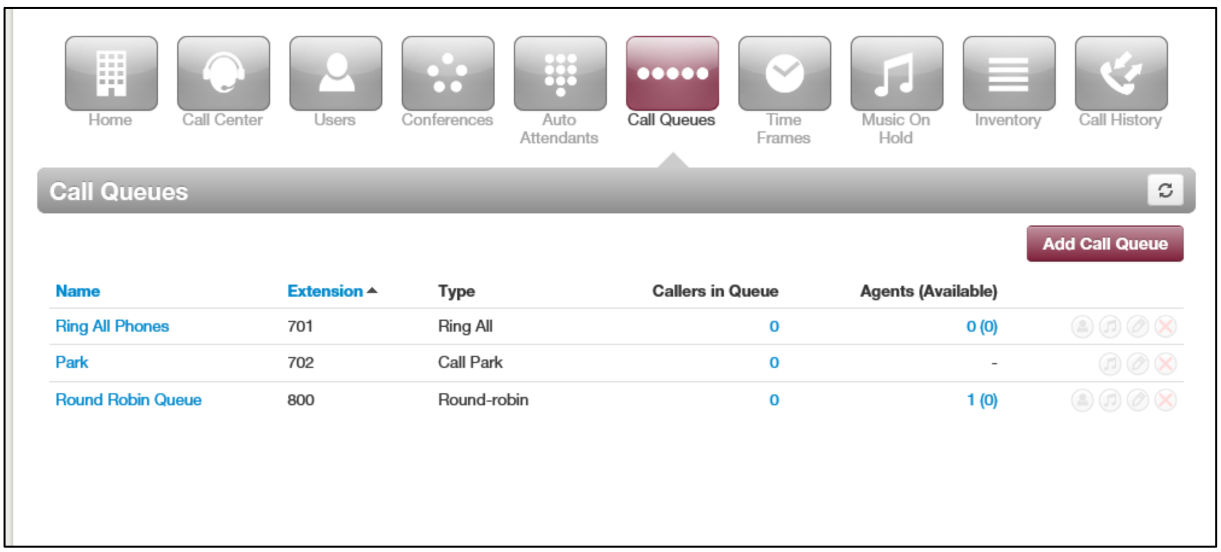
Topics:

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

Displaying the Call Queues Page

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

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



Where to go from here:

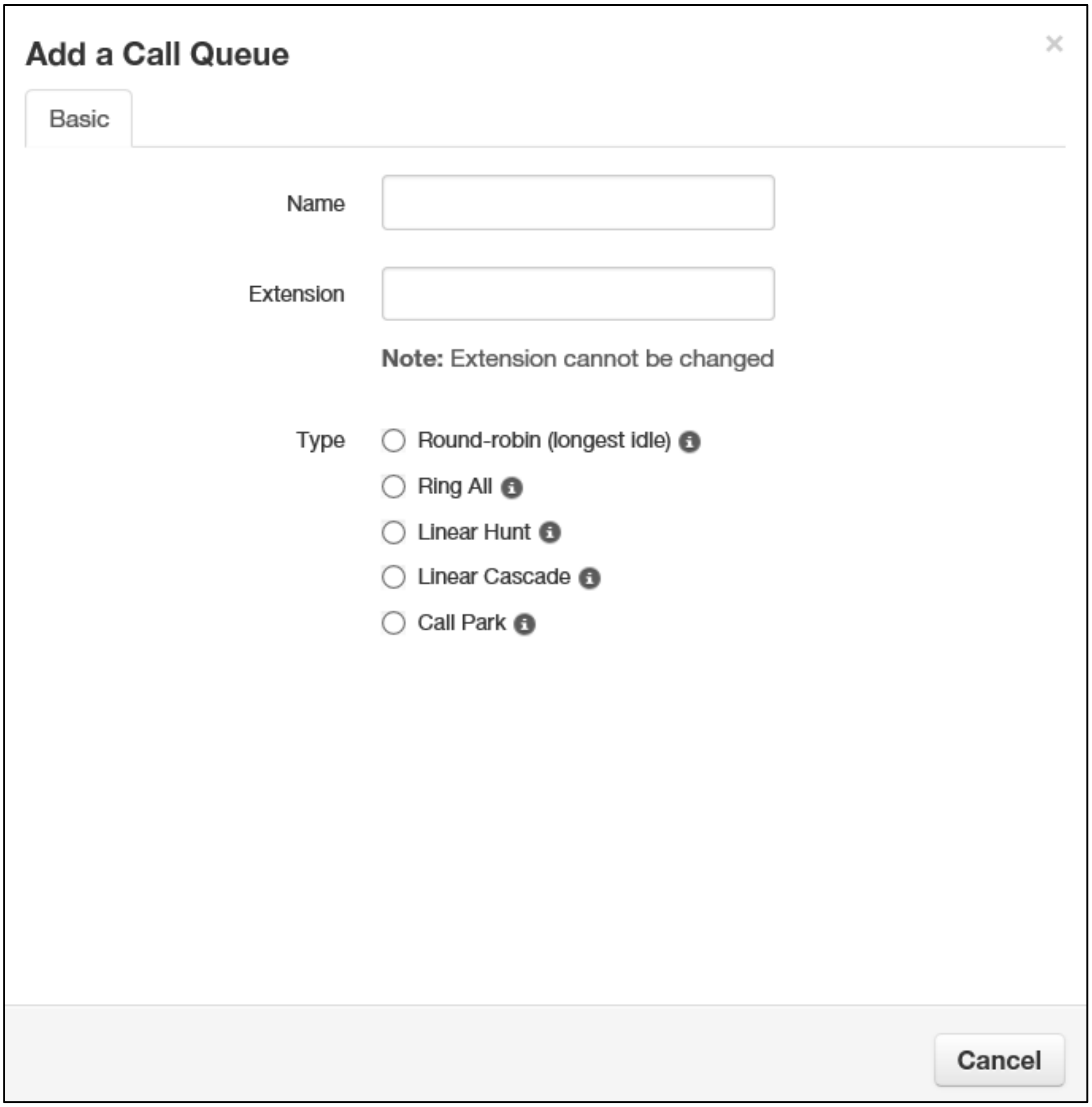
From the Call Queues page, you can:

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

Adding Call Queues

To add call queues:

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

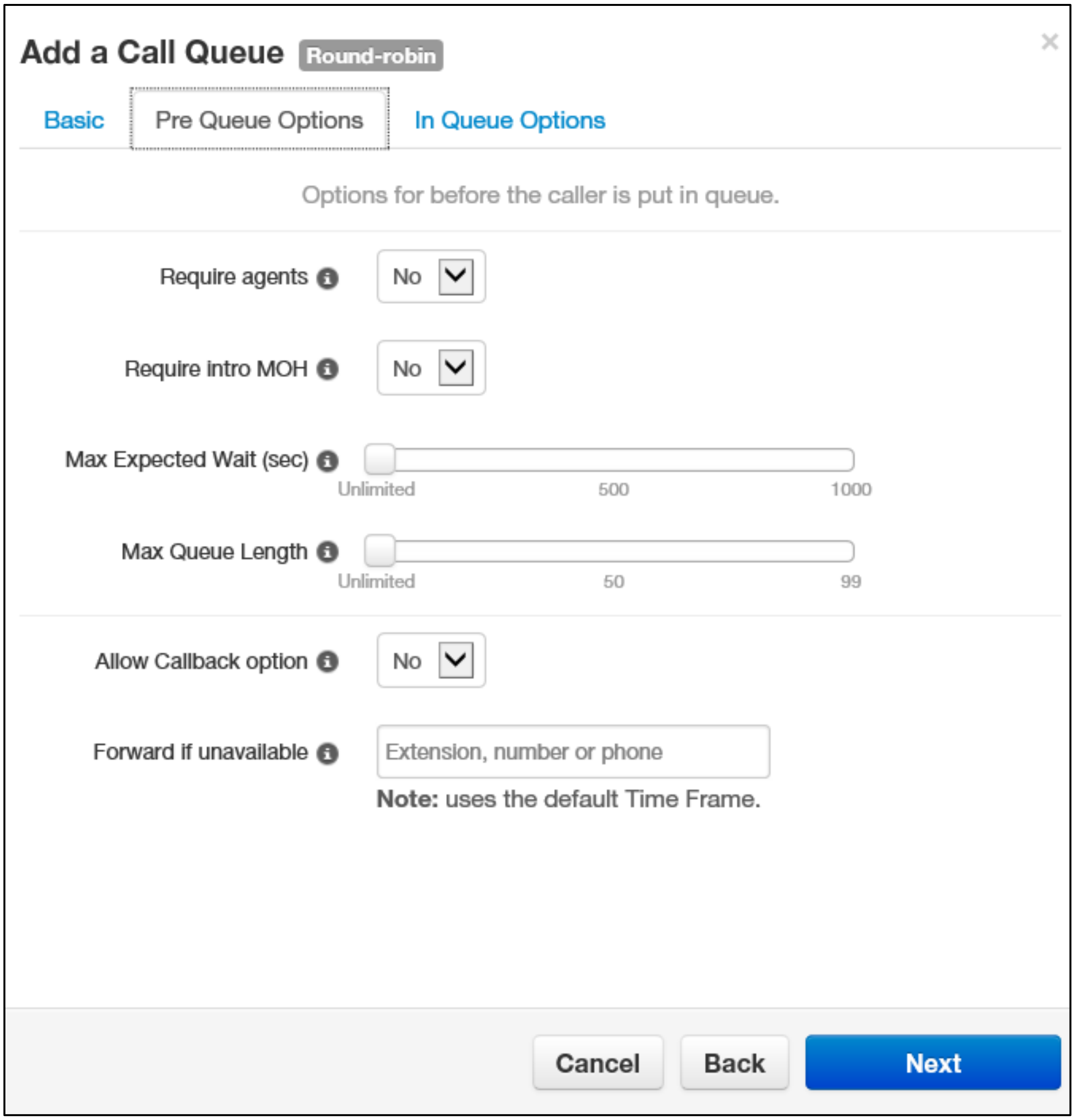


- Complete the fields (see Table 7-1).

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

Setting	Description
Name	Enter a name for this call queue. The name should allow you to differentiate this call queue from other call queues you configured.
Extension	Adding a call queue: Select an extension. Editing a call queue: read-only field that shows the extension.
Type	Determines how calls are distributed. Choices are: • Round robin = routes callers to the agent that has been idle for the longest period of time. Then complete the remaining fields in the window. • Ring All = routes callers to all available agents at the same time. Then complete the remaining fields in the window. • Linear Hunt = routes callers to the available agents in a predefined order. The order is defined when editing the queue's agents (see " Working with Agents" on page 69). Then complete the remaining fields in the window. • Linear Cascade = routes callers to groups of available agents in a predefined order. The order is defined when editing the queue's agents (see " Working with Agents" on page 69). Then complete the remaining fields in the window. • Call Park = places callers on hold until the agent retrieves them. Go to step 4.
Phone Number	Select the phone number
Record Calls	Select whether calls will be recorded (Yes) or not recorded (No) for this call queue.
Statistics	Select whether statistics will be recorded (Yes) or not recorded (No) for this call queue.
Message to Agent	Enter the message that will be sent to the agent (for example, "*Here's a call from the emergency support queue.*") You configure this setting after adding the call queue.

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



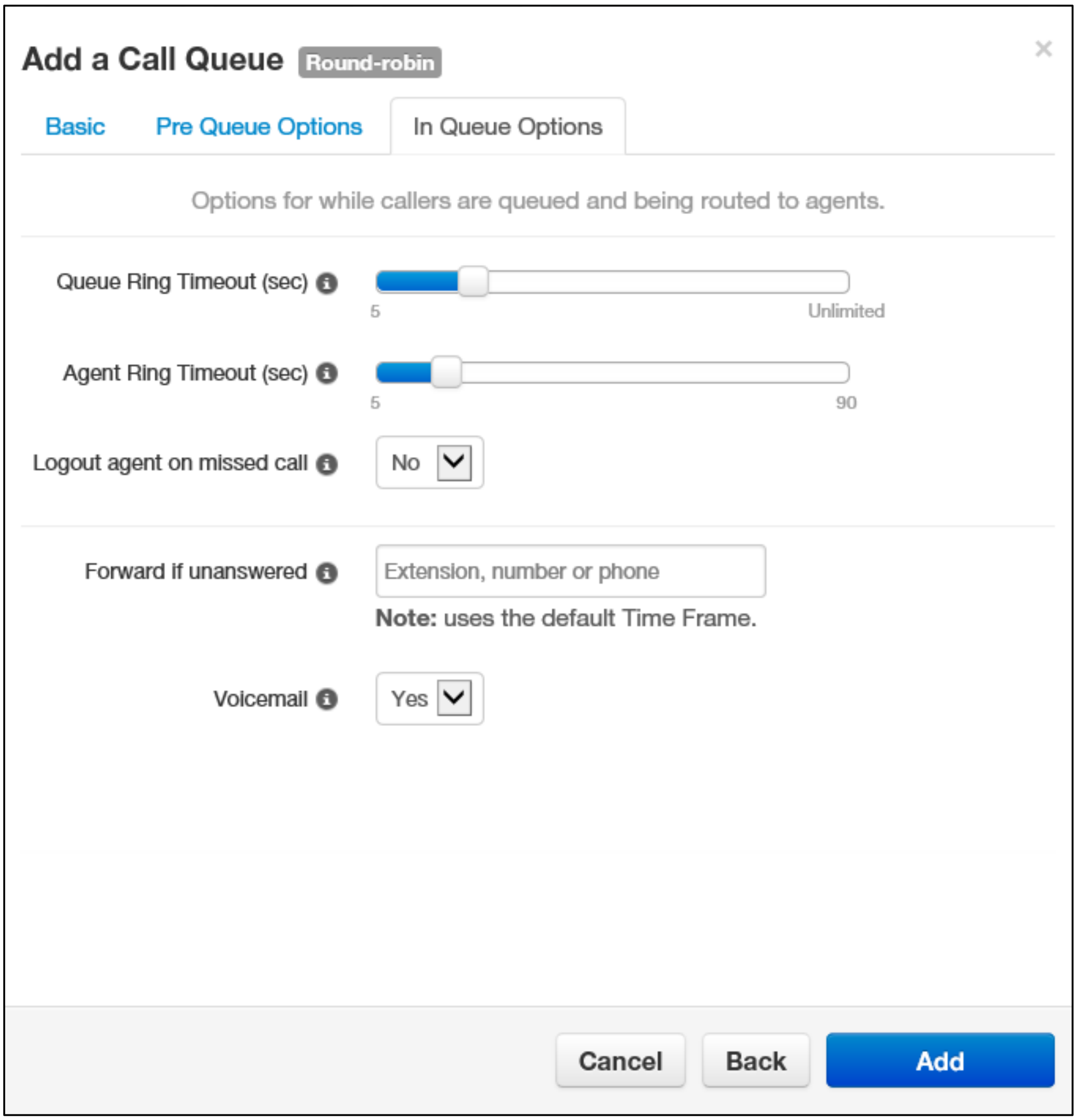
- Complete the fields (see Table 7-2).

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

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

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

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



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

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

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

- Click **Add**.

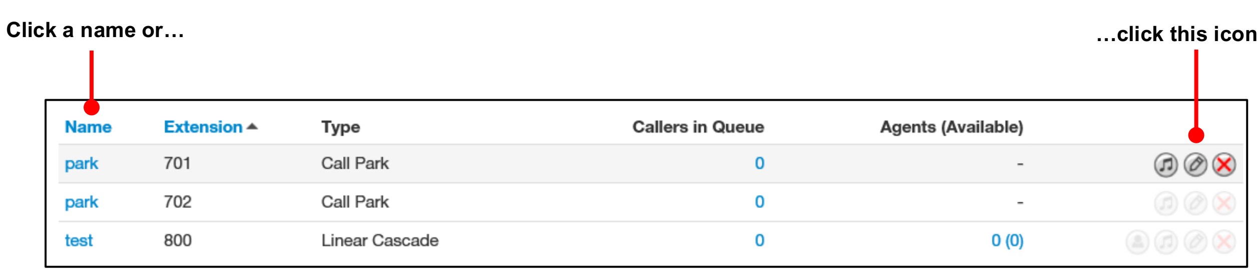
Editing Call Queues

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

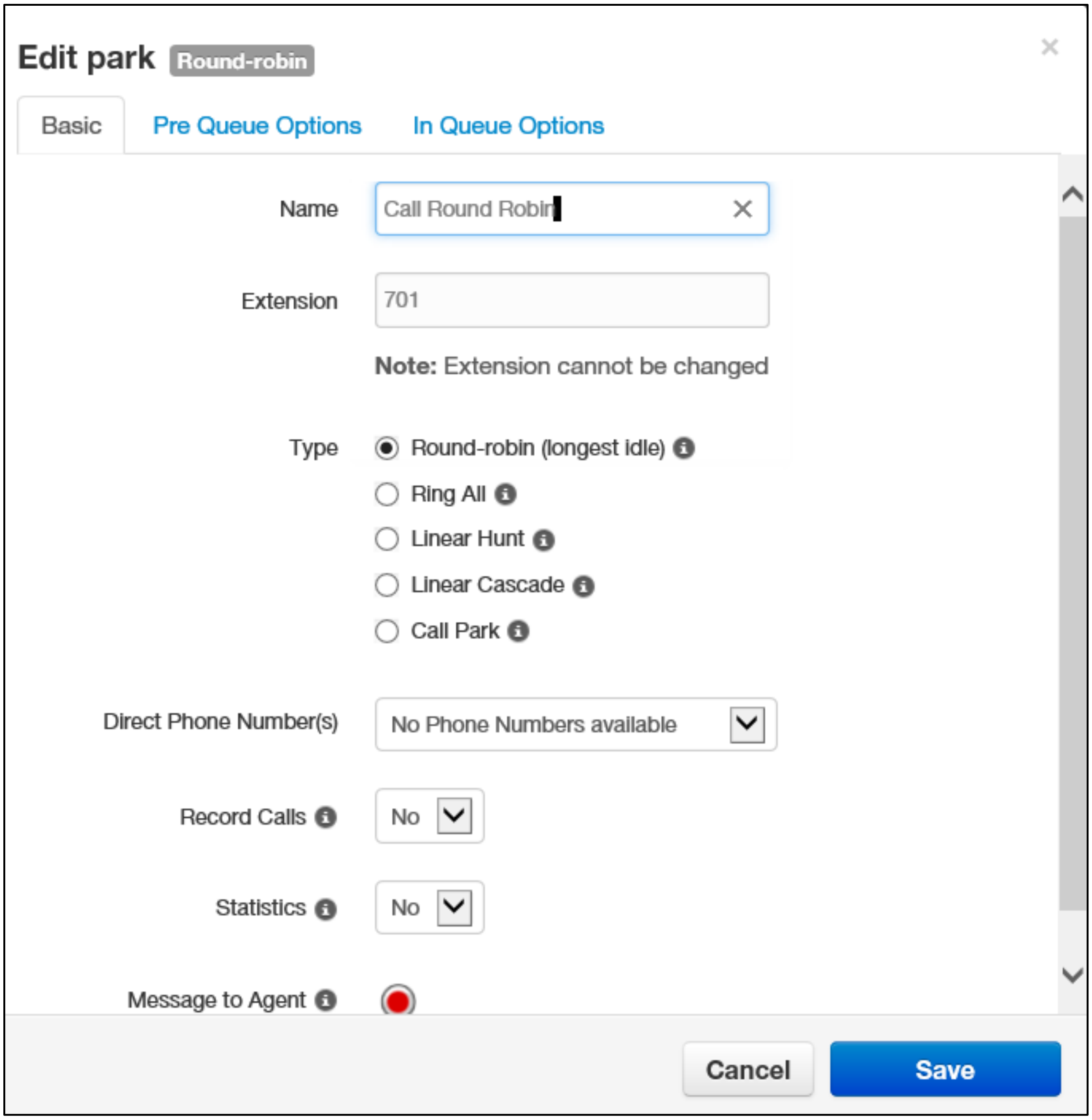
1. From the Call Queues page, either:
   - Click a name

     OR

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



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

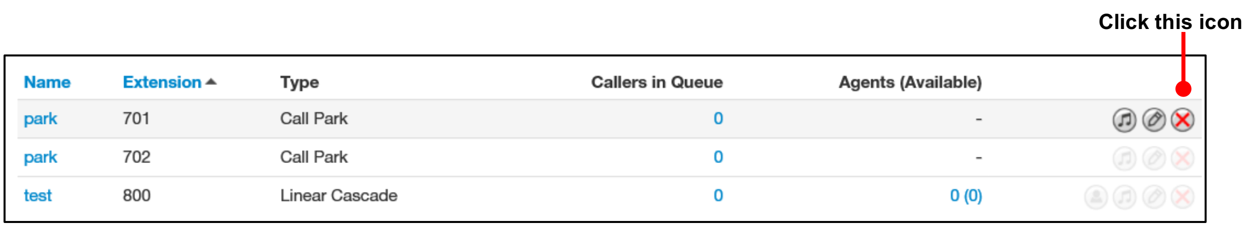


- Perform the procedure starting with step 2 under “Adding Call Queues” on page 62.

Deleting Call Queues

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

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

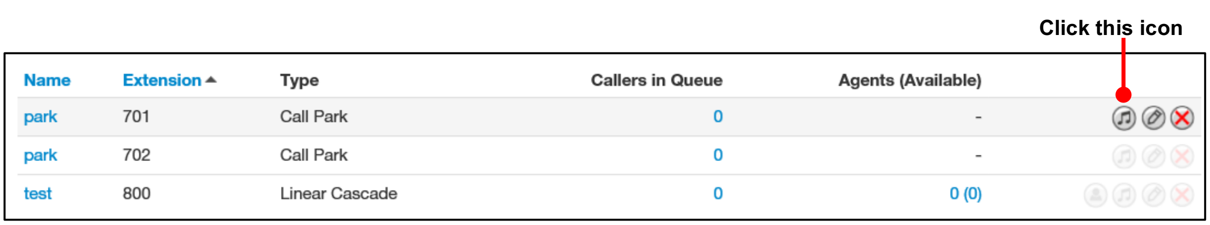


Name	Extension	Type	Callers in Queue	Agents (Available)
park	701	Call Park	0	-
park	702	Call Park	0	-
test	800	Linear Cascade	0	0 (0)

Adding Music on Hold to a Queue

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

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

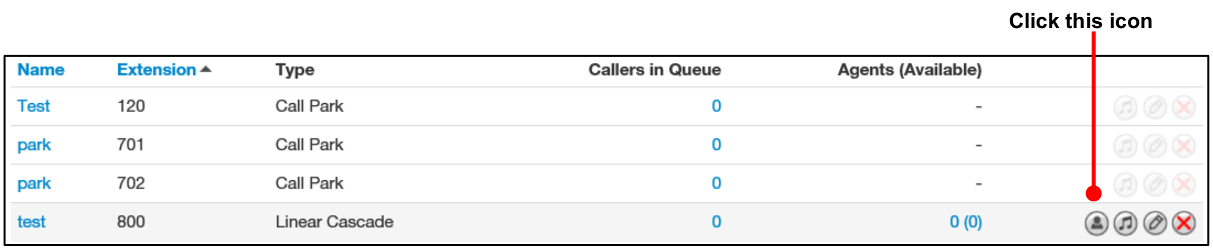


Name	Extension	Type	Callers in Queue	Agents (Available)
park	701	Call Park	0	-
park	702	Call Park	0	-
test	800	Linear Cascade	0	0 (0)

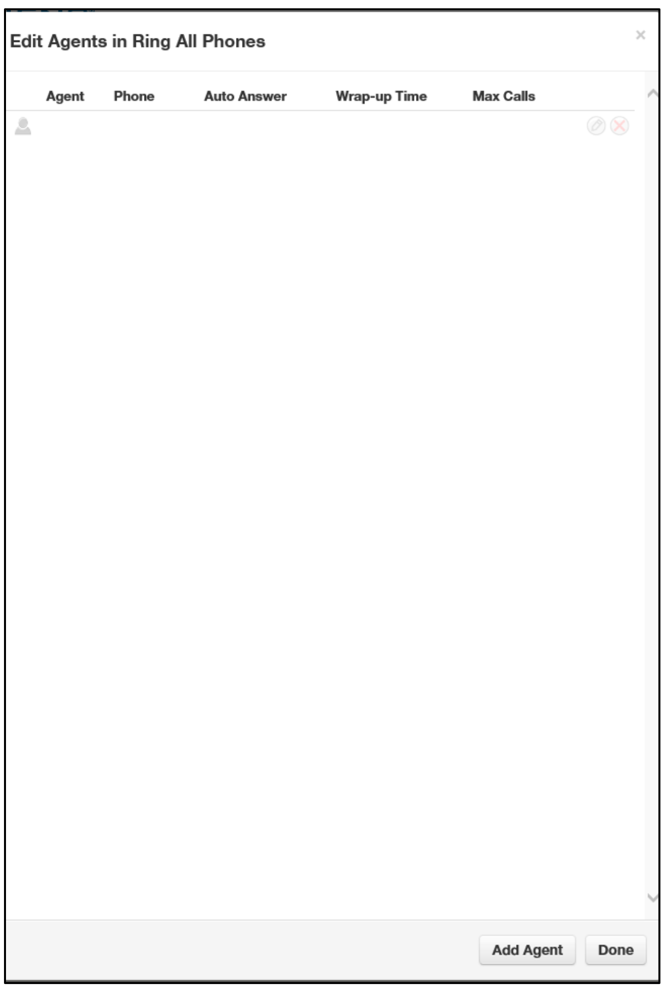
Working with Agents

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

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

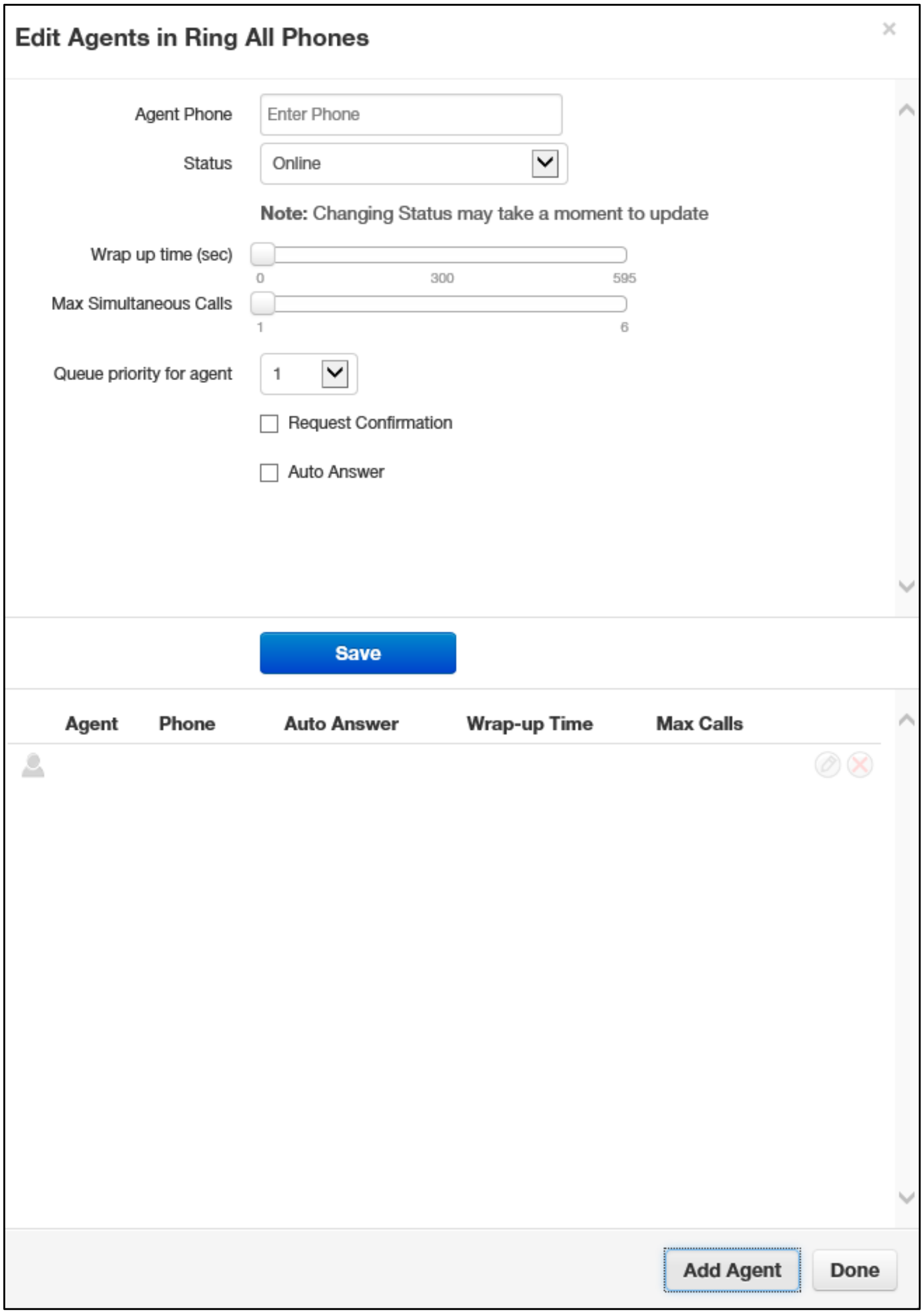


An Edit Agents pop-up window similar to the following appears.



- To add an agent:

a. Click the **Add Agent** button. The following settings appear.



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

b. Click **Save**. The color-coded status of the new agent is displayed:

– Green = available

– Gray = offline

– Red = on a call

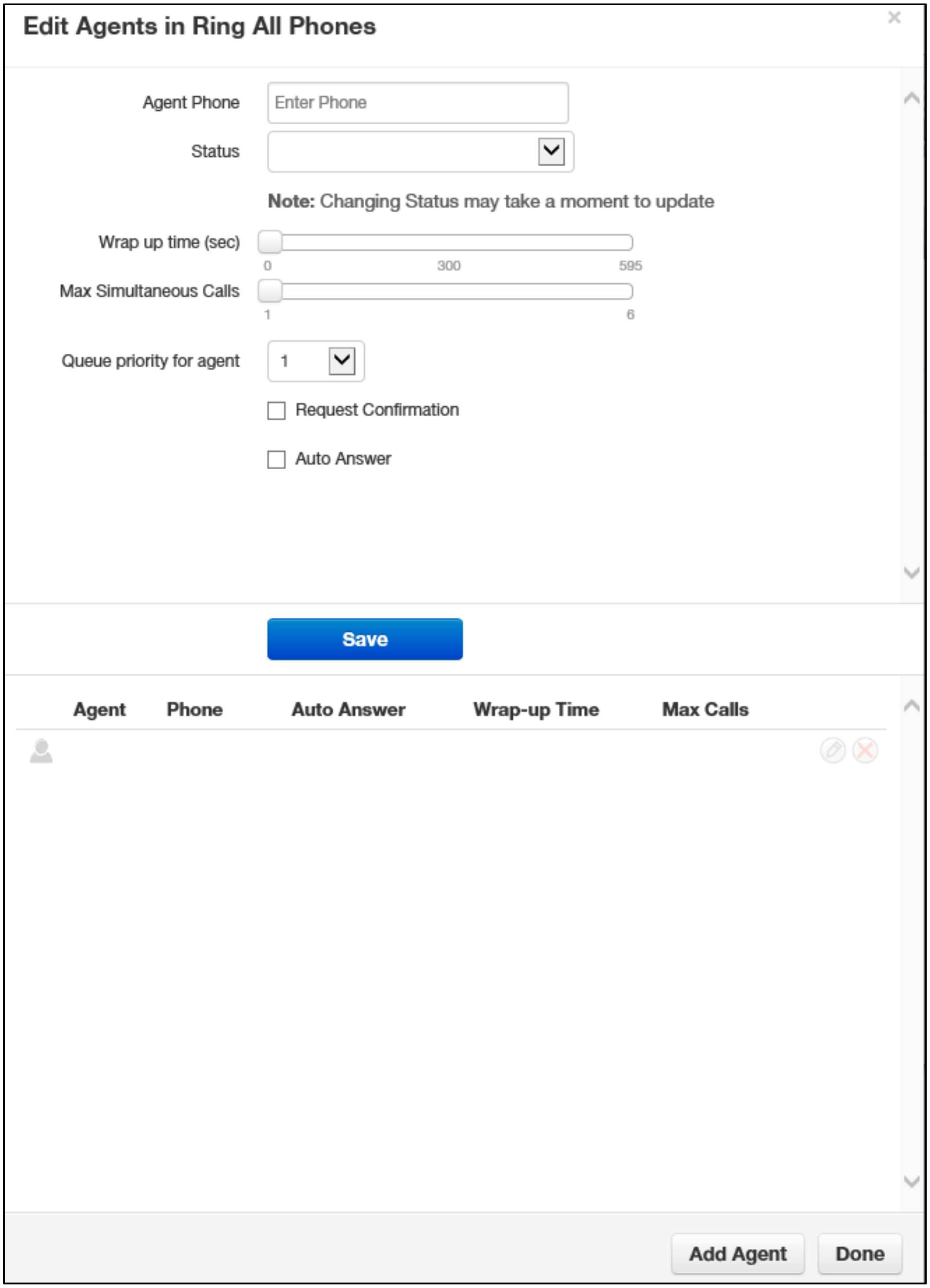
Table 7-4. Adding/Editing Agent Settings

Setting	Description
Agent Phone	Select a phone of an agent to add to the queue.
Status	Select whether the agent is ready to take calls (Online) or not active (Offline).
Wrap up time	Use the slider to specify the amount of time the agent is allocated to complete paperwork after finishing a call and before a new call is dispatched.
Max Simultaneous calls	Use the slider to specify the maximum number of calls an agent can take at one time. This will almost always be 1.
Order in Linear Hunt	Sets the dispatch order. If a call is dispatching, it will go to the available agent with the lowest order.
Queue priority for agent	Sets weighting for an agent that is servicing multiple queues. If you have an agent servicing two queues and both queues have a person waiting, for example, the agent will get the call from the queue whose priority is highest (lowest number).
Request Confirmation	Enables or disables request confirmation. Choices are: • Checked = requires the agent to confirm receiving the call. • Not checked = agent does not confirm the call.
Auto Answer	Enables or disables auto answer. Choices are: • Checked = agent phone answers automatically (not all phones support this feature). • Not checked = agent phone not answer automatically.

c. Click **Done**.

2. To edit agent settings:

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



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

c. Click **Save**. The color-coded status of the new agent is displayed:

– Green = available

– Gray = offline

– Red = on a call

- To delete an agent:

a. Hover over an agent, and then click the  icon at the far right of the window.

b. When a confirmation prompt appears, click **Yes** to delete the agent or **No** to retain it.

- When you finish working within the pop-up window, click **Done**.

8. WORKING WITH TIME FRAMES

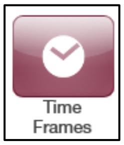
Topics:

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

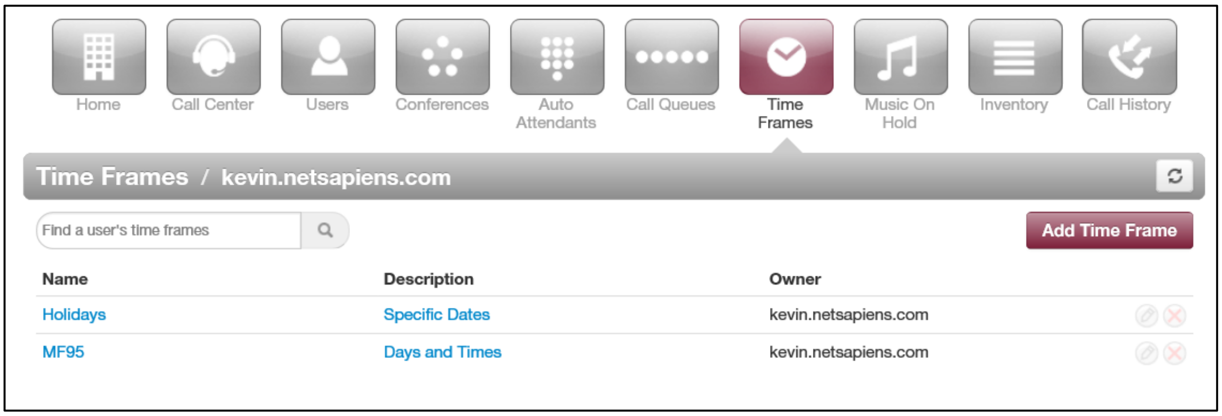
Time frames do not go into effect until you apply a time frame to an answering rule or auto attendant greeting. When the time frames are applied, the first matching time frame becomes active.

Displaying the Time Frames Page

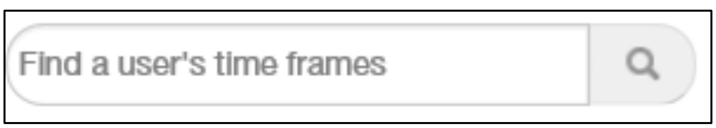
All time frame tasks are performed from the Time Frames page. To display this page, click the **Time Frames** icon on the menu bar:



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



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



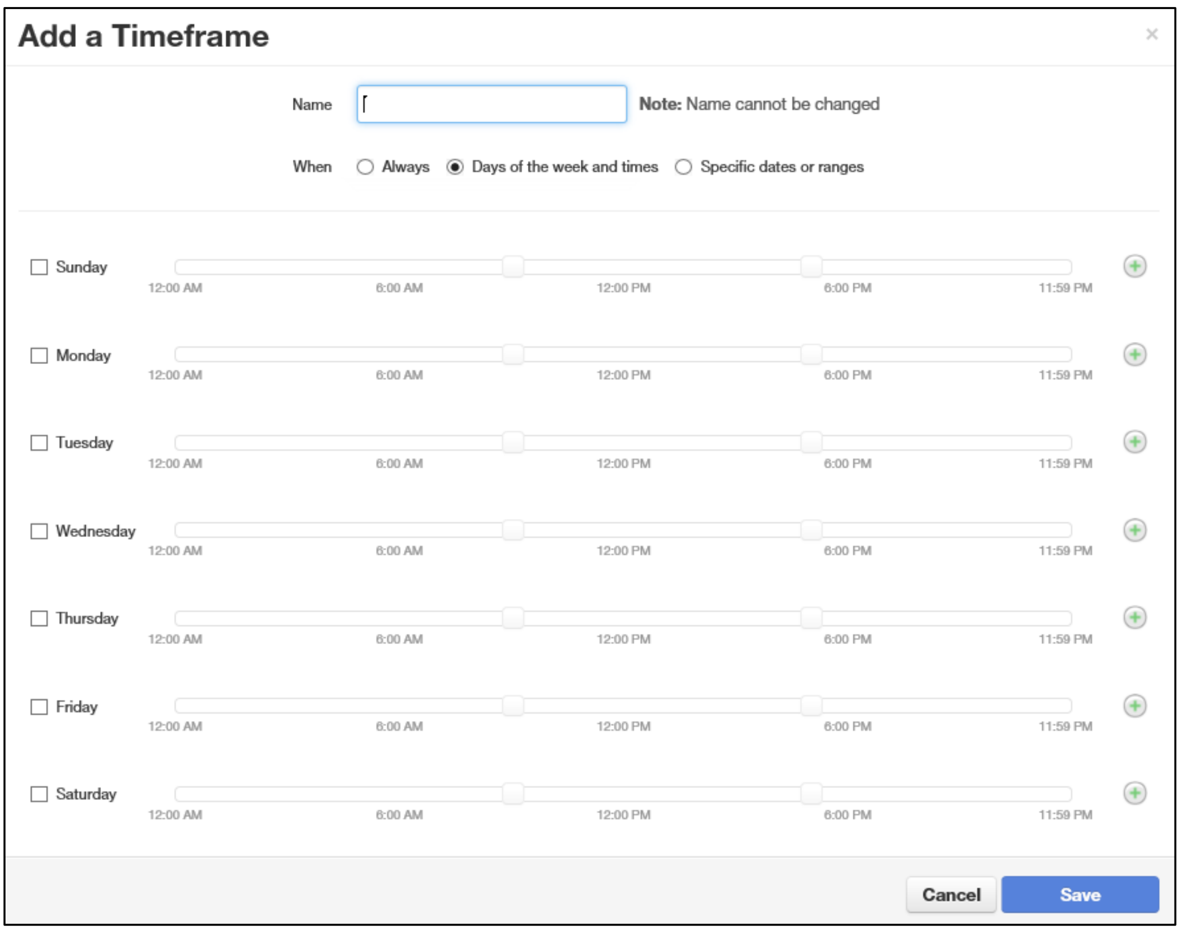
The  button at the top-right side of the page refreshes the information on the page.

Where to go from here:	From the Time Frames page, you can: • Add time frame. See “Adding Time Frames” on page 80. • Edit time frames. See “Editing Time Frames” on page 82. • Delete time frames. See “Deleting Time Frames” on page 83. • See begin and end dates for a time frame. See “Viewing Begin and End Dates” on page 83.

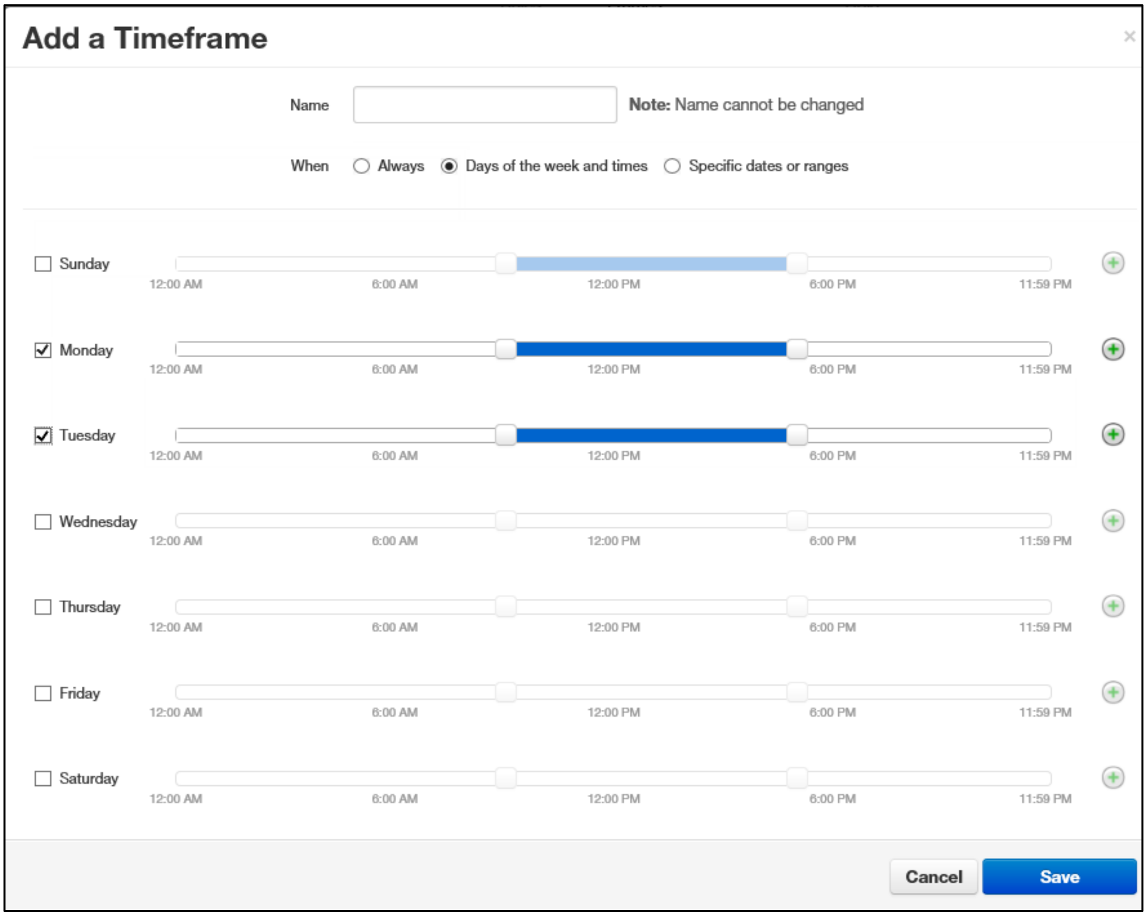
Working with Time Frames

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

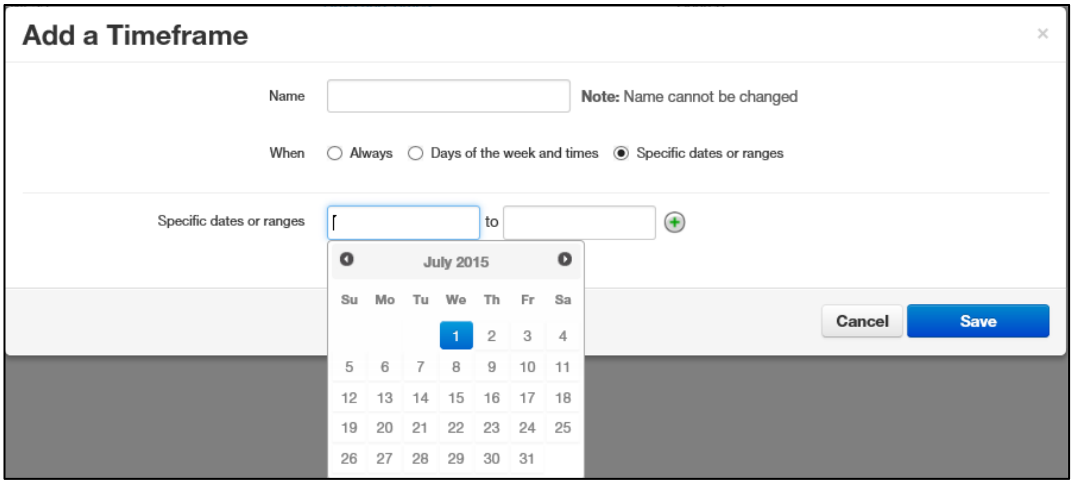
- **Always** = time frame applies to all hours of every day (24/7/365).
- **Days of the week and times** = commonly used to define office open hours such as Monday-Friday 9am – 5pm. Each day has its own check box. Check the days to which the time frame will be applied, and then use slide bars to define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



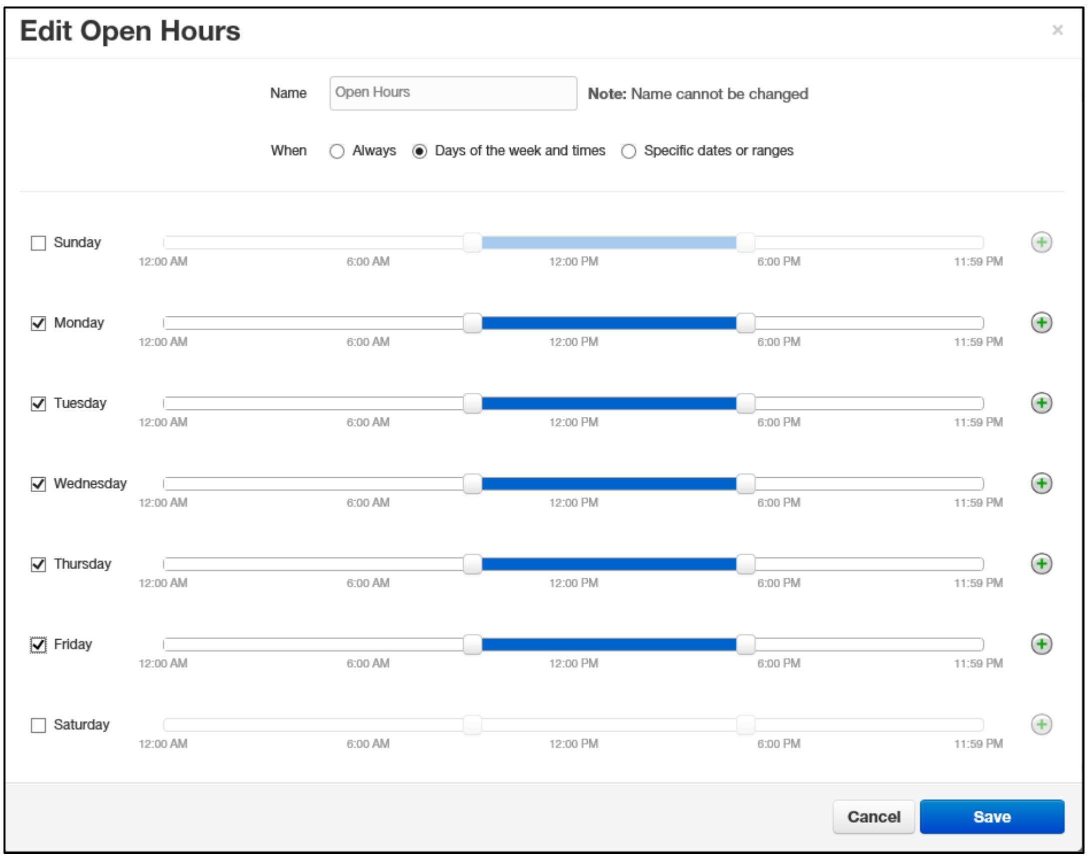
When you check a check box, a blue control bar covers the times 9AM to 5PM for that day. Drag this control to change the time according to your requirements. If you need to add more ranges for a day, click the following icon to the right of the time range:



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



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

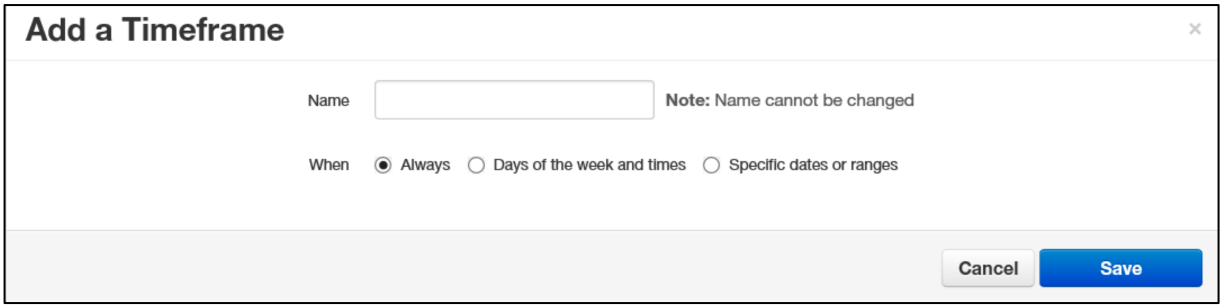


This time frame might be used with another time frame called **Holiday**, which covers holiday periods. You might even create a time frame called **Closed Hours (default already exists)**, which would be an “Always” rule, but would not always be active since it can be set for lower priority than **Holiday**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

Adding Time Frames

To add time frames:

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



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

Table 8-1. Adding/Editing Time Frame Settings

Setting	Description
Name	Adding a time frame: Enter a name for this time frame. The name should allow you to differentiate this time frame from other time frames you configured. Editing a time frame: read-only field that shows the name of the time frame.
When	Select when the time frame will be applied. Choices are: • Always = time frame is applied to all days and times. • Days of the week and times = use the controls in Figure 8-1 to check the days when the time frame applies, and then use the slider controls to select the hours for that date when the time frame applies. • Specific dates or ranges = use the controls in Figure 8-2 to select the dates or range to which the time frame applies.

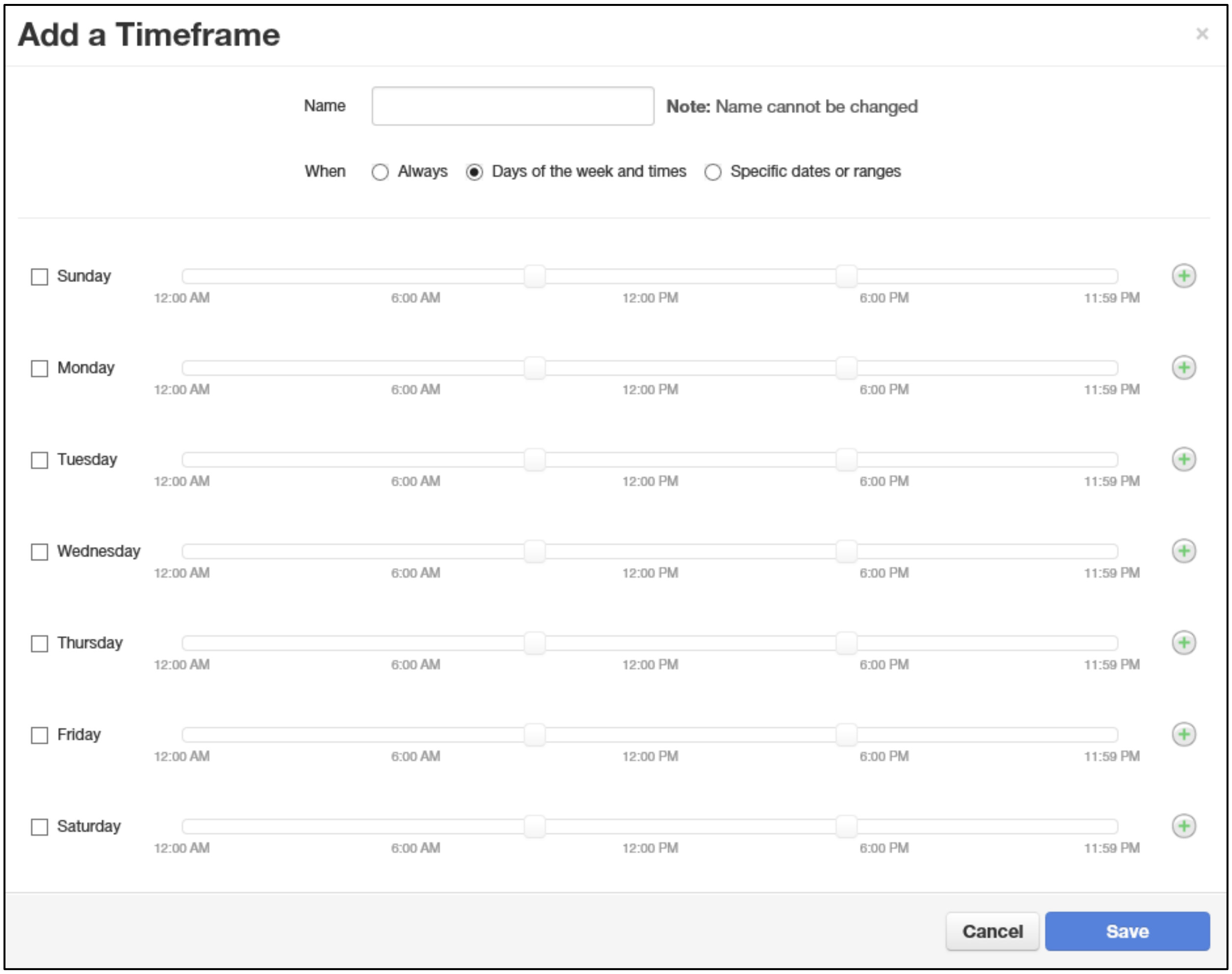


Figure 8-1. Configuring Days of the Week

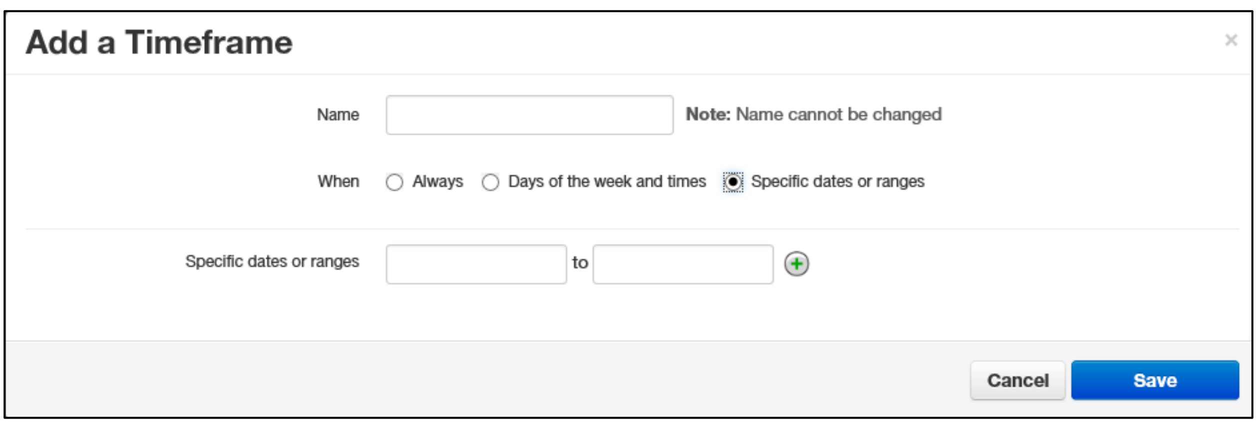


Figure 8-2. Configuring Specific Dates or Ranges

- Click **Save**.

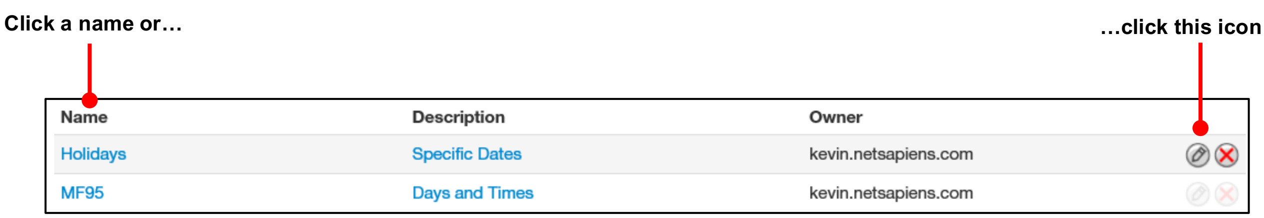
Editing Time Frames

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

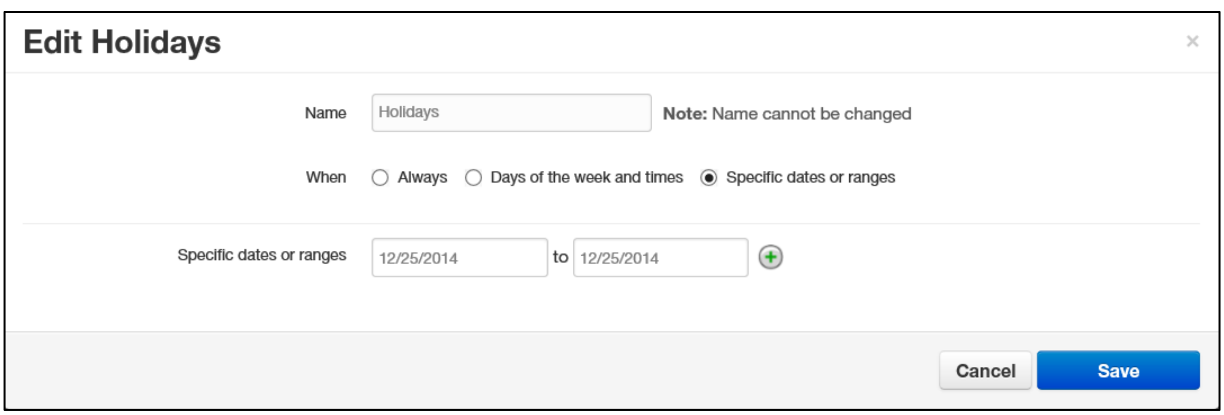
1. From the Time Frames page, either:
   – Click a name

     OR

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



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

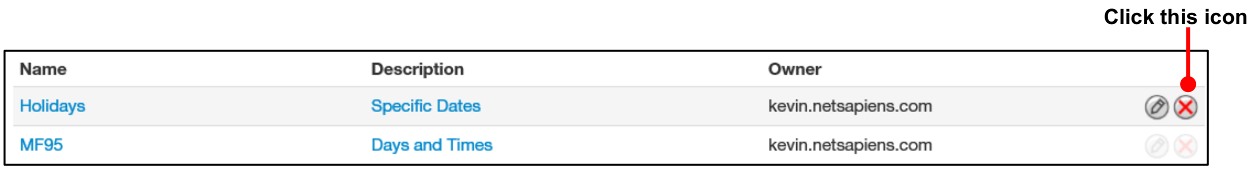


- Complete the fields (see Table 8-1 on page 80).
- Click **Save**.

Deleting Time Frames

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

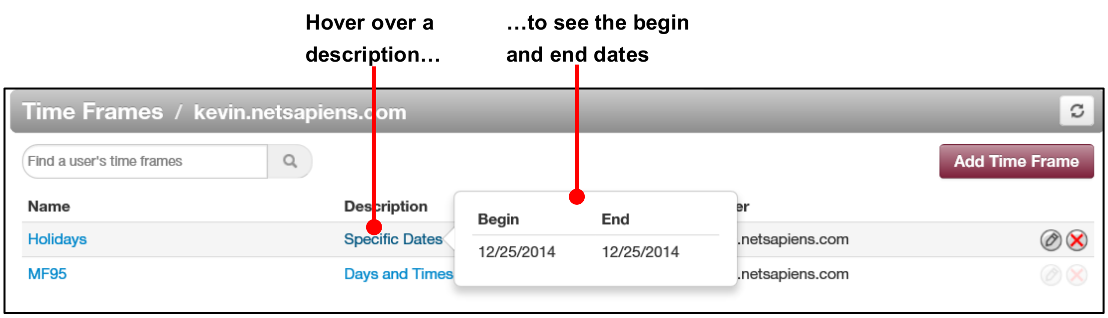
1. From the Time Frames page, hover over the time frame, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the time frame or **No** to retain it.



Viewing Begin and End Dates

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

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



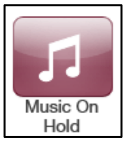
9. WORKING WITH MUSIC ON HOLD

Topics:

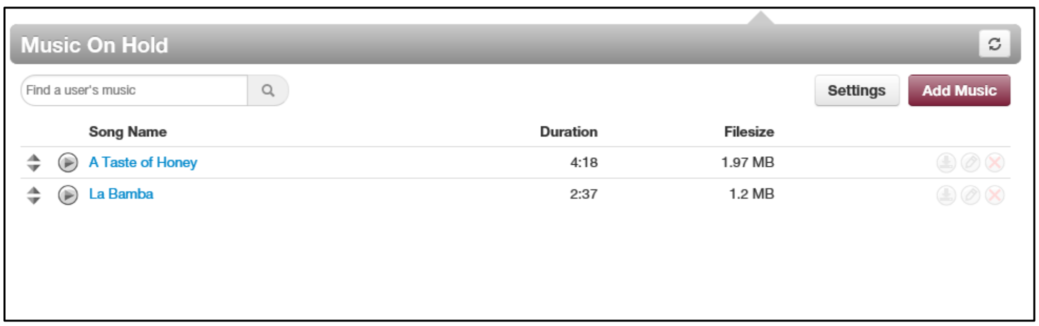
The system has a Music on Hold feature that plays when callers are on hold or waiting in queue. You can precede the first file with an optional introductory greeting.

Displaying the Music On Hold Page

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



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



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

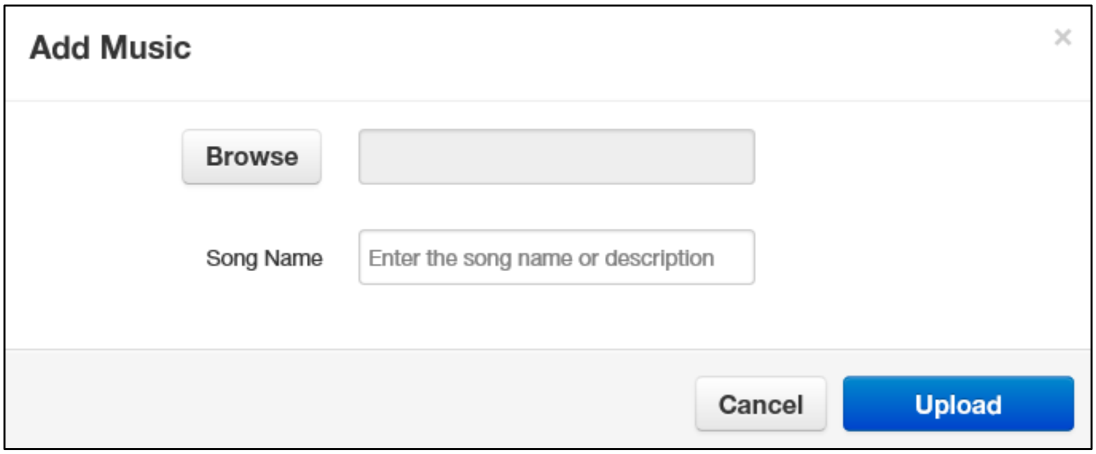
The  button at the top-right side of the page refreshes the information on the page.

Where to go from here:	From the Music On Hold page, you can: • Add files. See “Adding Music On Hold” on page 87. • Change the order of files. See “Changing the Order of Music On Hold Files” on page 88. • Edit files. See “Editing Music On Hold Files” on page 89. • Delete files. See “Deleting Music On Hold Files” on page 90. • Adjust Music On Hold settings. See “Adjusting Music On Hold Settings” on page 90.

Adding Music On Hold Files

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

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



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

Table 9-1. Adding/Editing Music On Hold

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

- Click **Upload**.

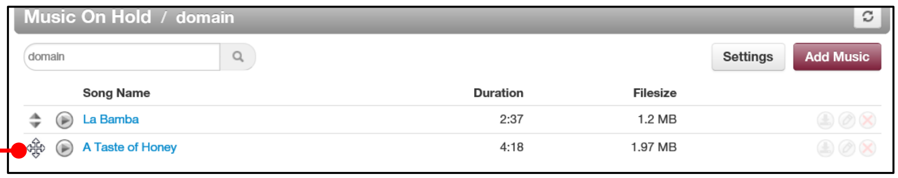
- After the file is uploaded, you can play it on your computer by clicking the  icon to the left of the file on the Music On Hold page.

Changing the Order of Music On Hold Files

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

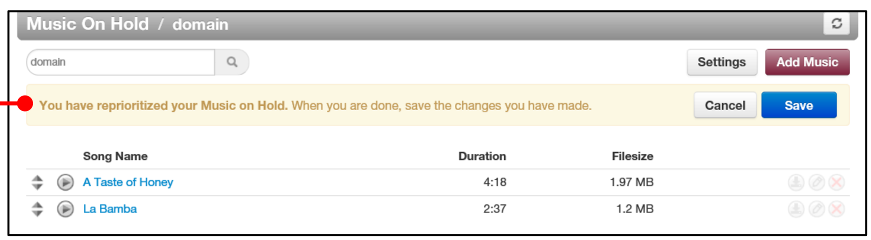
1. On the left side of the Music On Hold page, hover the mouse over the up/down arrows for the file you want to move (the pointer changes to a 4-headed arrow).

Pointer is hovering here



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

Message that file has been reprioritized



- Click **Save**.

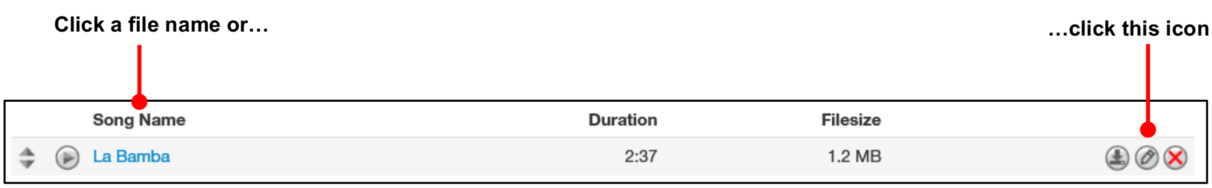
Editing Music On Hold Files

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

1. From the Music On Hold page, either:
   - Click a file name

     OR

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



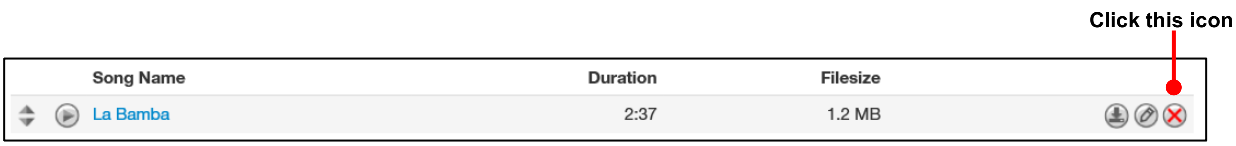
Either step displays the Edit Music pop-up window. For example:

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

Deleting Music On Hold Files

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

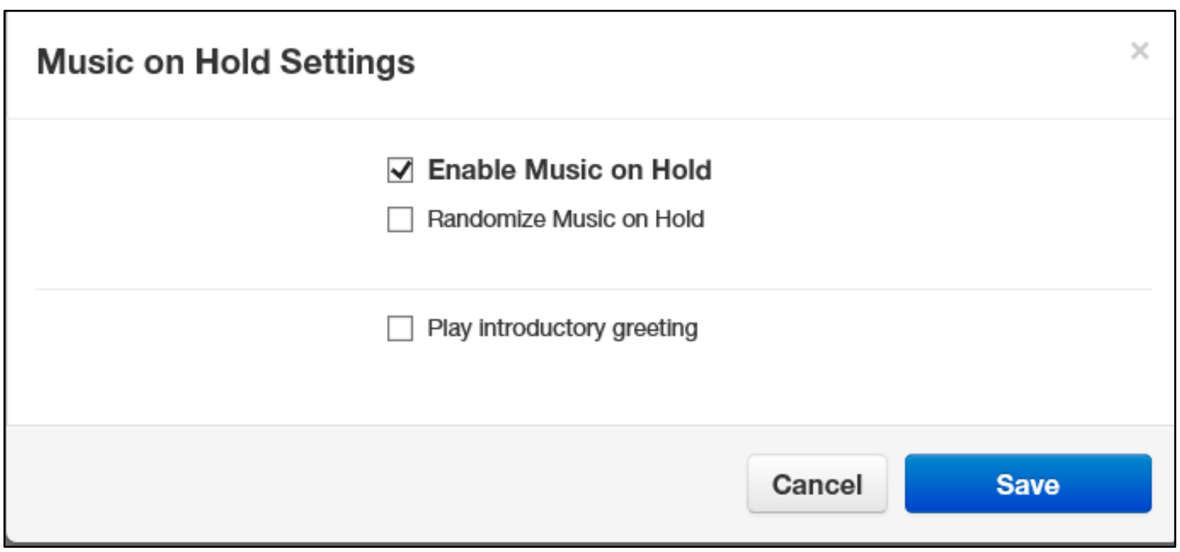
1. From the Music On Hold page, hover over the file name, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the file or **No** to retain it.



Adjusting Music On Hold Settings

To adjust Music On Hold settings:

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



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

Table 9-2. Music On Hold Settings

Setting	Description
Enable Music on Hold	Enable (check) or disable (uncheck) the Music On Hold feature.
Randomize Music on Hold	Play Music On Hold files in a random order (check) or according to their order on the Music On Hold page (uncheck).
Play introductory greeting	Play (check) or do not play (uncheck) an introductory greeting before playing the first Music On Hold file. If you check this check box, the New Greeting and Greeting Name fields appear for uploading or recording a greeting. Greetings must be in MP3 or WAV format: To upload a greeting file: 1. Next to New Greeting, click Upload. 2. Use the Browse button to select the file. 3. In the Greeting Name field, enter a name for the greeting. 4. Click Save. To record a greeting: 1. Next to New Greeting, click Record. 2. In the Call me at field, enter the number to call (either an extension or a telephone number such as your cell phone). 3. In the Greeting Name field, enter a name for the greeting. 4. Click Call. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording.

- Click **Save**.

10. WORKING WITH INVENTORY

Topics:

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

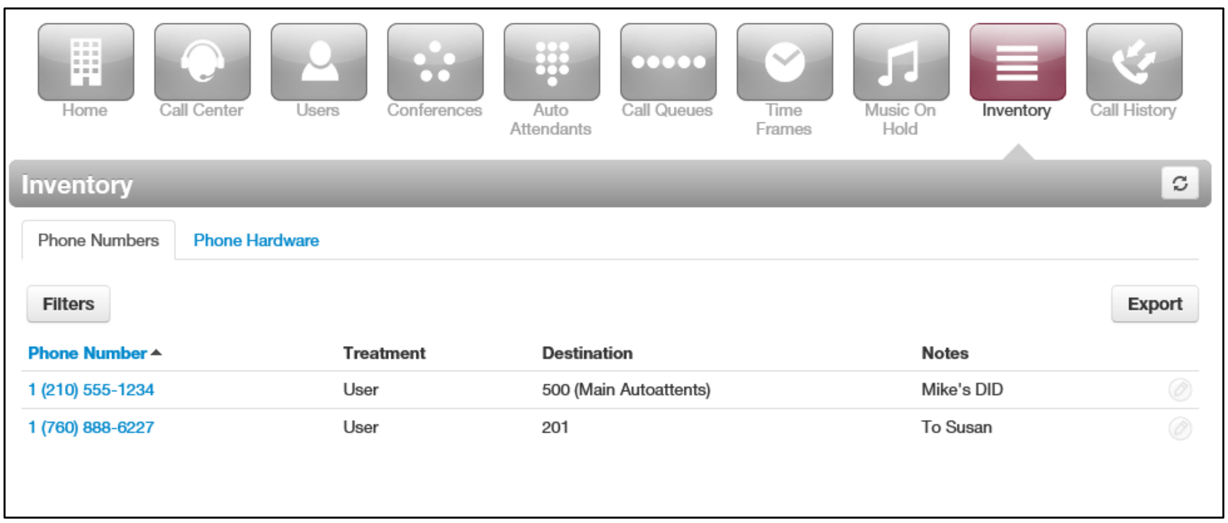
Displaying the Inventory Page

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

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

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

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



Where to go from here:	From the Inventory, you can:
	- Manage phone numbers. See “Managing Phone Numbers” on page 94. - Manage phone hardware. See “Managing Phone Hardware” on page 97.

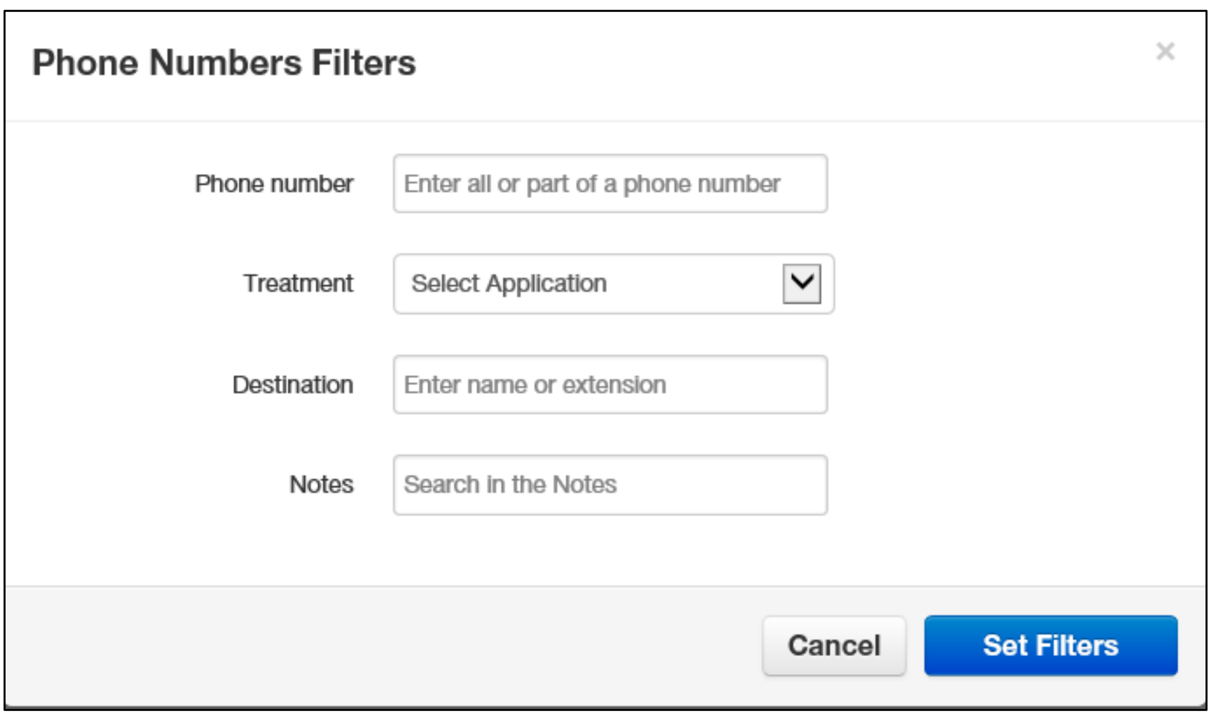
Managing Phone Numbers

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

Filtering Phone Numbers

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

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



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

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

Table 10-1.Phone Number Filter Settings

Setting	Description
Phone number	Enter all or part of the phone numbers you want to view.
Treatment	Select a treatment for the phone numbers you want to view. Choices are: • Available Number = an unassigned telephone number. • User = routes to a user specified. • Conference = routes to a conference bridge specified. • Call Queue = routes to a specified call queue. • Voicemail = routes to the specified user's voicemail box. • SIP Trunk = routes to a specified SIP trunk. • Auto Attendant = routes to a specified auto attendant.
Destination	Enter the name or extension of the phone destination.
Notes	Enter optional notes about this phone number.

Editing Phone Numbers

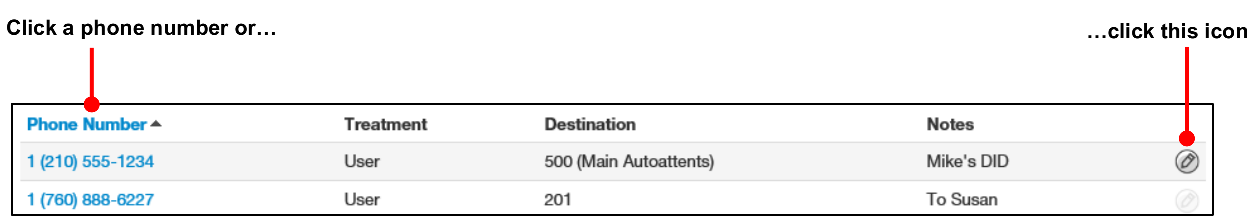
To edit phone numbers:

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

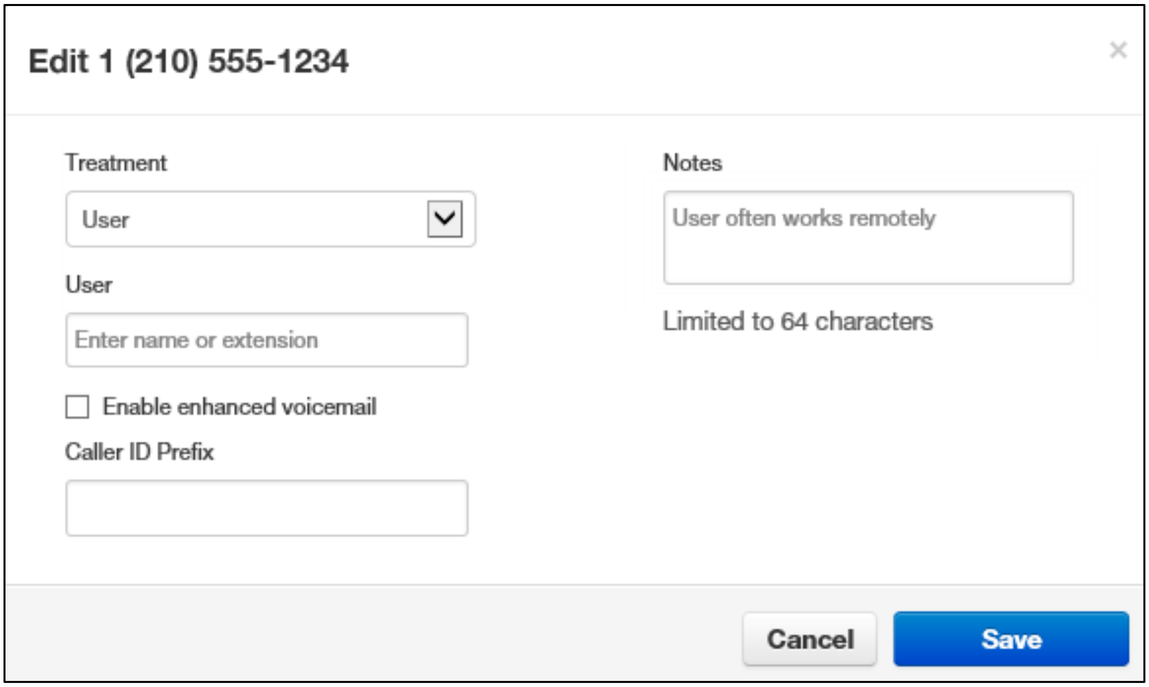
   – Click a phone number

   OR

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



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



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

Setting	Description
Treatment	Select a treatment for the phone numbers you want to view. Choices are: • Available number = an unassigned telephone number. • User = routes to a specified user. • Fax = routes to a fax number. • Conference = routes to a conference bridge specified. • Call queue = routes to a specified call queue. • Voicemail = routes to the specified user's voicemail box. • Autoattendant = routes to a specified auto attendant.
Notes	Enter optional notes about this phone number.
Caller ID Prefix	Enter a prefix to the caller ID for this phone number. Range: up to 64 alphanumeric characters.

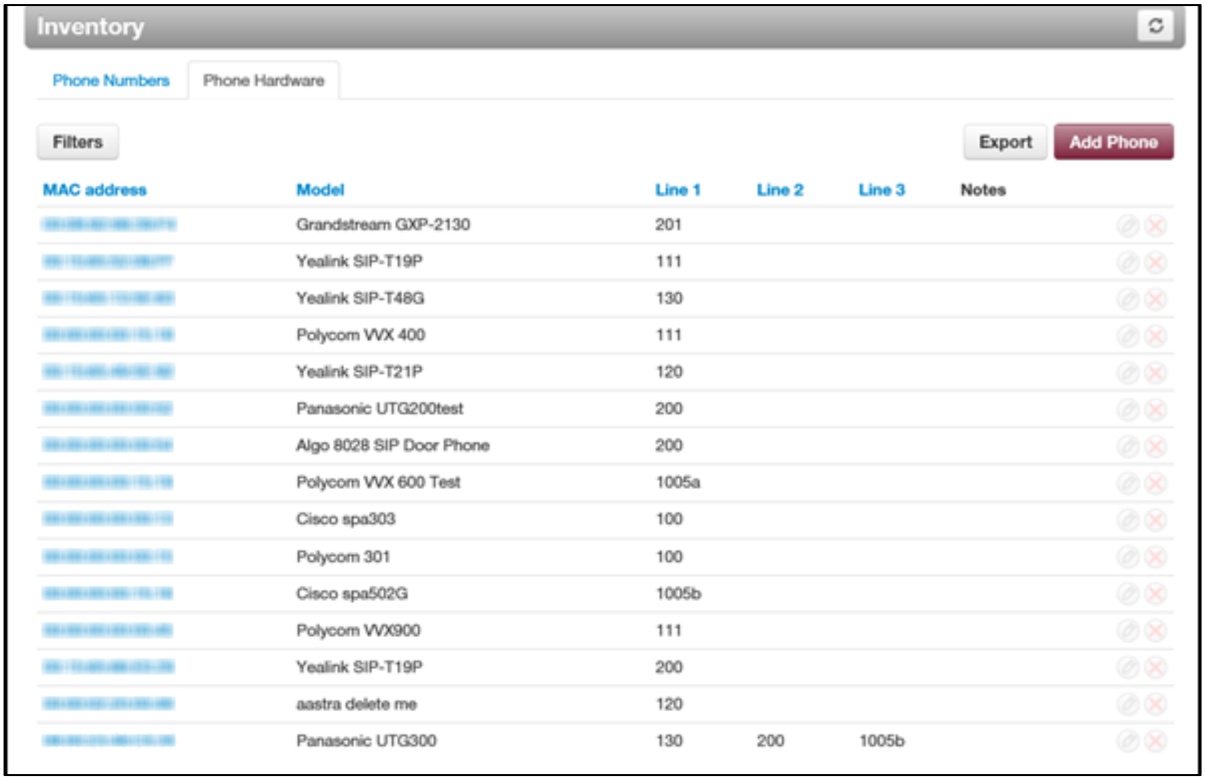
Exporting Phone Numbers

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

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

Managing Phone Hardware

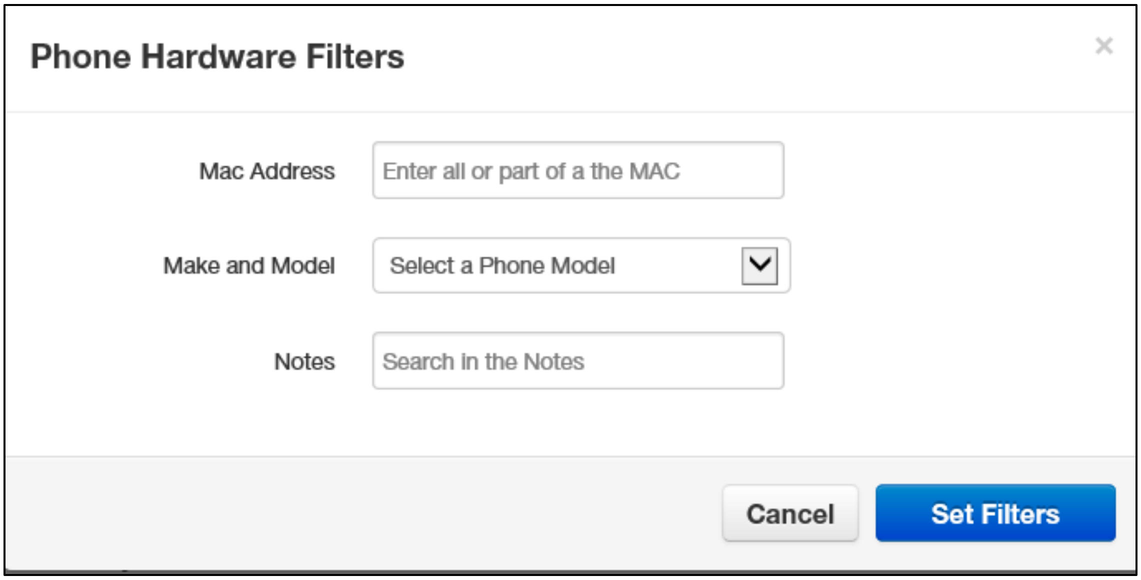
The **Phone Hardware** tab allows you to filter, add, edit, and export information about the phone hardware in your system.



Filtering Phone Hardware

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

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



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

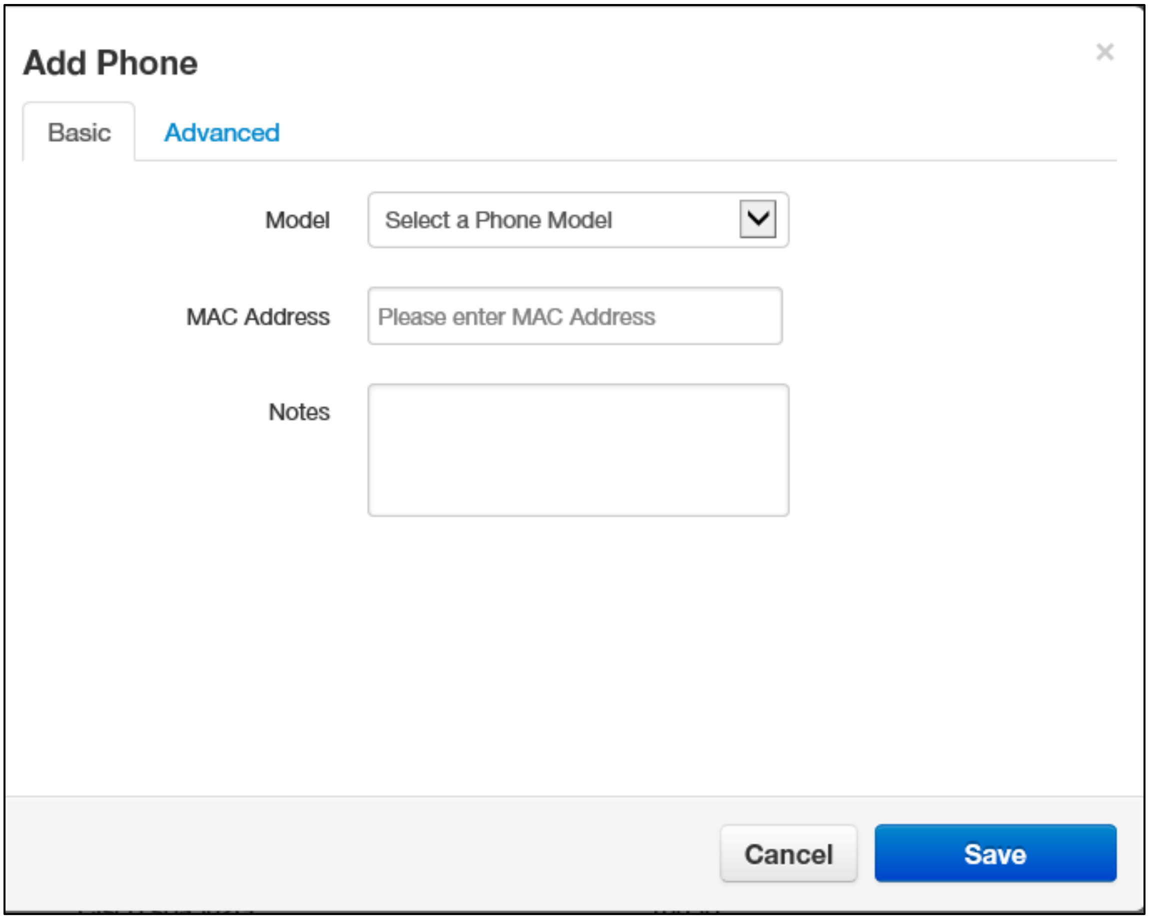
Table 10-2.Phone Filter Settings

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

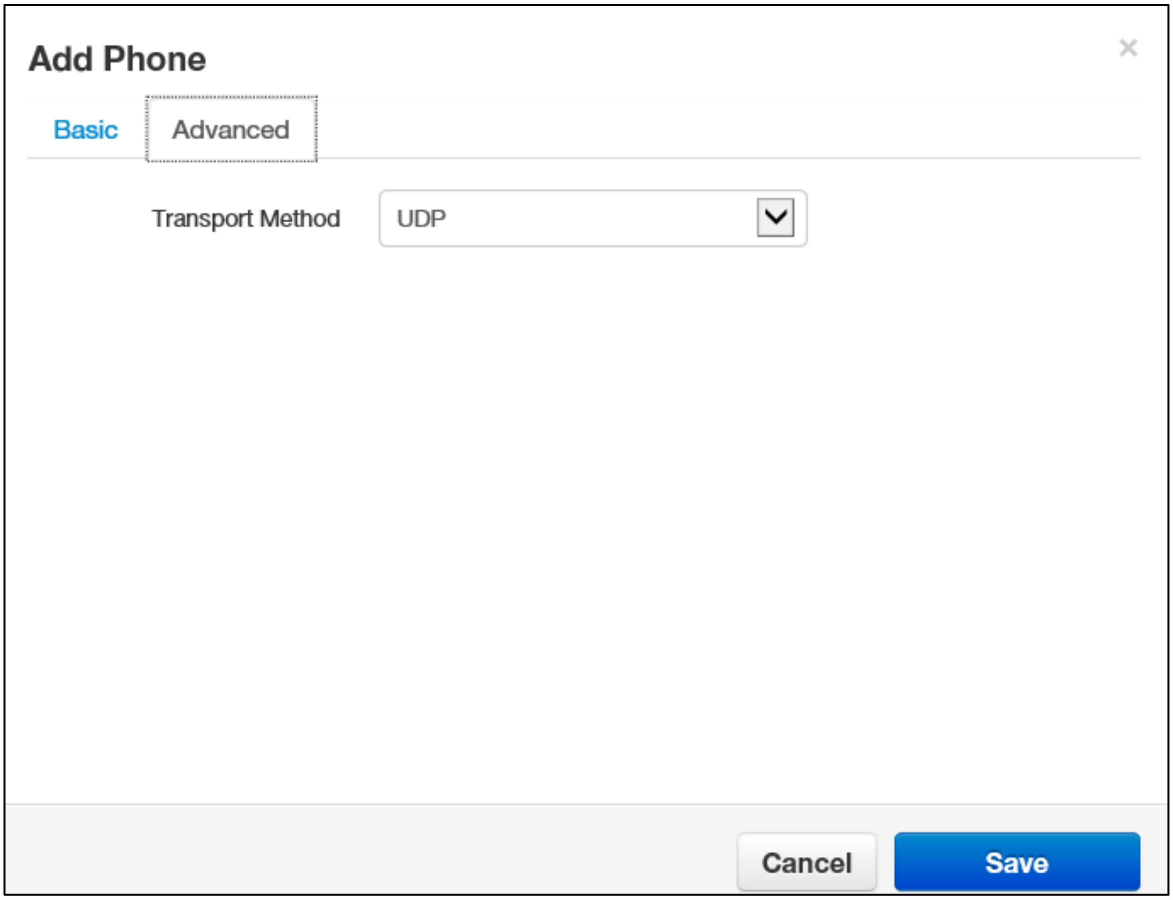
Adding Phones

To add phones:

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



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



4. Click **Save**.

Table 10-3.Basic Phone Settings

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

Table 10-4.Advanced Phone Settings

Setting	Description
Directory	If this setting is available for your make and model of phone, select a directory for this phone.
Preferred Server	If this setting is available for your make and model of phone, select the preferred server you want to associate with this phone.
Transport Method	Select a transport method for the phone. Choices are: • UDP • TCP • TLS

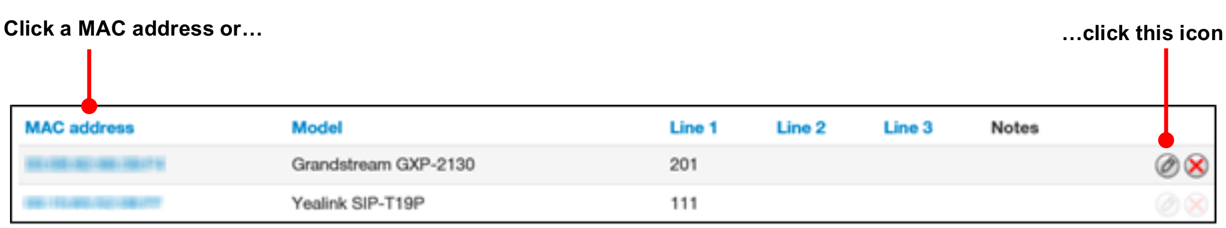
Editing Phones

To edit phones:

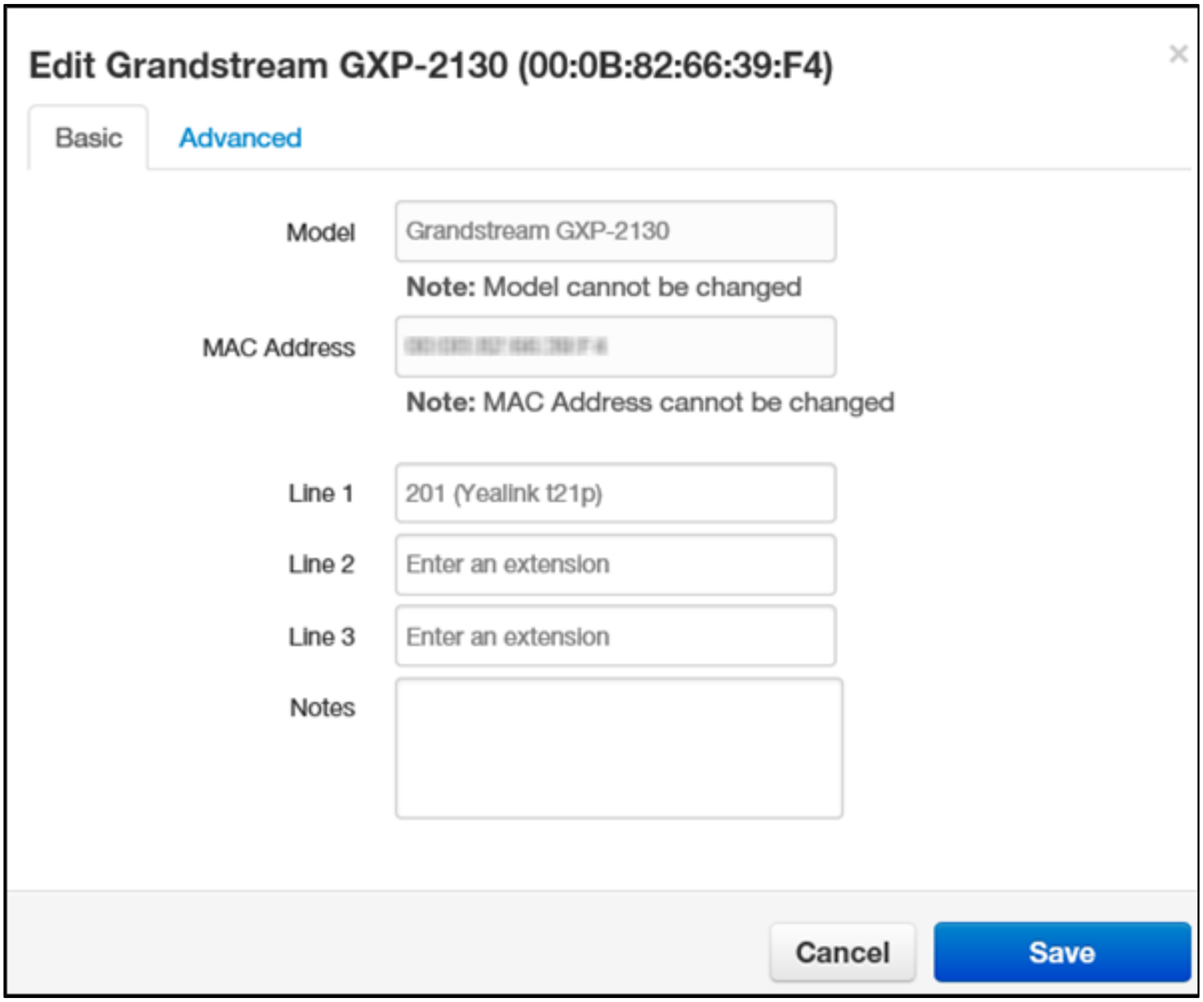
1. From the **Phone Hardware** tab, either:
   - Click a MAC address

     OR

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



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



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

Exporting Phone Hardware Information

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

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

11. VIEWING CALL HISTORY

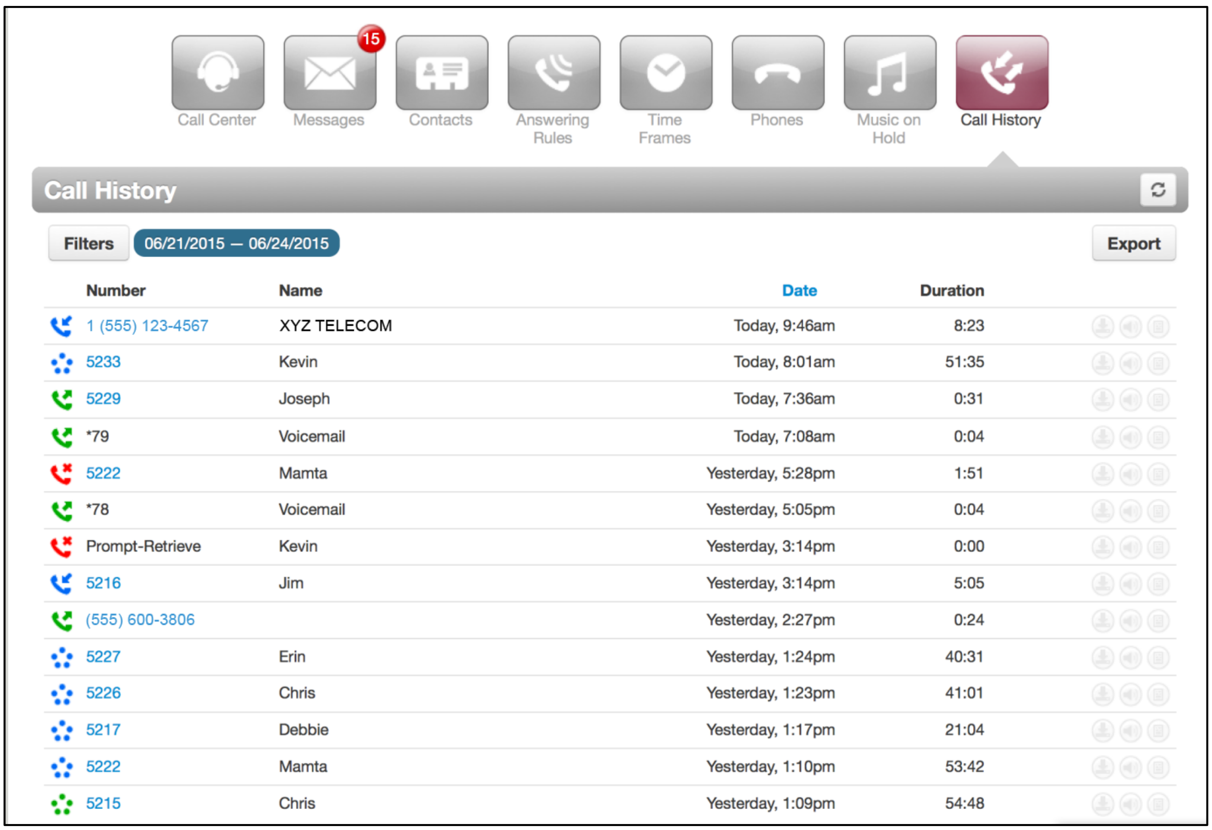
Topics:

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

Displaying the Call History Page

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

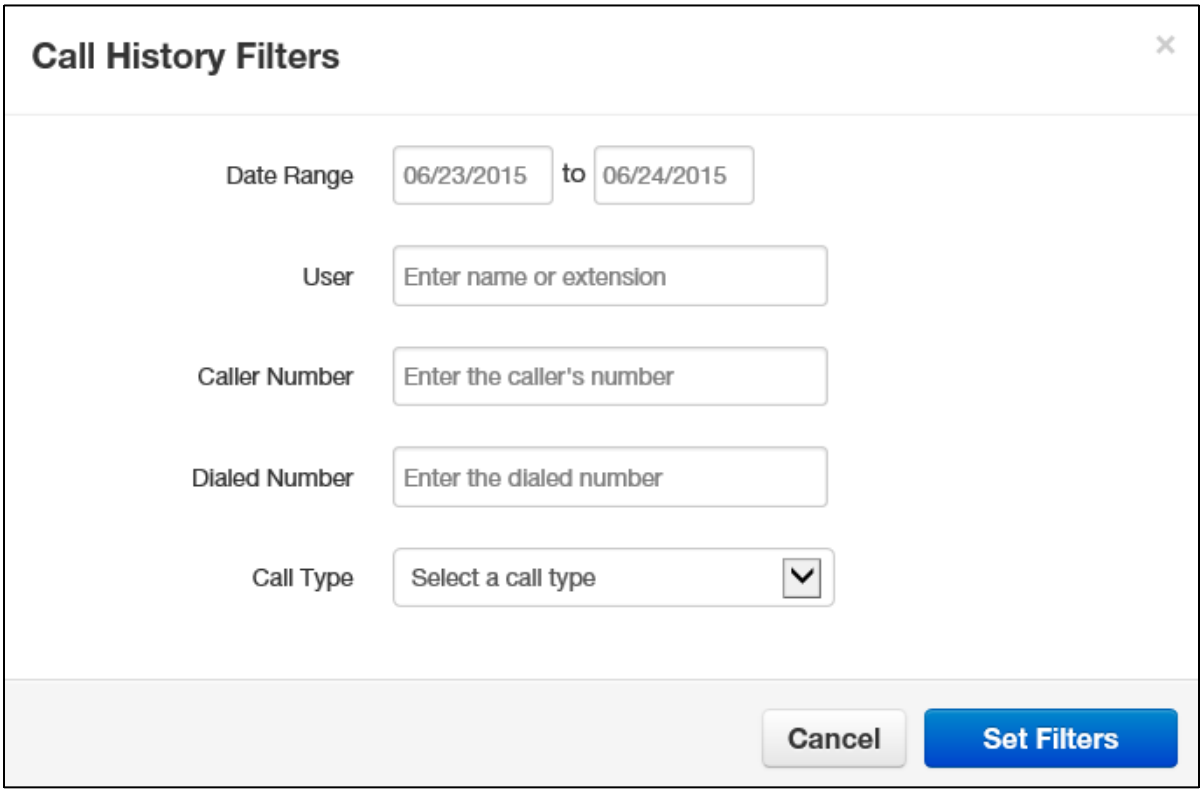
The following figure shows an example of the Call History page. The  button at the top-right side of the page refreshes the information on the page.



Filtering Call History

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

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



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

Table 11-1.Call History Filter Settings

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

Setting	Description
Dialed Number	Enter the dialed number you want to view.
Call Type	Enter the type of call you want to view. Choices are: • Inbound • Outbound • Missed

Exporting Call History

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

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

12. TAKING A PHONE HOME

Topics:

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

Installing a Phone at Home

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

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

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

Troubleshooting a Remote Phone

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

Problem	Corrective Action
Phone can make a call but lacks audio or cannot receive calls.	There might be a problem with your home network. Ensure that your network does not have double Network Address Translation (NAT) or SIP Application Layer Gateway (ALG) disabled on the router. Your provider cannot reconfigure home network; however, your provider will provide technical assistance to your IT staff or vendor.
Your home router is in a different room from the phone, and Ethernet wiring isn't available between the rooms.	Consider using a HomePlug Powerline solution. Your provider does not provide or support HomePlug systems, but such solutions are available from office supply and electronics stores.
Phone does not work at all.	Contact your provider for technical support. Before calling, have the phone's MAC address ready.
Phone can make and receive calls but call quality or reliability is poor.	• For connecting your phone/softphone, use Ethernet instead of Wi-Fi. • Check the quality of your internet connection at http://myspeed.visualware.com. If your Mean Opinion Score (MOS) is below 4, your Internet connection lacks the speed or quality to support an IP phone. • Your router may be able to prioritize SIP (IP Phone) traffic. Have your IT staff or vendor configure the Quality of Service on your router. Your provider cannot guarantee call quality or reliability with phones not on the provider's data network.

APPENDIX A. GLOSSARY

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

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

INDEX

A

B

C

D

E

F

G

H

I

J

L

M

O

PBX Admin/Office Manage Guide

May 15, 2018

Document version: Version 1