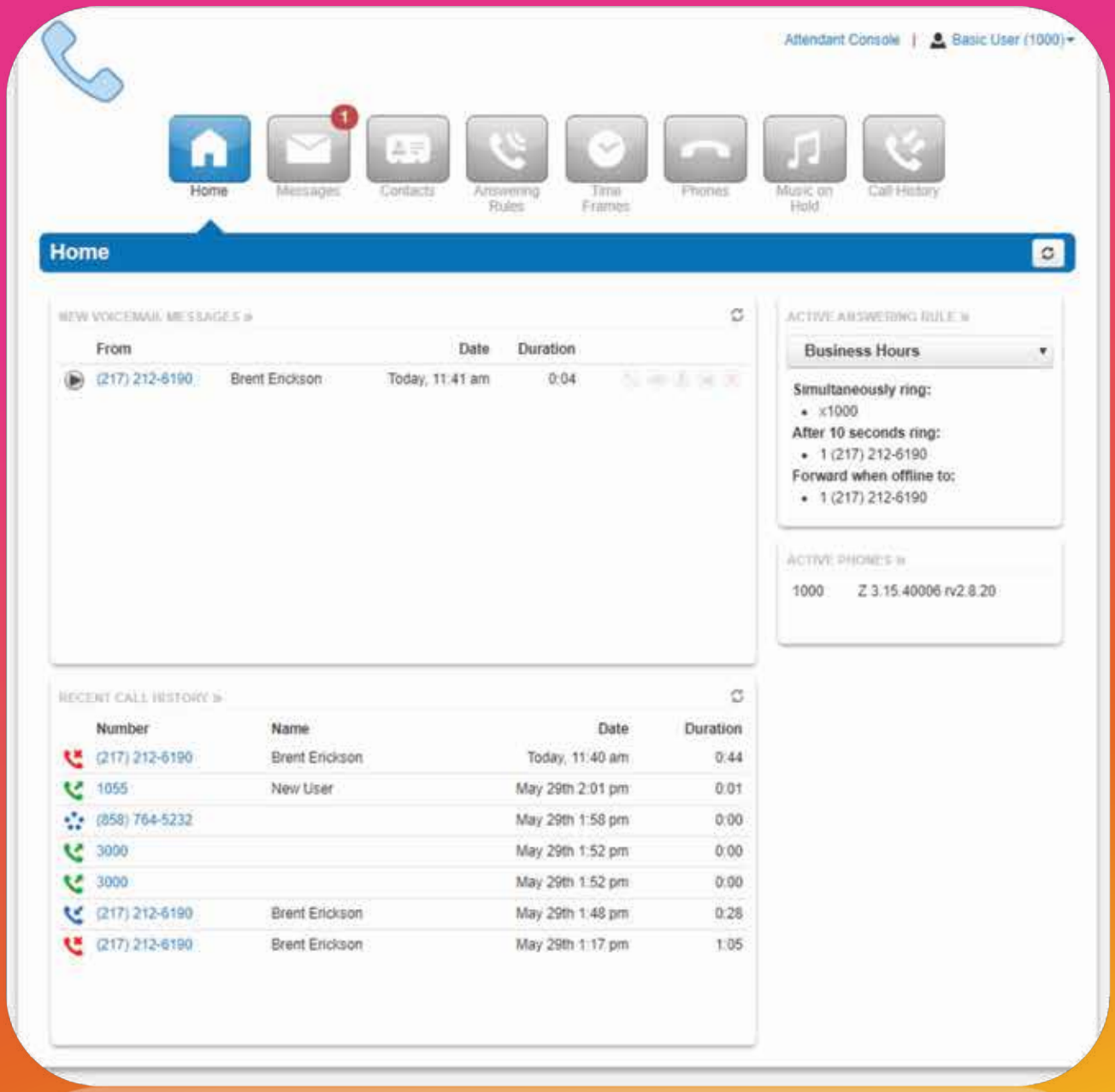
SMARTtalk
BY UTMA

USER GUIDE



Basic User Guide



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1 Getting Started

Welcome to your new unified communications account! Your account on this system will allow you to make calls, receive voicemails, chat with other users in the organization and much more.

This document is designed to help teach you how to navigate to the Manager Portal, a web interface that allows you to access and control your account.

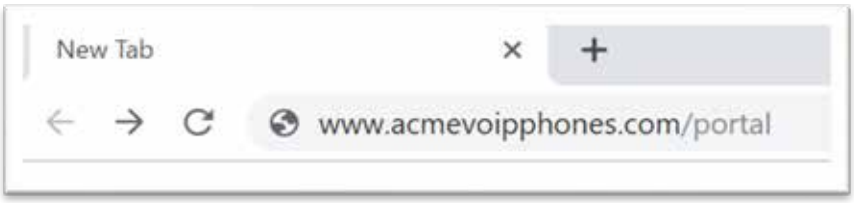
We will then break down the Manager Portal home page, the application navigation icons, the configuration options for them, and how they change the behavior of the application.

Finally, we will discuss how to use those applications in a real-world use case scenario, so you understand what the applications do, the configuration options that control the behavior of the application, and how to apply your knowledge to configure the application to meet your needs.

2 The Manager Portal

2.1.1 Accessing the Manager Portal

*Figure **Error!***



To manage your account, you will use the manager portal. A web interface that allows you to easily communicate with others and manage your account settings. In order to access the manager portal, open a web browser and enter your fully qualified domain provided by your administrator into your web browser as seen in figure 2.1.1.a

2.1.2 Logging In

After entering the domain into your browser, you will be taken to the login page as seen in figure 2.1.2.a. On the login page, enter your credentials provided by your administrator or click the New User link. Then enter your email and extension number and your credentials will be emailed to you. After entering your credentials, you are taken to the homepage of your account as seen in figure 3.1.a.

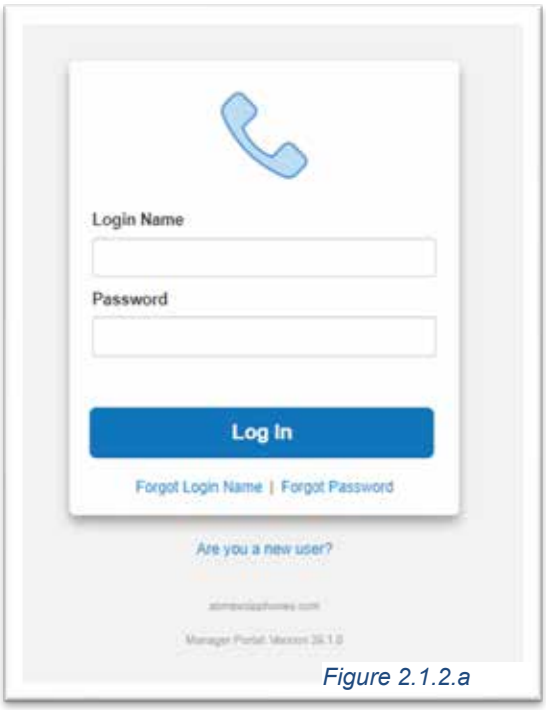
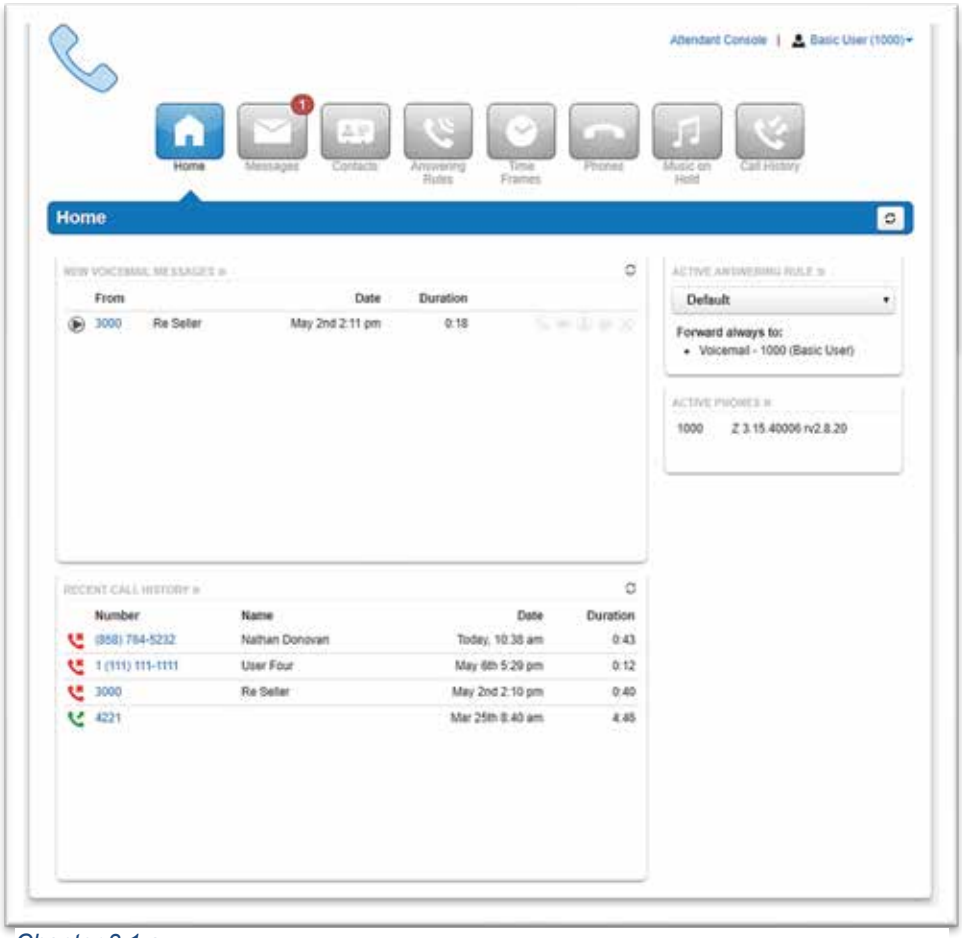


Figure 2.1.2.a

3 Homepage Layout

In the top righthand corner of the Manager Portal you will see the links for the Attendant Console plus your name and extension number displayed. Clicking on your name and extension number will display the options to edit your Profile information and log out of the manager portal as seen in figure 3.1.a.



Chapter 3.1.a

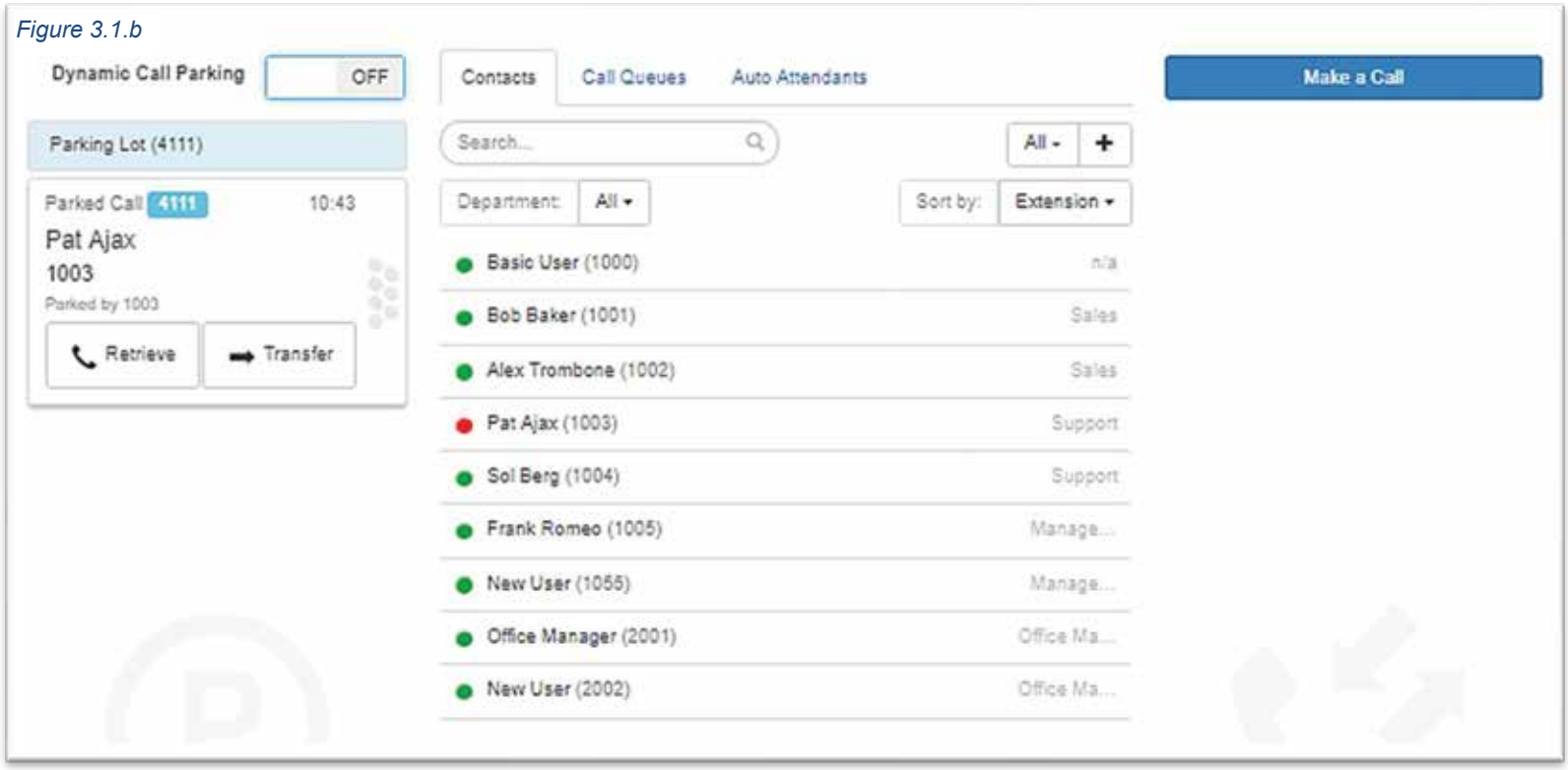
3.1 The Attendant Console

At the very top righthand corner of the home page is a link to the Attendant Console. This link will open another webpage and take you to the Attendant Console Contact's page as seen in figure 3.1.b.

3.1.1 Dynamic Call parking

You can also enable Dynamic Call Parking from the Attendant Console. Call Park enables you to put a call into a parking orbit so that another user can then retrieve the call when they are available. Dynamic call park will place the caller in the first available parking spot. While static call parking parks the call on a specific extension.

Figure 3.1.b



3.1.2 Contacts tab

The Contacts tab provides you an overview of all the contacts in your organization and provides a status indicator.

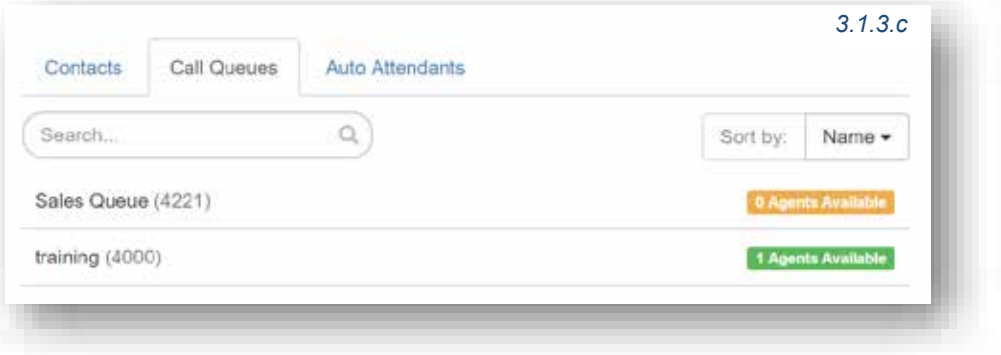
A green circle displayed next to a user's name and extension means that user is currently available. A red circle means the user is currently unavailable as they are already on the phone with another user or set their status to Do Not Disturb. Clicking on an extension will bring up a new window as seen in figure 3.1.2b, where you can call the contact at their extension, their work contact, mobile number, or their home contact number. You can also leave a voicemail for the contact as well.



3.1.2.b

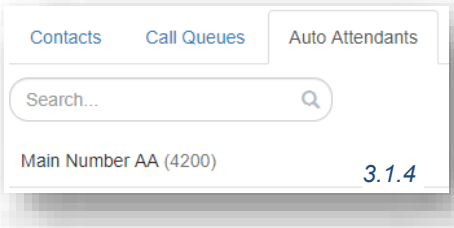
3.1.3 Call Queues tab

The Call Queues tab will give you an overview of how many Call Queues your organization has, and the number of agents logged into each queue as seen in figure 3.1.3

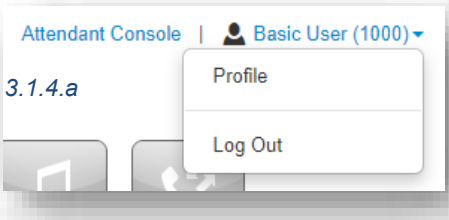


3.1.4 Auto Attendants tab

The Auto Attendants tab as seen in figure 3.1.4 will provide you with an overview of the Auto Attendants in your organization and allow you to click on them to call them.



Back on the Manager Portal homepage next to the Attendant Console link we see your name and extension number displayed as seen in figure 3.1.4.a. This link lets you manage your profile information. When clicking on the Profile link the profile page will appear with the options to configure your account settings as seen in figure 3.2 below.



3.2 Profile

The Profile options as seen in figure 3.2 allows for you to change your account options such as your first or last name, and Time Zone.

3.2.1 Directory Options

Directory options allow you to configure how you are represented in the organization contacts in the Manager Portal and audible company directory.

3.2.1.1 Announce in Audio Directory

Checking the Announce in Audio Directory will list you in the company directory. Callers will be able to search for your extension when routed to a company directory.

3.2.1.2 List in Directory

The List in Directory options controls if your extension is listed in the Contacts in the Manager Portal.

3.2.1.3 Caller ID Information

The Caller ID Information section allows you edit your area code that will be in your Caller ID and appended when only dialing 7 digits on outbound calls. You cannot edit your Caller ID or 911 Caller ID. If you need that changed contact your officer manager.

3.2.2 Change Account Security

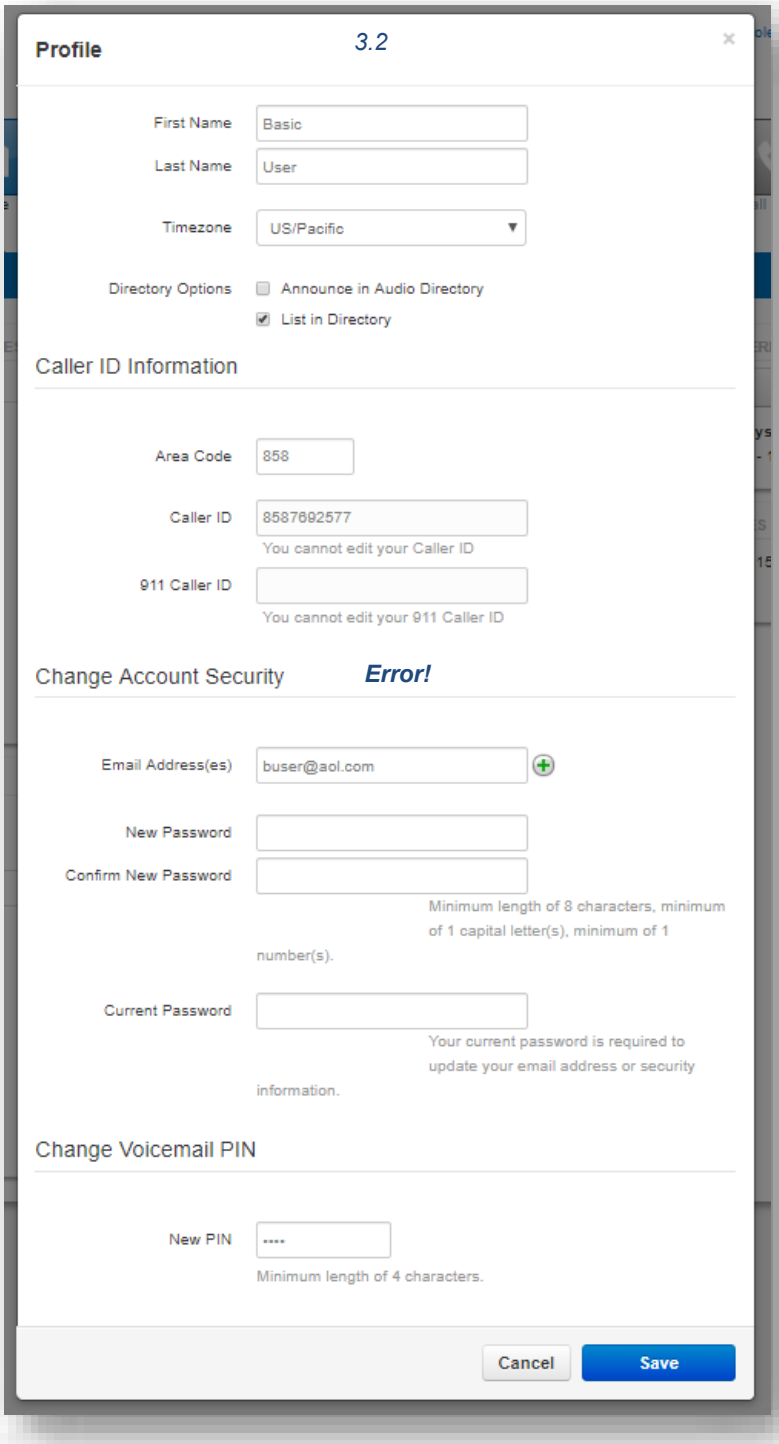
The Change Account Security section in the profile windows allows you to manage your passwords and email settings for your account.

3.2.2.1.1 Email Address

The Email Address field is the is where you configure your email address you would like to receive notification from. You can add more than 1 email address by clicking the green plus sign next to the email address field.

3.2.2.1.2 New Password

The Password field allows you to configure your account with a new Manager Portal password used to login with. Below is the Confirm Password field which requires you to enter the new password a second time for verification.



3.2.2.1.3 Current Password

The Current Password field is required to be filled out with your current password if any changes are made to any of the Change Account Security options.

3.2.2.1.4 Change PIN

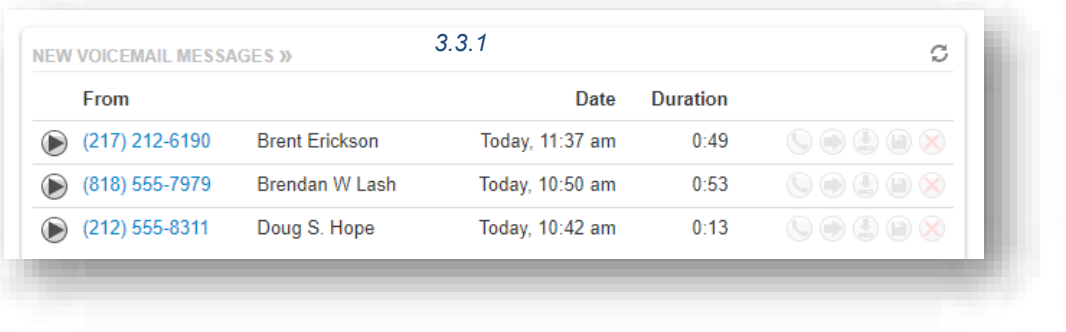
The Change PIN option allows you to change the numeric password used to check voicemail messages over the phone.

Below the Profile link is the Log Out option as seen back in figure 2-1 which will log you out of the manager portal and take you back to the login page.

3.3 Widgets on homepage

3.3.1 New Voicemail Messages Panel

The New Voicemal Messages panel displays all new voicemails as seen in figure 3.3.1. The voicemails are displayed with the number of the caller that left a voicemail. Their Caller ID name. Followed by the date and time the message was left and the duration of the voicemail.



3.3.1

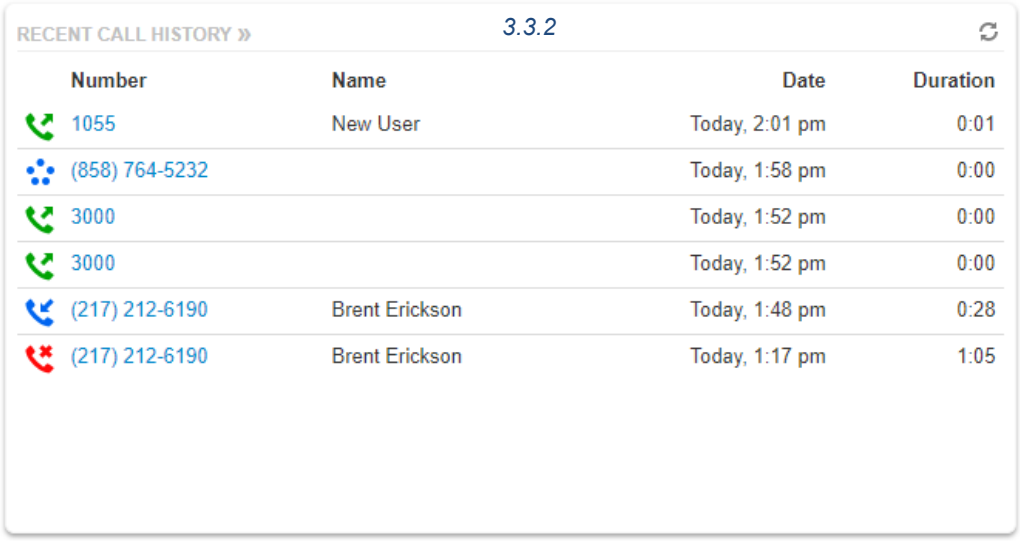
You will also see the options to Call to Play, forward the voicemail, download the voicemail locally to your computer or delete the voicemail message as seen in figure 3.3.1.a.



3.3.1.a

3.3.2 Recent Call History Panel

The Recent Call History panel provides an overview of the last 10 calls as seen in figure 3.3.2. A phone icon with a green arrow represents an outbound call. A phone with a red



icon means a call was not answered. Phone icon with a blue arrow means an inbound call was answered. 5 blue circles mean that a call was placed to a conference bridge.

3.3.3 Active Answering Rule Panel

To the right you will see the Active Answering Rule window which will display which rule is currently active and provide a summary of how calls are routed when they reach your extension as seen in figure 3.3.3. You can select a different answering rule by clicking the Active Answering Rule drop down and selecting a different rule.



3.3.4 Active Phones Panel

The Active Phone fields below list the active phones currently registered to your account you can send and receive calls from as seen in figure 3.3.4. If you do not see a device listed there that should be, that means the device is not configured for your account or the device is currently unregistered.



3.4 Navigation Options

On the top of the home page under the Attendant Console, Profile, and Log Out options is the application navigation menu as seen in figure 3.4. Selecting an option here will take you to that applications management center for the option selected.



3.4



4

4 Messages

The Messages icon as seen in figure 4, is where all your voicemails, chat messages, and account settings for voicemail options are stored.

4.1 Voicemail tab

Clicking the Message Center icon as see in figure 4 will take you to the Messages center voicemail tab as seen in figure 4.1. On the top of the tab, you will see a new message indicator showing how many (if any) new voicemails your account has as seen in figure 4.1.

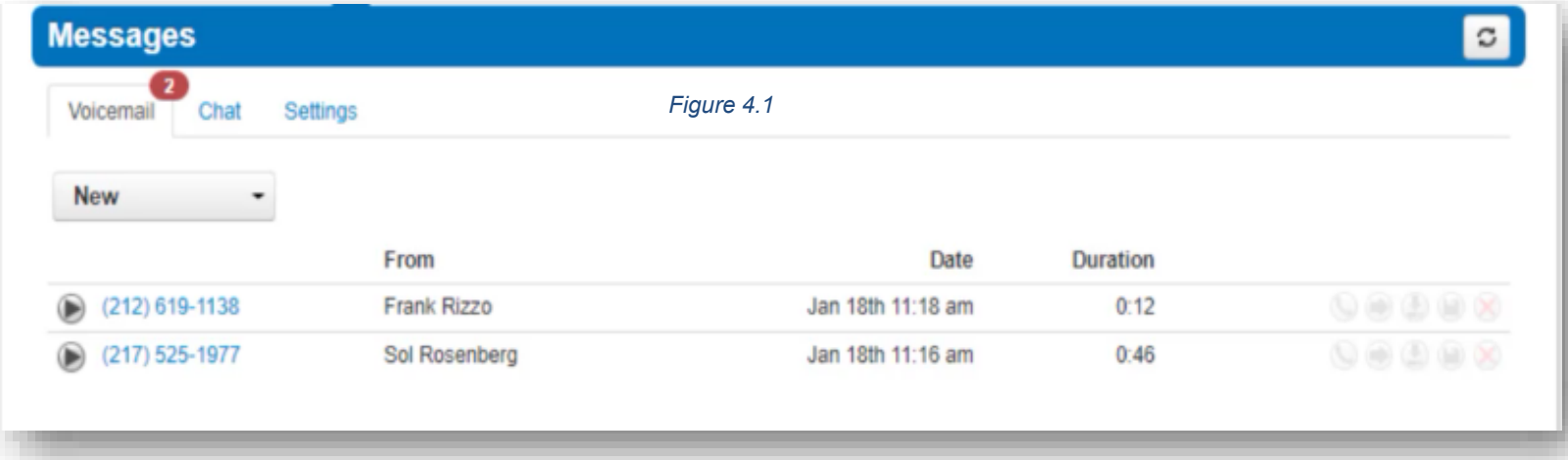


Figure 4.1

Underneath the tab selection you will see a drop down as seen in figure 4.1.a, which allows you to display new voicemails, saved messages, or trashed messages.

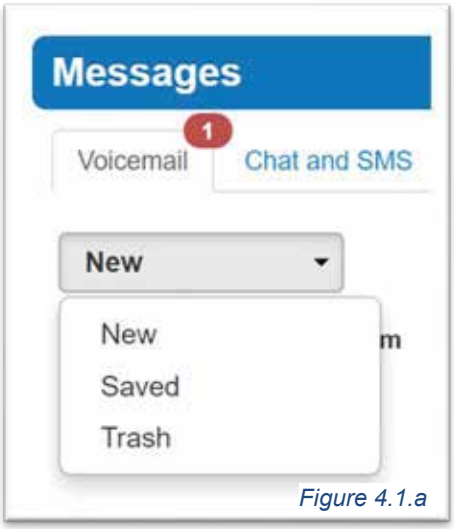


Figure 4.1.a

On the new page you can see all your new voicemail messages displayed with the caller's phone number. The Caller ID name, along with the date, time, and duration of the message as seen in figure 4.1.

To the right of the message and message information you will see the voicemail management options as seen in figure 4.1.b.

Error



4.1.1 Call to Play

The phone icon allows you to use the Call to Play options where the system will call our extension and play the voicemail.

4.1.2 Forward Voicemail

The arrow pointing to the right allows you to forward the voicemail to another extension.

4.1.3 Download Voicemail

The Arrow pointing down allows you to download the voicemail to your computer.

4.1.4 Save

The disk icon as allows you to save the voicemail in your account Saved section and will appear when selecting the Saved option from the voicemail box options as seen in figure 3-4.

4.1.5 Delete

The red X as seen in figure 3-1-2 is the delete option and clicking the icon will remove the voicemail. Once a voicemail has been deleted it can not be recovered from the phone system. If your account is configured to send an email notification with voicemail attachment

4.2 Chat tab

4.2.1 Chat and SMS tab

On the Chat tab you can see all your Chat conversations as seen in figure 4.2. The message is displayed with the contacts name. The last message received or sent.

Error! Use the Home tab to apply 0 to the text that you want to appear here..f



4.2.2 Start new conversation

4.2



4.2.2

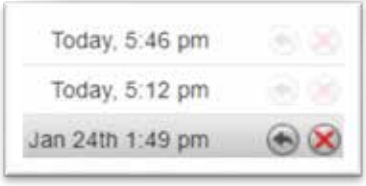


To start a new conversation, click the New Conversation button as seen in the righthand corner of figure 4.2 and a new chat window will appear. Start typing the users name or press down to see a list of everyone in the organization you can select from. Or on in your contacts widget click the chat box icon next to their name as seen in figure 4.2.2. After clicking one of the options a chat window will appear. Click in the *Send a message…* field and start typing. Press enter when you would like to send your message.

4.2.3 Replying to message

If you would like to reply to a message, simply type in the chat window that displays when receiving a message. You can also click the reply icon to the right of the message in the message center as seen in figure 4.2.3

4.2.3

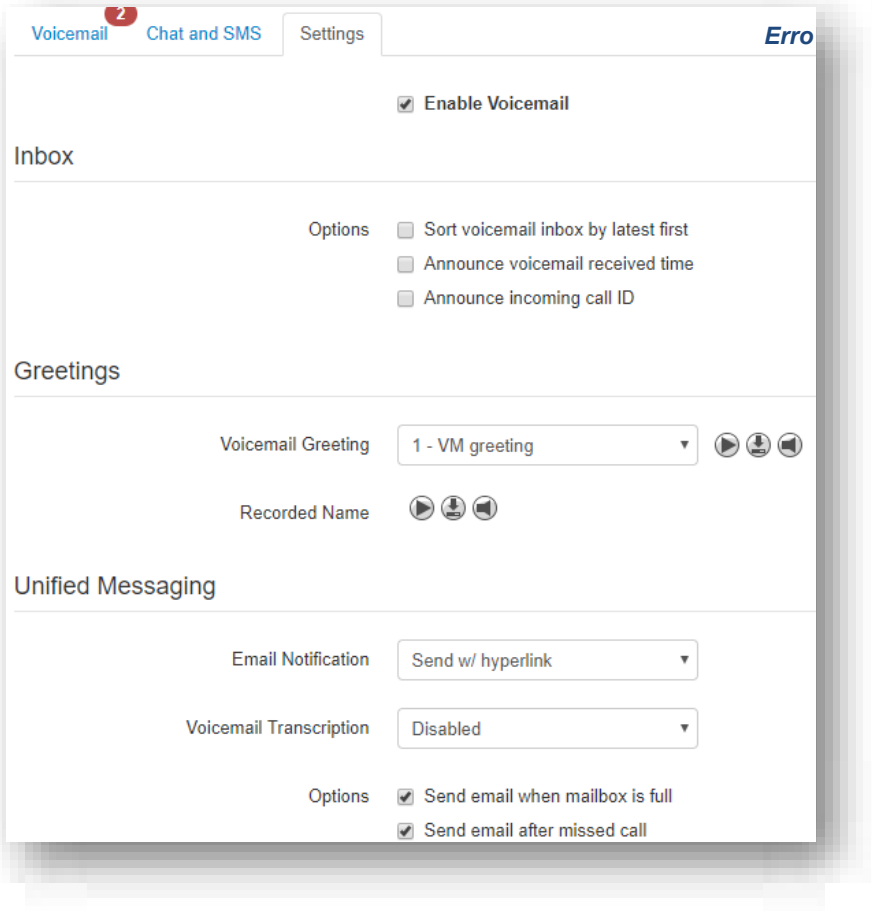


4.2.4 Delete a message

To delete a message, click the red x that appears next to the reply button when hovering over the message as seen in figure 4.2.3.

4.3 Settings tab

The settings tab as seen in figure 4.3. is where you can make changes to how your account handles voicemail and is represented in the company audible directory and in the Contacts of the organization.



4.3.1 Enable Voicemail

You can enable or disable the voicemail by clicking the checkbox next to Enable Voicemail option. A check means voicemail is enabled and unchecked means that it has been disabled.

4.3.2 Inbox Options

These options allow you to control your experience when calling into your voicemail box and checking your messages over the phone.

4.3.2.1 Sort voicemail inbox by latest first

Clicking the box next to *Sort voicemail inbox by latest first* will configure your voicemail to play the most recent voicemail message left as the first message you hear. If this option is not enabled the voicemails will be played in the order they were received.

4.3.2.2 Announce voicemail received time

Clicking the box next to *Announce voicemail received time* configure your voicemail account to tell you the time the voicemail was left when checking messages.

4.3.2.3 Announce incoming call ID

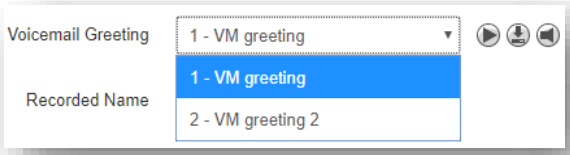
Clicking the box next to *Announce incoming Call ID* will have your voicemail read the caller ID number to you.

4.3.3 Greetings

Under the voicemail inbox options, you will see the *Greetings* section contains your Voicemail greeting and recorded name used in the company directory.

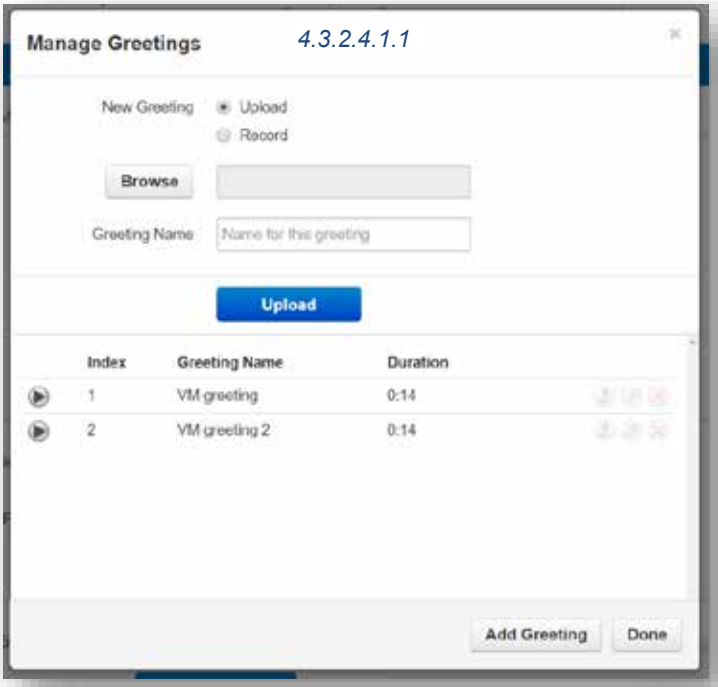
4.3.3.1 Voicemail Greetings

4.3.2.4.1



You can have more than 1 voicemail greeting and the drop-down box as seen in figure 4.3.2.4.1 allows you to select which greeting callers will hear when reaching your voicemail. To the right of the message select option you will see 3 icons for the options to Play the voicemail greeting, Download the greeting, Or Manage Greetings.

4.3.3.2 Manage Greetings



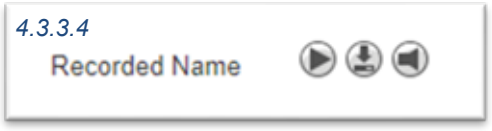
Clicking the Manage Greetings icon takes you to the Manage Greetings center as seen in figure 4.3.2.4.1.1. Here you can add mutlipue greetings to be selected from your voicemail greetings drop-down list as seen in figure 4.3.2.4.1.

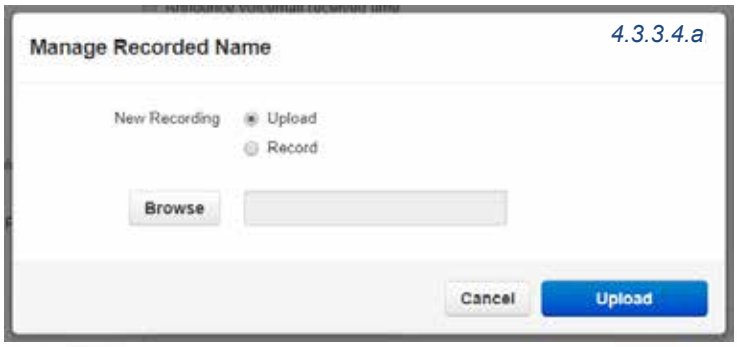
4.3.3.3 Adding voicemail greetings

To add a voicemail greeting, click the *Add Greeting* at the bottom of the Manage Greeting portal page. You will see the options to Upload a new recording from a file on your computer or selecting Record which will call you as the number you enter to record a new greeting. After the greeting is created you will see the message displayed as seen in figure 4.3.2.4.1.1. To the right of the message you will see options to Download, Edit the message, which will allow you to re-record the message or change the greeting. You will also see the option to delete the voicemail greeting message.

4.3.3.4 Recorded Name

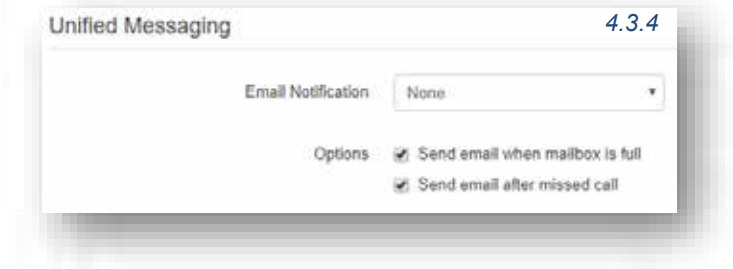
The Recorded Name option as seen in figure 4.3.3.4 allows you to record your name which will be played when the company directory says your name. If no recording is uploaded the system will read your name off by each letter. When clicking the *Manage* icon the *Manage Recorded Name* window appears as seen in figure 4.3.3.4.a which will allow you to upload a recording from your computer. Or record a new name by clicking the record and having the system call you to record.





4.3.4 Unfied Messages

Under the Greetings you will see the Unified Messaging options as seen in figure 4.3.4 which will allow you to manage your email notifications when a voicemail is left, a call is missed, or if your mailbox becomes full.



4.3.4.1 Email Notification

The Email Notification options allows you to select the format of email notifications that you receive.

4.3.4.1.1 None

Selecting none will not email you when a voicemail is left.

4.3.4.1.2 Send w/ brief hyperlink

4.3.4.1.3 Send w/ attachment (move to saved)

4.3.4.1.4 Send w/ attachment (move to trash)

4.3.4.1.5 Send w/ brief attachment (leave as new)

4.3.4.1.6 Send w/ brief attachment (move to trash)

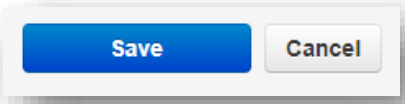
4.3.4.2 Send email when mailbox is full

Enabling this option will send you an email when you've gone over your mailbox data storage limit.

4.3.4.3 Send email after missed call

Enabling the Send email after missed call will email you each time you miss a call even if the caller does not leave a voicemail.

4.3.4.a



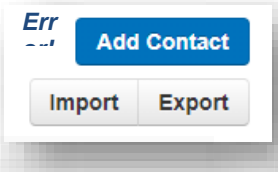
For any of the changes to take effect you must click the *Save* button at the bottom of the page as seen in figure 4.3.4.a. The *Cancel* button will disregard any changes made.



5

5 Contacts

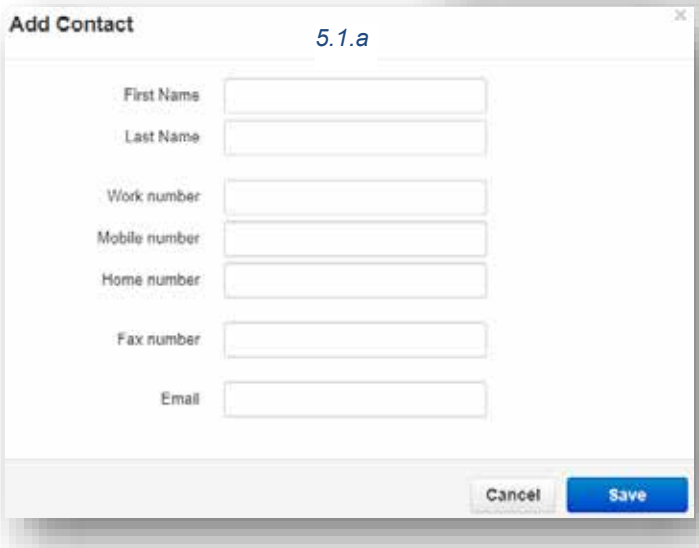
The Contacts center icon as seen in figure 5 is where all users with "List in Directory" enabled under their profile as seen in back in figure 2.2 are listed. If you do not see a user listed in the contacts that is because "List in Directory" has been disabled.



5.1 Add Contact

The Add Contact button in the righthand corner as seen in figure 5.1 will open the new contact window as seen in 5.1.a and allow you to enter a new contact that will be displayed in your account's contacts.

5.1.a



5.2 Import

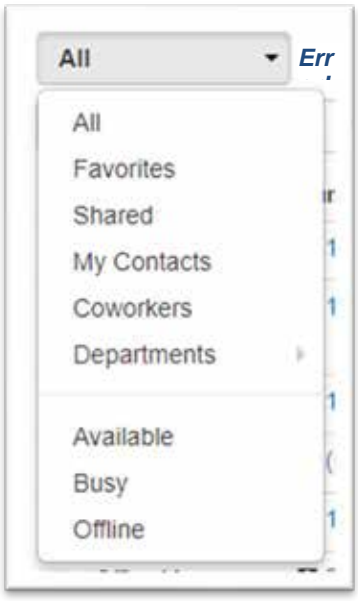
The import option allows you to import contacts from a csv file (Outlook, Google, and Apple vCard) that will bulk create users in your contacts.

5.3 Export

The Export button will allow you to create a csv file for the contacts group select in the *Contacts to export* drop down. The Export format will export the csv file into an Outlook, Google, or Apple vCard csv file format.

5.4 Groups

On the Contacts page, you will see a drop down as seen in figure 5.1 that will let you filter for:



5.4.1 All Users

Displays all users on the system with List in Directory enabled.

5.4.2 Your Favorites

Displays contacts you selected as favorites. Which you can add to by clicking the star next to the contacts name as seen in figure 5.1.2.

5.1.2



5.4.3 Shared

Shared contacts are contacts available to the entire organization added by Office Managers.

5.4.4 My Contacts

Contacts you have manually added by clicking the Add Contact button in the top right.

5.4.5 Coworkers

Displays all contacts in organization with List in Directory enabled.

5.4.6 Departments

Which break users down by the Department entered on their user profile.

5.4.7 Available Users

Displays contacts that are available to be called or chat via the portal.

5.4.8 Busy Users

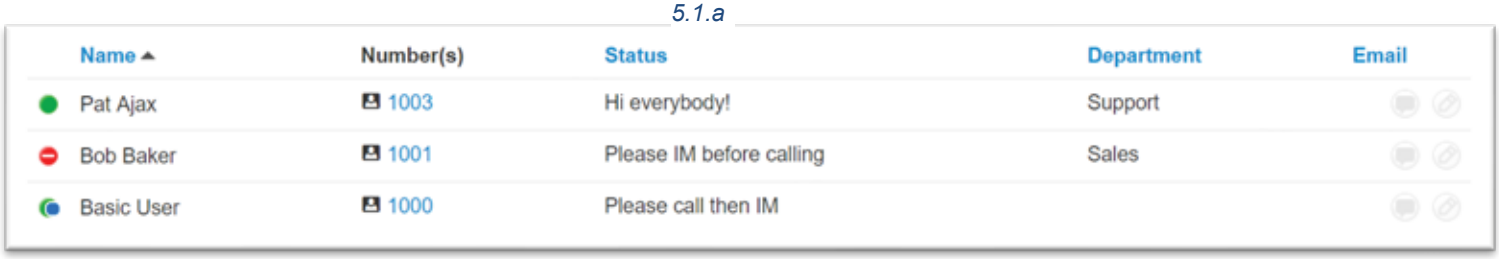
Are users currently on the phone or has their status set to Do Not Disturb.

5.4.9 Offline Users

Users who do not have a registered device and not logged into the portal available to chat.

When selecting a contacts group option, the contacts for that group will appear as seen in figure 5.4.9. You can sort them by Name, Status, Department and Email.

5.1.a



5.5 Contacts Status Icon

5.5.1 Green

Contacts displayed with a green dot are available.

5.5.2 Blue

Contacts displayed with a smaller blue dot in front of the green means that person is available to chat in the portal.

5.5.3 Red

If the contact has a red circle that means the user is currently busy.

5.6



You can chat with the user by clicking the chat icon to the right as seen in figure 5.2. Next to the chat icon you will see the Edit contact icon as seen in figure

5.6 Chat with contact

Clicking the chat icon seen in figure 5.6 will open a chat window with that user.

5.7 Edit

The Edit icon to the right of the contact will open the Edit Contact window as seen in figure 5.4 where you can configure the contact with a different:

- First Name
- Last Name
- You cannot change the extension number

- Work number
- Mobile Number
- Home Number
- Fax number
- Email address



6

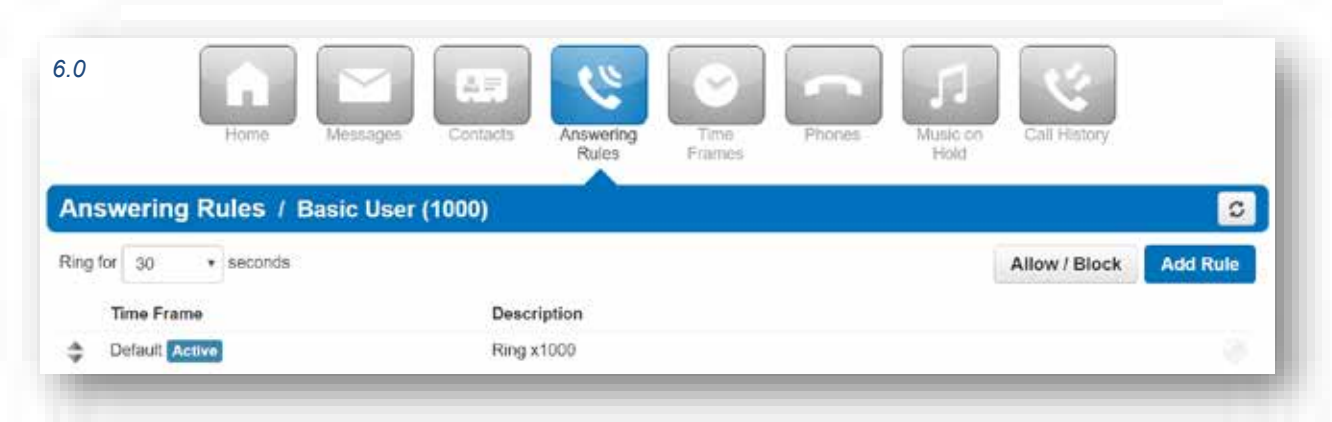
6 Answering Rules

The Answering Rules icon as seen in figure 6 will take you to your answering rules center. Answering Rules are how you control what devices ring, how long those devices ring for when receiving a call. It is also where you can configure what to do with a call that goes unanswered.

Clicking the Answering Rules icon in will take you to your Answering Rules center as seen in figure 6.0. Here you will see your answering rules listed. Every account is configured with a Default rule that cannot be deleted.

If you have multiple answering rules configured the answering rule that is currently infect will say Active next to the rule. Every rule is displayed with their name. A description of how the rule will route the call and the options to edit or delete (except the default) the rule.

6.0



6.1 Ring for __ seconds / Ring Time

When you click on Answering Rules you will see the option to set the *Ring for seconds* as seen in figure 6.1. This is what controls how long a call attempts to ring you for.

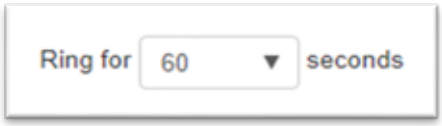


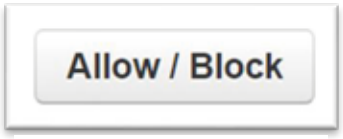
Figure 6.1

To set the ring time out click the drop-down to select how many seconds you would like calls to ring before sending the call to voicemail or the specified destination entered into the When unanswered field in the active answering rule.

If you do not want a ring time out, meaning you want your phone to ring forever, select Unlimited at the bottom of the drop-down.

6.2 Allow and Block Phone numbers

To the right you will see the Allow and Block button as seen in figure 5.2. This allows you to enter certain phone numbers to allow or prevent them reaching you. Clicking the Allow / Block button will open the Allow / Block window as seen in figure 6.2.a



6.2

On the left is the allowed numbers. This allows you to add numbers that are blocked by the domain so you can still receive calls from that user.



6.2.a

Phone numbers added to allow will also let the call bypass Call Screening. If you have Call Screening enabled in an answering rule but want certain phone numbers to not have to record their name when calling you, add them to the allow field. Then when that number calls you, they will be sent directly to you and not have to record their name first like other callers not listed.

Block allows you to add phone numbers you do not want to be able to reach you. To add a phone number to Allow or Block, simply enter the number into the respective field and click the plus sign to add the phone number.

6.2.1 Block anonymous or unknown

You can block all anonymous or unknown callers simply by clicking the check box next to *Block anonymous or unknown*.

6.3 Add Rule

The *Add Rule* button as seen in figure 6.3 allows you to configure a new Answering Rules for your account. Clicking the *Add Rule* button will display the Add an Answering Rule window as seen in figure 6.3.a

Figure 6.3

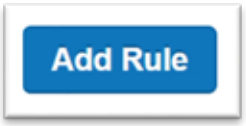
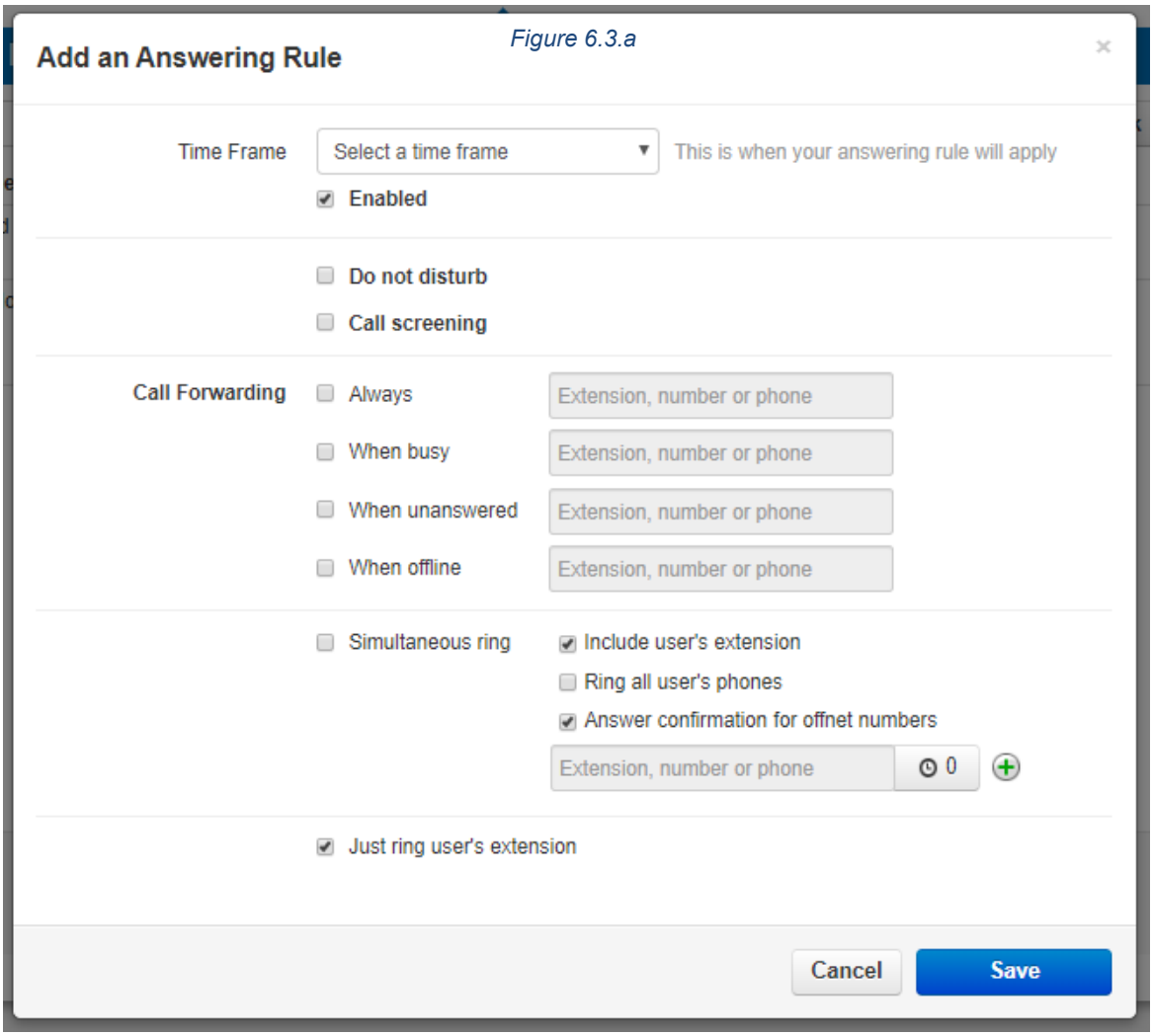


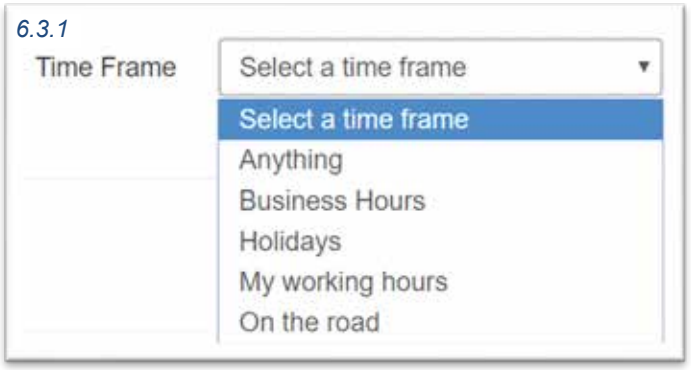
Figure 6.3.a



6.3.1 Answering rule Time Frame

Time Frames are a set period of time which covers when we want certain events to occur such as our phone to ring. When configuring a new answering rule you must first chose when the rule will be in affect by selecting a Time Frame as seen in figure 6.3.1.

6.3.1



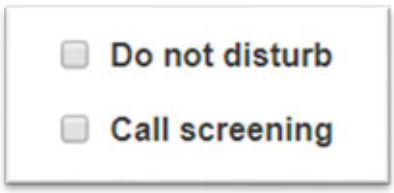
6.3.2 Enable

The enable options lets you easily enable and disable the rule from being in affect. A check in the box means the rules is enabled and will be in affect during the selected time frame.

6.3.3 Do Not Disturb

The *Do not Disturb* option as seen in figure 6.3.3 will prevent calls from reaching your devices and send the call to voicemail if voicemail is enabled or disconnect the call if voicemail is not enabled.

6.3.3

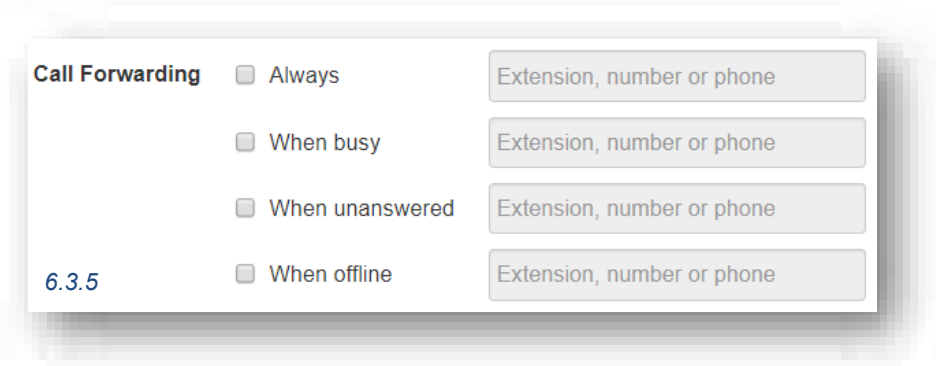


6.3.4 Call Screening

When Call screening is enabled, callers record their name. After they record their name, then your devices will ring. If you answer the call, it will play the users name and allow to press 1 to be connected or hang up the call and have them be sent to voicemail or wherever your Call Forwarding options are configured to send unanswered calls.

6.3.5 Call Forwarding

The Call Forwarding options as seen in figure 6.3.5 will route calls based of the options selected. When entering a destination, it can be anything you would like, another user or another telephone number that does not have to be associated with your account or even on the system.



6.3.5

6.3.5.1 Always

Always will forward the call to the destination entered in *the Extensions, phone number, or phone field* every time your account received a call.

6.3.5.2 When Busy

When Busy forwards calls only when you are already on the line.

6.3.5.3 When Unanswered

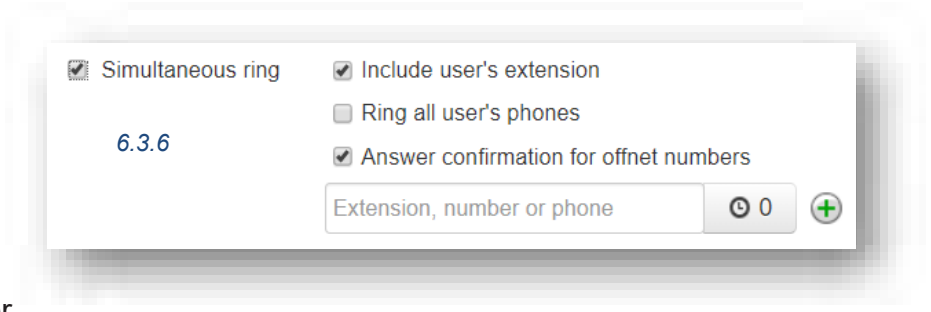
When unanswered dictates where to send the call when the *Ring For X Seconds* has been reached.

6.3.5.4 When Offline

When Offline routes the call to the desired destination entered into *extension, number, or phone* field when the user's devices are offline. If you use a softphone on your laptop and shut down the softphone this is where your calls are forwarded.

6.3.6 Simultaneous Ring

The *Simultaneous Ring* options, also known as SIM ring for short, seen in figure 6.3.6 allows you to configure what devices ring when receiving a call. Clicking the *Simultaneous Ring* box will allow you to ring more than just your extension and allow you to ring other extensions or phone numbers as well.



6.3.6

6.3.6.1 Include user's extensions

Enabling this option will make sure your extension rings when sim rings is enabled.

6.3.6.2 Ring all user's phones

This option will ring all devices registered to your account.

6.3.6.3 Answer confirmation for off net numbers

This option lets the user know the call is forward from their phone system and gives them the option to be connected to the user by pressing 1 or hanging up the call so they are not connected with the forwarded calling party.

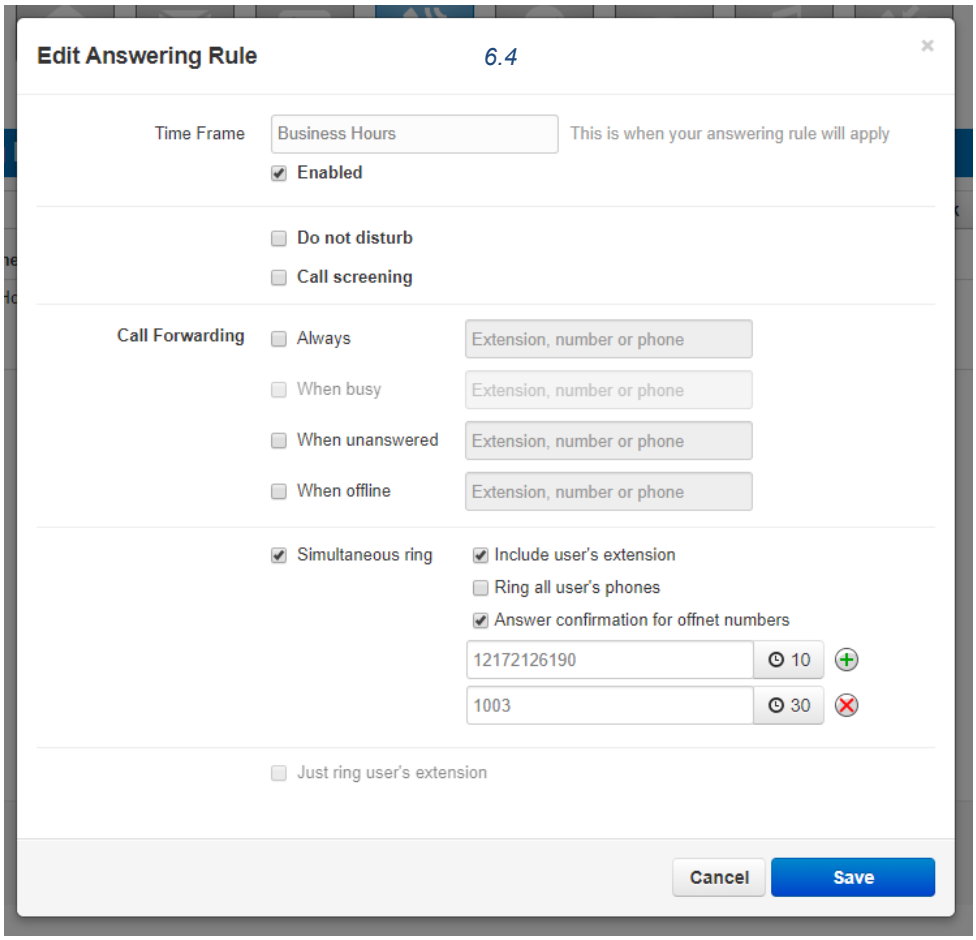
6.3.7 Just ring user's extension

As seen in the bottom of figure 6.3.a this option is only available if *Simultaneous ring* is not enabled. If *Just ring user's extension* is enabled, it will just ring your default device configured under your account.

6.4 How to create new Answering Rule with Simultaneous ring

If we wanted to create a rule when receiving an incoming call during business hours to ring our extension for 45 seconds before sending the call to voicemail, then after 10 seconds ring our cell phone, then after 30 seconds ring a receptionist's extension 1003. Then go to voicemail after business hours we would:

1. On the Answering Rule page we would adjust the *Ring for* timeout option to 45 seconds.
2. Create a new rule by clicking *Add Rule* in the Answering Rules center.
3. On the Add an Answering Rule window select the *Time Frame* you would like the rule to be in effect.
4. Make sure *Enabled* has a checked box.
5. Click the *Simultaneous ring* option under Call Forwarding.
6. Click *Include user's extension* to ring our phone.
7. Enable *Answer confirmation for offnet numbers* so our cell phone voicemail does not take the call if our voicemail answers the call.
8. In the Extension, number, or phone field enter your cell phone number you would like to ring then click the *Ring Delay* option and slide to 10 seconds.



9. Then click the *plus sign* next to the *Extension, number, or phone field* and in the new window that appears enter the extension of the receptionist 1003 and click save. Your rule should look like the example in figure 6.4.
10. Once the answering rule is created you will see it appear in the answering rules list as seen in figure 6.4.b. If the time frame you select is in effect, then you will see *Active* next to the rule.
11. To send calls directly to voicemail afterhours click the *edit* icon for the default answering rules.
12. On the *Edit* Answering Rule for the default rule, select *Always* in the *Call Forwarding* options then enter your extension, select voicemail, and click save.
13. Then slide the rule with the during business hours selected to the top of the answering rules and the default on the bottom as seen in figure 6.4.b.



6.4.b

Now when your extension receives calls during business hours your extension will ring. After 10 seconds your cell phone will start ringing in addition to your extension. Then after 30 seconds have passed it will ring the receptionist at extension 1003. If no one answers after 45 seconds the call is sent to our voicemail.

If a call reaches your extension outside of the selected business hour time frame, then the Default rule would be active and route the calls directly to voicemail.



7

7 Time Frames

The Time Frames icon as seen in figure 7 will take you to the Time Frames application center. Time Frames are a set period of time which covers when we want certain events to occur, such as our phone to ring.

We create Time Frames with different time and date ranges so we can apply them to answering rules which then allow you to control how calls are routed depending on the time of the day the call occurs.

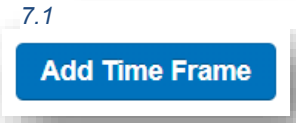
To view and create your available Time Frames click on the Time Frame icon in the top navigation menu bar as seen in figure 7. Here you will see all the time frames available for you as displayed in figure 7.a. Time frames with names in black and without the

7.a

Name	Description	Owner
Anything	Days and Times	Shared
Business Hours	Days and Times	Shared
Holidays	Specific Dates	Shared
Out of Office	Specific Dates	1000

option to edit or delete are time frames created at the domain level that are available to everyone in the domain to use. You can only edit the time frames with blue name that you created. If you need domain level Time Frames changed contact your Office Manager.

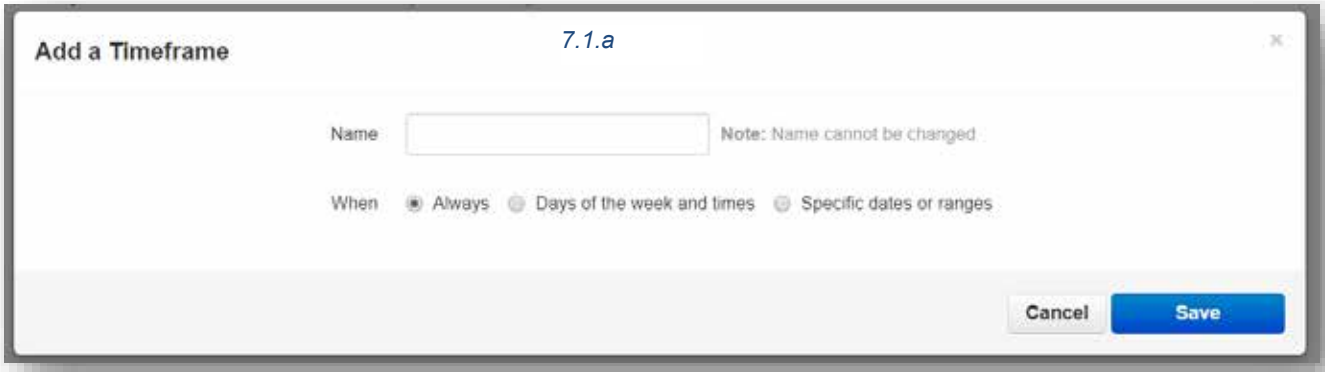
7.1



7.1 Adding Time Frames

To create a time frame, click on the Add Time Frame button as seen in figure 7.1. After clicking Add Time Frame button the *Add Timeframe* window will appear as seen in figure 7.1.a

7.1.a



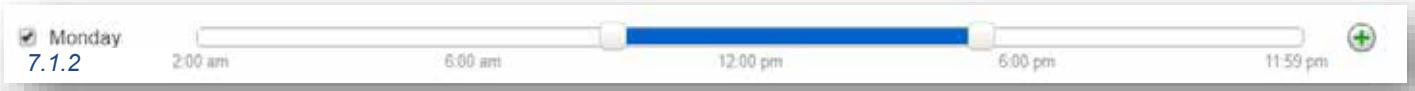
The Name field allows you to give the Time Frame a name that will help identify the time frame. The name cannot be changed once the rule as been created. If you want to change the name delete the rule and recreate it with the new name. Under the name field, you see three options for when the time frame should be in effect:

7.1.1 Always

This option makes the time frame always in effect. 24 hours a day 7.

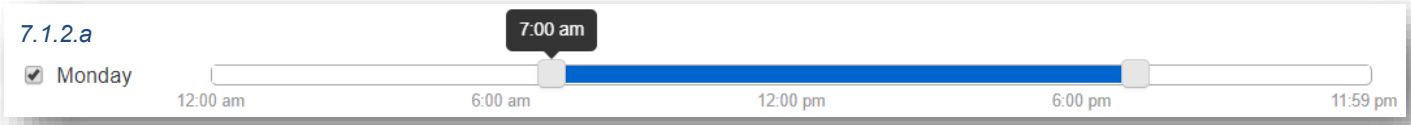
7.1.2 Days of the week and times

Allows you to select specific days of the week and the hours in the day you want the time frame to take effect. When selecting this option, the days of the week appear with a check box that allow you select which days you would like the time frame active. Once selecting a day of the week, a blue bar appears allowing you to slide the ends to when



7.1.2

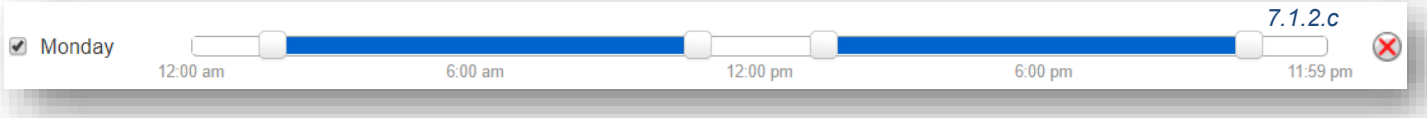
you would like the time frame to stop and start as seen in figure 7.1.1.2. If would like your time frame to be in effect from 7am to 7pm, simply click on the edge of the blue bar and slide them over to the desired time as seen in figure 7.1.1.2.a.



7.1.2.a

If you'd like a break in the middle of the time frame click the plus sign next to the 11:59m as seen in figure 7.1.2.b. You will then see another blue bar appearing representing when the time frame will take effect as seen in figure 7.1.2.c.

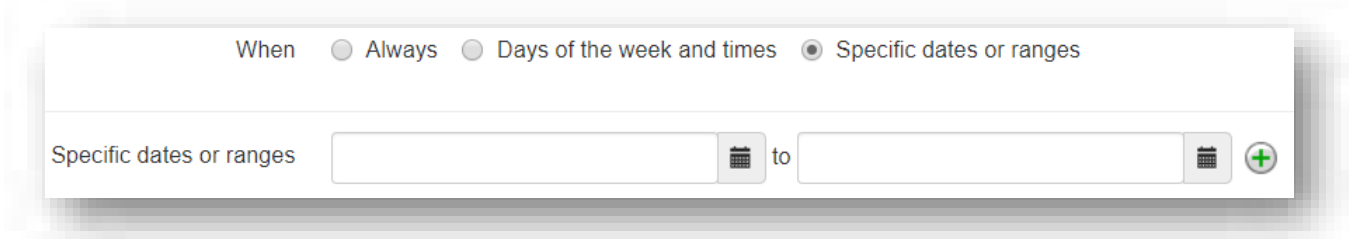

7.1.2.b



7.1.2.c

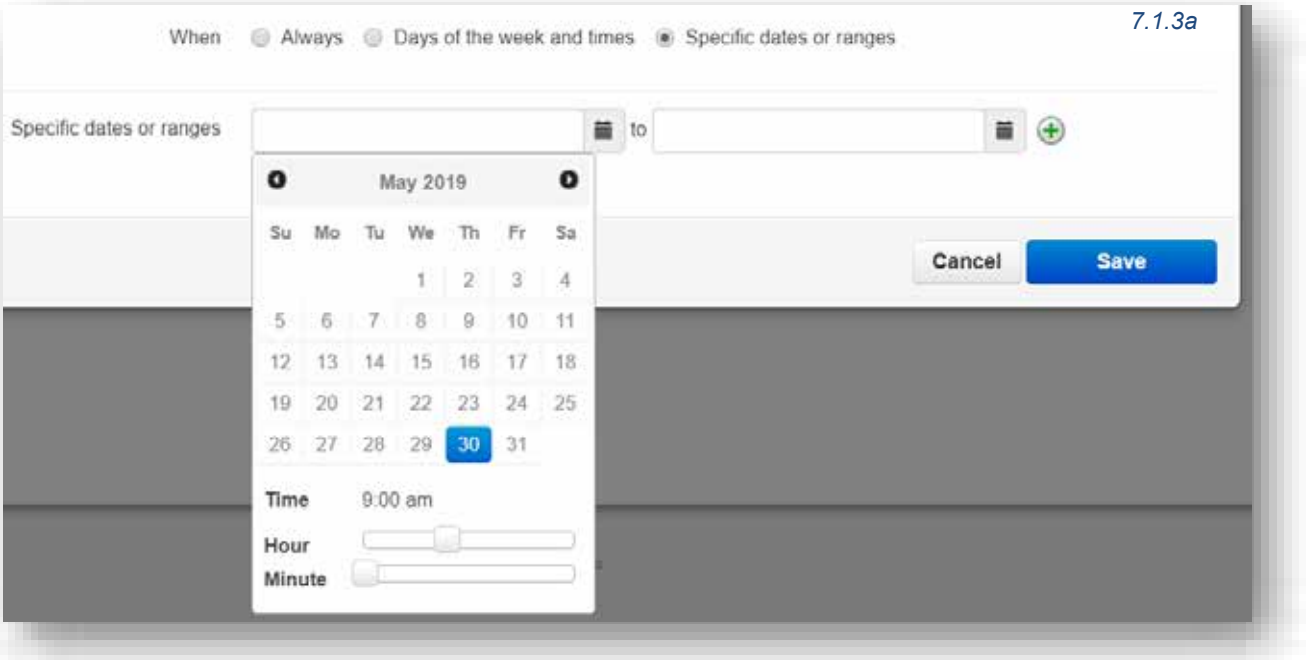
7.1.3 Specific dates or ranges

This option will allow you to configure a time frame to be in effect for specific dates and times. After selecting the Specific date or ranges options you will see the *to* and *from* dates as seen in figure 7.1.3.



7.1.3

When clicking in the *To* or *From* date fields a calendar will appear as seen in figure 7.1.3.a.



7.1.3a

Then select the end date you would like the time frame to start and stop.

Below the calendar is the *Hour* and *Minute* options so you can configure your time frames to start and stop certain hours on the selected dates.

Clicking the plus sign will all you to add more date ranges for the time frame to be in effect.

7.2 Edit Time Frame

To edit a Time Frame click the pencil icon to the right as seen in figure 7.2. You can edit the When options however not the name. If you would like to rename the Time Frame delete it and create a new when with the same When options however new desired name.



7.2

7.3 Delete Time Frame

To delete a Time Frame click the red x delete icon as seen in figure 7.2.



8

8 Phones

The phone icon as seen in figure 8 will take you to your phones center where all registered devices to your account are listed as seen in figure 8.a.

8.a

	Name	Device Type	IP Address	MAC Address	Line
✓	5232	Polycom/5.4.1.14510 PolycomVVX-VVX_500-UA/5.4.1.14510	66.185.162.140:1041	00:04:F2:79:5E:71	1
✓	5232d	PolycomVVX-VVX_501-UA/5.8.2.4732	66.185.162.140:1048	64:16:7F:02:04:0F	1
✗	5232z	Z 3.15.40006 rv2.8.20	66.185.162.140:50409	-	-
✗	5232wp	SNAPmobile Web 40.0.1 (Chrome 74.0.3729.157)	66.185.162.140:50737	-	-

A green icon next to the device means the device is registered and will be able to send and receive calls without issue.

A red icon means the device is unregistered. This could be caused because the device is softphone and currently turned off. Or the phone system is unable to communicate with the device.

To the right of the status indicator is the name of the device. Followed by device type, the manufacturer and model number of the device, the IP address the device is registered at, the MAC address of the device. Then the line number the device has the extension number displayed.



9

9 Music on Hold

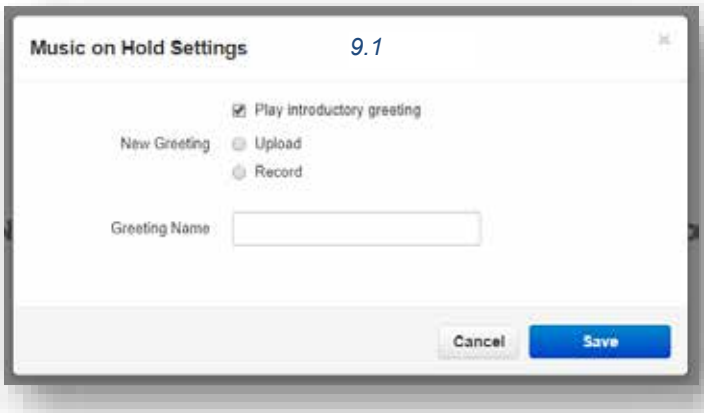
Clicking the Music on Hold icon as seen in figure 9 will take you to your accounts music on hold center and will list all the custom music uploaded to your account that is played when you place someone on hold as seen in figure 9.0. Music played in a top-to-bottom order or randomized depending how the queue was created.



Figure 8-0

9.1 Music on Hold Settings

Clicking the setting button will display the Music on Hold Settings as seen in figure 9.1 which allows for the option Play introductory greeting to be enabled. When the option is selected, you will be asked to upload a WAV or mp3 file of the introductory greeting. This introductory greeting will always play first when someone is placed on hold then music afterwards.



9.1

9.2 Add Music on Hold

The Add Music button as seen in figure 9.2 will allow you upload an mp3 or WAV file format and name the music on hold file.



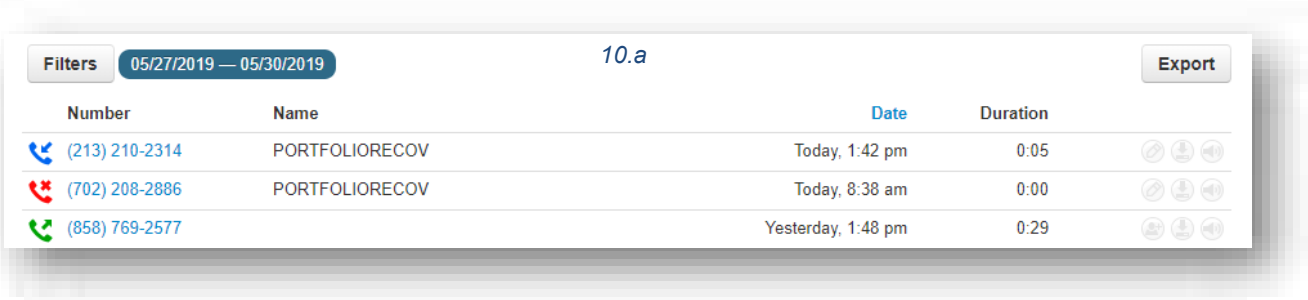
9.2

10 Call History



10

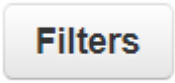
The Call History icon as seen in figure 10 will take you to the Call History page. Where you will see the calls made to and from your account for the specified date range as seen in figure 10.a.



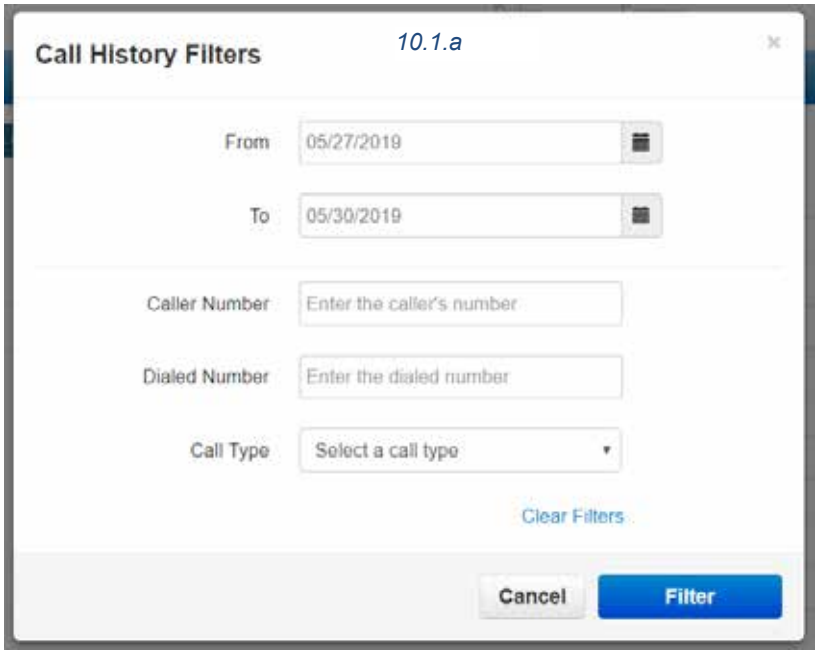
10.a

10.1 Call History Filters

You can change the date range by clicking the Filters button as seen in figure 10.1. After clicking the filter button, the Call History Filters window will appear as seen in figure 10.1.a. Here you can change the Call History date range.



10.1



10.1.a

10.1.1 Caller Number

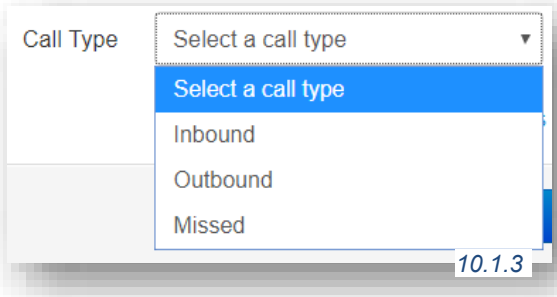
Allows you to search for calls from a specific phone number by entering the number into the Caller Number field.

10.1.2 Dialed Number

The Dialed Number field will let you filter for a specific number that you dialed.

10.1.3 Call Type

The Call Type drop down as seen in figure 10.1.3 lets you filter based off the type of call. Inbound, Outbound, or Missed call.



10.1.3

10.1.4 Calls Displayed

Clicking the Filter button as seen in figure 10.1.a will then display the calls that match the filter criteria.

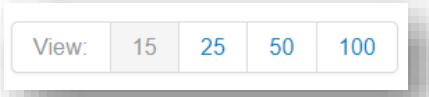
Calls displayed with a red x are missed calls.

Calls displayed with a green arrow are outbound calls.

Calls displayed with a blue arrow are inbound calls that were answered.

You can set the Call History to display 15, 25, 50, and 100 calls per page as seen in figure 10.1.4.

10.1.4



10.1.4.a



The caller can be added to your contacts by clicking the Add Contact icon as seen in figure 10.1.4.a.

10.1.4.b



You can add a call to your contacts by clicking the Edit Icon next to the call which will display the contact information fields as seen in figure 10.1.4.b.

10.1.4.c



If call recording is enabled for your profile, device, or if the call was from a queue configured to record calls you can download the call clicking the Download icon as seen in figure 10.1.4.d.

10.1.4.d



If you'd like to listen to the call without downloading the call you can click the listen icon as seen in figure 10.1.4.e which will open a media player right in your browser as seen in figure 10.1.4.f

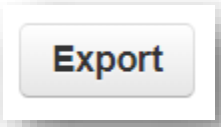
10.1.4.j



10.1.4.f

10.2 Exporting Call History

10.2



The export icon as seen in figure 10.2 allows you to download the call history into a csv file that can be opened in any spreadsheet application such as Excel or Apache Open Office.

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