



# **PBX User Guide**

## **FastFind Links**

**Using Your Desk Phone**

**Using the User Web Portal**

**Voicemail**

**Answering Rules and Time Frames**

**Contacts**

**Phones**

**Music On Hold**

**Call History**

**Profile**



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# INTRODUCTION

Welcome to the Cloud PBX User Guide. Your Cloud PBX combines the best in traditional phone system features with modern Internet Protocol (IP) capabilities. In this guide, you will learn how to perform many common tasks on your phone, as well as make full use of your web portal.

# 1. USING YOUR DESK PHONE

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## Topics:

- ^ *Making Calls (page 6)*
- ^ *Receiving Calls (page 7)*
- ^ *Voicemail (page 7)*
- ^ *Handling Calls (page 10)*

While there are many different models of desk phones, they largely all work the same way. In this chapter, you will learn how to use common functions of your phone.

## Making Calls

Making a call with your phone does not require a leading 9. You can dial on-hook or off-hook.

➤ To dial on-hook

1. Dial the phone number.
2. Pick up the handset, headset, or speaker.

➤ To dial off-hook

1. Pick up the handset, headset, or speaker.
2. Dial the phone number.

Calls to the US and Canada are all dialed using 10 or 11 digits. Local calls can be dialed using 7 digits.

## Making International Calls

➤ To dial an international call

1. Dial the international call code 011.
2. Dial the country code.
3. Dial the local number.

International calling is commonly disallowed to prevent toll fraud.

## Extension Dialing

Extensions on your system can be dialed using their 3-to-4 digit extension or by pressing the button on your phone corresponding to the desired extension.

## Intercom

VoIP phones provide an intercom feature that allows you to instantly connect to other phones within your office. Intercom functionality is ideal for announcing visitors or asking a quick question.

When one phone intercoms another extension, it does not ring the other phone. Instead, the other phone will beep, and then its microphone and speaker turn on.

- To intercom

1. Dial 08ext. For example, to intercom extension 100, dial **08100**.

## Receiving Calls

When a call comes in, you can answer it via a headset, speakerphone, or handset.

- To answer a call using a handset
  - Lift the handset off-hook.
- To answer a call using a speakerphone
  - Press the **Speaker** button.
- To answer a call using a headset
  - Usage depends on how the headset is connected. Often, you'll press the button on the headset or press the headset button on the phone.

## Voicemail

### Accessing Voicemail

- To access voicemail
1. Press the **Messages** button on your phone to access your voicemail box, or dial 5001 if you can not identify the voicemail button.
  2. If you subscribe to multiple mailboxes, a list of mailboxes may appear. Select the mail box you want to access.
  3. When prompted, enter your voicemail pin, and then press **#**.

➤ **To access another person's mailbox**

1. Dial **5000**.
2. When prompted, enter the other person's extension number.
3. Enter the voicemail PIN of the other person's mailbox, followed by **#**.

## **Setting Up Your Mailbox**

The first time you log in to your mailbox you are walked through recording your name for the directory and recording your personal greeting.

The name recording is for the dial-by-name directory, so when someone enters the first three letters of your last name, it will play back your name recording.

The greeting plays when your mailbox is reached. It is very important to make a custom message, as many callers will not leave messages at mailboxes that have generic greetings.

## **Alternate Greetings**

Your mailbox supports multiple greetings for different scenarios like business trips and holidays.

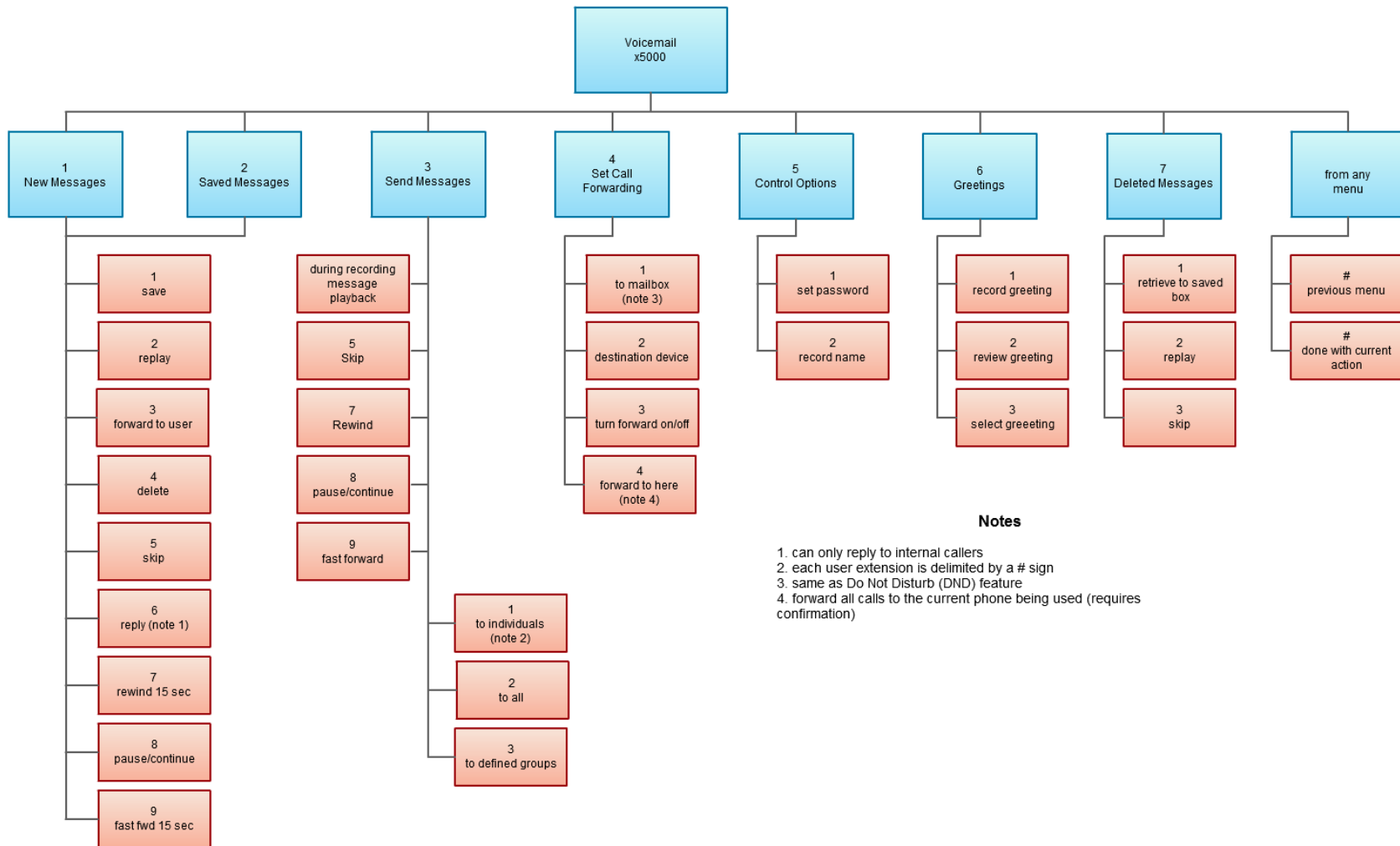
➤ **To record an alternate greeting**

1. From your mailbox, press **6** for greetings, and then press **1** to record an alternate greeting.
2. When prompted for the greeting number press **2** for your next alternate greeting (1 is your default greeting).
3. After your recording is completed, select the active greeting by selecting option **3** in the greetings menu.

## **Voicemail Tree**

On the next page you'll find a voicemail tree showing what to dial for each option in your mailbox.





# Handling Calls

Your cloud PBX features various ways to move calls around, including attended transfer, unattended (blind) transfer, voicemail transfer, park, and more. In this section, references to BLFs are the 1-touch buttons to extensions common at front-desk phones.

## Attended Transfer

Attended transfer allows you to speak to the transfer recipient prior to completing the transfer while the caller is on hold.

➤ To perform an attended transfer using Polycom and Yealink phones

1. Press the **Transfer** key/softkey on your phone.
2. Dial the recipient's extension or press their BLF.
3. Speak to the recipient, and then either press **Transfer** again to complete or cancel if the recipient cannot take the call.

## Blind Transfer

Blind transfer goes straight to the recipient.

➤ To blind transfer using Polycom phones with older firmware

1. Press **Transfer**.
2. Press the **Blind** softkey. (if there is no Blind softkey see directions for new firmware)
3. Enter the extension of the recipient or the recipient's BLF.

➤ To blind transfer using Polycom phones with newer firmware

1. Press and hold the **Transfer button**.
2. Select Blind from the on screen menu
3. Enter the extension of the recipient or the recipient's BLF.

➤ To blind transfer using Yealink phones

1. Press **Transfer**.
2. Dial the extension of the recipient
3. Press Transfer.

## Transfers to External Numbers

A transfer can also go to an external number such as a cell phone. Follow the transfer directions above but instead of dialing an extension, dial a 10 digit phone number.

## Voicemail Transfer

Voicemail transfer goes straight to the recipient's voicemail box without ringing the recipient's phone.

- To perform a voicemail transfer
  - Perform a blind transfer with a 03 prefix before the extension. For extension 111's voicemail, for example, blind transfer to 03111.

## Park and Hold

On your phone system, hold is a local function. This means a call held on your phone cannot be picked up at another station. Park is a system-wide function. This means a call parked at one phone may be picked up by any phone.

- To park a call
1. Dial \*\*\* in an active call from any phone. The system says, "The call is parked at 7xx."
  2. Hang up.

To retrieve the parked call, dial **7xx** where **xx** is the number stated by the system.

## Directed Call Pickup

Directed call pickup (DCP) allows you to answer a call ringing at another station.

- To perform a directed call pickup
  - Dial **07ext**. If 111 is ringing, for example, dial **07111** to pick up that call.

Phones with BLFs to the ringing station can also press the corresponding BLF.

## 3-Way Conference

- To make a 3-way conference
1. Call or be called by the first participant in the conference.
  2. Press the **Conference** key/softkey, and then dial the second participant.

3. After the second participant picks up, press **Conference** again to connect everyone.

## 2. USING THE USER WEB PORTAL

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### Topics:

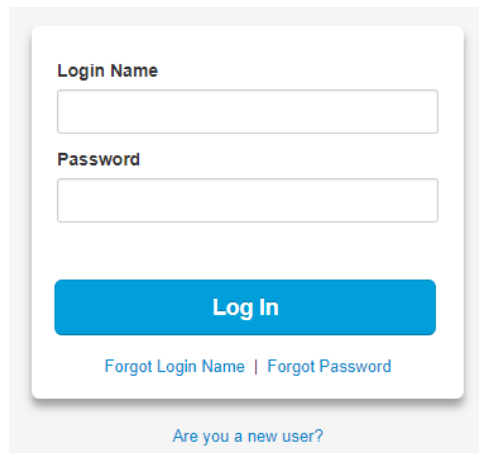
- ⤴ *Accessing the Portal (page 14)*
- ⤴ *Voicemail (page 17)*
- ⤴ *Answering Rules and Time Frames (page 22)*
- ⤴ *Contacts (page 36)*
- ⤴ *Phones (page 39)*
- ⤴ *Music On Hold (page 41)*
- ⤴ *Call History (page 44)*
- ⤴ *Profile (page 48)*

Each extension of your Cloud PBX system has access to a powerful web portal for managing voicemail, call routing, and more.

## Accessing the Portal

➤ To access the web portal

1. Start a web browser.
2. Go to <https://pbx.simplelogin.net>.
3. At the login page (see **Error! Reference source not found.**):
  - Enter your **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



## Desktop Call Control

Desktop call controls appear when making or receiving a call. These controls allow you to see who is calling and manage a current call.

### *Incoming Calls*

Incoming calls appear in a window in the portal similar to the one in Figure 2-1. This window shows the caller ID name and number, along with **Reject** and **Answer** buttons.

- Selecting **Reject** sends the call to voicemail if available. The **Answer** button may not be available, depending upon your handset model.



Figure 2-1. Example of an Incoming Call

### *Active Calls*

Figure 2-2 shows an active call window that displays the caller ID and call time. The three controls at the bottom of the window let you hold, hang up, or transfer the call. If you select transfer, a field appears for entering the extension of the recipient. If you prefix the recipient's extension number with 03, the call goes straight to voicemail.

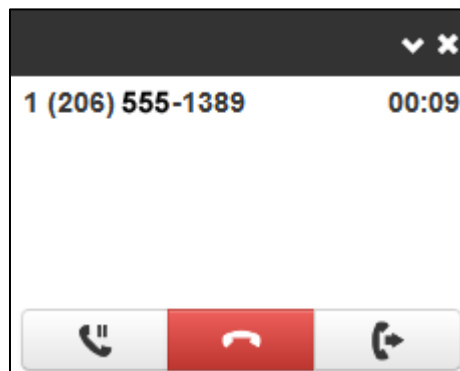


Figure 2-2. Example of Active Call Window

## Home

The Home page of your portal provides an at-a-glance view of everything going on with your extension. Table 2-1 describes the areas on the Home page.



NEW MESSAGES »

From	Date	Duration
(206) 555-8555 <small>HERNANDEZ, MARIA THOMAS</small>	Today, 10:38am	0:36
(206) 555-5597 <small>WALKER, STEVE (DND)</small>	Apr 4th, 10:19am	0:34

RECENT CALL HISTORY »

Number	Name	Date	Duration
(206) 555-8555		Today, 10:41am	1:22
(206) 555-1389	<small>DAVENPORT, NICKEL</small>	Today, 10:38am	0:04
(206) 555-8555	<small>HERNANDEZ, MARIA THOMAS</small>	Today, 10:36am	2:24

STATUS MESSAGE

ACTIVE ANSWERING RULE »

**Open Hours** ▼

Simultaneously ring:

- x5702
- x5702a
- x5702c
- x5702b
- x5702d
- x5702e

ACTIVE PHONES »

5702e	Panasonic_KX-TGP500B0...
5702c	Polycom 335-UA/3.3.4....
5702	PolycomV VX-VVX_400-UA...

**Figure 2-3. Example of Home Page**

**Table 2-1. Fields in the Home Page**

Field	Description
New Messages	Shows new messages. You can play messages, click to call back, download, save, and delete. To see all the controls, hover over the message.
Recent Call History	Color-coded icons show your recent calls. <ul style="list-style-type: none"> <li>• Green icon = outbound call.</li> <li>• Red icon = missed inbound calls.</li> <li>• Blue icon = inbound received calls.</li> </ul> To call back a number, click the phone number.
Status Message	Allows you to enter a status message that appears to other users of the portal.
Active Answering Rule	Your extension can have multiple answering rules. For example, you might ring your phone in one mode or forward to your cell in another mode. In this field, you can which answering rule is the active rule.
Active Phones	Your extension may have multiple phones (for example, one in the office and one at home). This field shows which handsets are currently online.



## Voicemail

You configure voicemail using the Messages page. This page has two tabs for handling voicemail:

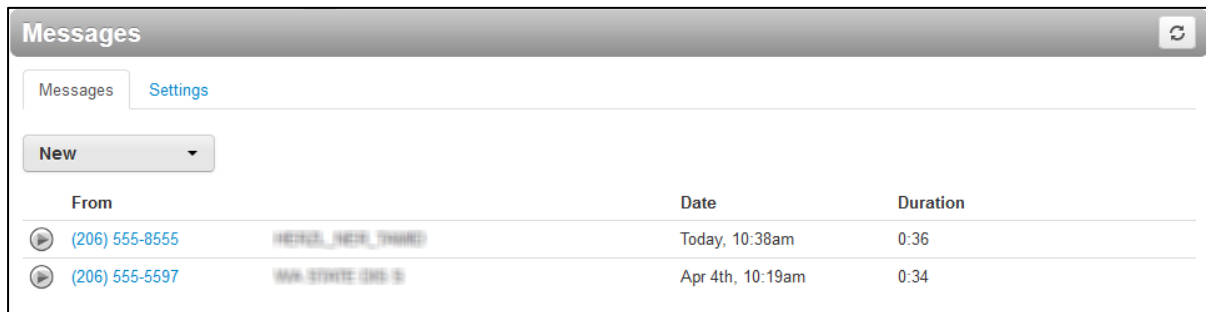
- **Messages** — see “Messages” below.
- **Settings** — see “Voicemail Settings” on the next page.

To display the Messages page, click the **Messages** icon at the top of the page:



## Messages

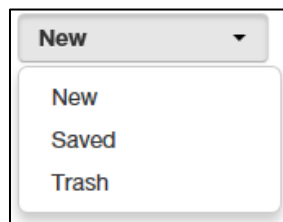
The **Messages** tab allows you to manage your new, saved, and deleted voicemail, as well as greetings and other settings.



**Figure 2-4. Messages Page**

Like the Home page, you can play messages, click a number to call it back, and download, save, forward, and delete messages. To see all the controls available, hover the mouse pointer over a message.

The **New** drop-down list allows you to review New, Saved, and Trash (recently deleted) messages.




## Voicemail Settings

Clicking the **Settings** tab displays options for controlling your voicemail order, timestamps, greetings, and voicemail to email.

The screenshot shows the 'Settings' tab selected. At the top, there are two tabs: 'Messages' and 'Settings'. Below the tabs, there is a section for 'Enable Voicemail' with a checked checkbox. The 'Inbox' section contains three options: 'Sort voicemail inbox by latest first', 'Announce voicemail received time', and 'Announce incoming call ID', each with an unchecked checkbox. Below these is an 'Operator Forward' field with a placeholder 'Enter Operator Extension'. The 'Greetings' section has a 'Voicemail Greeting' dropdown menu and a 'Recorded Name' field with upload and play icons. The 'Unified Messaging' section has an 'Email Notification' dropdown menu set to 'None'. At the bottom, there are 'Save' and 'Cancel' buttons.

**Figure 2-5. Settings Tab**

**Table 2-2. Fields in the Settings Tab**

Field	Description
Enable Voicemail check box	Enables (check) or disables (uncheck) voicemail.
Inbox	<p>These options affect audio voicemail (calling in) but not the portal.</p> <ul style="list-style-type: none"> <li>Sort Voicemail inbox by latest first = plays your newest messages first.</li> <li>Announce voicemail received time = plays the timestamp of the message.</li> <li>Announce incoming call ID = plays the caller ID number if available.</li> <li>Operator Forward = option to press 0 in a mailbox greeting and be directed elsewhere.</li> </ul>
Greetings	<p>Allows you to select an active voicemail greeting, listen to it, and record a new greeting.</p> <ul style="list-style-type: none"> <li>To select the active voicemail greeting, click it from the pull-down menu and click Save.</li> <li>To listen to a selected greeting on your PC, click the play button: </li> <li>To record a greeting, see "Recording a Greeting" on page 19.</li> </ul>

Field	Description
Unified Messaging	<p>Provides the following selections for adjusting your voicemail to email settings.</p> <ul style="list-style-type: none"> <li>• None = no email is sent when voicemail is left.</li> <li>• Send w/ hyperlink = a link to the voicemail is emailed to you.</li> <li>• Send w/ brief hyperlink = a link to the voicemail in plaintext is emailed to you.</li> <li>• Send w/ attachment (<i>storage option</i>) = an email is sent to you with the audio file of the message attached. The <i>storage option</i> allows you to leave messages in your inbox as new, move to saved, or move to trash.</li> <li>• Send w/ brief attachment (<i>storage option</i>) = an email is sent to you in plaintext with the audio file of the message attached. The <i>storage option</i> allows you to leave messages in your inbox as new, move to saved, or move to trash.</li> </ul>

### ***Recording a Greeting***

➤ To record a greeting

1. From the **Settings** tab of the Messages page, click the speaker icon .

*A Manage Greetings page similar to the one in Figure 2-6 appears.*

The screenshot shows a web portal window titled "Manage Greetings" with a close button (X) in the top right corner. The interface is divided into several sections. At the top, under "New Greeting", there are two radio buttons: "Upload" (which is selected) and "Record". Below these, there is a "Browse" button next to a text input field. Further down, there is a "Greeting Name" label followed by a text input field containing the placeholder text "Name for this greeting". A large blue "Upload" button is positioned below the input fields. The main body of the window is a large white area that currently displays the message "No greetings have been added yet." in a centered, gray font. At the bottom right of the window, there are two buttons: "Add Greeting" and "Done".

Figure 2-6. Manage Greetings Page

2. Next to **New Greeting**, click **Record**.

The **Browse** button changes to a **Call me at** field.

**Manage Greetings**

New Greeting ☐ Upload ☒ Record

Call me at


Greeting Name

**Call**

3. In the **Call me** at field, enter a number to call. This can be an extension or a telephone number such as your cell phone.
4. In the **Greeting name** field, enter a name for this greeting.
5. Click the **Call** button.
6. At the prompt, record the new greeting. When you finish the greeting, press #.
7. Click **Add Greeting** at the bottom of the Manage Greetings page, and then click **Done** to close the page.

### ***Uploading a Greeting***

- To upload a greeting

1. From the **Settings** tab of the Messages page, click the speaker icon .
 

*A Manage Greetings page similar to the one in Figure 2-6 on page 20 appears.*
2. Hover over a greeting. Options appear for editing, deleting, or renaming the greeting.
3. Next to **New Greeting**, click **Upload**.
4. Click the **Browse** button.
5. In the Choose File to Upload dialog box, select a WAV or MP3 recording from your PC, and then click **Open**.
 

*The path and file name appear in the **Browse** field.*
6. Click **Upload**.
7. Click **Add Greeting** at the bottom of the Manage Greetings page, and then click **Done** to close the page.

## Recorded Name

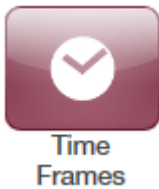
If your company has a dial-by-name directory, you must record your name for the directory to be found. You can click the play button to listen to your current name recording on your PC, or click the speaker button to record or upload a new name recording.

## Answering Rules and Time Frames

Though Answering Rules and Time Frames are separate tabs, they are so interconnected that describing them together makes sense.

### Time Frames

Time frames allow you to control the scheduling of the system. You configure time frames using the Time Frames page. To display this page, click the **Time Frames** icon at the top of the page:



Three common time frames are:

- Open Hours (for example, M-F 9am-5pm)
- Holidays (Independence Day, Thanksgiving, New Year's, and so on)
- Closed Hours (all other times)

Time frames can be both shared (system-wide and set by the administrator) or personal to your extension. You can add a time frame to your extension by clicking the **Add Time Frame**.

Time Frames			Add Time Frame
Name	Description	Owner	
Cell Forward <span>Edit</span>	Days and Times	5702	
Closed Hours	Always	Shared	
Customer Care Hours	Days and Times	Shared	
Holidays	Specific Dates	Shared	
Kevin Holiday	Specific Dates	5702	
Open Hours	Days and Times	Shared	

➤ To add time frames

1. From the Time Frames page, click **Add Time Frame**.

*The Add a Timeframe page appears.*

**Add a Timeframe** ×

Name  **Note:** Name cannot be changed

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

2. In the **Name** field, enter a name for this time frame.
3. Next to **When**, select the time period when the time frame will be applied:
  - **Always** = select this option if the time frame will always be applied. Click **Save** to complete the procedure.
  - **Days of the week and times** = select this option to select days and times when the time frame will be applied. Proceed to “If you select Days of the week and times” on page 24.
  - **Specific dates or ranges** = select this option to specify a specific date or range of dates. Proceed to “If you select Specific dates or ranges” on page 28.

***If you select Days of the week and times***

Options appear for selecting days and times when the time frame will be applied (see Figure 2-7).

**Add a Timeframe** ×

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

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

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

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

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

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

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

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

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

Cancel Save

**Figure 2-7. Setting Days of the Week and Times**

1. Using the check boxes next to the name of each day of the week, check the days when the time frame will be applied. A blue line to the right of checked day shows the default hours for this time frame (9:00 AM through 5:00 PM).



**Add a Timeframe**

Name:  Note: Name cannot be changed

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

☐ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

Default operating hours

Cancel Save

- To change the start time, drag the button on the left side of the blue bar either to the left to begin the start time earlier or to the right to begin the start time later.

☒ Monday

9:00 AM

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


- To change the end time, drag the button on the right side of the blue bar either to the left to shorten the end time or to the right to lengthen the end time.

☒ Monday

5:00 PM

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

**Hint:** To fine-tune start and end times, click start time or end time button, and then use the left and right arrow keys on your keyboard to change the time in 5-minute increments.

- By default, each day is made up of one time period. However, you can use the  icon to define two time periods per day. For example, the figure below shows a setup for an office that answers calls in the morning and afternoon, and then transfers calls to an answering

service over lunch, on Monday through Friday. By doing this, you would create two time frames (for example, one from 8 to noon and another from 1:00 to 5:00 PM).

### Add a Timeframe

Name
Note: Name cannot be changed

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

☐ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

12:00 AM

6:00 AM

12:00 PM

6:00 PM

11:59 PM

12:00 AM

6:00 AM

12:00 PM

6:00 PM

11:59 PM

12:00 AM

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6:00 AM

12:00 PM

6:00 PM

11:59 PM

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Cancel

Save

- Click **Save** to save your selections.

*The time frame appears as a row on the Time Frames page.*

Time Frames		
<div>Add Time Frame</div>		
Name	Description	Owner
Normal Business Hours	Days and Times	Shared

**Hint:** Moving the pointer over the blue text in the **Description** column shows the settings for that timeframe.

### Time Frames

Name	Description
Normal Business Hours	Days and Times

Day	Time
Monday	8:00 am to 12:00 pm 1:00 pm to 5:00 pm
Tuesday	8:00 am to 12:00 pm 1:00 pm to 5:00 pm
Wednesday	1:00 pm to 5:00 pm 8:00 am to 12:00 pm
Thursday	8:00 am to 12:00 pm 1:00 pm to 5:00 pm
Friday	8:00 am to 12:00 pm 1:00 pm to 5:00 pm



Add Time Frame

***If you select Specific dates or ranges***

Fields appear for entering dates or ranges (see Figure 2-8).

**Figure 2-8. Setting Dates or Ranges**

1. Click in the left field, and then select a starting date and time from the pop-up calendar.

2. Click in the right field, and then select an ending date and time from the pop-up calendar.
3. To specify additional ranges, click the  icon to display another row of fields, and then repeat steps 1 and 2 in the new fields. Repeat this step for each additional date or range you want to specify. To delete a date or range, click the  icon next to the appropriate row.

### Add a Timeframe

Name
Note: Name cannot be changed

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

Specific dates or ranges

to

to

- Click **Save** to save your selections.

*The time frame appears as a row on the Time Frames page.*

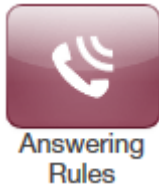
Time Frames			Add Time Frame
Name	Description	Owner	
Normal Business Hours	Specific Dates	Shared	

**Hint:** Moving the pointer over the blue text in the **Description** column shows the settings for that timeframe.

Time Frames			Add Time Frame
Name	Description	Owner	
Normal Business Hours	Specific Dates	Shared	<input type="button" value="edit"/> <input type="button" value="delete"/>
	<div> <div>Begin</div> <div>End</div> <div>12/30/2015</div> <div>12/30/2015</div> </div>		

## Answering Rules

After you set up your time frames, you can create different answering rules for your time frames. You configure answering rules using the Answering Rules page. To display this page, click the **Answering Rules** icon at the top of the page:



The left side of the Answering page has a **Rings for *n* seconds** drop-down list that allows you to specify the maximum ring time (one ring is generally 5 seconds). When that time expires, the caller will be forwarded to the **Call Forward When Unanswered** rule if defined; otherwise, the caller will be forwarded to voicemail if enabled. The right side of the Answering Rules page has buttons for adding answering rules, and specifying allowed and blocked numbers.

Figure 2-9 shows examples of answering rules. In this figure:

- The extension has a rule to simultaneously ring many desk phones during Open Hours.
- **Cell Forward** rings many desk phones and a cell phone simultaneously.
- Holiday and closed hour rules go straight to voicemail.

The active rule is the topmost rule that matches the conditions in the corresponding time frame. In Figure 2-9, for example, the time is around 1pm on Friday, so both **Open Hours** and **Cell Forward** rule match the time/day condition, but **Open Hours** is active because it is the topmost rule. You can change the order by using the arrows at left of each rule to drag the rules.

Answering Rules / Kevin Selkowitz (5702)	
Ring for <input type="text" value="20"/> seconds	<input type="button" value="Allow / Block"/> <input type="button" value="Add Rule"/>
Time Frame	Description
⬆ Open Hours <span>Active</span>	Simultaneously ring x5702, x5702a, x5702c, x5702b, x5702d, x5702e
⬆ Cell Forward	Simultaneously ring x5702, (425) 555-1212, x5702c, x5702e
⬆ Kevin Holiday	Do not disturb
⬆ Closed Hours	Do not disturb
⬆ Holidays	Do not disturb

**Figure 2-9. Sample Answering Rules**

➤ To add an answering rule

1. From the Answering Rules page, click **Add Rule**.

*The Add an Answering Rule page appears. From this page, you can create rules to screen callers, forward calls, and ring multiple numbers simultaneously.*

**Add an Answering Rule** ×

Time Frame Select a time frame ▼ This is when your answering rule will apply

☐ Do not disturb

☐ Call screening

**Call Forwarding**

☐ Always Extension, number or phone

☐ On Active Extension, number or phone

☐ When busy Extension, number or phone

☐ When unanswered Extension, number or phone

☐ When offline Extension, number or phone

☐ Simultaneous ring

☒ Include user's extension

☐ Ring all user's phones

☐ Answer confirmation for offnet numbers

Extension, number or phone 🕒 0 +

☒ Just ring user's extension

Cancel Save

**Figure 2-10. Add an Answering Rule Page**

2. Complete the fields in the Add an Answering Rule page (see Table 2-3).
3. Click **Save**.

**Table 2-3. Fields in the Add an Answering Rule Page**

Field	Description
Time Frame	Select the time frame when this answering rule will apply.
Do not disturb	No phone rings, goes straight to voicemail if available.
Call screening	Prompts caller to say their name, lets you screen the call before accepting.
Call Forwarding Always	Immediately forwards to the number specified. See "Call Forward Drop-down Options" below.
Call Forwarding On Active	Forward calls to the number specified when you have one or more calls active. See "Call Forward Drop-down Options" below.
Call Forwarding When Busy	Forwards calls to the number specified when your extension has used all available call paths. See "Call Forward Drop-down Options" below.
Call Forwarding When Unanswered	Forwards calls to the number specified if the call is not answered after the specified ring timeout. See "Call Forward Drop-down Options" below.
Call Forwarding When Offline	Automatically forwards if your desk phone loses communication (such as during a power outage). See "Call Forward Drop-down Options" below.
Simultaneous ring	<p>Rings many phones at once. Check box options allow you to:</p> <ul style="list-style-type: none"> <li>• Include the user's extension.</li> <li>• Ring all your user's phones.</li> <li>• Use the option "Answer confirmation for offnet numbers" to ensure that a person — and not voicemail — answers simrings to a cell/landline by prompting the answering party to press 1 to accept the call. An icon to the right of this option allows you to specify a ring delay.</li> </ul> <p>Note: A simring rings handsets, not users. So, for example, if 111 is listed, the simring will ring handset 111. If user 111 has a call forward set to their cell, however, the simring will not occur at the cell since simring rings handsets, not users.</p>
Just ring user's extension	Rings just your phone.

## Call Forward Drop-down Options

When entering an extension as a call forward option, a drop-down list allows you to forward the call to specific resources associated with that extension. Table 2-4 describes the options. Some options may not appear, depending on the features associated with the extension.

**Table 2-4. Call Forward Drop-down Options on the Add an Answering Rule Page**

Field	Description
Handset	Bypasses the user answering rules and forwards to the handset associated with the specified user.
User	Forwards to the user at that extension and follows the user's answering rules.
Voicemail	Forwards to voicemail at the specified extension.
Queue	Forwards to the queue associated with that user.
Autoattendant	Forwards to the auto attendant associated with that user.
Conference	Forwards to a Conference bridge



## Ring Timeout

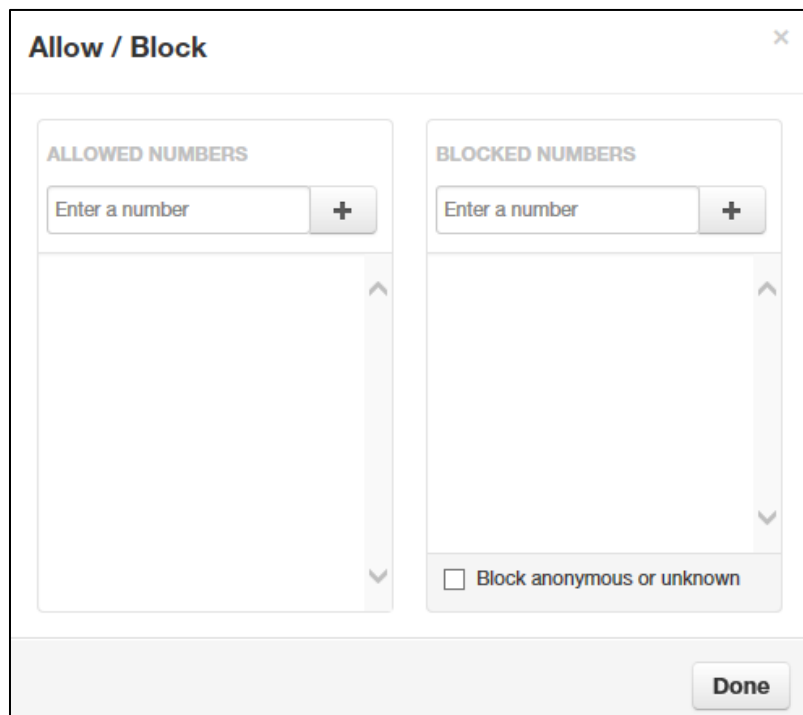
At the top of the page is the ring timeout selection. This option specifies the number of seconds that your phones will ring or forwarding rule before going to voicemail (when available).

## Allowing or Blocking Callers

The Answering Rules page has an **Allow/Block** button that allows you to permit or block calls from certain numbers. Using this feature, you can block unwanted calls to your phone, as well as calls from anonymous and unwanted numbers. Allowed numbers bypass user Do Not Disturb and Call Screening rules to ring through immediately.



1. From the Answering Rules page, click **Allow/Block**.

*The Allow/Block page appears. This page has two lists, one for allowed phone numbers (on the left) and another for blocked phone numbers (on the right).*



**Figure 2-11. Allow/Block Page**

2. To allow phone numbers, perform the following steps under **ALLOWED NUMBERS**:
  - a. Click in the **Enter a number** field.
  - b. Enter the number you want to allow.

- c. Click the  button. The number appears in the **ALLOWED NUMBERS** list and a brief message tells you the allowed number was added.
- d. To add more numbers, repeat step 2.
- e. To remove a number, click the  button next to that number.

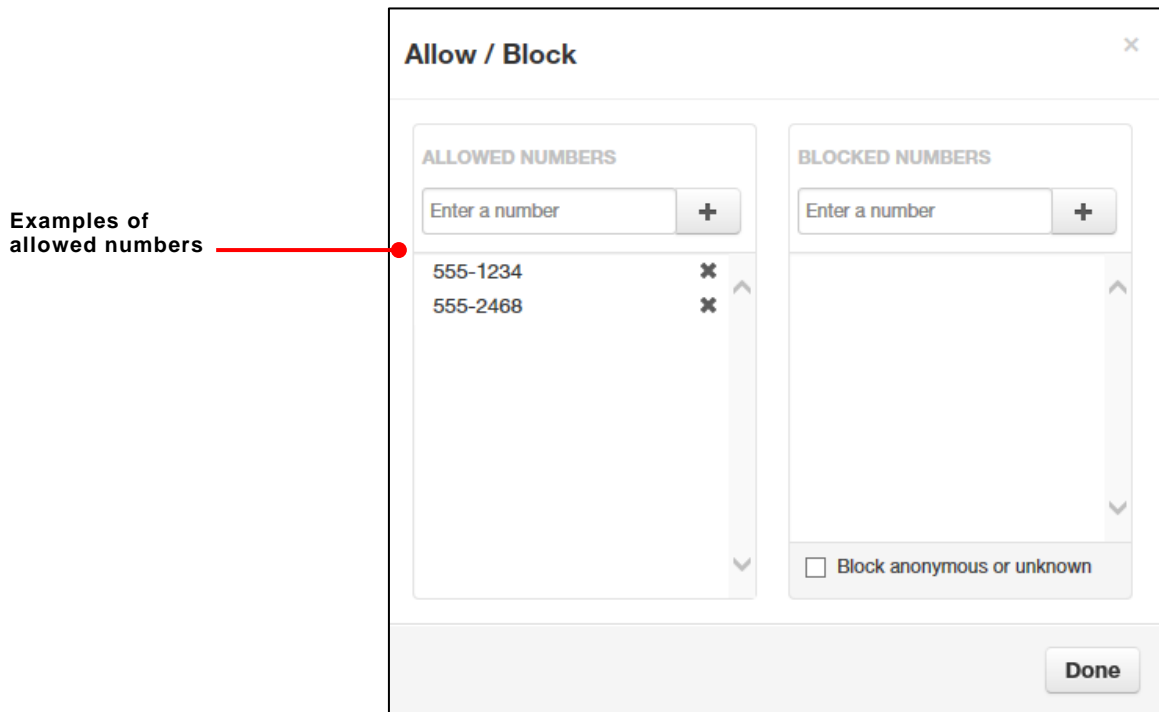


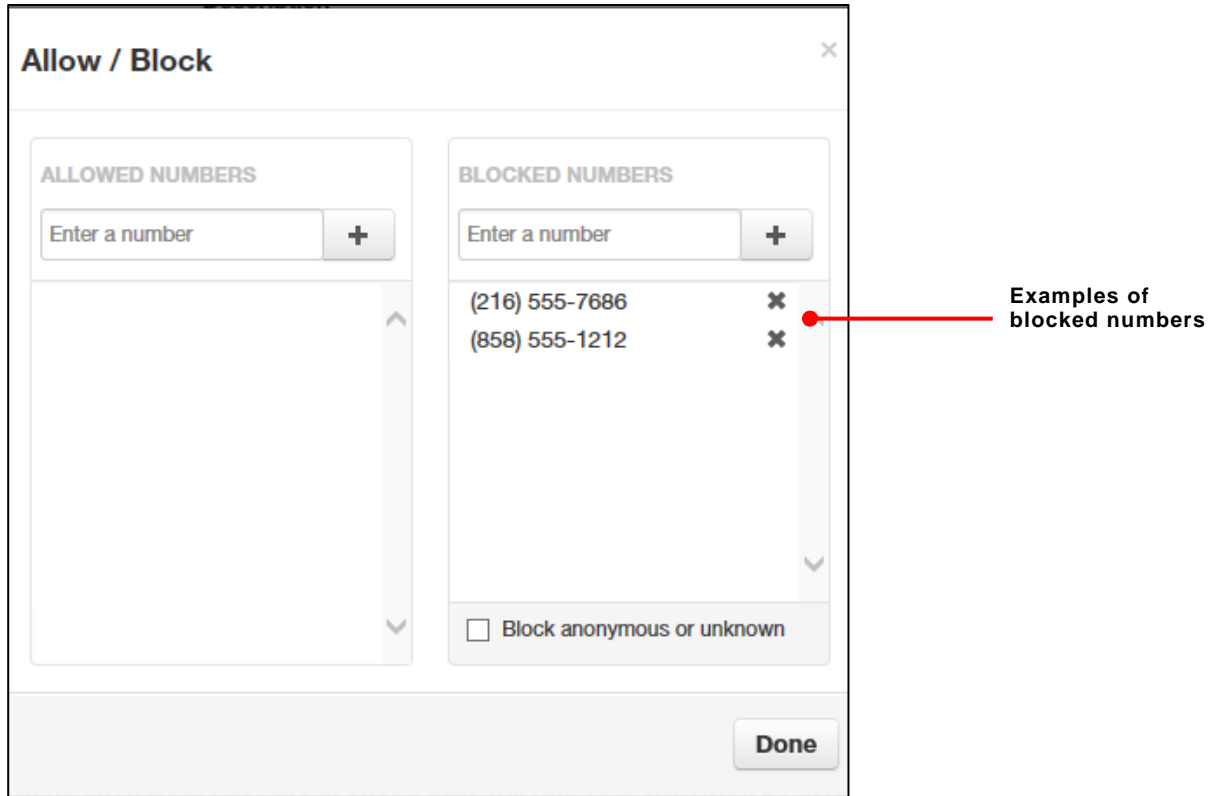


Figure 2-12. Example of Allowed Numbers

3. To block phone numbers, perform the following steps under **BLOCKED NUMBERS**:
  - a. Click in the **Enter a number** field.
  - b. Enter the number you want to block.
  - c. Click the  button. The number appears in the **BLOCKED NUMBERS** list and a brief message tells you the blocked number was added.
  - d. To add more numbers, repeat step 3.
  - e. To remove a number, click the  button next to that number.
4. To block anonymous calls and calls from unknown numbers, check **Block anonymous or unknown**.



The screenshot shows a web portal interface titled "Allow / Block" with a close button (X) in the top right corner. The interface is divided into two main sections: "ALLOWED NUMBERS" on the left and "BLOCKED NUMBERS" on the right. Each section has a text input field labeled "Enter a number" and a "+" button to add numbers. The "BLOCKED NUMBERS" list contains two entries: "(216) 555-7686" and "(858) 555-1212", each with an "X" button to its right. A red line points from the text "Examples of blocked numbers" to the "X" button next to the first number. At the bottom of the "BLOCKED NUMBERS" section, there is a checkbox labeled "Block anonymous or unknown". A "Done" button is located at the bottom right of the dialog box.

**ALLOWED NUMBERS**

Enter a number +

**BLOCKED NUMBERS**

Enter a number +

(216) 555-7686 X

(858) 555-1212 X

☐ Block anonymous or unknown

Done

Examples of blocked numbers

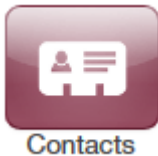
Figure 2-13. Example of Blocked Numbers

5. When you are finished, click **Done**.

## Contacts

By default, contacts contain all the extensions on your system. However, you can add contacts to enable easier access to everyone you need to reach.

You configure contacts using the Contacts page. To display this page, click the **Contacts** icon at the top of the page:




The following figure shows an example of a Contacts page. The sections following the figure describe the key areas on the page.

All ▾		Add Contact	
Enter a name or extension 🔍		Import Export	
Name	Number(s)	Status	Department
● Karen Filippelli	102		n/a
● Jim Halpert	101		n/a
● Pam Halpert ★	104		
● Stanley Hudson ☆	103		

### Filter and Search

The **All** pull-down list allows you to search contacts by group. Using this list, you can select groups to search such as Favorites, Departments, Available, Busy, and more. Selecting a group filters the contacts on the page to show only the ones located in the group selected.

The **Enter a name or extension** field below the drop-down list allows you to search by contact name or extension. Entering a name or extension in this field filters the contacts on the page to show only the ones that match your entry. Click the  in this field to delete your entry and redisplay all contacts.

### Add and Import Contacts

The **Add Contact** button allows you to add a contact one at a time. These are for external contacts only. Your contact list will automatically update with your internal extensions.

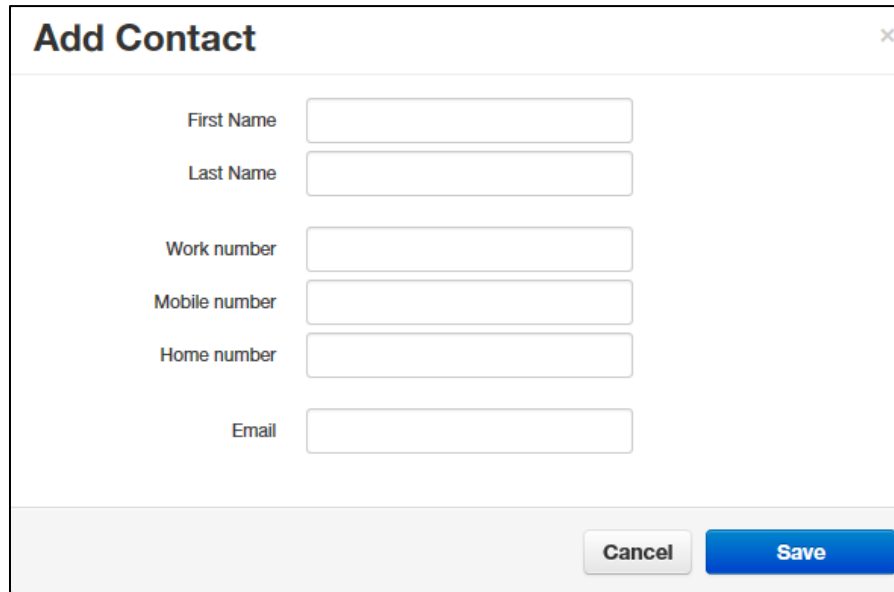
Import will allow you to select a file from your PC, the import can accept CSVs from Microsoft Outlook and Gmail as well as vCards.

### ***Adding a Contact***

- To add a contact

1. From the Contacts page, click **Add Contact**.

*The Add Contact page appears.*



**Add Contact** [X]

First Name

Last Name

Work number

Mobile number

Home number

Email

Cancel Save

2. Complete the fields in the Add Contact page (see Table 2-5).

3. Click **Save**.

*The contact appears on the Contacts page.*

**Table 2-5. Fields in the Add Contact Page**

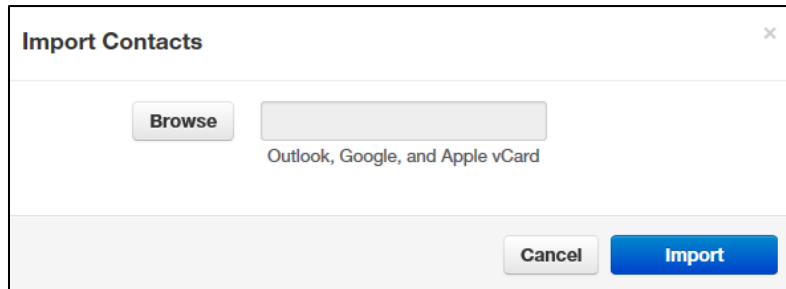
Field	Description
First Name	Contact's first name.
Last Name	Contact's last name (surname).
Work number	Contact's work telephone number.
Mobile number	Contact's mobile telephone number.
Home number	Contact's home telephone number.
Email	Contact's email address.

## Importing Contacts

➤ To import contacts

1. From the Contacts page, click **Import**.

*The Import Contacts pop-up window appears.*



2. Click the **Browse** button.
3. In the Choose File to Upload dialog box, go to the location where the file you want to import is located. Click the file, and then click **Open**.

*The path and file appear in the **Browse** field.*

4. Click **Import**.

*The imported contacts appear on the Contacts page.*

## Selecting Favorites

When hovering over a contact, a light gray star appears next to the contact name. Clicking the star selects the contact as a favorite and changes the color of the star to yellow.

## Editing Contacts

When hovering over a contact you'll see an edit button on the far right, click that button to edit the contact.

## Phones

The Phones page allows you to manage your phones. To display the Phones page, click the **Phones** icon at the top of the page:



Each row shows a phone that has been added to the system, along with:

- Whether the phone is registered.
- The phone name and device type. The hyperlink below the **Name** column allows you to edit the phone information. You can also edit or delete phones using icons on the right side of the row.
- The phone's IP address, MAC address, and line number on the phone associated with your extension.



Clicking the Refresh button updates the information shown on the page.

The page has an **Add Phone** button that adds phones to your system. This task usually is performed by administrators and is not described in this guide.

The Phones page also has a **SNAPmobile** button that allows you to access SNAPmobile. SNAPmobile is a mobile app that turns your cell phone into an extension of your Cloud PBX. Make and receive calls with the same identify as being in the office along with managing your voicemail, answering rules, and contacts. To start using SNAPmobile, see “Using SNAPmobile” on page 40.

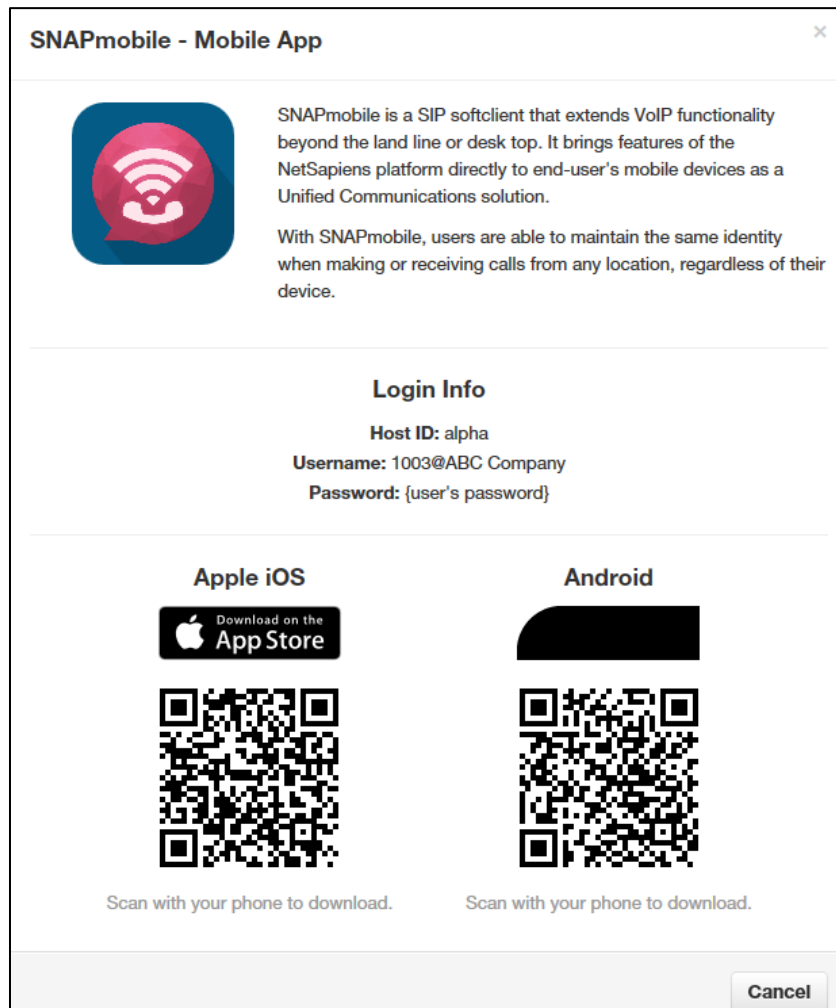
Registered	Name	Device Type	IP Address	MAC Address	Line
X	1003	-	-	-	-
X	1003b	Polycom VVX400		00:00:00:00:00:11	1

## Using SNAPmobile

➤ To use SNAPmobile

1. From the Phones page, click **SNAPmobile**.

*The splash screen in Figure 2-14 appears.*



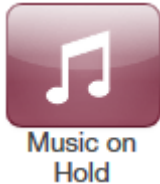
**Figure 2-14. SNAPmobile Splash Screen**

2. Scan the QR code to download the app or search for SNAPmobile in the app store, and then enter the information from that page into the SNAPmobile logon screen.



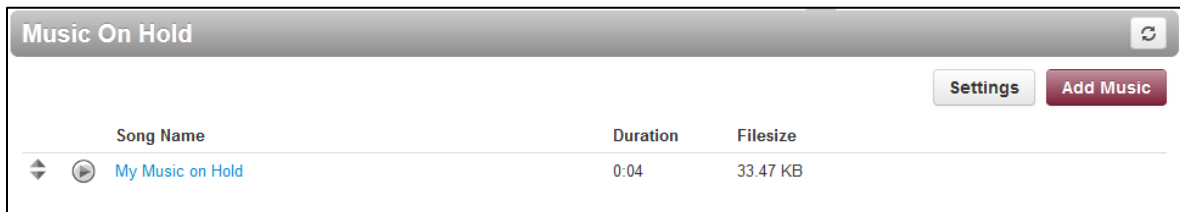
## Music On Hold

Music on Hold allows you to specify personal music on hold for your extension. You configure music on hold files using the Music On Hold page. To display this page, click the **Music on Hold** icon at the top of the page:



The **Add Music** button allows you to add music on hold files. When you add music on hold files, the file name appears on the Music On Hold page, along with the duration and file size. The **Settings** button allows you to play an introductory greeting.

If you hover over a file you can see options to play the file, download the file, edit the name, or delete the file. If multiple files are uploaded you can rearrange them using the arrows at the left of the page.

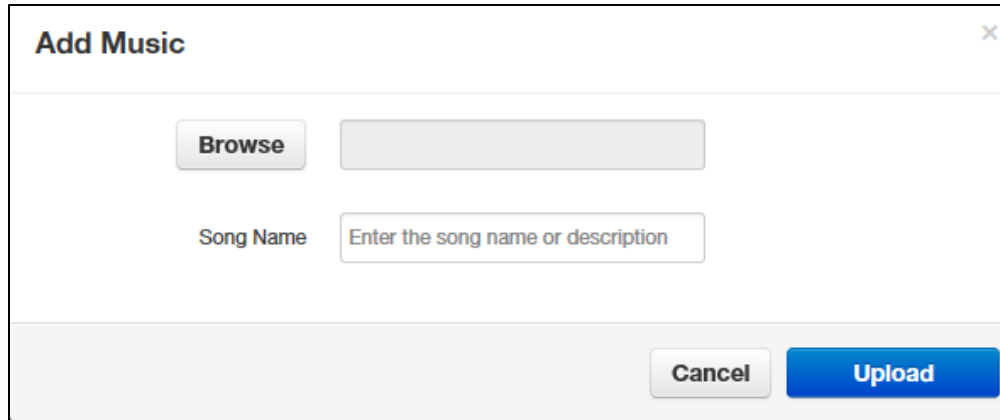


### Adding Music on Hold Files

➤ To add music on hold files

1. From the Music On Hold page, click **Add Music**.

*The Add Music page appears.*

A dialog box titled "Add Music" with a close button (X) in the top right corner. Inside the dialog, there is a "Browse" button next to a text input field. Below this, there is a label "Song Name" followed by a text input field with the placeholder text "Enter the song name or description". At the bottom right of the dialog, there are two buttons: "Cancel" and "Upload".

**Add Music** [X]

**Browse** [Text Field]

Song Name [Enter the song name or description]

[Cancel] [Upload]

2. Click the **Browse** button.
3. In the Choose File to Upload dialog box, go to the location where the file you want to import is located. Click the file, and then click **Open**.

*The path and file appear in the **Browse** field.*

**NOTE:** The music file must be in MP3 or WAV format, and must be properly licensed.

4. In the **Song** Name field, enter a name for the song.
5. Click **Upload**.

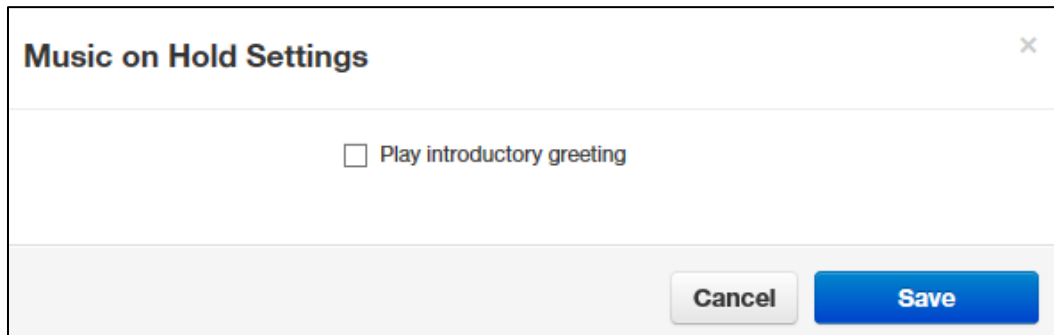
*The music file appears on the Music on Hold page.*

## Playing an Introductory Greeting

- To play an introductory greeting before having the music on hold file play

1. From the Music On Hold page, click **Settings**.

*The Music on Hold Settings page appears.*



The screenshot shows a modal dialog box titled "Music on Hold Settings" with a close button (X) in the top right corner. Inside the dialog, there is a single setting: an unchecked checkbox followed by the text "Play introductory greeting". At the bottom right of the dialog, there are two buttons: a light gray "Cancel" button and a blue "Save" button.

2. Check **Play introductory greeting**.
3. Click **Save**.

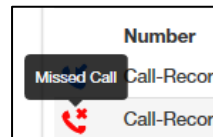
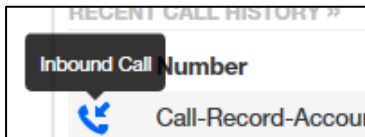
## Call History


The Call History page shows a log of all your extensions calls. It also provides tools to filter and export data.

The left side uses color-coded icons to represent call status:

- Green = outbound calls
- Blue = inbound received calls
- Red = missed calls

Moving your screen pointer over an icon displays a tooltip with the call status. For example:








You can click a number in the **Number** column dial back the number. Clicking the Refresh button  updates the information shown on the page.

To display the Call History page, click the **Call History** icon at the top of the page:



The following figure shows an example of the Call History page. The sections following the figure describe the **Filters** and **Export** buttons.

Call History 			
Filters 2013-04-14 to 2013-04-17		Export	
Number	Name	Date ▼	Duration
 5709	Tiffany Truong	Today, 4:28pm	0:14
 (206) 555-0111		Today, 4:22pm	6:09
 (206) 555-0111		Today, 4:20pm	0:00
 (206) 555-0074	Todd Todd	Today, 3:43pm	0:07

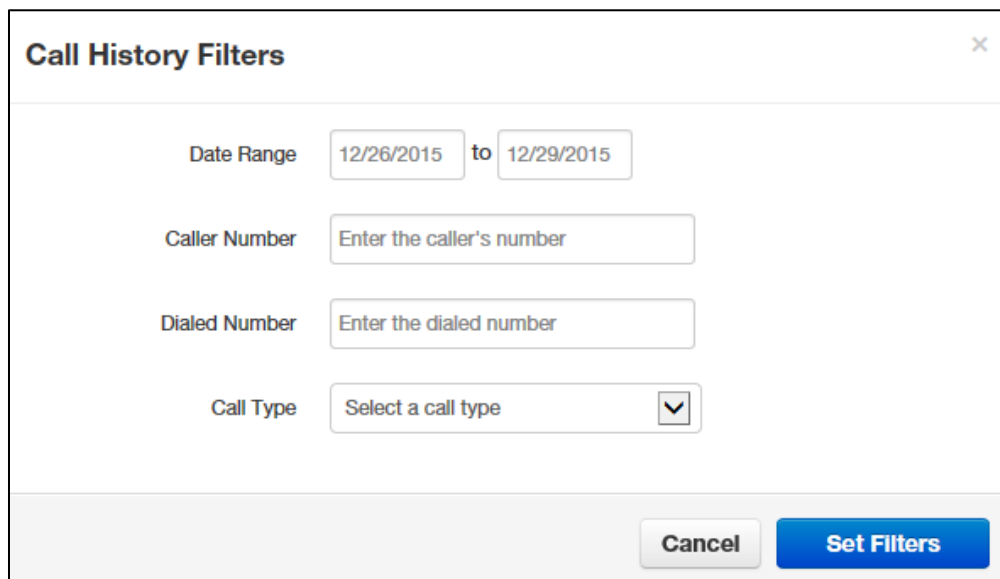
## Filtering the Call History

The **Filters** button allows you to filter the information displayed in the Call History page, so you can view only the information that interests you.

➤ To filter the call history

1. From the Call History page, click **Filters**.

*The Call History Filters page appears.*



The image shows a 'Call History Filters' dialog box with a close button (X) in the top right corner. It contains four filter criteria: 'Date Range' with two date input fields (12/26/2015 and 12/29/2015) separated by 'to'; 'Caller Number' with a text input field containing the placeholder 'Enter the caller's number'; 'Dialed Number' with a text input field containing the placeholder 'Enter the dialed number'; and 'Call Type' with a dropdown menu showing 'Select a call type' and a downward arrow. At the bottom right, there are two buttons: 'Cancel' and 'Set Filters'.

2. Complete the fields in the Add Contact page (see Table 2-6).
3. Click **Set Filters**.

*The Call History page appears, with only the items that match your criteria.*

Table 2-6. Fields in the Call History Filters Page

Field	Description
Date Range	To filter by a specified date range, click in the left field, and then select a starting date and time from the pop-up calendar (see Figure 2-15). Click in the right field, and then select an ending date and time from the pop-up calendar.
Caller Number	To filter by a caller number, enter the caller's number.
Dialed Number	To filter by a dialed number, enter the dialed number.
Call Type	To filter by type of call, select a call type.

The screenshot shows the 'Call History Filters' dialog box. The 'Date Range' field is active, showing '12/26/2015' to '12/29/2015'. A pop-up calendar for December 2015 is displayed, with the date '26' selected. The calendar shows days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 31. The 'Set Filters' button is highlighted in blue, and the 'Cancel' button is in gray.

Figure 2-15. Selecting a Start Date from the Pop-up Calendar

## Exporting the Call History Log

➤ To export the call history log

1. From the Call History page, click **Export**.


*Depending on your browser, the history log is downloaded to your computer or you are prompted to save the log. The log is in comma-separated-value (CSV) format.*

2. After downloading the log, you can open it using Microsoft Excel, Google Docs, and other spreadsheet applications.

## Profile

Clicking the **Profile** link at the top-right of the page displays the Profile page. From this page, you can configure the settings in Table 2-7.

### Profile

First Name	<input type="text" value="Office"/>
Last Name	<input type="text" value="Manager"/>
Login Name	<input type="text" value="1001@kevinsworld"/>
Department	<input type="text"/>
Timezone	<input type="text" value="US/Pacific"/>
Email Address(es)	<input type="text" value="kevin@something.com"/> 
Directory Options	<input checked="" type="checkbox"/> Announce in Audio Directory <input checked="" type="checkbox"/> List in Directory

### Caller ID Information


Area Code	<input type="text" value="858"/>	
Caller ID	<input type="text" value="8582424114"/>	You cannot edit your Caller ID
911 Caller ID	<input type="text" value="8582424114"/>	You cannot edit your 911 Caller ID

### Change Password

New Password	<input type="password"/>
	<b>Note:</b> Password must be numbers only.
Confirm New Password	<input type="password"/>



Table 2-7. Fields in the Profile Page

Field	Description
First Name	The first name and last name will be shown in contacts and used in the dial by name directory.
Last Name	
Timezone	Your local time zone.
Email Address(es)	Address used for email, password resets, etc. To add email addresses, click the  button to add fields for entering more email addresses.
Record User's Calls	Select whether the calls for this user will be recorded (Yes) or not recorded (No).
Directory Options	Enables or disables announce in auto directory and list in directory features. <ul style="list-style-type: none"> <li>Announce in Audio directory = check to include the user in the dial-by-name directory.</li> <li>List in Directory = check to add user to the internal extensions list (contacts).</li> </ul>
Caller ID Information	
Area Code	Local area code for 7 digit dialing associated with the user.
Caller ID	For outbound calls, this is the number that recipients will see.
911 Caller ID	For calls to 911, this is the e911-enabled number the 911 agent will see.
Change Password	
New Password	Password for voicemail and the portal. Avoid using common codes like 0000 or 1234. For security, each typed password character is masked by a dot (●).  Please keep this number secure. We will never call you to request your passcode.
Confirm New Password	

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