

Cloud Telephony Solution

Features Guide

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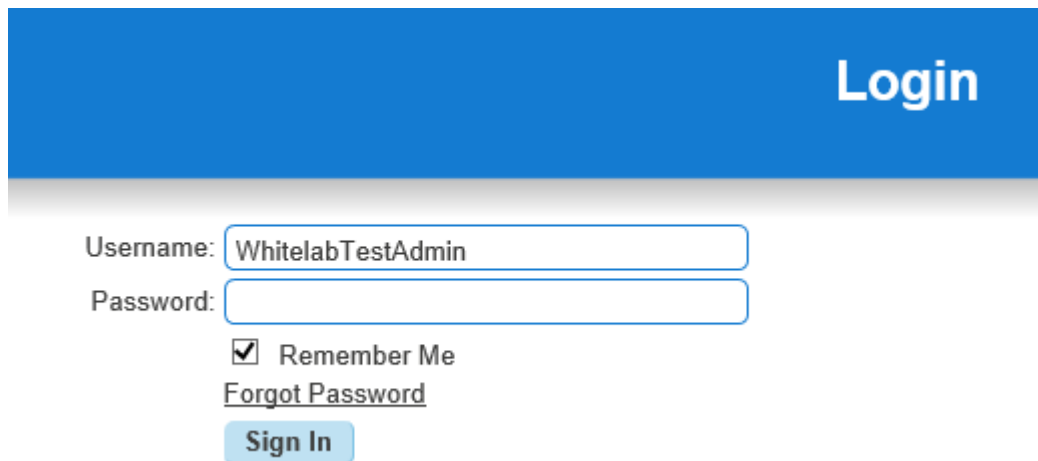
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How do I gain access to the Cloud Telephony website?

Your Cloud Telephony service can be accessed at (www.???.mypabx.co.uk), and supports Internet Explorer 6.0, 7.0, 8.0, 9.0, Mozilla Firefox, Safari, Chrome, and Opera.

From here you will be prompted to submit your user details:



Login

Username:

Password:

Remember Me

[Forgot Password](#)

Logging in as an Administrator

How do I customise my Dashboard?

The dashboard that you are presented with when you login can be customised to ensure you achieve the best view for your specific needs. In order to do this simply hover over the title of a section you would want to move and drag it to your preferred place on the screen.

The screenshot displays a dashboard with a top navigation bar containing 'Add User' and 'Create Group' buttons. The main content area is divided into several sections:

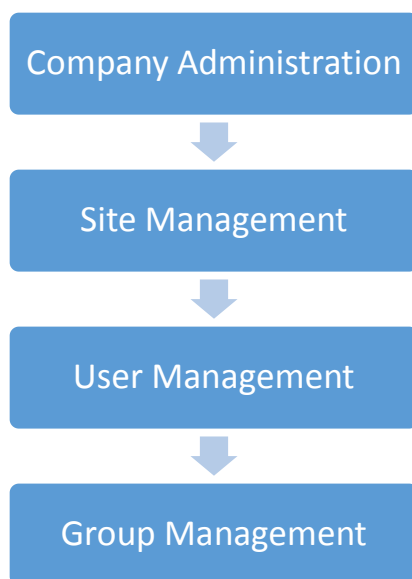
- Call Outcomes:** A section with 'Inbound' and 'Outbound' tabs. It features a large empty box with a '1' and a line, and a weekly chart below it with days from 'Thu' to 'Wed' and categories 'Answered', 'Engaged', and 'Unanswered'.
- Subscription Summary:** A table with columns 'Name', 'Used', and 'Available'.

Name	Used	Available
Premium	4	10
Integrator - Bullhorn	0	10
Call Centre Agent Client	0	10
Call Centre Agent	0	10
Call Centre Supervisor Client	0	10
Call Queue Group User	0	10
Integrator CRM	0	10
Integrator EMIS	0	10
TAPI Driver	0	10

Below the table are page numbers '1 2' and 'Previous Next' links, and a 'Manage' button.
- Calls per week:** A section with 'Inbound' and 'Outbound' tabs, containing a large empty box with a '1' and a line.
- Top 10 Callers (Calls Received):** A section header at the bottom left.

How do I setup the Cloud Telephony portal?

As a company administrator setting up the cloud telephony system can be a sizeable task if a clear indication of what is required is not provided. Below we have provided a list and hierarchy of how you should establish your Cloud Telephony portal:



Company Administration – The ability to define for the company the call profiles, service options, company portal, and company voice portal amongst other key information and options.

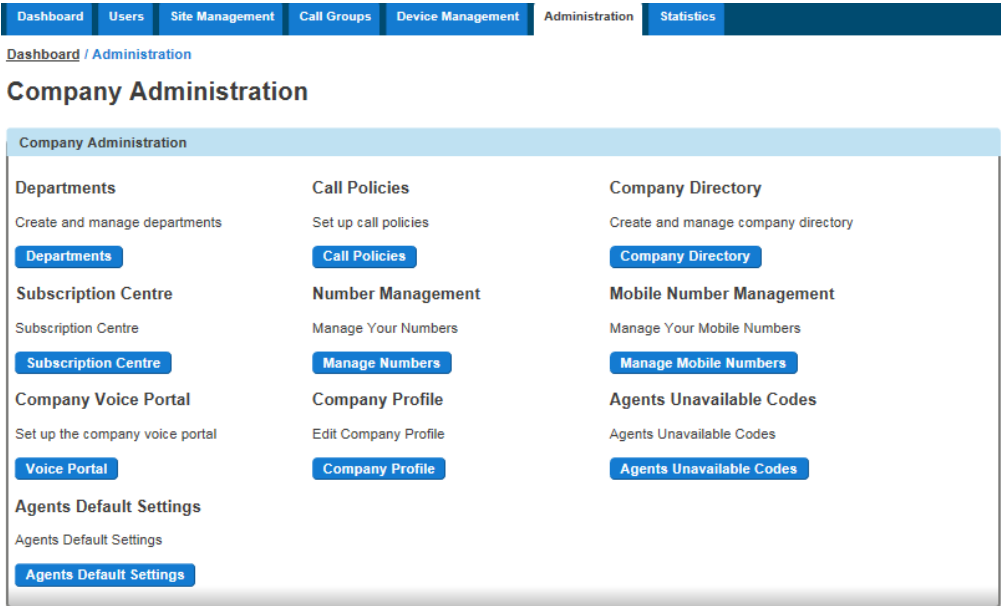
Site Management – The ability to define per site the main site DDI, and additional key information such as Schedules, Music on Hold, and Call Barring

User Management – The ability to create users of the system and assign them a phone to activate the devices supplied. You can also assign a telephone number, decide on any call barring, and give them optional services such as Voicemail, controlled from the system login provided.

Call Groups– The ability to manage incoming calls and present a profile image for you company through the use of Auto Attendants and Hunt Groups.

How do I setup the Company Administration?

As the company administrator you have the ability under the “Administration” tab to change service options and establish departments and policies as well as managing numbers and subscriptions over the whole company.



The screenshot shows a navigation bar with tabs: Dashboard, Users, Site Management, Call Groups, Device Management, Administration (selected), and Statistics. Below the navigation bar is a breadcrumb trail: Dashboard / Administration. The main heading is "Company Administration". The content area is a grid of management options, each with a description and a button:

Company Administration		
Departments Create and manage departments Departments	Call Policies Set up call policies Call Policies	Company Directory Create and manage company directory Company Directory
Subscription Centre Subscription Centre Subscription Centre	Number Management Manage Your Numbers Manage Numbers	Mobile Number Management Manage Your Mobile Numbers Manage Mobile Numbers
Company Voice Portal Set up the company voice portal Voice Portal	Company Profile Edit Company Profile Company Profile	Agents Unavailable Codes Agents Unavailable Codes Agents Unavailable Codes
Agents Default Settings Agents Default Settings Agents Default Settings		

How do I setup Departments?

As the company administrator you have the ability under the “Administration” tab to add and manage departments, so that users and services can be associated to them.

To add a new department click on the “Department” button, define the department name, and click on the “Add” button. If you wish to delete or adjust the department, simply check the one to be removed and click on the “Delete Selected” button.

Departments

Departments

Name

No Records Found

[Delete Selected](#)

Add Department

Name:

[+ Add](#)

How do I setup Call Policy for a Site?

As the company administrator the Call Policy section allows you to override the company call policy for each individual site. This allows you as the company administrator to override the activation of blocking callers name for external calls for each site. To allow this you need to set the override company call policy button to "On". You will only be able to select the "Site phone number" if the company site DDI has been set.

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / Site Management / WhitelabTestSite / Call Policies

WhitelabTestSite Call Policies

[Manage WhitelabTestSite](#)

WhitelabTestSite Call Policies

off Override company call policy

off Block calling name for external calls ?

Number to use for calling line identity: User phone number Site phone number

[Save](#)

How do I setup the Company Directory

The company administrator has the ability under the "Administration" tab to setup and adjust the company directory which can be accessed by all users. Clicking on the "Company Directory" tab will allow you to search, edit, add, and delete contacts from the directory.

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / Administration / Directory & Contacts

Company Directory

First Name: Last Name:

Number: Extension:

Company: [Search](#)

My Directory

<input type="checkbox"/>	First Name	Last Name	Number	Company	Email Address	Edit
<input type="checkbox"/>	James	Bushell	072222222222 (2222)		✉ james.bushell@	Edit

[Delete Selected](#) [+ Add](#) [Download](#)

To add a contact to the directory you need to select “Add New Contact” where you can then complete the form and click on “Add” to complete the addition.

Company Directory

First Name:

Number:

Company:

Last Name:

Extension:

[Search](#)

My Directory

<input type="checkbox"/>	First Name	Last Name	Number	Company	Email Address
No Records Found					

[Delete Selected](#)
[+ Add](#)
[Download](#)

To either edit or delete a contact, you simply need to check the required box and appropriate buttons before making the changes and confirming.

How do I manage my company’s subscriptions?

As the company administrator you have the ability to view the number of user subscriptions you have left and request more if required. To access this section you simply need to go to “Administration” and “Subscription Centre” tab which will then provide you with an overview for your company.

Dashboard
Users
Site Management
Call Groups
Device Management
Administration
Statistics

[Dashboard](#) / [Administration](#) / [Subscription Centre](#)

Subscription Centre

Available User Subscriptions

Name	Used	Available	
Premium	4	10	More Info
Virtual Power Pack	0	10	More Info
Auto Attendant	1	9	More Info
Integrator - Bullhorn	0	10	More Info
Call Centre Group	0	10	More Info
Call Centre Agent Client	0	10	More Info
Call Centre Agent	0	10	More Info
Call Centre Supervisor Client	0	10	More Info
Call Queue Group User	0	10	More Info
Integrator CRM	0	10	More Info

1 2
[Previous](#) [Next](#)

?

Available Call Group Subscriptions

Name	Used	Available	
CallParking	1	9	More Info
CallPickUp	1	9	More Info
Call Queue Group	0	10	More Info
Hunt Group	1	9	More Info
InstantConferenceGroup	0	10	More Info
Page Group	0	10	More Info

[Request More](#)

If you then want to find out more information about a specific subscription type you can then click on the “More info” button which will explain further the service provided.

The screenshot displays a user interface for a 'Premium' subscription. At the top left, the word 'Premium' is written in a bold, dark font. Below this, there are two main sections. The first section, titled 'Usage', shows '4 used' and '10 available' in a light blue box. Below the usage information are two buttons: 'Show Users' and 'Request More'. To the right of the usage section is a 'Feature Information' box, which is currently empty. Below the usage section is a 'Features' section, which contains a list of features. The first feature, 'Incoming Call', is highlighted in a dark blue bar. Below it, a list of other features is shown, including 'Anonymous Call Rejection', 'Automatic Callback', 'Barge-in Exempt', 'Busy Lamp Field', 'Call Forwarding Always', 'Call Forwarding Busy', 'Call Forwarding No Answer', 'Call Notify', 'Call Return', 'Calling Line ID Delivery Blocking', and 'Calling Name Retrieval'. At the bottom of the features list, 'In Call' and 'Outgoing Call' are also visible. The entire interface is enclosed in a light blue border.

Should you wish to view a list of all users who are allocated to this subscription you can then select the “Show Users” button which will show over your company who is assigned.

Finally if you click the “Request More” button you can request more subscriptions to be added to your account by your communications provider, however please note these will be charged at your agreed rate card.

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / Administration / Subscription Centre / Order More Subscriptions

Order More Subscriptions

Request Additional Subscriptions

Premium	<input type="text" value="0"/>	+
Virtual Power Pack	<input type="text" value="0"/>	+
Auto Attendant	<input type="text" value="0"/>	+
Integrator - Bullhorn	<input type="text" value="0"/>	+
Call Centre Group	<input type="text" value="0"/>	+
Call Centre Agent Client	<input type="text" value="0"/>	+
Call Centre Agent	<input type="text" value="0"/>	+
Call Centre Supervisor Client	<input type="text" value="0"/>	+
CallParking	<input type="text" value="0"/>	+
CallPickUp	<input type="text" value="0"/>	+
Call Queue Group	<input type="text" value="0"/>	+
Call Queue Group User	<input type="text" value="0"/>	+
Integrator CRM	<input type="text" value="0"/>	+
Hunt Group	<input type="text" value="0"/>	+
InstantConferenceGroup	<input type="text" value="0"/>	+
Integrator EMIS	<input type="text" value="0"/>	+
Horizon TAPI Driver	<input type="text" value="0"/>	+
Integrator	<input type="text" value="0"/>	+
Page Group	<input type="text" value="0"/>	+
Receptionist	<input type="text" value="0"/>	+
iOS Soft Client	<input type="text" value="0"/>	+
Soft Client Mac	<input type="text" value="0"/>	+
Soft Client Android	<input type="text" value="0"/>	+
Soft Client PC	<input type="text" value="0"/>	+
Voice Mail	<input type="text" value="0"/>	+

[Continue](#)

Once you have clicked on the “Continue” button the request will then be sent to your communications provider helpdesk and you’ll need to contact them should you wish to cancel the order.

How do I manage numbers over my company?

As the company administrator you have the ability to manage the telephone numbers assigned throughout your company. This page can be accessed through the “Administration” tab and through click on “Number Management”. Within this section you have the ability to move numbers available to be allocated to a site under the “Site Management” section. The homepage will display all available numbers your company has, showing them in either a range or individual numbers. To assign a number to a site click on number and then the “Assign” button, or if you select a range the system will give you the option to allocate all or part of that range.

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / Administration / Manage Numbers

Manage Numbers

Available Numbers

Numbers	
01256678669	Assign
01256678671	Assign
01635886395-01635886396	Assign

Once you have selected the site and all the numbers you wish to assign to that site you can then click on “Assign” in order to action this.

How do I manage numbers associated to my site?

As the company administrator you have the ability to see all numbers assigned to a site, and view whether they are free or being used by another service or user. This screen can be accessed through the “Site Management” section of the Cloud Telephony portal.

The screenshot shows the 'Manage WhitelabTestSite Numbers' page. At the top, there is a navigation bar with tabs for Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below the navigation bar, the breadcrumb trail reads 'Dashboard / Site Management / WhitelabTestSite / Manage Numbers'. The main heading is 'Manage WhitelabTestSite Numbers' with a 'Manage WhitelabTestSite' button to the right. A section titled 'Available Numbers' contains a table with three rows of numbers, each with a red circle icon to its left. Below the table is a 'Download Numbers' button.

Numbers
D1635886392
D1635886392-D1635886394
D1635886397

Numbers within this section are displayed as either a range or single number, and by selecting either “Release All” or “Release Selected” you’ll be able to release the numbers from their current use and reserve them for reallocation. If you choose to “Release Selected” you will be prompted to check the numbers required and confirm by clicking on the “Release” button.

How do I setup the Company Profile?

The company administrator has access to the “Company Profile” area of the system. This page is editable and provides basic information about the company as well as how many users you have.

The screenshot shows the 'Company Profile' page. At the top, there is a navigation bar with tabs for Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below the navigation bar, the breadcrumb trail reads 'Dashboard / Administration / Company Profile'. The main heading is 'Company Profile'. The page is divided into three sections: 'Company Details', 'Company Administrator Contact Details', and 'User Count'. The 'Company Details' section shows 'Company Name: WhitelabTestCompany' and 'Default Domain: whitelabtestpurpledev.com'. The 'Company Administrator Contact Details' section shows 'Contact Name: AdamChaplin', 'Contact Email: adam.chaplin@', and 'Contact Number:'. The 'User Count' section shows 'Current number of users: 5'. A 'Save' button is located at the bottom right.

Site Management

As the company administrator, Site Management is one of the first steps you should take when establishing the Cloud Telephony system in order to set management policies for each site. This section can be accessed from the dashboard and selecting the Site Management option, before then searching for the site you wish to access.

The screenshot shows the 'Site Management' dashboard. At the top, there is a navigation bar with tabs for 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. Below the navigation bar, the breadcrumb 'Dashboard / Site Management' is visible. The main heading is 'Manage Sites'. There is a search bar labeled 'Site Name:' with a 'Search' button. Below the search bar is a table with the following data:

Sites	
Name	
WhitelabTestSite	Manage
Basingstoke	Manage
Aberfeldy	Manage

Once you have selected which site you wish to manage you will then be prompted with the options for that site.

The screenshot shows the 'WhitelabTestSite' management page. At the top, there is a navigation bar with tabs for 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. Below the navigation bar, the breadcrumb 'Dashboard / Site Management / WhitelabTestSite' is visible. The main heading is 'WhitelabTestSite'. There are three buttons: 'Add User', 'Create Group', and 'Current Site DDI 01635886392'. Below this is a section titled 'Manage WhitelabTestSite' with a grid of options:

Schedules Create and manage time schedules Schedules	Authorisation Account Codes Create and manage authorisation account codes Authorisation Codes	Call Policy Override a sub set of call policy features for this site Call Policy
Call Barring Setup the call barring options for this site Call Plan	Music on Hold Set up the music that a person hears when put on hold Music on Hold	Manage Numbers Manage the numbers assigned to this site Manage Numbers

How do I setup the Site DDI?

As the company administrator you have the ability to set the "Company Site DDI" by selecting on the "Current Site DDI Choose One" tab. Once clicked you can then select a Site DDI from the list of numbers allocated to your company's profile, before clicking on the "Update" button to implement this for this site.

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / Site Management / WhitelabTestSite

WhitelabTestSite

Add User Create Group

Current Site DDI 01635886392

Here You Can Change The Default Site DDI Number

Available DDI Numbers:
01635886392

Cancel Update

Manage WhitelabTestSite

Schedules
Create and manage time schedules
Schedules

Call Barring
Setup the call barring options for this site
Call Plan

Authorisation Codes
Create and manage authorisation codes
Authorisation Codes

Music on Hold
Set up the music that a person hears when put on hold
Music on Hold

Call Policy
Override a sub set of call policy features for this site
Call Policy

Manage Numbers
Manage the numbers assigned to this site
Manage Numbers

When this has been set within the main site management screen you will be able to see the current site DDI and edit this as required by clicking on the tab.

User Management

As a company administrator you would have the ability to add new users to the Cloud Telephony system. This can be found under the User Management menu from the Dashboard. A user's account is only active when it has an extension and service pack assigned to it.

To add a new user please click on "Add User" from the User Management menu.

The screenshot shows the 'Add New User' form in the 'Account' step. The breadcrumb trail is 'Dashboard / User Management / Add New User'. The form has a progress bar with steps: Account (selected), Assign Number, Assign Services, Permissions, and Phone. The 'Location' section has a 'Site' dropdown menu with 'Choose One' selected. The 'Account Details' section includes: 'Title' dropdown (Choose One), 'First Name' and 'Last Name' text boxes, 'Username' text box (with 'whitelabtestpurpledev.com' below it), 'Department' dropdown (None) with an 'Add' button, 'Contact Mobile' and 'Email' text boxes. The 'HOW?' logo is in the top right, and the 'WH?T' logo is in the bottom right. At the bottom are 'Cancel' and 'Create and Continue' buttons.

On this page you will need to fill in all user account details including their username and the email that login credentials will be sent to. Alternatively if you don't want these details being sent out you can send them to yourself to then issue as required.

Once completed please click "Create and Continue" and this will take you to the assign number page, where you can assign the user a DDI and predefine what will be displayed when making a call.

The screenshot shows the 'Add New User' form in the 'Assign Number' step. The breadcrumb trail is 'Dashboard / User Management / Add New User'. The progress bar shows 'Assign Number' as the active step. The 'Find a Fixed Number' section has a search box with 'Search...' and a list of results showing '01635886393'. The 'Extension' section has an 'Extension' text box with a '?' icon. The 'Presentation Name' section shows 'Currently presenting: Andrew Robinson' and two radio buttons: 'Same as user details' (selected) and 'Other:'. Below are 'First Name' (Andrew) and 'Last Name' (Robinson) text boxes. The 'WH?T' logo is in the bottom right. At the bottom are 'Cancel' and 'Continue' buttons.

Through clicking on “Continue” you will then go through to the “Assign Services” page where you can give them a service pack and add any optional bolt on’s for that user such as a Voicemail inbox.

The screenshot shows the 'Add New User' page in the 'Assign Services' step. The breadcrumb trail is 'Dashboard / User Management / Add New User'. The page title is 'Add New User'. The navigation tabs are 'Account', 'Assign Number', 'Assign Services' (active), 'Permissions', and 'Phone'. There are two main sections: 'Service Pack' and 'Optional Extras'. The 'Service Pack' section has a radio button selected for 'Premium' with '9 Left' remaining. Below it is a 'Request More' button and a 'WH?T' logo. The 'Optional Extras' section is a list of checkboxes with '10 Left' remaining for each: 'Integrator - Bullhorn', 'Call Centre Agent Client', 'Call Centre Agent', 'Call Centre Supervisor Client', 'Call Queue Group User', 'Integrator CRM', and 'Integrator EMIS'. Below this list is another 'Request More' button and 'WH?T' logo. A 'Features' section is visible below, with a dropdown menu currently set to 'Incoming Call'. The dropdown list includes: 'Busy Lamp Field', 'Call Forwarding Always', 'Call Forwarding Busy', 'Call Forwarding No Answer', 'Call Notify', 'Call Return', 'Calling Line ID Delivery Blocking', 'Calling Name Retrieval', 'CommPilot Express', 'Connected Line Identification Restriction', and 'Voice Mail'. Below the dropdown are sections for 'In Call' and 'Outgoing Call'. At the bottom right are 'Cancel' and 'Save and Continue' buttons.

Now the system is aware of the features being provided to the customer, you will need to set the permissions for the user in terms of what they will be able to access.

The screenshot shows the 'Add New User' page in the 'Permissions' step. The breadcrumb trail is 'Dashboard / User Management / Add New User'. The page title is 'Add New User'. The navigation tabs are 'Account', 'Assign Number', 'Assign Services', 'Permissions' (active), and 'Phone'. The section is titled 'Access and Permissions'. It contains five toggle switches, all currently set to 'off': 'This User can enable Always Forward To', 'This User can use Advanced Call Setup', 'This User can use CLI presentation', 'This User can use Profiles', and 'This User can use Remote Office'. A 'WH?T' logo is in the bottom right corner. At the bottom right are 'Cancel' and 'Continue' buttons.

Finally and to complete the user setup you’ll need to assign a device to the user from the hardware you have ordered for your company. To action this you’ll need to check the MAC address on the bottom of the device and ensure this is selected within the GUI, alongside the right type of device. Most important of all is to ensure you select the correct Codec required for routing your calls.

The Codec in the phone converts speech from the handset to a digital format (IP packets) and vice versa. You will need to ensure that the maximum number of simultaneous incoming and outgoing calls does not exceed the bandwidth/codec combination arranged by your Communications Supplier.

Bandwidth estimate for various codecs.

G.729 codec - 30 to 50 kb/s depending on contention ratio of broadband service.

G.711 codec – 90 to 150kb/s depending on contention ratio of broadband service.

G.722 codec. This can only be used on external calls if the other phone in the call can support G.722. Usually 100 to 175kb/s will suffice depending on contention ratio in this case.

Please note that if the wrong Codec is selected and there is not enough bandwidth available you may encounter poor quality external calls over all calls from your site.

Dashboard / User Management / Add New User

Add New User

Account Assign Number Assign Services Permissions Phone

Assign Device

Device Profile: Polycom_VVX411_87:44:38:79:75:24 ?

Codec: G711 G711 G722 G729

Continue without device Finish and Edit Finish and Show List

Once actioned you can then click “Finish and Edit” to edit the user functions further, or “Finish and Show List” to view a list of all users.

How do I bulk upload users?

As an administrator you are able to bulk upload users, which will help reduce the level of effort in creating a sizeable user base. At present you can only bulk upload users to a single site, therefore if you have setup multiple sites then you’ll need to action a bulk or single addition for both. In order to implement this you simply need to click on the “Bulk Add Users” section under “Users” where you’ll be able to download the required templates.

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / User Management / Bulk Upload

Bulk Upload Users

Upload File

Site: Choose One

File to Upload: Browse

Download Existing Devices Template Upload

To create the bulk upload spreadsheet you first need to download the spreadsheets for available numbers, and existing device templates. Once you have these spreadsheets open you’ll then need to create a Comma Separated Values (.csv) file with the corresponding headings shown below.

These files are easily created in Microsoft Excel and if you fill in the relevant column headings you can then populate the required information.

	A	B	C	D	E	F	G	H	I
1	User ID	First Name	Last Name	Email	Phone Number	Extension	Device	Service Pack	Add On
2	johnDoe@domain	John	Doe	john.doe@something.com	1665660232	5435	Polycom450_01:1a:a0:88:89:a5	Premium	Unified Messaging
3	janeDoe@domain	Jane	Doe	jane.doe@something.com	1665660233	5436	Polycom550_01:1a:a0:88:89:a6	Standard	

Once created if you save the file as .csv you are then able to use the “Upload” button to add this to the system.

On uploading the file the Hosted PBX system will run some validation over the information provided to ensure it is a valid file. As such if there are errors you will see the below screen highlighting the problem with the file and asking you to correct.

Dashboard / User Management / Bulk Upload

Bulk Upload Users

Errors were found in your upload. Please review them below. Roll you mouse over the error icons to see more information

Errors in User Upload

Username	First Name	Last Name	Email	Number	Extension Device	Service Pack	Add Ons
2 testuser1@whitelabtestpurpledev.com	Test	User1	test.user1@gamma.co.uk	1887440362	▲	▲	▲
3 testuser2@whitelabtestpurpledev.com	Test	User2	test.user2@gamma.co.uk	1887440365	▲	Standard	▲

The number is not available for assignment or does not exist

Try again

If the file has no errors then you should see the final confirmation screen asking you to “Confirm” your submission.

Dashboard / User Management / Bulk Upload

Bulk Upload Users

Please confirm you wish to import this information

Confirm User Import

Username	First Name	Last Name	Email	Number	Extension Device	Service Pack	Add Ons
testuser1@whitelabtestpurpledev.com	Test	User1	test.user1@gamma.co.uk	01887440362 0362	Polycom_VVX411_87:44:38:79:75:24	Premium	Voice Mail,

Confirm

How do I setup Call Management?

As a company administrator you may also want to manage your incoming calls more effectively through the use of hunt groups and auto attendants. In order to access this section you simply need to click on “Call Groups”, where you’ll be presented with a variety of call management options.

Instant Conference Group

As the company administrator you have the ability to setup a conference group allowing up to 15 different people to be called automatically once the conference has been started. You may choose to use this to create incident bridges or similar instant conference groups for your company for this to be activated the conference group can be started by any user calling the conference number, which will then trigger calls to other group members. In order to setup an instant conference group you need to click on “Instant Conference Group” under “Call Groups” where you will need to assign it to site, as well as defining a name, username, and caller id to be displayed on the phones when ringing.

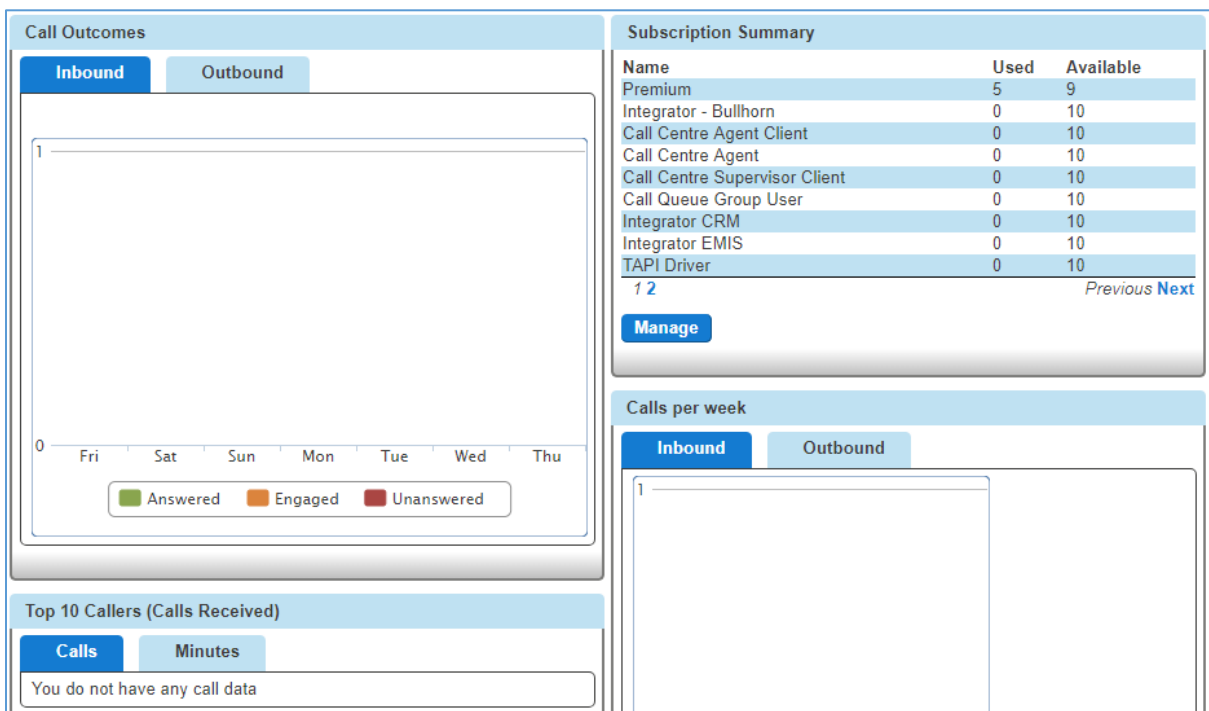
Once you have created your Instant Conference Group you can click on the “Continue” button which will then ask you to define the maximum ring time for the user phones to be dialled if unanswered to avoid ongoing ringing.

Clicking on “Continue” again will prompt you to search and confirm the numbers that need to be added to this conference group, and this can simply be done by selecting the required number and then clicking on the “Add” button.

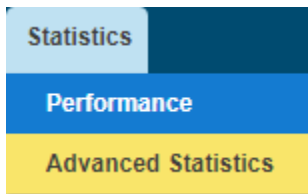
Once you’re happy with the group members you can click on “Continue” to finally assign a number to the instant conference group and any extension for internal call routing, prior to clicking on either “Finish and Edit”, or “Finish and show list” to establish this conference group.

How do I monitor calls over my sites and users?

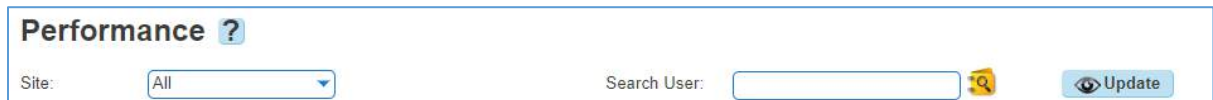
There are a number of ways you can monitor calls over both sites and users, and from the home page you can access a simple summary screen of calls made over the whole of your company as shown below



If you would then like to burrow into your company, sites, and user further you can access the “Statistic” link where you can either view summary graphs under “Performance” or if setup on “Advanced Stats” this link so you can burrow in to the raw data.



Within the “Performance” screen 4 graphs appear which can be customised by the top search criteria to select either a “Site” or a “User” who you would like to see the performance of



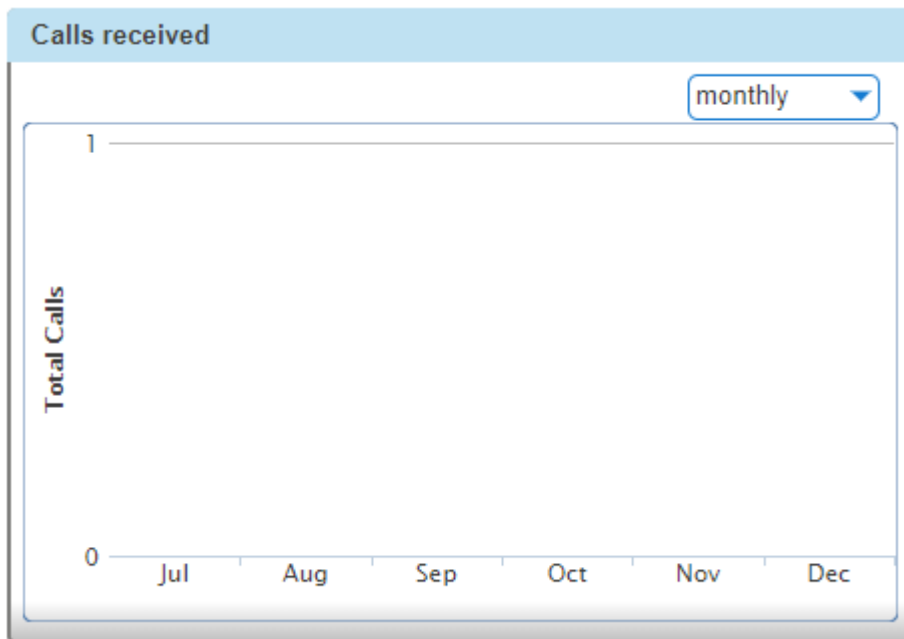
By clicking on the “Update” button once selected the graphs will then adjust to show the relevant detail for that search selection.

Please note that for all call statistics at the moment there is an issue in reporting calls routing to Hunt Groups. Instead of showing a single call, this will show multiple calls depending on the number of hops the call makes.

What Inbound Statistics are available?

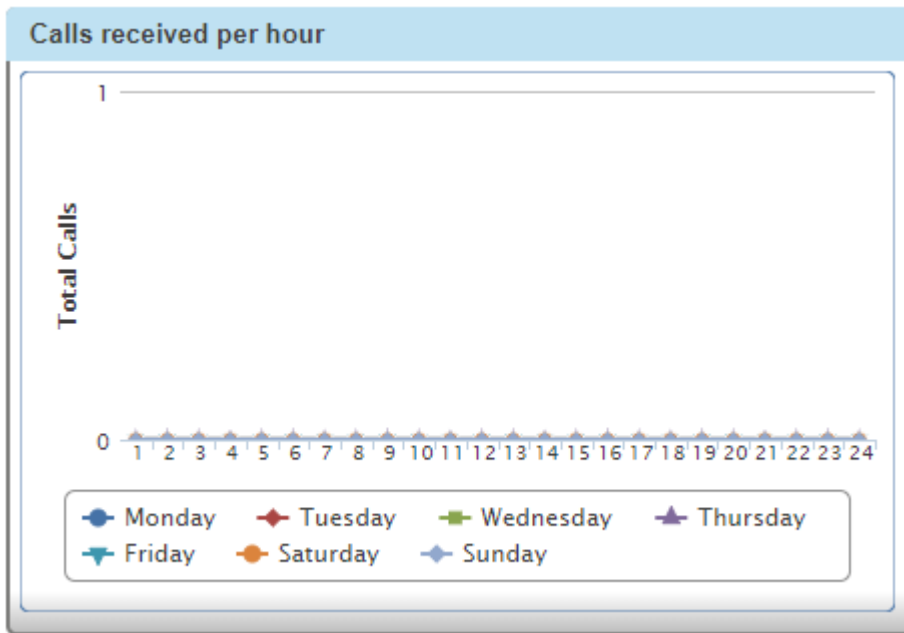
Calls Received

This graph simply shows on a weekly or monthly view, how many calls are being received to the search criteria selected.



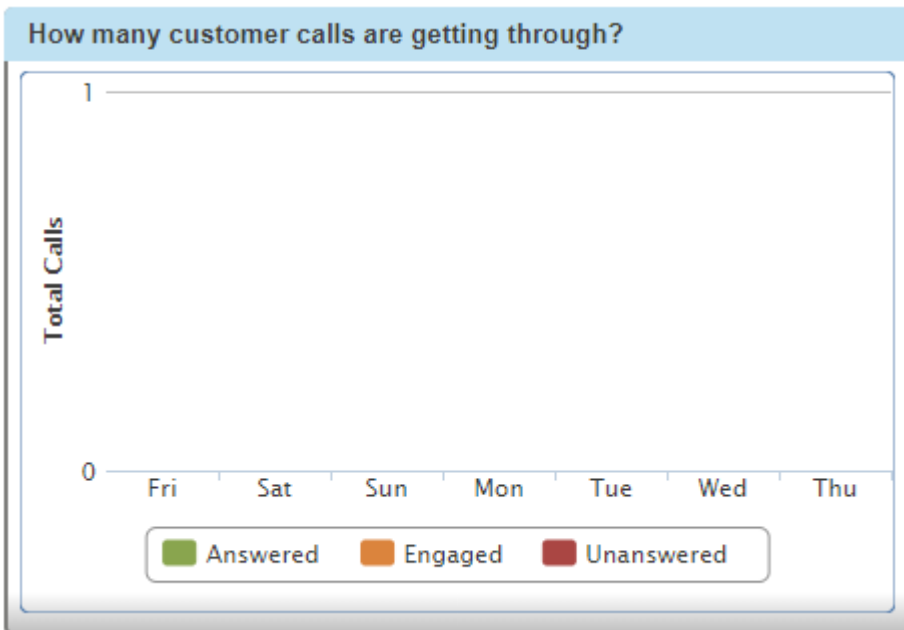
Calls Received per hour

This graph shows over the course of each day of the week, shown by different coloured lines, how many calls have been received per hour of the day. This report helps to show when your busy periods are for the search criteria selected.



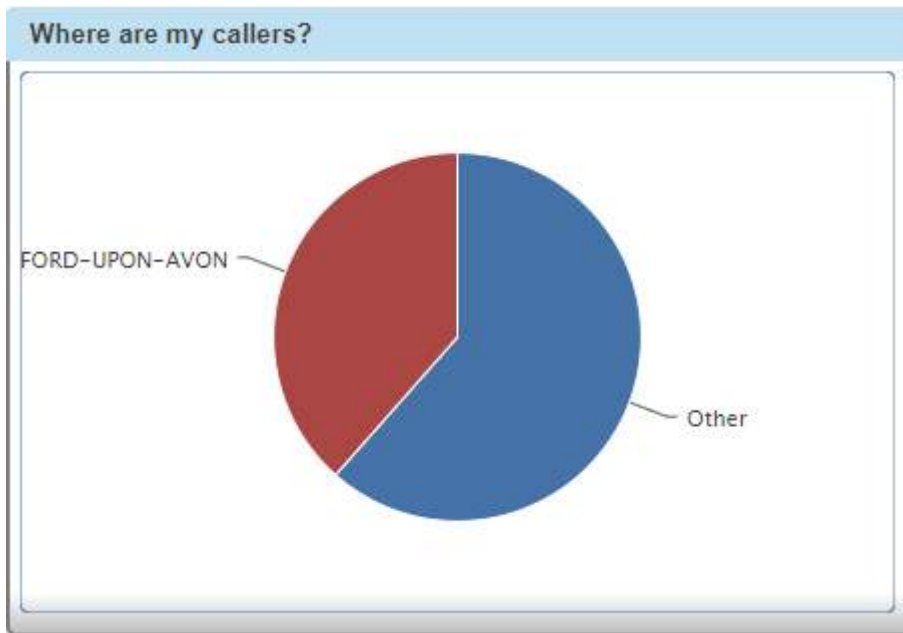
How many calls are getting through?

This report shows how many calls are getting through on a 7 day rolling cycle. For each day on the graph scale 3 coloured lines will be shown, depicting whether calls were answered, unanswered or engaged, for the search criteria you have selected. This report helps users to see whether or not they have sufficient staff to take incoming business, or whether their incoming routing plan is handling the calls being delivered.



Where are my callers located?

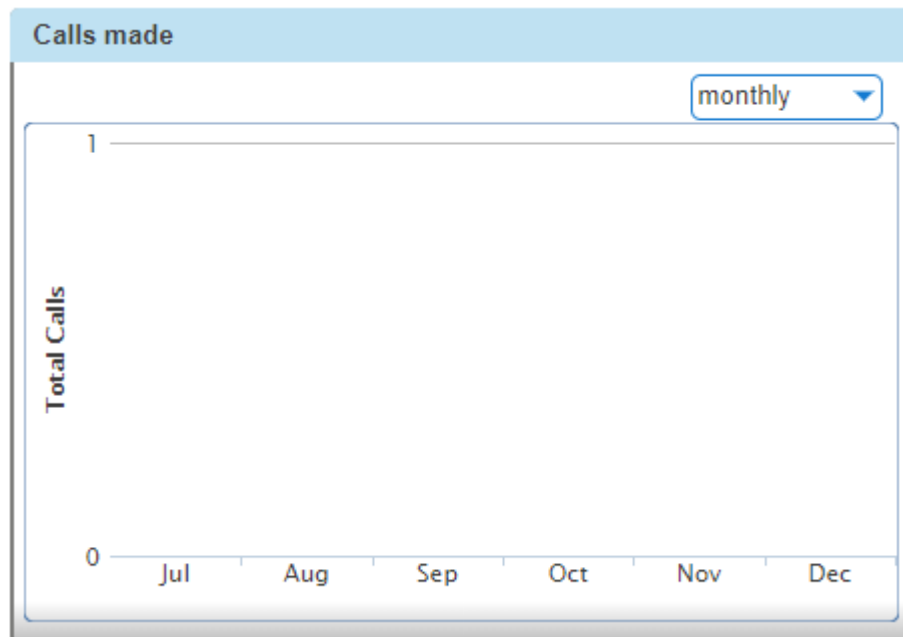
This graph shows in a pie chart format where your customers are calling from based on the search criteria selected. A number of different colours will show on this chart to depict the various caller locations, and can really add value to marketing campaigns and survey if you have advertised a specific number for that particular use.



What Outbound Statistics are available?

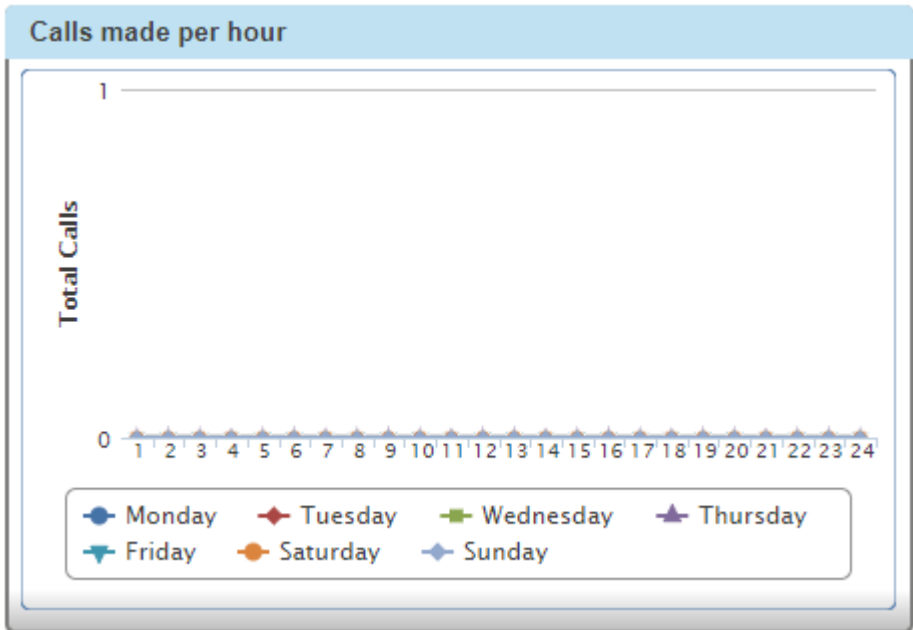
How many Outbound calls have I made?

This report shows on either a weekly or monthly basis how many outbound calls have been made from the search criteria you have entered.



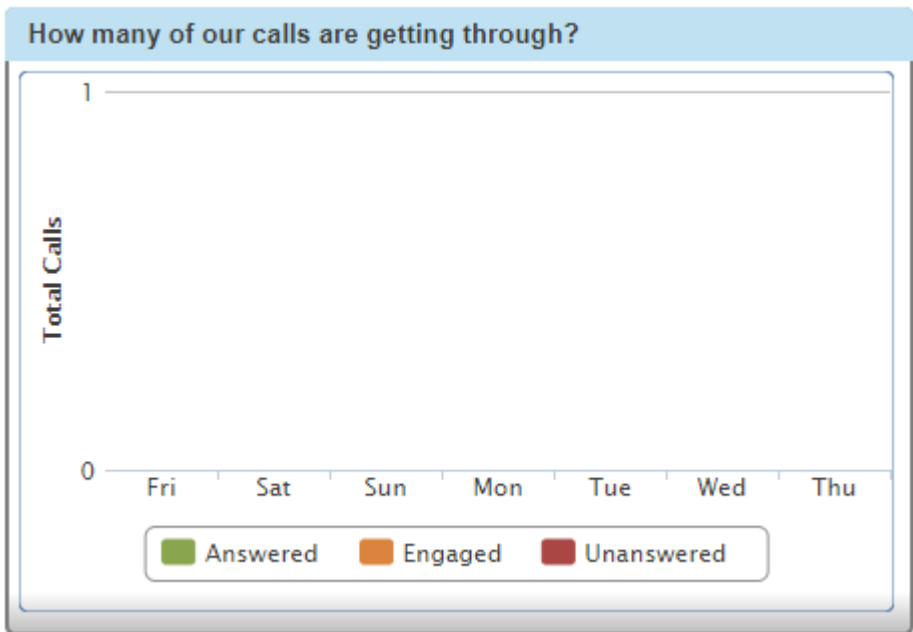
How many calls am I making each hour?

This graph shows over the course of a week how many calls are being made from the search criteria you have selected. A different coloured line will show for each day and will highlight when the busy periods are for the search criteria selected.



How many of our calls are getting through?

This graph shows how many calls are being answered, unanswered, or hitting an engage tone, based on a 7 day rolling cycle. For each day 3 different lines will show the results for that day based on the search criteria you have submitted.



Where are we calling?

This graph shows where your most frequently dialed locations are, based on the search criteria submitted. This will show as a coloured pie chart.

Advanced Statistics

As well as providing easy to use graphs under the “Performance” tab you also have the ability to look at the raw data if this has been set up by your Service Provider. If you have not requested this at the ordering stage please contact your Service Provider who can then easily provide you with this access.

Within this screen you will then have the ability to select one or all of the following search criteria:

The screenshot shows a web application interface for 'Advanced Statistics'. At the top, there is a navigation bar with tabs: Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below the navigation bar, the breadcrumb path is 'Dashboard / Advanced Statistics'. The main heading is 'Advanced Statistics'. There are several search filters: 'Site' (dropdown menu set to 'All'), 'Start Date/Time' (date field '2017-12-14', hour dropdown '00', minute dropdown '00'), 'End Date/Time' (date field '2017-12-21', hour dropdown '14', minute dropdown '29'), 'Calls Per Page' (dropdown menu set to '20'), 'Search User' (text input field with a search icon), 'Call Type' (dropdown menu set to 'Both Ways'), and 'Call Scope' (dropdown menu set to 'Both'). A blue 'Search' button is located below the filters. Below the search filters is a table with the following columns: Type, Site, Call Date/Time, Duration, Calling Number, Destination Number, and Outcome. A 'Download' button with a download icon is located below the table.

Through clicking on the “Search” button you will then be provided with a table of results based on your search criteria

All of this information within the table is exportable to an excel file through clicking on the “Download” button at the bottom of the screen.

1 or 2 Digit Dialling (Speed Dials)

One Digit Dialling enables users to dial single digit codes to call up to eight different numbers, such as frequently dialled numbers. Press # AFTER the number for one digit dialling (i.e. 0#). The One Digit Dialling range is 2 through to 9.

Two Digital Dialling enables users to dial two-digit codes to call up to 73 frequently called numbers. You can use the speed dial codes from 01 - 79, with the exception of 21, 31, 40, 41, 43 and 58 which are dedicated short codes. Press # BEFORE the number for two digit dialling (i.e. #00)

If you are using the Receptionist Console, Speed Dials set up by the user here will appear in the Receptionist Console.

Setting up 1 or 2 Digit Dialling as a Company Admin

Step 1

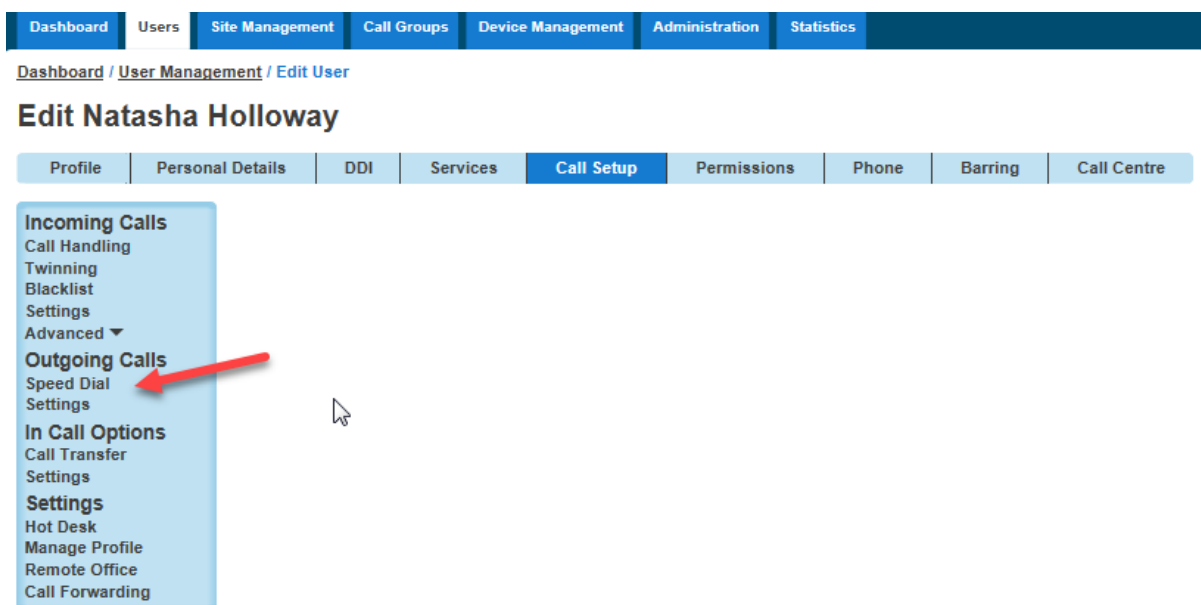
Log into the Cloud Telephony portal and go to "Users" and then click "List Users".

Step 2

Locate the user you are wanting to set up 1 or 2 Digit Dialling for. You can do this by scrolling through the User list, or you can use the search facility presented on the page. Click the "Edit" button next to the user.

Step 3

Click Call Setup and then under the "Outgoing Calls" tab select "Speed Dial"



Step 4

1 Digit Dialling is selected by default. If it is 1 Digit Dialling you want to set up then you should click "Add New". If it is 2 Digit Dialling then select the "2 Digit Dialling" tab and then click "Add New"

You can also do this in bulk by clicking the "Download Template" button and downloading a CSV file. Remember when you're uploading the file to do the following:

- The "Destination" column needs to be formatted as "text". To do this right click on column C > Format Cells > Text and click OK.
- The leading zero from the from the "Destination" Number" needs to be there for speed dials to work correctly
- There is a blank row. There must be no blank rows when uploading your bulk spreadsheet.
- If you do not wish to use a particular number a speed dial then you will need to remove it. The numbers do not need to be in numerical order.
- Speed dials can be 1-79 excluding 21, 31, 40, 41, 43 and 58 which are hashtag short codes for the Cloud Telephony solution.
- The file needs to be saved as a CSV file before uploading. Any other file format will cause the upload to fail.

Please note: If no speed dials are setup then the speed dial will start from 2 (This is because most carriers configure 1 as Voicemail).

Step 5

Click the "Search Directory" icon to assign a number from the company. Use the Search Directory fields (minimum of one field must be completed) and click "Search" to find the users you want to have a speed dial for. Use the button next to the name of the user to select them.

Search Directory X

Number Extension

First Name

Last Name

Site

Natasha Holloway(01635886392 Ext: 6392)

Step 6

Once you've got the Name and Destination field completed click "Save".

Set up 1 or 2 Digit Dialling as a User

Log into the Cloud Telephony Portal as a user and click on "Call Setup" then click "Speed Dial" then follow the instructions as per step 4 above.

Set up 1 or 2 Digit Dialling from a Handset

To set up One Digit dialling from your Cloud Telephony Handset dial *74, the number you want to assign a speed dial to, and then the telephone number you want to dial.

For example *74208081788000 will assign 08081788000 to speed dial digit 2.

Account and Authorisation Codes

The company administrator has access to setup authorisation codes and account codes through the “Site Management” section, however only one of these types can be setup at once.

To activate these features you first need to ensure the feature is enabled

WhitelabTestSite Auth Account Code Administration Manage WhitelabTestSite

Code Structure

Enable Codes Code Length

Save

Administration Code

Authorisation Codes Switch to this Account Codes Manage Users

Only one code structure may be used at a time. When switching from one structure to another any selected users will be preserved.

Manage Codes

Once this is selected then you can choose between either authorisation or account codes through the “Manage Structure” button.

Account codes are enabled to track calls made outside the company by prompting the users for an account code. Within this section you then have the option of setting up two groups, one list of optional and one list of mandatory. In order to enter a code in either group then you will need to dial *71, then the account code, and then the number to be dialled. To add a user to the right group simply search for the users and then select, before clicking on “Add Selected” to the required group.

WhitelabTestSite Auth Account Code Administration Manage WhitelabTestSite

Code Results

Code	Description
No Records Found	

Delete Selected

Add Code

Code:

Description:

Back Add

Authorisation codes are used to perform authorisation of calls made outside of a calling group by prompting the user for an authorisation code. This could be for example where a phone is located in a public area and calls are to be restricted. In this scenario all users will be prompted to input the authorisation code before the call is connected. To add a contact to this group simply search and select before clicking on “Add Selected”.

Cloud Telephony Short Codes

Please see the below table of short codes for your Cloud Telephony solution:

*74	Speed Dial 8	*88	Call Park Retrieve
*75	Speed Dial 100	*68	Call Park
*71	Per Call Account Code	*63*	Call Forwarding Not Reachable Interrogation
*610	No Answer Timer	*95	Call Forwarding Not Reachable Deactivation
*60	Music On Hold Per-Call Deactivation	*94	Call Forwarding Not Reachable Activation
*13	Location Control Deactivation	#41	Call Forwarding No Answer To Voice Mail Deactivation
*12	Location Control Activation	*41	Call Forwarding No Answer To Voice Mail Activation
*66	Last Number Redial	*61*	Call Forwarding No Answer Interrogation
#58	Group Call Park	*93	Call Forwarding No Answer Deactivation
*79	Do Not Disturb Deactivation	*92	Call Forwarding No Answer Activation
*78	Do Not Disturb Activation	#40	Call Forwarding Busy To Voice Mail Deactivation
*80	Diversion Inhibitor	*40	Call Forwarding Busy To Voice Mail Activation
*97	Directed Call Pickup	*67*	Call Forwarding Busy Interrogation
*55	Direct Voice Mail Transfer	*91	Call Forwarding Busy Deactivation
*57	Customer Originated Trace	*90	Call Forwarding Busy Activation
*99	Clear Voice Message Waiting Indicator	#21	Call Forwarding Always To Voice Mail Deactivation
*70	Cancel Call Waiting	*21	Call Forwarding Always To Voice Mail Activation
*65	Calling Line ID Delivery per Call	*21*	Call Forwarding Always Interrogation
#31	Calling Line ID Delivery Blocking Persistent Deactivation	*73	Call Forwarding Always Deactivation
*31	Calling Line ID Delivery Blocking Persistent Activation	*72	Call Forwarding Always Activation
*67	Calling Line ID Delivery Blocking per Call	#9	Automatic Callback Menu Access
#43	Call Waiting Persistent Deactivation	#8	Automatic Callback Deactivation
*43	Call Waiting Persistent Activation	*87	Anonymous Call Rejection Deactivation
#92#	Call Return Number Deletion	*77	Anonymous Call Rejection Activation
*69	Call Return	*62	Voice Portal Access
*11	Call Retrieve	*86	Voice Mail Retrieval
*98	Call Pickup		

Anonymous Call Rejection

Anonymous Call Rejection enables a user to reject calls from anonymous parties who have explicitly restricted their Caller ID. By activating the service via a web interface, callers without available caller ID are informed that the user is not accepting calls at that time. The user's phone does not ring and the user sees or hears no indication of the attempted call. This service does not apply to calls from within the group.

If a user in a Call Queue Group has Anonymous Call Rejection enabled and a "withheld" caller reaches the front of the queue, the call will not be delivered to the user with Anonymous Call Rejection, even if that user is available. The call will wait until another user without Anonymous Call Rejection enabled becomes available.

Please note: only a Company Administrator can set up a user with Anonymous Call Rejection.

Short Codes

- ◆ Activate: *78
- ◆ Deactivate *87

Activating / Deactivating Anonymous Call Rejection for a User

Step 1

Log into the Cloud Telephony portal and select "Users" and "List Users" and using the search screen identify the user you want to activate or deactivate Anonymous Call Rejection for and click "Edit".

Step 2

Click "Call Setup" and then under the Incoming Calls section select "Settings".

Use the button next to "Reject Withheld Number" to either switch this feature on or off. Click Save.

The screenshot displays the user management interface for 'Natasha Holloway'. The navigation menu includes 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. The 'Call Setup' tab is selected, and the 'Incoming Calls' section is active. The 'Settings' option is highlighted in the left sidebar. The main content area shows the 'Incoming Call Settings' for the user, with the 'Reject Withheld Numbers' setting highlighted by a red box and set to 'off'. Other settings include 'Enable music for calls on hold' (on), 'Lookup Caller ID when none is Provided' (off), 'Present Incoming Caller's ID for External Calls' (on), 'Present Incoming Caller's ID for Internal Calls' (on), and 'Do Not Disturb' (off). An 'Apply' button is located at the bottom right.

Auto Attendant

As a company administrator you have the ability to setup Auto Attendants for your company. An auto attendant allows callers to your company to be automatically transferred to a person or group without the intervention of an operator or receptionist.

In order to setup an auto attendant you simply need to click on the “Auto Attendant” button and then select either “Edit” or “Create New Auto Attendant” as required.

Create New Auto Attendant

Account Menu Options Assign Number Audio

H?W

Location

Site: Choose One

WH?T

Attendant Details

Name: [Text Field] Username: [Text Field] @
whitelabtestpurpledev.com

Department: Choose One

WH?T

Dialling Scope

Scope of extension dialling Company Site Department

Scope of name dialling Company Site Department

Name Dialling Entries LastName + FirstName LastName + FirstName or FirstName + LastName

WH?T

Cancel Continue

Once in the setup wizard you first need to select a site the auto attendant will be assigned to, along with giving it a name, username, and assigning it to a department against that site. Alongside this you also need to define what the dialling scope of that auto attendant is if you wish to use extension or name dialling on the auto attendant, as to whether it can make contact to company, site, or department level contacts.

Clicking on the “Continue” button will then ask you to define the menu options. In order to ensure the auto attendant links to the right “Schedule” for your company, you can then select from the drop down menu the right “Schedule” that best defines Business Hours, and Holiday. If you haven’t set up your company schedules please refer to this section within this guide called “How do I setup schedules?”

Auto Attendant Options

Use the same menu all the time Use different menus during and after business hours

Open Hours: None ? +

Closed Hours: None ? +

WH?T

After selecting the right schedule you’ll then need to complete the grid to decide on the right routing of the call when the corresponding number is pressed.

The options which can be implemented here are:

Transfer with Prompt – NOT CURRENTLY AVAILABLE – This will allow the user to here a recorded message played once they have selected a menu item, i.e. Please hold whilst we connect you.

Transfer without Prompt – This will forward the call to the required destination once a menu item is selected. This destination could be a user, call group i.e. hunt group or new auto attendant.

Transfer to Operator – This will forward the call to the Company Operator as defined under the “Company Management” section.

Name Dialling – This will allow the caller to type in a name based on your dialling scope through the PBX handset, i.e. my name Chris would be typed from the handset as 222447774447777

Extension Dialling – This will allow the caller to type in a user’s extension, allowing the call to connect to this extension based on your dialling scope.

Repeat Menu – This option will replay the call recording associated to this auto attendant to effectively replay the menu items to the caller

Exit – This option will effectively terminate the call on behalf of the caller

None – This option will mean the menu option will take no effect on the call routing of the call

Once you have set this up for Business hours then you would need to click on the “After Hours” tab which will allow you to define this also.

Clicking on the “Continue” button will then allow you to define a number for the auto attendant, extension for internal call routing, and display name for presentation once the call is delivered.

Create New Auto Attendant Account Menu Options Assign Number Audio

Find a Fixed Number

Search...

01635886397

WH?T

Extension

Extension: ?

WH?T

Display Caller ID

Display First Name: ? Display Last Name:

WH?T

The final page to establish you auto attendant is to upload the audio file to be played when the call is connected. This step can be bypassed if recording your message via a phone. In order to upload this you'll need to record a file in the following format:

- .wav format
- Encoded with CCITT u-Law
- Formatted at 8.000 kHz, 8 Bit mono, 7 kb/sec

Create New Auto Attendant Account Menu Options Assign Number Audio

When Open

Use System Default

Custom Audio File

Upload File ?

WH?T

Once your file has been uploaded then you should then be able to click either "Finish and Edit" or "Finish and Show List" to return you to the main auto attendant section.

Recording an Auto Attendant message with a Cloud Telephony Phone

After setting up your Auto Attendant without a file recording you have the ability to record an Auto Attendant message through a phone allocated to the same site as the Auto Attendant.

In order to action this you have to first setup the Company Voice Portal pass code which has now been added as a definable option under the Administration/Voice Portal option.

The screenshot shows the 'Company Voice Portal' configuration page. It features a header with the title and a 'HOW?' icon. Below the header are four main sections: 'Information', 'Find a Fixed Number', 'Extension', and 'Portal Passcode'. The 'Information' section contains a text box stating that the voice portal is created at the company level. The 'Find a Fixed Number' section shows the current number '01887440362' with 'Change' and 'Remove' buttons. The 'Extension' section has a text input field containing '2222'. The 'Portal Passcode' section has two text input fields for 'Change Password' and 'Re-enter Password', with a question mark icon next to the first field. At the bottom right, there are 'Remove Voice Portal' and 'Save' buttons. A 'WH?T' logo is visible in the bottom right corner of each section.

Prior to recording an Auto Attendant through your phone please note that you can only do this from an internal phone and when recording for an Auto Attendant that is on the same site as the phone you are calling from. In some cases you may need to ensure all Auto Attendants are assigned to a single site where your voice recording resource is located, if looking to manage multiple multi-site Auto Attendants.

In order to access the Company Voice Portal to record a message for the required Auto Attendant you:

1. Dial the Company Voice Portal number as established for the Company
2. At the prompt enter the Voice Portal 4 digit extension for the Company Voice Portal
3. Enter the pass code defined
4. Press menu option 1 to change the Auto Attendant greeting
5. At the prompt for the Auto Attendant enter the 4 digit extension of the Auto Attendant you would like to record.
6. Press 1 to record business hours greeting
7. Press 2 to record an out of hours greeting
8. Once recorded looked to review prior to saving
9. Test the Auto Attendant by calling the incoming number and routing to test that this has been recorded correctly and adjust through points 1 – 8 if required.

Please note: Within the Cloud Telephony system we have tested routing a call down to 3 levels of auto attendant.

Automatic Call Back

If you call another Cloud Telephony user within your company and they are busy, Automatic Call back allows you to be notified when they are off the phone.

Once the Automatic Call Back feature is enabled, when you call an internal extension [1234 for example], and it's busy - you will hear an announcement:

"The line you are calling is busy, please press 1 if you would like to be notified when the line becomes available"

Press 1 on the phones keypad in order to activate this. You will then hear the following announcement:

"The line will be monitored for 30 minutes; you will be notified by a special ringtone when the line becomes available"

Once the internal extension becomes available, you will shortly get a call back to your phone - the calling number will be the extension you originally contacted [the ring tone will be different from your standard one, - you cannot amend this], when you answer you will get a message:

"Call back to [dialled extension e.g. 1234], in progress, hang-up to cancel call-back. Press any key or hold the line to proceed with call-back"

Your phone will then ring the originally dialed extension [1234 in this example]

Short Codes

- ◆ Menu Access: #9
- ◆ Deactivate #8

Setup Automatic Call Back for a User

Automatic Call Back can only be set up by a Company Administrator.

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user that you want to add Automatic Call Back for and then click the "Edit" button.

Step 2

Select the "Call Setup" tab and then click "Settings" under the Outgoing Calls tab. From here you can turn Automatic Call Back on or off. Click "Apply" to save your changes.

Edit Natasha Holloway

- Incoming Calls**
 - Call Handling
 - Twinning
 - Blacklist
 - Settings
 - Advanced ▾
- Outgoing Calls**
 - Speed Dial
 - Settings
- In Call Options**
 - Call Transfer
 - Settings
- Settings**
 - Hot Desk
 - Manage Profile
 - Remote Office
 - Call Forwarding

Outgoing Call Settings

Settings

Enable Automatic Callback off

Withhold my number when making calls off

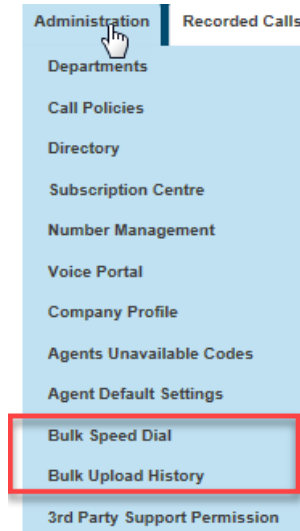
WH?T

✓ Apply



Bulk Speed Dial

Under the Administration tab of the Cloud Telephony portal there will be two new menu options for a Company Administrator to use. When setting up a **new** company you will be able to create a set of 1 and 2 digit speed dials and then copy those details to one, some or all the users within the organisation. **We recommend that all users are created before using this service.**

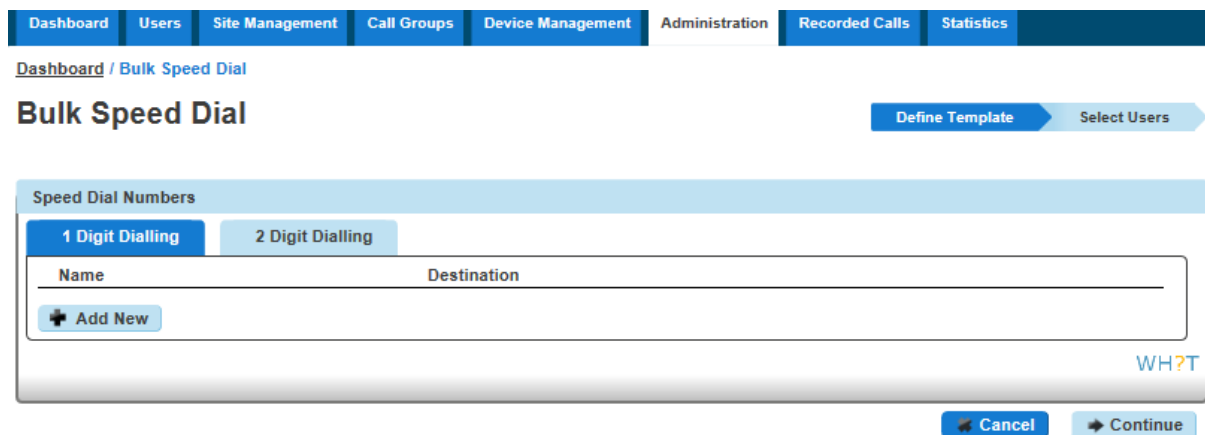




When an Administrator accesses the Administration menu they will be presented with two new options

Bulk Speed Dial - option create speeds dial and apply to multiple users

Bulk Upload History - Historical log of an Administrators changes

To create a new speed dial list select Administration>Bulk Speed Dial and you'll then be presented with the following screen, where you can add the 1 and 2 digit speed dials to a group of users by toggling between the 1 and 2 Digit Dialling tabs



Enter the speed dial details freehand or select from the Company's directory by clicking the  icon, then search for the user details you wish to add. To delete a row hit the  icon.





Dashboard / Bulk Speed Dial

Bulk Speed Dial

Define Template Select Users

Speed Dial Numbers

1 Digit Dialling 2 Digit Dialling

	Name	Destination	
2	Natasha Holloway	01635886392	 
3	Roy Farrow	01635886394	 

+ Add New

WH?T

Cancel Continue

Once you are happy that you have correctly created the speed dials hit the “Continue”, after which you will be presented with the below screen where to you can select the users you wish to apply the list(s) by clicking “add selected “and then “finish and save”.

Dashboard / Bulk Speed Dial

Bulk Speed Dial

Define Template Select Users

Select Users

Search...

- Natasha Test
- Andrew Robinson
- Richard James
- Roy Farrow
- Tom Edwards

+ Add Selected

- Natasha Holloway

WH?T


Cancel Finish and Save

You'll be asked to acknowledge the following implication after which the speed dials will be created against the selected users.

Confirm X

Warning - by submitting this request you will be overwriting all of the current speed dials that the user(s) selected have set up. Are you sure you want to continue?

No Yes



The service has been designed to assist with the initial set up of company and isn't suitable for the ongoing management of a company's speed dial list, as it:

- Doesn't retain any record of previously provisioned speed dials
- Will overwrite the personal amendments made by a user
- Will delete records where a blank is left basically meaning you cannot bulk update a single entry

The Bulk Upload History tab (found under the "Administration" header) will show the event type, who requested the change, when they requested it, the status and when it completed as an audit log of activity.

Busy Lamp Field (BLF)

A Busy Lamp Field (BLF) gives you the ability to monitor a fellow colleague's line to see if they are available to take a call that you may transfer to them, or to enable you to pick up their calls.

When implemented the phone will show the user's caller id on the pre-defined line keys on your device. This line key can also be used as a speed dial to contact your colleague's number quickly when transferring a call or when needing to speak to them directly.

Devices	Standalone keys available	1 sidecar - available line keys	2 sidecars - available line keys	3 sidecars - available line keys
Cisco 501	6	30	50	N/a
Cisco 502	0	30	50	N/a
Cisco 504	2	32	50	N/a
Cisco 509	10	30	50	N/a
Cisco 525	3	30	50	N/a
Polycom SoundPoint 450				
Polycom SoundPoint 650	4	18	32	46
Polycom VVX310	4	32	50	
Polycom VVX410	10	32	50	
Polycom VVX500	10	32	50	
Polycom VVX600	10	32	50	
Yealink W52P DECT	N/a	N/a	N/a	N/a

Setup and Edit Busy Lamp Fields (BLFs)

Busy Lamp Fields can only be set up by a Company Administrator.

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user that you want to add Busy Lamp Fields for and then click the "Edit" button.

Step 2

Select the "Call Setup" tab and then "Advanced" and "Busy Lamp" under the "Incoming Calls" tab.

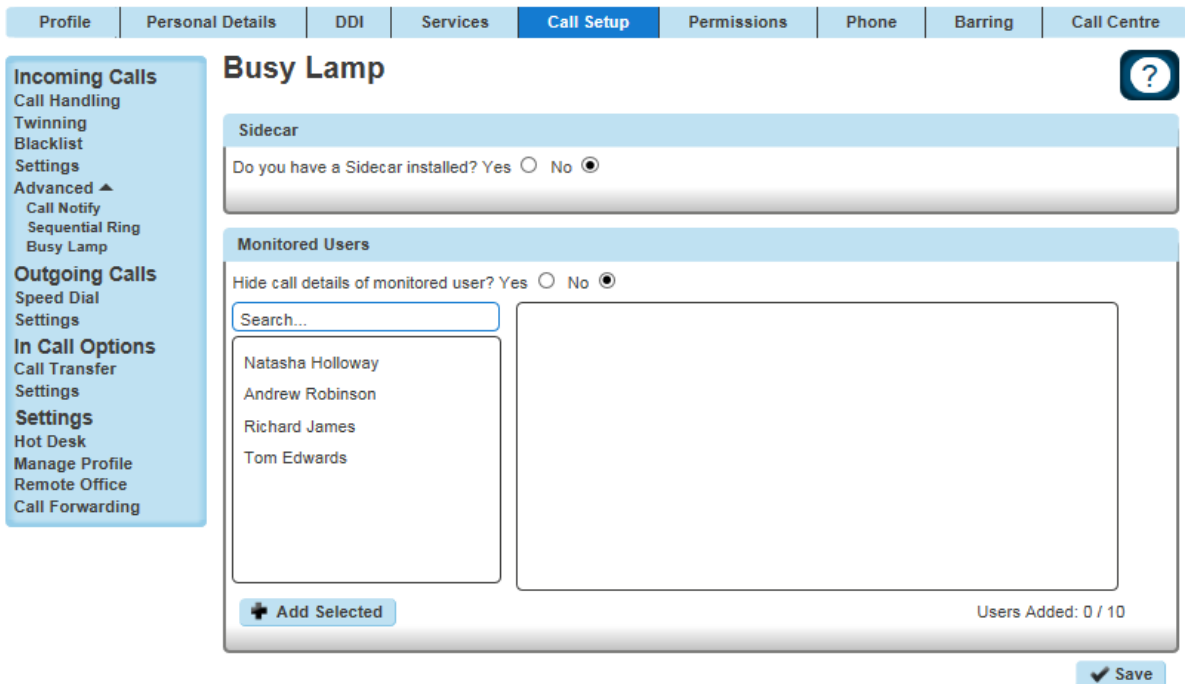


Step 3

The Cloud Telephony solution will detect to see if the user's device is compatible for Busy Lamp. If not, you'll be returned with an error message.

If the handset is compatible for Busy Lamp, select if you have a Sidecar installed, and then what users you want to be "monitored".

You can remove Busy Lamp Fields (BLFs) by clicking the "X" next to the user you want to remove. Click Save.



To ensure that the BLFs do not interfere with incoming calls to that handset, please ensure that "hide call details of monitored users" is ticked 'yes'.

Busy Lamp Field (BLF) Name Searching

The Cloud Telephony portal has been updated to improve the searching for a user when editing a BLF, previously users were only searchable by the full username

The search has been improved to now include the First and Last Name fields and will return results on partial matches of the user first and/or last name.

The screenshot shows the 'Edit User' interface for 'Roy Farrow'. The top navigation bar includes 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', 'Recorded Calls', and 'Statistics'. Below this, the breadcrumb trail is 'Dashboard / User Management / Edit User'. The main title is 'Edit Roy Farrow'. A secondary navigation bar contains 'Profile', 'Personal Details', 'DDI', 'Services', 'Call Setup' (highlighted with a red box), 'Permissions', 'Phone', 'Barring', and 'Call Centre'. On the left, a sidebar lists various call management features under categories like 'Incoming Calls', 'Outgoing Calls', and 'In Call Options'. The main content area is titled 'Busy Lamp' and contains a 'Sidecar' section with a radio button for 'Do you have a Sidecar installed?' (set to 'No'). Below that is the 'Monitored Users' section, which has a search input field containing 'nat' (highlighted with a red box) and a 'Hide call details of monitored user?' radio button (set to 'No'). A list of users is displayed: 'Natasha Holloway' and 'Natasha Test'. At the bottom of the 'Monitored Users' section, there is an 'Add Selected' button and a status 'Users Added: 0 / 10'. A 'Save' button is located at the bottom right of the page.

Call Barge

Call Barge allows specified users to "barge" into an active call and set up a three-way call. Every Cloud Telephony Company will have one Call Barge Group set up and does not require a Call Centre subscription to use.

Setup & Edit Call Barge

Call Barge can only be set up and edited by a Company Administrator.

Step 1

Log into the Cloud Telephony portal and select "Call Groups" and then "Call Barge".

Step 2

You will now have the Call Barge set up screen. All Cloud Telephony users will be shown in the left hand table that are currently not set up as a Monitored or Managing User. Select all the users that you want to be monitored or managing and select the relevant "Add Selected" button.

Only Managing Users can barge into calls, and they can only barge into calls of Monitored Users.

A Call Centre Agent or Supervisor that has the Call Barge service subscribed will automatically appear in the appropriate list on this screen and cannot be removed or unassigned using the "Remove All" or "Unassigned All Users" buttons. The Call Centre Barge feature is classed as a higher priority.

Once you've made all the changes, click Save.

The screenshot shows the 'Call Barge' configuration interface. At the top, there is a navigation bar with tabs for Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below the navigation bar, the breadcrumb path is 'Dashboard / Call Groups / Call Barge'. The main heading is 'Call Barge'. On the right side, there is a 'HOW?' help icon. The interface is divided into two main sections: 'Monitored Users' and 'Managing Users'. On the left, there is a 'Select Users' panel with a search bar and a list of users: Natasha Holloway, Richard James, Tom Edwards, Andrew Robinson, and Roy Farrow. Below the 'Monitored Users' list, there are 'Add Selected' and 'Remove All' buttons. Below the 'Managing Users' list, there are also 'Add Selected' and 'Remove All' buttons. At the bottom right of the 'Managing Users' section, there is a 'Warning Tone' toggle switch set to 'on'. At the very bottom of the screen, there are two buttons: 'Unassign All Users' and 'Save'. A 'WH?T' help icon is also visible in the bottom right corner of the main content area.

Barging into a call

A user has to be set up as a Managing User to be able to barge into a monitored users call. To barge into the call, the Managing User should dial *33. Once the managing user hears the stuttered dial tone they should enter the monitored user's extension number.

When a barge happens, the Monitored Users hears a Barge-in warning tone. The other party is briefly put on hold for 1 second and will hear silence while the Monitored User is receiving the warning tone.

There is no limit on how many Managing Users can barge in on a single call of a monitored user.

If a call is unanswered by a Monitored User and a Managing User barges in on this call, then the call will be answered by the Managing User and this won't invoke a three-way call.

Call Barring

As an administrator you have the ability when editing a user to adjust call barring options which would override the site call plan. You can select these settings for when a user is making or transferring/diverting a call.

The screenshot shows the 'Edit User' interface for Roy Farrow. The 'Barring' tab is selected, and the 'Call Plan Options' section is visible. The 'When making a call' sub-tab is active, showing a list of call barring options with toggle buttons. The 'Override site call plan' option is currently set to 'off'. Other options include 'Allow freephone calls', 'Allow national calls', 'Allow international calls', 'Allow chargeable directory service calls', 'Allow premium calls', 'Allow mobile calls', 'Allow 084 calls', and 'Allow 087 calls', all of which are currently set to 'on'. A 'Save' button is located at the bottom right of the form.

In order to make the changes you simply need to click on the “On” and “Off” buttons to allow the override and adjust the proposed plan

You are able to set 8 different types of call barring for outgoing calls:

Allow Freephone calls – This gives permission to make calls to any freephone numbers such as 080 numbers

Allow National calls – This gives permission to make calls to any UK National location such as 01, 02, and 03 numbers

Allow International calls – This gives permission to make calls to any International destination such as 00 XX numbers

Allow Chargeable Directory Services calls – This gives permission to make calls to any chargeable directory service such as 118 XXX or 123 numbers

Allow Premium calls – This gives permission to make calls to any Premium location such as 09 numbers.

Allow Mobile Calls – This gives permission to make call to any UK mobile networks such as Vodafone, EE or O2 on 07 numbers

Allow 084 Calls – This gives permission to make calls to any Non Geographic numbers beginning with 084.

Allow 087 Calls – This gives permission to make calls to any Non Geographic numbers beginning with 087.

Call Forwarding

The Call Forwarding feature allows you to forward incoming calls to a number of your choice, or to a voicemail message box. Users have the option to activate and deactivate the service by dialing a feature access code or configuring the service via their web interface or simply pressing a key on the phone. If activated a user must specify the forwarding number.

If a user has Connect they will be able to control how calls are forwarded depending on whether someone called their mobile or fixed number. This is referred to as Call Forwarding Selective.

If a user is also using a soft client then the Call Forwarding button on their device will no longer work (Polycom VVXs) or disappear (Polycom SoundPoint or Cisco's).

Short codes

Action	Shortcode
Call Forwarding Always Activation	*72
Call Forwarding Always Deactivation	*73
Call Forwarding Always Interrogation	*21*
Call Forwarding Always to VM Activation	*21
Call Forwarding Always to VM Deactivation	#21
Call Forwarding Selective Activation	#76
Call Forwarding Selective Deactivation	#77
Call Forward Busy Activation	*90
Call Forward Busy Deactivation	*91
Call Forward Busy Status Check	*67*
Call Forward Busy to VM Activation	*40
Call Forward Busy to VM Deactivation	#40
Call Forward No Answer Activation	*92
Call Forward No Answer Deactivation	*93
Call Forward No Answer Status Check	*61*
Call Forward No Answer to VM Activation	*41
Call Forward No Answer to VM Deactivation	#41
Call Forward Not Reachable Activation	*94
Call Forward Not Reachable Deactivation	*95
Call Forward Not Reachable Status Check	*63*

Turning Call Forwarding On or Off as a Company Administrator

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user that you want to set up Call Forwarding for and then click the "Edit" button.

Step 2

Click the "Call Setup" tab and then under Incoming Calls select "Call Handling". You can now set up the following options:

- When I'm Busy - you can forward calls to voicemail or a specific number when you are on another call.
- When I Don't Answer - you can forward calls to voicemail or a specific number when you don't answer after a certain amount of rings. To do this you should leave the number box blank, tick the tick box and state the amount of rings before the call reaches voicemail
- When I'm Unreachable - you can forward calls to a specific number (not voicemail) when your handset is not registered or powered on (e.g. If your internet access is down, incoming calls would go to this number).

The screenshot shows the 'Call Handling' settings page. At the top, there is a navigation bar with tabs: Profile, Personal Details, DDI, Services, Call Setup (selected), Permissions, Phone, Barring, and Call Centre. On the left, there is a sidebar menu with categories: Incoming Calls (Call Handling, Twinning, Blacklist, Settings, Advanced), Outgoing Calls (Speed Dial, Settings), In Call Options (Call Transfer, Settings), and Settings (Hot Desk, Manage Profile, Remote Office, Call Forwarding). The main content area is titled 'Call Handling' and contains three sections: 'When I'm Busy', 'When I don't answer', and 'When I'm Unreachable'. Each section has a radio button for 'No Action' and a radio button for 'Forward the call to:' followed by a text input field and a search icon. The 'When I don't answer' section also has a dropdown menu for 'after 3 rings'. A 'Save' button is located at the bottom right of the page.

Turning Call Forwarding On or Off as a User

A user can set their own Call Forwarding rules from the Cloud Telephony portal. Once logged in they can select the "Call Setup" option and the Incoming Call Handling option.

Turning Call Forwarding Always/Selectively On or Off

The Call Forwarding menu option on the left (underneath Settings) allows for calls to be forwarded to a destination all the time, or for calls to be forwarded selectively (to another number, or voicemail) depending on whether the caller reached the users mobile or fixed number.

Turn Call Forwarding On/Off as a User using a Soft Client

Soft Clients can be used instead of a handset, some settings can also be changed directly from a soft client - please see your Service Provider for further details.

Call Notify by Email

This enables a user to define criteria that cause certain incoming calls to trigger an e-mail notification. If an incoming call meets user-specified criteria an e-mail is sent to the notify address informing the user of the details of the incoming call attempt. A criteria set is based on incoming calling line identity, time of day and day of week. Multiple criteria sets can be defined.

Turning Call Notify by Email On or Off

Call Notify by Email can only be set up for a user by the Company Administrator.

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user that you require and then click the "Edit" button.

Step 2

Click the "Call Setup" tab and then under Incoming Calls select "Call Notify" under the "Advanced" option in Incoming Calls.

The screenshot shows the 'Call Notify' configuration page. The navigation menu on the left includes 'Incoming Calls', 'Outgoing Calls', and 'In Call Options'. Under 'Incoming Calls', 'Call Notify' is selected. The main content area has three sections: 'Notify Options' with a toggle set to 'on' and a 'Notify Email' text box; 'Restrict by Schedule' with radio buttons for 'all the time' (selected) and 'only when I'm available'; and 'Number Restriction' with radio buttons for 'any number' (selected) and 'only for these numbers'. A 'Save' button is at the bottom right.

Step 3

From here you can switch Call Notify by Email on or off. If you select "On", you'll get some more options. You should enter your email address into the "Notify Email" text box.

You can change the email address that gets the notifications at any time by editing the Notify Email text box and clicking "Save".

If you want it to notify you at certain times, you can set up a Schedules and select this by using the "Use call notify on this number only when I'm available".

If you want to be notified by email of a call from a certain number(s) within your directory, you can do this as well by selecting "Notify me only for these numbers" and using the textbox and the Add button, or you can search your directory by clicking the directory icon.

Call Paging

Call Paging is a feature within the Cloud Telephony portal that allows a user to call numerous users all at the same time with one-way audio (i.e. only the caller can speak). Once a call is placed then all handsets set up to receive a call in the call paging group will be answered automatically on loud speaker.

Call paging only works for users that use handsets and not soft clients.

- Polycom devices will announce the message instantaneously if the user is not on a call.
- Cisco devices will announce the message instantaneously if the user is not on a call. If a user's is on a call, the Call Page will announce and put the current call on hold.
- Yealink devices will display the page as a call that needs to be answered. If the user is on a call, then it will display the Call Page as a call waiting. If there are other users that are in the group that are available to receive the call page, the user that is on the call will lose the page

Setting up a Call Page Group

Call paging is set up by the Company Administrator for a user.

You need to ensure you have a Call Paging Add-On subscription to use this functionality.

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Page Group". On the Page Group page click "Add".

Step 2

You will now be in the wizard for Call Page Groups. The first page you will be setting up the following:

- Site - the site that the Call Page will be used for. All the users of the Call Page Group will be on this site.
- Group Details - enter the name, username and department that you'd like the group to be assigned to. This is so that you can quickly identify the group if you ever need to edit or delete the group.
- Caller ID - this will be what is displayed on the handset when the Call Page Group is used.

Step 3

You can now select your "Sending users". These are you users that can make a call from this group to those "Receiving User" (see next step).

Add everyone that you want to be able to send a call page and then "+Add Selected" and once all users are in the right hand table you can click "Continue"

If you have added a user in error you can use the white "X" next to the user's name.

Step 4

You can now select the "Receiving Users", these will be the people that get the call page when the call page extension is dialled.

Step 5

Now you should give the group a unique extension number so that when it is dialled by one of the "Sending Users" a call is initiated to all the "Receiving Users" in the group.

If you click "Finish and Edit" this will save the Call Page Group that you've just configured and take you back to the start of the wizard "Account" so you can edit the group as you see fit.

If you click "Finish and Show List" this will take you back to the Page Group page within the Cloud Telephony Portal and you will now see your new Call Page Group.

Editing a Call Page Group (including Add/Removing Users)

You are unable to edit the Site or the Username of the Call Page group.

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Page Group". On the Page Group page click "Edit" next to the Call Page Group that you wish to edit.

Step 2

Using the links at the top of the page you can edit the following:

- Account
 - Group Details - you change the name and department
 - Caller ID - this will be what is displayed on the handset when the Call Page Group is used.
- Select Sending Users
 - Add new users by clicking the "+Add Selected" button.
 - Remove users by clicking the white "X" next to the user.
- Select Receiving Users
 - Add new users by clicking the "+Add Selected" button.
 - Remove users by clicking the white "X" next to the use
- Assign Extension
 - Change the Extension number of the Call Page Group.

Deleting a Call Page Group

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Page Group". From here select the Call Page Group that you want to delete (you can select multiple call page groups to delete) and then hit the "Delete Selected" button.

Click on the "Confirm" button to confirm the deletion.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. The main content area is titled "Page Group" and includes search filters for Name, Number, Site, and Department. A table lists "Page Groups" with columns for Name, Site, Department, Phone Number, and Status. One entry, "Test Page Group1", is selected. Below the table are buttons for "Delete Selected" and "Add". A "Confirm" dialog box is open, asking for confirmation to delete the selected page group(s).

Dashboard / Group Management / Page Group

Page Group

Name: Site:

Number: Department:

<input type="checkbox"/>	Name	Site	Department	Phone Number	Status	
<input checked="" type="checkbox"/>	Test Page Group1	WhiteiabTestSite		(7897)	✔	<input type="button" value="Deactivate"/> <input type="button" value="Edit"/>

Confirm

On performing this action, all the settings of the Page Group(s) will be deleted. Are you sure you wish to continue?

- Test Page Group1

Call Park

As a company administrator you have the ability to setup Call Park. The Call Park service allows a user to hold the call for an extended period of time, allowing them access to other features and calls as well as making the call available to other users who are notified. A Call Park group is site specific and each user can only be part of one call park group.

In order to park a call the user would enter *68 from their PBX phone, followed by the internal extension of the user they would like to park the call against. To retrieve a parked call a user from the group can dial *88 from their PBX phone followed by the extension to retrieve the call.

To create a call park group you simply need to select the "Call Park" section and click on "Create New Call Parking". Within here you'll then need to give the group a name and select the site the group is to be assigned against. Once confirmed you can then select the users who form the group from searching for them and selecting the tick box next to them, before clicking the "Add Selected" button to move them over to the main view.

Once all users required have been added to this group, you can simply click on the "Create" button to confirm and establish this Call Park Group.

Call Park Short Codes

Park a call	User presses transfer when on a call and then dials *68 (or pressed "Park") followed by the extension number of the user the call is to be parked against
Group Park	Users within a group press 'GrPark' and the handset will randomly allocate against another user's extension. Each user can only be in one group.
Retrieve a parked call	User dials *88 from handset (or presses 'GetPark') and dials the extension of the handset the call is parked against.

Device Customisation on Polycom and Cisco devices are different:

- On Polycom 'Get Park' on the soft keys and 'Call Retrieve' on line keys can be used to retrieve a parked call.
- On Cisco 'Get Park' on soft keys (also appearing as 'Parked Call Retrieve' on Device Customisation) can be used to retrieve a parked call. Cisco handsets do not allow this to be provisioned on line keys.

Call Pickup

As a company administrator you have the ability to setup Call Pickup. This feature allows you to answer any phone ringing within the defined call-pickup group. If part of a group, then the user will be able to pick up the call by dialling *98 which will connect that call to them. Please note that if there are multiple calls ringing within a group the call which has been ringing the longest will be picked up first.

Each user is only able to be in one call pickup group and these can be created through the “Call Pickup” button

Once within this section you’ll need to give the call pickup group a name and assign it against a site. From here you can then select the users who are to form the group, by searching and then checking the tick box next to them before clicking on “Add Selected” to move them over to the main view.

Create Call Pickup

[HOW?](#)

Create Call Pickup

Name:

Site:

[WH?T](#)

Select Users

Roy Farrow

Andrew Robinson

[WH?T](#)

Call Queue Groups

A call queue group is a basic simultaneous Hunt Group with the ability to queue up to 25 calls at network level should all users be busy. Each Call Queue Group can be customised with its own welcome and comfort message as well as its own hold music, and has the added capability of a user breakout.

Charge is only applied to a user who can be part of a Call Queue Group. Therefore, you could have 3 users over multiple groups and only be charged for those 3 users, rather than users per group.

If a user in a Call Queue Group has Anonymous Call Rejection enabled and a withheld caller reaches the front of the queue, the call will not be delivered to the user with Anonymous Call Rejection, even if that user is available. The call will wait until a user without Anonymous Call Rejection enabled becomes available.

Setting up a Call Queue Group

Call Queue Groups are setup by the Company Administrator

Before you start to set up your Call Queue Group, you need to make sure that you have Call Queue Group Add-ons subscription to do this.

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Call Queue Group". On the Call Queue Group page click "Add".

Step 2

You will now be in the wizard for Call Queue Groups. The first page you will be setting up the following:

- Site - the site that the Call Queue Group will be used for. All the users of the Call Queue Group will be on this site.
- Group Details - enter the name, username and department that you'd like the group to be assigned to. This is so that you can quickly identify the group if you ever need to edit or delete the group.
- Caller ID - this will be what is displayed on the handset when the Call Queue Group is used.

Step 3

Now you can configure the options for the Call Queue Group. The available options during the setup of the Call Queue Group are:

- Queue Settings:
 - Queue Length is how many calls you would like in the Call Queue Group, up to a maximum of 25 calls.
 - If you want the call to play a ring tone when offering the call to a user
 - If you want to reset the wait time for the Statistics when a call enters the group or not.
- User Settings
 - If you want to allow users to be able to sign in or out of a Call Queue Group using the users Cloud Telephony Portal access

- If Call Waiting is allowed for users

If "Allow call waiting on users" is on as well as "Play ringing when offering call" is on – the call will present on the phone and the calling party will hear ringing – even if no agent is free to answer. This is the nature of Call Waiting and we would recommend to have one or the other on, rather than both.

- Overflow Settings
 - If you want to enable overflow for calls that have been waiting for a defined amount of seconds, and if this is to
 - ◆ Play busy tone
 - ◆ Transfer to a different phone number
 - If you want to play the default announcement before overflow processing
- Additional Options
 - If you would like Distinctive Ringing for external calls.

Dashboard / Group Management / Call Queue Group / Create New Call Queue Group

Create Call Queue Group

Account Options Users Number

Queue Settings

Queue Length: calls

Play ringing when offering call

Reset wait time upon entry into queue

User Settings

Allow users to sign in/out of Queue Group

Allow Call Waiting on users

Overflow Settings

Play busy tone

Transfer to phone number

Enable overflow after calls wait seconds

Play default announcement before overflow processing

Additional Options

off Distinctive Ringing for External Calls

Cancel Continue

Step 4

Select the users which you want in the Call Queue Group, click "Add Selected" so that they move to the box on the right hand side of the screen and then click "Continue".

A user needs to have the Call Queue Group User add-on associated to their Services. To do this go to edit a user and select the "Services" tab and tick "Call Queue Group User" option and click Save.

Edit test call queue

Account Options **Users** Number Announcements Voicemail Advanced Settings

?

Select Users

Search...

Natasha Holloway

+ Add Selected

Save

Step 5

Find an available number that you have on your Cloud Telephony Company to assign to and type in a free extension.

"Finish and Show List" will finish the set up with basic settings of the Call Queue Group.

"Finish and Edit" will finish the setup with the basic settings of the Call Queue Group and allow you to edit some of the more advanced options. These include:

- Announcements
 - Entrance Message (this is a message placed to the user when their call reaches the Call Queue Group)
 - Comfort Message
 - Music on Hold
- Call Recording
- Voicemail
 - What announcement should be used for the voicemail
 - If you want voicemail notifications to be sent to an email address
 - If you want all calls to be sent to voicemail
 - Change Voicemail Passcode for the Call Queue Group
- Scheduling (Advanced Settings)
- Call Forwarding (Advanced Settings)
- Call Forwarding when Busy (Advanced Settings)

Add/Remove Users to/from a Call Queue Group

A user needs to have the Call Queue Group User add-on associated to their Services. To do this go to edit a user and select the "Services" tab and tick "Call Queue Group User" option and click Save.

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Call Queue Group". On the Call Queue Group page click "Edit".

Step 2

Select the "Users" tab. From here you can add new users from the table on the left hand side and clicking "Add Selected", and remove users by clicking the white "X" next to the user you want to remove.

Editing Call Queue Group Settings

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Call Queue Group". On the Call Queue Group page click "Edit".

Step 2

From here you will be presented with the following options:

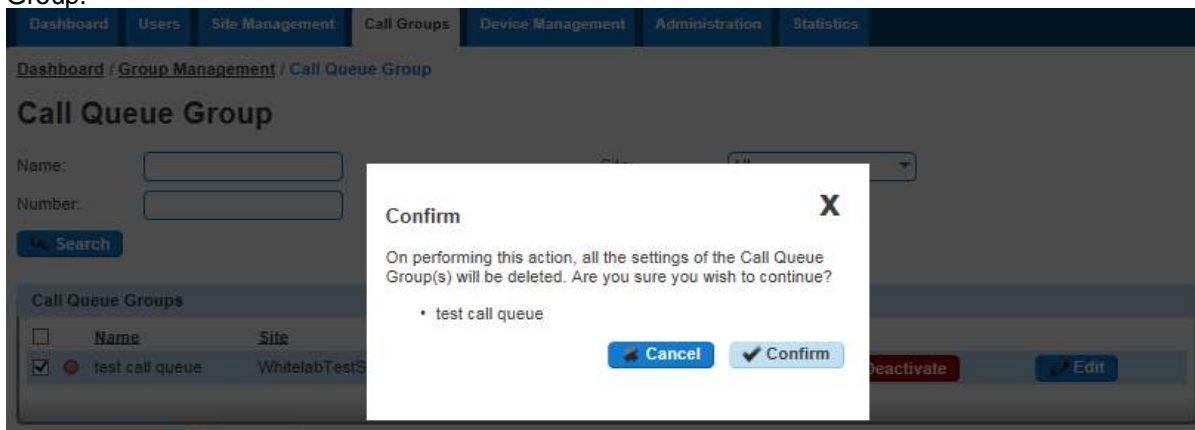
- Account
 - Change the name and Caller ID settings
- Options
 - Change the Queue Settings, including:
 - ♦ Queue Length
 - ♦ Play ringing when offering a call
 - ♦ Allow users to dial a number to leave a message
 - ♦ Reset the wait time when a call enters the call queue group
 - Change the user settings:
 - ♦ Allow users to sign in/out of a Call Queue Group
 - ♦ Allow call waiting for users
 - Overflow settings
 - ♦ Enable overflow after call is waiting for a defined amount of seconds
 - ♦ To send the call to voicemail or transfer to another phone number
 - ♦ Play a default announcement before overflow processing
 - Switch on Distinctive Ringing for external calls
- Users
 - Add or remove users from the Call Queue Group
- Number
 - Change the telephone number of the Call Queue Group
 - Change the extension number of the Call Queue Group
- Announcements

- Entrance Message (this is a message placed to the user when their call reaches the Call Queue Group)
- Comfort Message
- Music on Hold
- Call Recording
- Voicemail
 - What announcement should be used for the voicemail
 - If you want voicemail notifications to be sent to an email address
 - If you want all calls to be sent to voicemail
 - Change Voicemail Passcode for the Call Queue Group
- Scheduling (Advanced Settings)
- Call Forwarding (Advanced Settings)
- Call Forwarding when Busy (Advanced Settings)

Deleting a Call Queue Group

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Call Queue Group". On the Call Queue Group page select the Call Queue Group(s) that you want to delete and then click the "Delete Selected" option.

Click "Confirm" when asked if you are sure that you want to continue in deleting the Call Queue Group.



Logging in and out of a Call Queue Group as a User

A user can log in and out of a Call Queue Group in their Cloud Telephony Portal using their log in details if the Call Queue Group has the "Allow users to sign in/out of a Call Queue Group" option selected in the Call Queue Group Options (see Editing a Call Queue Group)

Once this option is selected then when a user logs into the Cloud Telephony Portal they will see "Queue Groups" in the menu. They will then be able to click "Sign In" or "Sign Out" depending on what their status with the Call Queue Group is.

Call Recording

The Call Recording feature allows you to record your Inbound, Outbound or both Inbound and Outbound calls. This can be done at a user level or on a whole hunt group, and you can set call recording up to record a percentage of calls, record on demand or to not record calls at all.

For Call Recording to fully work a user or group needs to have a DDI assigned to it.

When a user is deleted or the number is unassigned from a user or call group, the administrator is limited when searching for their recordings. You are unable to search for numbers recordings using either the number or the username fields.

Dashboard | Users | Site Management | Call Groups | Device Management | Administration | Recorded Calls | Statistics

Dashboard / Recorded Calls / Search Recorded Calls

Recorded Call Search

Username

Number

Calling/Called Number

Start Date/Time: 2017-12-10 11 : 42

End Date/Time: 2018-01-10 11 : 42

Both Inbound Outbound

Items Per Page: 30

Call Date/Time	Last Name	Number	Site	Duration (Secs)	Call Direction	Called/Calling
----------------	-----------	--------	------	-----------------	----------------	----------------

Call Recording Storage


Billing Period: CURRENT

Maximum recording storage used: 4.21 GB

The recordings will only be visible when searching against:

- ◆ Calling/Called Number
- ◆ Start Date/Time
- ◆ End Date/Time
- ◆ Direction

Recorded Call Search

Username 

Number


Calling/Called Number

Items Per Page


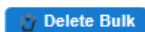
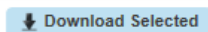
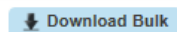
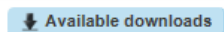
Start Date/Time :

End Date/Time :

Both Inbound Outbound

 Search

<input type="checkbox"/> Call Date/Time	Last Name	Number	Site	Duration (Secs)	Call Direction	Called/Calling
<input type="checkbox"/> 2017-11-10 10:14:48.0	Unknown	03332401415	Unknown	4	Outbound	08081788000
<input type="checkbox"/> 2017-11-10 10:10:14.0	Unknown	03332401415	Unknown	2	Outbound	08081788000
<input type="checkbox"/> 2017-11-08 10:14:47.0	Unknown	03332401415	Unknown	2	Outbound	08081788000
<input type="checkbox"/> 2017-11-08 10:08:26.0	Unknown	03332401415	Unknown	3	Outbound	08081788000
<input type="checkbox"/> 2017-10-31 12:34:57.0	Unknown	03332401415	Unknown	1	Outbound	07900785181
<input type="checkbox"/> 2017-10-31 12:30:22.0	Unknown	03332401415	Unknown	2	Outbound	07900785181
<input type="checkbox"/> 2017-10-31 12:30:03.0	Unknown	03332401415	Unknown	2	Outbound	07900785181
<input type="checkbox"/> 2017-10-31 12:27:58.0	Unknown	03332401415	Unknown	3	Outbound	07900785181
<input type="checkbox"/> 2017-10-30 17:09:52.0	Unknown	withheld	Unknown	1	Outbound	07900785181
<input type="checkbox"/> 2017-10-30 17:08:45.0	Unknown	withheld	Unknown	2	Outbound	07900785181
<input type="checkbox"/> 2017-10-30 17:07:41.0	Unknown	withheld	Unknown	55	Outbound	07900785181
<input type="checkbox"/> 2017-10-30 17:06:22.0	Unknown	withheld	Unknown	2	Outbound	07900785181
<input type="checkbox"/> 2017-10-30 17:05:32.0	Unknown	withheld	Unknown	9	Outbound	07900785181


 Delete Selected  Delete Bulk  Download Selected  Download Bulk  Available downloads

Call Recording Storage

Billing Period Maximum recording storage used:

A recording of a call will take up approximately 200kilobytes per 1 minute of recording.

 **Cloud Telephony to Cloud Telephony calls, including internal calls, currently are not recorded.**

 Advanced Call Recordings will only search for a 3-month range to help with performance. If you are looking for a full 6 months, you will have to run two 3 month searches to get all the results.

Call Recording Retention Period

A Channel Partner will be able to set the retention period of call recordings to either 3, 6 or 12 months. The default setting of any new Horizon Company created from the 9th March 2017 will be 3 months, to modify a Companies retention policy please speak to your Service Provider.

Call Recording for a User

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then select "List Users" so you can search for the user that you want Call Recording set up for.

Locate the user and click the "Edit" button.

Step 2

In the User Management page click "Call Setup" and then under the Settings header select "Call Recording"

From here you can select the recording type for the user. Select the recording type and click "Save" for your changes to take effect.

Edit Roy Farrow

Profile | Personal Details | DDI | Services | **Call Setup** | Permissions | Phone | Barring | Call Centre

Call Recording

There may have been problems with your settings. If it doesn't work, please contact Front Desk

Call Recording

Select Recording Type

- Record for % calls
- Record On Demand
- Pause/Resume calls
- Do not record calls

Call Recording for a Hunt Group

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Hunt Groups" so you can search for the Hunt Group that you want Call Recording set up for.

Locate the Hunt Group and click the "Edit" button.

Hunt Group

Name: Site:

Number: Department:

<input type="checkbox"/>	Name	Site	Department	Phone Number	Status	
<input type="checkbox"/>	new hunt group	WhitelabTestSite			✓	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Edit"/>
<input type="checkbox"/>	Sales Line	Aberfeldy		01887440364 (0364)	✓	<input type="button" value="Deactivate"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	Sales Number	Basingstoke		01256678670 (8670)	✓	<input type="button" value="Deactivate"/> <input type="button" value="Edit"/>

Step 2

In the Edit Hunt Group page click "Call Recording".

From here you can select the recording type for the user. Select the recording type and click "Save" for your changes to take effect.

Call Recording for a Call Queue Group

Step 1

Log into the Cloud Telephony portal and click the Call Groups" option and then select "Call Queue Groups" so you can search for the Call Queue Group that you want Call Recording set up for.

Locate the Call Queue Group and click the "Edit" button.

Dashboard | Users | Site Management | Call Groups | Device Management | Administration | Recorded Calls | Statistics

Dashboard / Group Management / Call Queue Group

Call Queue Group

Name: Site:

Number: Department:

<input type="checkbox"/>	Name	Site	Department	Phone Number	Status	
<input type="checkbox"/>	test call queue	WhitelabTestSite			✓	<input type="button" value="Deactivate"/> <input type="button" value="Edit"/>

Step 2

In the Edit Call Queue Group page click "Call Recording".

From here you can select the recording type for the user. Select the recording type and click "Save" for your changes to take effect.

Bulk Call Recording with delete

Step 1

Log into the Cloud Telephony portal and click "Recorded Calls" option and select "Bulk Download".

Bulk Download Recordings Panel

Start Date:

End Date:

Date and Time Requested	User	From	To	Status
No Records Found				

WH?T

Step 2

This will then take you to the main Bulk Download page where the user can request downloads. To request downloads enter a 2 week date range and select Bulk Download. If you try to select more than a two week date frame you will receive an error.

Please note: If during the bulk request there are missing files, then the request would previously fail. Moving forward, there will be a dummy file with the naming convention "dummy_file_date_time.dummy" – this will let a user know that there was a call recording at that date / time but it's not been downloaded.

Step 3

If the download is successful you will see the download start within your browser, if this doesn't happen please select the 'Download History' tab.

The download pop up will provide information on the file size and the time outstanding to complete the download.

Once the downloaded has completed the ZIP file can be extracted and saved to a location of the Administrators choice.

Step 4

There is also a Download History section that will provide key information about the date and time a Bulk Download request was made, who made it, the date range selected and status. An administrator is also given option to delete the recordings from the storage facility should they wish to. To delete recording between the From and To dates simply click the delete button.

Step 5

Any download that has been requested by a user parsing in via the Service Provider portal will be prefixed by "3rd Party or External".

If access was directly via the Cloud Telephony portal then only the username will be displayed.

To protect system performance there is limit to the number of concurrent call recording that will be allowed across the platform, when this limit is reached the user will receive a message stating "We are currently experiencing a high demand for call recording downloads. Please try again later".

Searching for a Call Recording

Step 1

Log into the Cloud Telephony portal and click "Recorded Calls" option and select "Call Recording".

Dashboard Users Site Management Call Groups Device Management Administration Recorded Calls Statistics

Dashboard / Recorded Calls / Search Recorded Calls

Recorded Call Search

Username

 Number

Calling/Called Number

Items Per Page

Start Date/Time :

End Date/Time :

Both Inbound Outbound

Calls						
<input type="checkbox"/> Call Date/Time	Last Name	Number	Site	Duration (Secs)	Call Direction	Called/Calling

Call Recording Storage

Billing Period

Maximum recording storage used:

From here you can search for the user you are wanting to listen to the calls of. You can search using one of the following criteria:

- First Name
- Last Name
- Number (this is the full telephone number and not the extension number)
- Site

A number will only appear in this list if they have call recording set up.

Searching for a Call Recording using Advanced Call Recording

Using Advanced Call Recording you can:


- Download up to 1000 inbound calls at once
- Download up to 1000 outbound calls at one
- Delete up to 1000 calls at one.

Step 1

Log into the Cloud Telephony portal and click "Recorded Calls" option and select "Advanced Call Recording".

Step 2

From here you can search for the user you are wanting to listen to the calls of. You can search using one of the following criteria:

- Username (Directory search can be used by clicking the Directory icon) 
 - Number
 - Extension
 - First Name
 - Last Name
 - Site
- Number
- Calling / Called Number
- Start date/time
- End date/time
- Direction of call
 - Both directions
 - Inbound only
 - Outbound only

Step 3

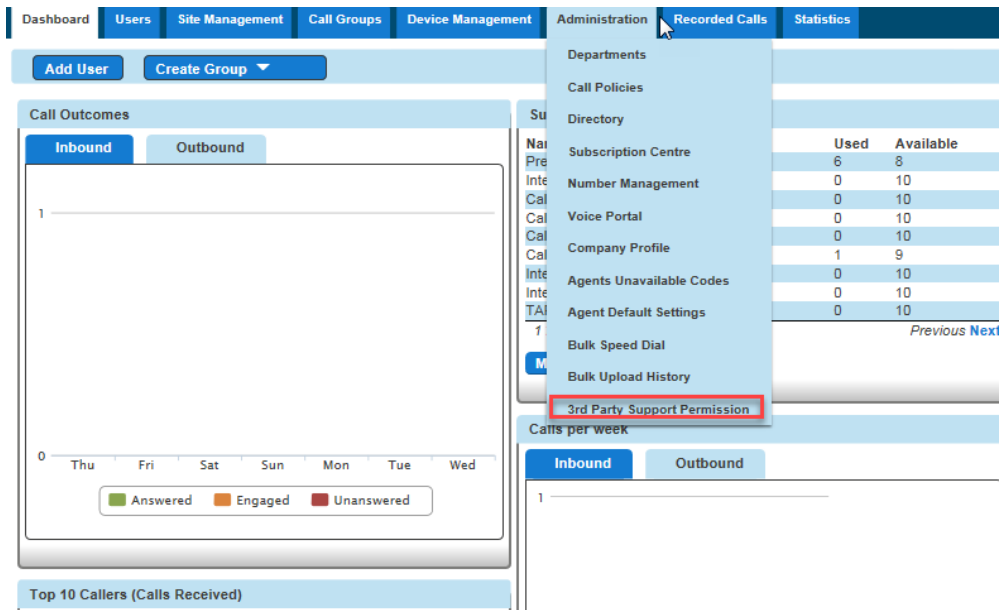
Select the calls you want to download and click the "Download Selected" button. Alternatively, if you want to delete calls, select the "Delete Calls" button. You can download 100 recordings at a time.

You can download call recordings in bulk, or download selected files. You can also delete selected files or files in bulk.

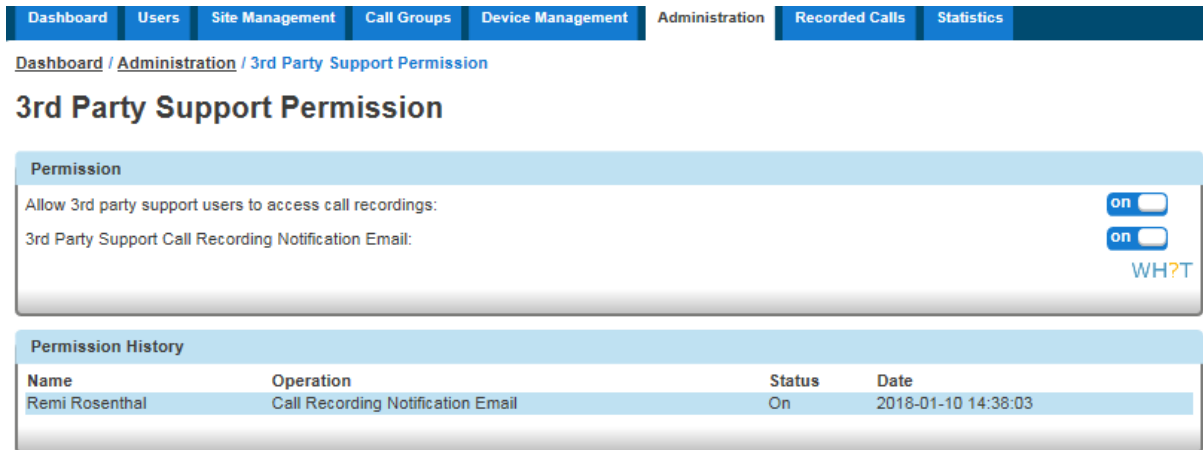
Access and notification control to call recording

As a company administrator you will be able to prevent any support users using the log into Cloud Telephony pass through from the Service Provider portal to a Companies Call Recording download and delete options, there will also be the option to notify all company administrators if a support user has entered a company's call recording area.

Any company administrator entering a valid username and password via the Horizon portal directly will always see the Recorded Calls tab and be presented with the 3rd Party Support Permission option under the Administration drop down.



The Cloud Telephony portal will also provide an audit log of who is enabling and disabling the options.



The service will be deployed as opt in to prevent any operational or support difficulties and unexpected emails being sent to company administrators

All existing and new companies created from the 16th November 2017 onwards will be defaulted to allow pass through login access to call recordings from the Service Provider portal and the email notification will be set to off as indicated here. Please note these options will only appear on the Cloud Telephony portal if the company has call recording enabled with the Service Provider.

This means any pass-through login from the Service Provider portal will be able to access the companies call recordings and no notifications will be sent if they do. They will not have access to alter the 3rd party permission options, this can only be done by an administrator logging directly onto the Cloud Telephony portal.

If an administrator chooses to enable the notification email, as below, then every time a support user passes through via the Service Provider Portal and attempts to search, download or delete from within the call recordings area an email will be sent to all administrators.



Your Call Recordings have been accessed

A 3rd party user has recently accessed your companies call recordings. The details are:

User: rfarrow

Accessed Date/Time: 03/11/2017 at 14:40

Searched Date/Time: from 01/11/2017 to 02/11/2017

If you have any queries about this please contact your Service Provider.

Thank you

We recommend that all companies are built and handed over in a fashion that ensure your customers/end users make a conscious decision as to whether they allow access to the call recording data to support users via the Service Provider portal.

Call Transfer

Call Transfer gives various options when transferring a call. These options include having a call being transferred back if the person you are transferring it to is engaged or doesn't answer the call. When a call is recalled to your handset, it just rings as it normally would when you receive a call.

The options that you have available are:

- Call transfer recall - this will return the call to you if it hasn't been answered within a defined amount of rings
- Use Diversion Inhibitor for Blind Transfer - this is where you want to transfer a call to an extension number, removing all redirections in place, without going through to the extension first.
- Use Diversion Inhibitor for Consultative Calls - this is where you want to transfer a call to an extension number, removing all redirections in place, speaking to the user who owns the extension number first.

Activate/Deactivate Call Transfer as a Company Administrator

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then "List Users" so you can search for the user that you want Call Transfer set up for. Locate the user and click the "Edit" button.

Step 2

In the User Management page click "Call Setup" and then under the "In Call Options" header select "Call Transfer". From here you can set up your Call Transfer options.

The screenshot shows the 'Edit Natasha Holloway' page in the Cloud Telephony portal. The top navigation bar includes 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. The breadcrumb trail is 'Dashboard / User Management / Edit User'. The page title is 'Edit Natasha Holloway'. The main navigation tabs are 'Profile', 'Personal Details', 'DDI', 'Services', 'Call Setup', 'Permissions', 'Phone', 'Barring', and 'Call Centre'. The 'Call Setup' tab is active, and the 'Call Transfer' settings are displayed. The settings include 'Call Transfer Recall' (off), 'Use Diversion Inhibitor for Blind Transfer' (off), and 'Use Diversion Inhibitor for Consultative Calls' (off). A 'Save' button is located at the bottom right. A sidebar on the left contains a list of settings categories: 'Incoming Calls', 'Outgoing Calls', 'In Call Options', and 'Settings'. The 'In Call Options' category is expanded, showing 'Call Transfer Settings'.

Call Transfer	off
Call Transfer Recall	<input type="checkbox"/>
Options	
Use Diversion Inhibitor for Blind Transfer	<input type="checkbox"/>
Use Diversion Inhibitor for Consultative Calls	<input type="checkbox"/>

Call Waiting

Call Waiting allows a user to receive multiple calls at the same time. If you're on a call and you receive another call, it will display on your screen, and you'll also hear a beeping noise in the receiver. You can receive up to 3 external calls.

If you switch off Call Waiting and a call comes though whilst you're already on another call, then the new caller will get a busy tone.

Call Waiting is applicable to the individual user of a hunt group for calls made directly to their extension number. Therefore clicking on Call Waiting will allow a call made to the user directly to be kept on hold until the user becomes free. Not selecting this option would be an engaged tone returned where the user is receiving or answered a call in the Hunt Group.

Short Codes

- ◆ Call Waiting persistent activation - *43
- ◆ Call Waiting persistent deactivation - #43
- ◆ Cancel Call Waiting - *70

Enable / Disable Call Waiting for a User

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then select "List Users" so you can search for the user that you want Call Transfer set up for. Locate the user and click the "Edit" button.

Step 2

In the User Management page click "Call Setup" and then under the "In Call Options" header select "Settings". From here you can enable / disable call waiting.

The screenshot shows the 'Edit User' interface for 'Natasha Holloway'. At the top, there is a navigation bar with tabs: Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below this is a breadcrumb trail: Dashboard / User Management / Edit User. The main heading is 'Edit Natasha Holloway'. A secondary navigation bar contains tabs: Profile, Personal Details, DDI, Services, Call Setup (selected), Permissions, Phone, Barring, and Call Centre. On the left, a sidebar menu lists various settings categories: Incoming Calls (Call Handling, Twinning, Blacklist, Settings, Advanced), Outgoing Calls (Speed Dial, Settings), In Call Options (Call Transfer, Settings), and Settings (Hot Desk, Manage Profile, Remote Office, Call Forwarding). The 'In Call Settings' section is expanded, showing an 'Information' box with a note about call waiting applicability and a 'Settings' box where 'Enable call waiting' is toggled 'on'. An 'Apply' button is located at the bottom right of the settings area.

Enable / Disable Call Waiting for a Hunt Group

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Hunt Group" so you can search for the Hunt Group that you want Call Waiting set up for. Locate the Hunt Group and click the "Edit" button.

Step 2

In the Edit Hunt Group page click "Options". From here you can enable / disable call waiting.

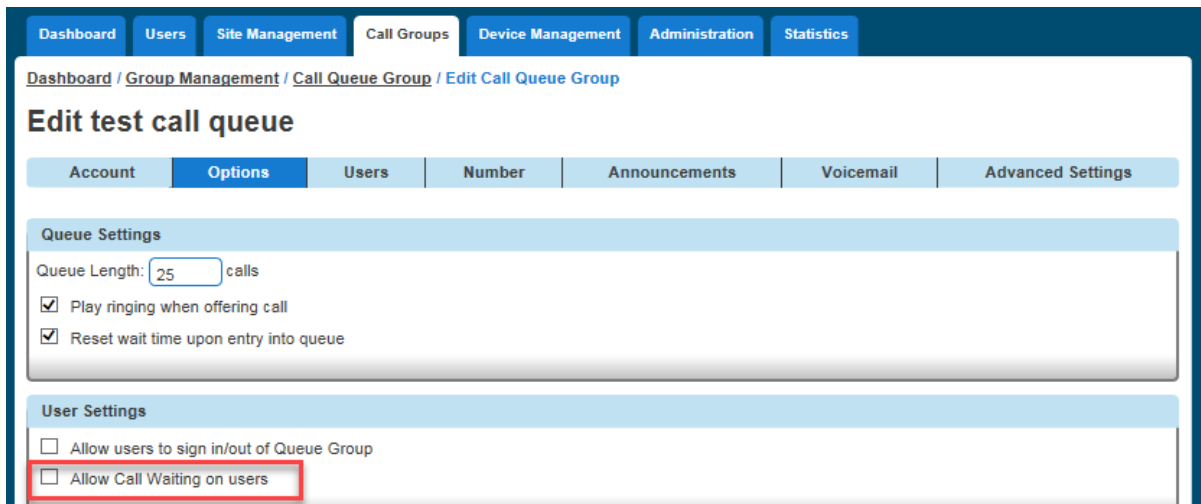
Enable / Disable Call Waiting for a Call Queue Group

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Call Queue Groups" so you can search for the Call Queue Group that you want Call Recording set up for. Locate the Call Queue Group and click the "Edit" button.

Step 2

In the Edit Call Queue Group page click "Options". Within the Options page you can activate / deactivate the "Allow Call Waiting on users".



The screenshot displays the 'Edit test call queue' interface. At the top, there is a navigation bar with tabs for Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below this, a breadcrumb trail reads: Dashboard / Group Management / Call Queue Group / Edit Call Queue Group. The main title is 'Edit test call queue'. A secondary navigation bar contains tabs for Account, Options (which is active), Users, Number, Announcements, Voicemail, and Advanced Settings. The 'Queue Settings' section includes a 'Queue Length' input field set to 25 calls, and two checked checkboxes: 'Play ringing when offering call' and 'Reset wait time upon entry into queue'. The 'User Settings' section contains two unchecked checkboxes: 'Allow users to sign in/out of Queue Group' and 'Allow Call Waiting on users', which is highlighted with a red rectangular box.

CLI Presentation

The Number Presentation functionality allows you to present a different CLI for outbound calls.

For a user to be able to use CLI Presentation, the Administrator needs to switch on the "Override Site Call Policy" option.

Site Call Policy

The company administrator has access to the Call Policy section which allows you to override the company call policy for each individual site. This allows you as the company administrator to override the activation of blocking callers name for external calls for each site. To allow this you need to set the override company call policy button to "On". You will only be able to select the "Site phone number" if the company site DDI has been set.

WhitelabTestSite Call Policies

Manage WhitelabTestSite

WhitelabTestSite Call Policies

on Override company call policy

off Block calling name for external calls ?

Number to use for calling line identity: User phone number Site phone number

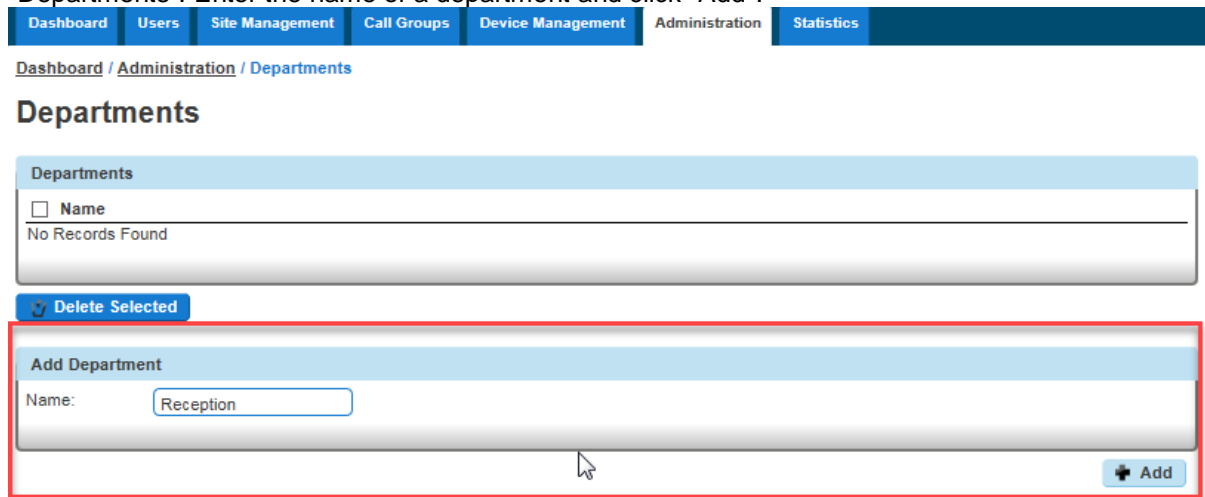
Save

Departments

The company administrator has the ability under the "Administrator" tab to add and manage departments, so that users and services can be associated to them.

Setup Departments

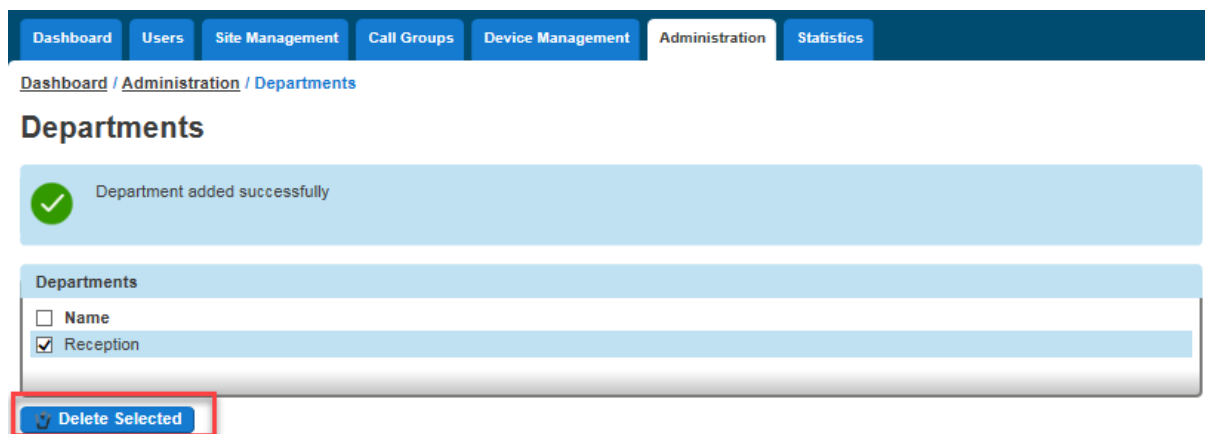
Log into the Cloud Telephony portal and click the "Administration" option and then select "Departments". Enter the name of a department and click "Add".



The screenshot shows the 'Administration' tab selected in the top navigation bar. Below the navigation bar, the breadcrumb trail reads 'Dashboard / Administration / Departments'. The main heading is 'Departments'. A table with one row is shown, with a checkbox next to the 'Name' column and the text 'No Records Found' below it. Below the table is a 'Delete Selected' button. A red box highlights the 'Add Department' form, which contains a 'Name:' label and a text input field containing 'Reception'. An 'Add' button is located at the bottom right of the form.

Delete Department

Log into the Cloud Telephony portal and click the "Administration" option and then select "Departments". Select the Department that you are wishing to delete by using the tick-box next to it and then click "Delete Selected".



The screenshot shows the 'Administration' tab selected in the top navigation bar. Below the navigation bar, the breadcrumb trail reads 'Dashboard / Administration / Departments'. The main heading is 'Departments'. A success message 'Department added successfully' is displayed at the top. Below it, a table with one row is shown, with a checkbox next to the 'Name' column and the text 'Reception' below it. The checkbox is checked. Below the table is a 'Delete Selected' button, which is highlighted with a red box.

Add/Remove users from Departments

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then select "List Users" so you can search for the user that you want add/remove the department for. Locate the user and click the "Edit" button.

Step 2

On the "Profile" table you can select the Department of a user. If you wish for a user not to be assigned to a department then select the option "None". Click Save.

Device Customisation

Device Customisation allows you to set up the line keys and soft keys of your Cloud Telephony hardware. Device Customisation is available on the following handsets.

Cisco	Polycom
SPA504G	SoundPoint 450
SPA525G	VVX310
	VVX410
	VVX500
	VVX600

The options you have with Device Customisation are:

Option	Meaning
Speed Dial	A key that quickly dials a number. This could be a number that is on the Horizon company or a different number
Busy Lamp Field	Sets up a Busy Lamp Field key so you can monitor a user's line
Call Park	Allows you to park a call against your own extension or to another defined extension
Call Retrieve	Allows you to retrieve a parked call from either your own extension or another defined extension
Group Call Park	Allows you to park a call again the call park group that you are in. Other users within the group will be able to pick up a call parked by using Group Call Pickup
Call Pickup	Allows you to pick up a call that has been parked against this extension or another defined extension
Group Call Pickup	Allows you to pick up a call that has been parked in the Call Park Group that you are in.
Page Group	This allows you to call the Page Group that the user is a member of. The user must be a Page Group sender.
Call Pull	This feature gives the opportunity to the user to retrieve a call that has been answered from a desktop client.
Empty	This will leave a empty line key.
Last Call Redial	This will allow you will be able to redial they last call you have made.
Call Return	This will allow you to call the last received or missed call.
VoiceMail	This will allow you to dial out to your voice portal using the mail box number and voice pin you supply

If your user is using the Receptionist Console, Speed Dials set up within Device Customisation won't show in the Receptionist Console.

Give a user access to set up Device Customisation

A company Administrator can give a user permission to do their own device customisation.

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then "List Users" so you can search for the user that you want give device customisation permissions to. Locate the user and click the "Edit" button.

Step 2

Click the "Permissions" tab and enable "This User can customise their soft keys" and "This User can customise their line keys".

The screenshot shows the 'Edit User' interface for Roy Farrow. The top navigation bar includes 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. Below the navigation, the breadcrumb trail is 'Dashboard / User Management / Edit User'. The main heading is 'Edit Roy Farrow'. The 'Permissions' tab is active, showing a list of permissions. The 'Device Customisation Permissions' section is highlighted with a red box and contains the following permission: 'This User can customise their linekeys' with a toggle switch set to 'off'. Other permissions in the 'Access and Permissions' section include 'This User can enable Always Forward To', 'This User can use Advanced Call Setup', 'This User can use CLI presentation', 'This User can use Profiles', and 'This User can use Remote Office', all with toggle switches set to 'off'. A 'Save' button is located at the bottom right of the page.

Device Customisation as a Company Admin

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then "List Users" so you can search for the user that you want give device customisation permissions to. Locate the user and click the "Edit" button

Step 2

Click the "Phone" tab and then select "Device Customisation". Now refer to the Configure My Device sections for Cisco, Polycom VVX or Polycom Soundpoint.

Dashboard / [User Management](#) / [Edit User](#)

Edit Roy Farrow

Profile | Personal Details | DDI | Services | Call Setup | Permissions | **Phone** | Barring | Call Centre

HOW

Desk Device Details

Vendor: Polycom
 Model: VVX411
 Codec: G711
 Mac Address:
 Profile Type: Polycom VVX411

WH?T

[Device Customisation](#) |
 [Manage Soft Clients](#) |
 [Change Codec](#) |
 [Change Device](#) |
 [Unassign Device](#)

Configure my Device

For full user guides for Cisco or Polycom devices please speak to your Service Provider.

Assigning Line Keys

Step 1

When in the Device Customisation page for your device, select the "Line Keys" option.


Dashboard / [User Management](#) / [Edit User](#)

Edit Roy Farrow

Profile | Personal Details | DDI | Services | Call Setup | Permissions | **Phone** | Barring | Call Centre

HOW

Polycom VVX411 - Device Customisation

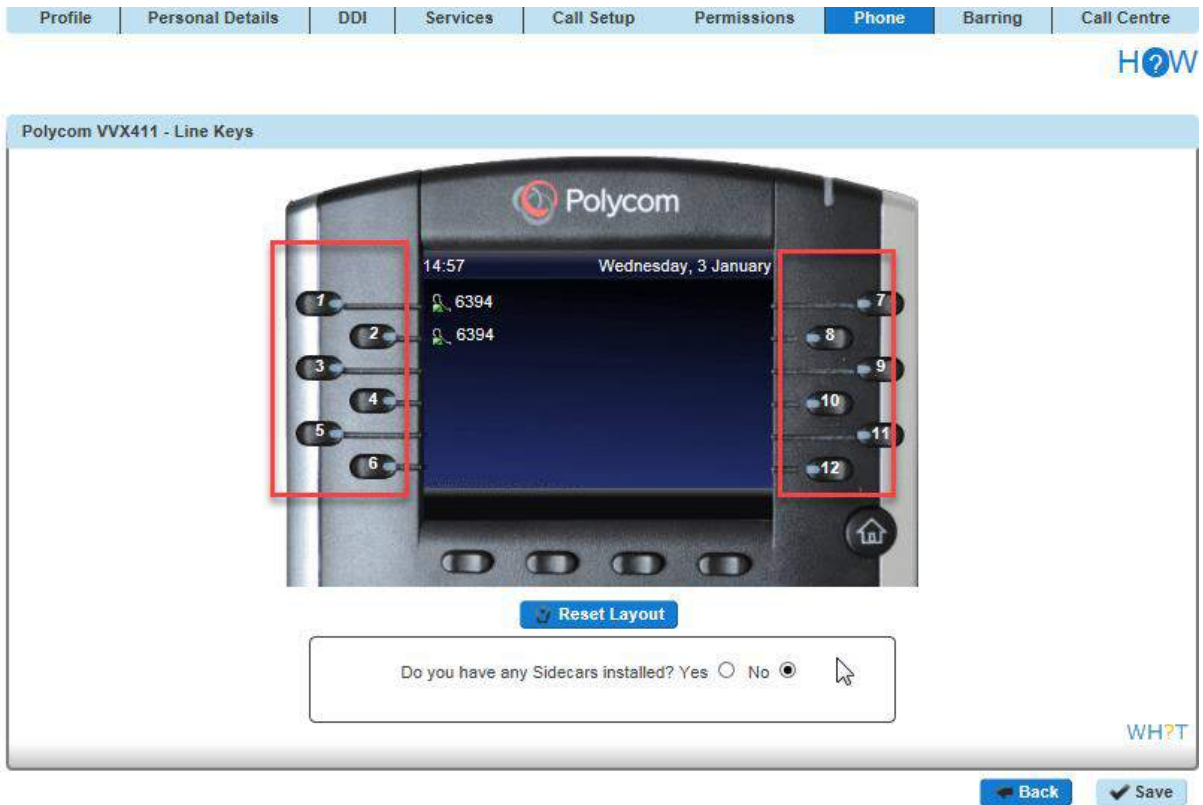


Line Keys
 Customise your devices line keys
[Line Keys](#)

Restart Device
 Send a request to remotely restart this device
[Restart Device](#)

Step 2

Select a Line Key that you want to configure.



If you have a Side Car set up and would like to configure the line keys on the Side Car, click "Side Car" to load up the buttons of the side car.

Step 3

Now select what you want that particular key to do. Please see the table in the Device Customisation section of this guide if you need further assistance.

Clicking "Save" will restart the device(s) that you've configured to download the latest configuration file with your new handset setup.

Distinctive Ringing for External Calls

Distinctive Ringing for External Calls gives the handset a different ringtone to calls that come from another Cloud Telephony user on the same Company.

Setup Distinctive Ringing as a Company Administrator

Step 1

Log into the Cloud Telephony portal and Click the "Users" option and then select "List Users" so you can search for the user that you want enable / disable do not disturb for. Locate the user and click the "Edit" button.

Step 2

Click the "Call Setup" tab and then select "Settings" under Incoming Calls. From here you can set Distinctive Ring for External Calls to be on or off for the user.

The screenshot displays the user management interface for 'Roy Farrow'. At the top, there is a navigation bar with tabs: Dashboard, Users, Site Management, Call Groups, Device Management, Administration, and Statistics. Below this, a breadcrumb trail reads 'Dashboard / User Management / Edit User'. The main heading is 'Edit Roy Farrow'. A secondary navigation bar includes tabs: Profile, Personal Details, DDI, Services, Call Setup (selected), Permissions, Phone, Barring, and Call Centre. On the left, a sidebar menu lists various call-related settings under categories like 'Incoming Calls', 'Outgoing Calls', 'In Call Options', and 'Settings'. The 'Incoming Call Settings' section is expanded, showing a list of settings with toggle switches. The 'Distinctive Ring for External Calls' setting is highlighted with a red rectangular box and is currently set to 'off'. Other settings include 'Reject Withheld Numbers' (off), 'Enable music for calls on hold' (on), 'Lookup Caller ID when none is Provided' (on), 'Present Incoming Caller's ID for External Calls' (on), and 'Present Incoming Caller's ID for Internal Calls' (on). At the bottom right of the settings area, there is a 'WH?T' logo and an 'Apply' button.

Do Not Disturb

Do Not Disturb (DND) allows users to set their phone as unavailable so that incoming calls are given a busy treatment. Users have the option to activate and deactivate the service by dialling a feature access code or configuring the service via their web interface or by pressing the DND button on phones which support it.

This can be activated and deactivated using the handset directly (if applicable), the voice portal or the Cloud Telephony Portal by a user or Company Administrator.

Short Codes

- Activate - *78
- Deactivate - *79

Enabling Do Not Disturb (DND) from a Handset or Soft Client

To see Do Not Disturb (DND) from your Cloud Telephony handset you can select the "DND" soft key on your Cloud Telephony Handset or dial *78 to switch on and *79 to switch off. From the Soft Client go to the settings menu and select "Do Not Disturb".

For more information on the Soft Clients please speak to your Service Provider.

Enabling/Disabling Do Not Disturb (DND) from Administrator Portal

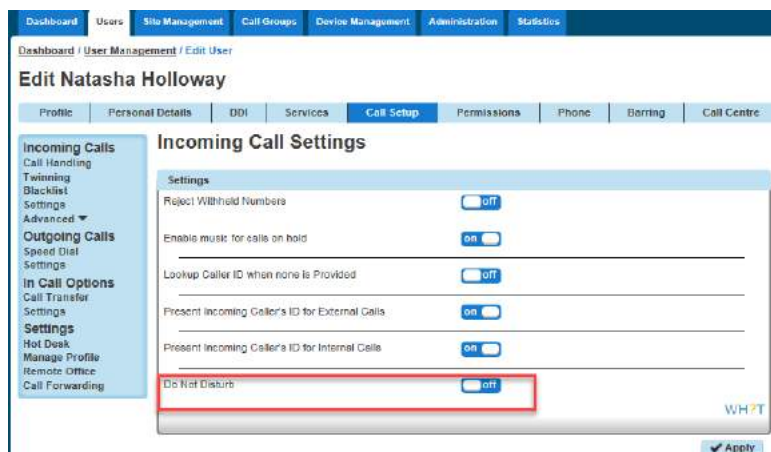
Step 1

Log into the Cloud Telephony portal and click the "Users" option and then select "List Users" so you can search for the user that you want enable / disable do not disturb for.

Locate the user details and click the "Edit" button.

Step 2

Click the "Call Setup" tab and then select "Settings" under Incoming Calls. From here you can set Do Not Disturb to be on or off for the user.



SIP ALG

SIP ALG is a setting on the customer router, for the Cloud Telephony solution to work this setting needs to be disabled - for further information on this please speak to your Service Provider.

Hot Desking

The company administrator has the ability to allow a user to use a pre-configured hot desks where a phone is available for a user to login to. Hot Desk is also referred to as "Hotelling".

If you are using a Polycom SoundPoint 450 or SoundPoint 650, when hot desking the extension will appear as the guest's extension number. For every other handset it will still appear as the host's extension number, even if the guest is logged in.

By default, all users Hot Desk Options are disabled for security purposes. When switched on, it provides the ability for all devices in all locations under one Company to be used in a hot desk environment. You can disable a user from being set up as a host device.

Switching Hot Desking On or Off

To switch Hot Desking either on or off you do this based on the handset that is associated with the user.

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user that you want to have the handset available for hot desking for and then click the "Edit" button.

Step 2

On the "Profile" tab you should make sure that the "Enable Hot Desk" is set to yes or no.

Login to a Hot Desk as Administrator

A Company Administrator can give a user a hot desk. To do this:

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user that you want to have the handset available for hot desking for and then click the "Edit" button.

Step 2

On the "Call Setup" tab select "Hot Desk" under Settings. From here you can search for a handset on the site using any of the following search criteria:

- First Name
- Last Name
- MAC Address
- Extension

Once a hot desk phone is located then click on the blue tick to start an association between the user (guest) and the handset (host).

Dashboard Users Site Management Call Groups Device Management Administration Statistics

Dashboard / User Management / Edit User

Edit Roy Farrow

Profile Personal Details DDI Services **Call Setup** Permissions Phone Barring Call Centre

Incoming Calls
Call Handling
Twinning
Blacklist
Settings
Advanced ▾

Outgoing Calls
Speed Dial
Settings

In Call Options
Call Transfer
Settings

Settings
Hot Desk
Manage Profile
Remote Office
Call Forwarding

Hot Desking

Settings

Enforce Association Limit for hours

Save

Search for a Hot Desk Phone

Site:

First Name: ?

Last Name: ?

Mac Address: ?

Extension:

Ending Hot Desk Association as Administrator

Step 1

Log into the Cloud Telephony portal and go to "Users" and "List Users" and locate the user who is hot desking and then click the "Edit" button.

Step 2

Click the "Call Setup" tab and "Hot Desk" under the Settings section. From here click "Stop Using" to end the association.

Logging in to a Hot Desk as a User

Step 1

Log into the Cloud Telephony portal as a user and from the menu bar select 'Hot Desk'.

Step 2

From here you can search for a handset on the site using any of the following search criteria:

- [First Name](#)
- [Last Name](#)
- [MAC Address](#)
- [Extension](#)

Click on the blue tick to start an association between the user (guest) and the handset (host).

Logging into a Hot Desk using a Polycom Handset

Please note only the Polycom SoundPoint 450 and SoundPoint 650 can support the GuestIn key.

Step 1

On the Polycom handset you should see a "GuestIn" button. Press this.

Step 2

Enter the Voice Portal user ID and Password and press OK.

If successful, the GuestIn button will become "GuestOut"

Logging into a Hot Desk using a Cisco Handset and the Voice Portal

Step 1

Dial the Voice Portal from the handset that the user wishes to hot desk into.

If the user is already associated with the device, simply enter the passcode credentials.

If the user is not associated with the device, the user will need to press * to login with credentials that aren't currently associated to the handset.

Step 2

Select Option 7 - "Access Hoteling"

Step 3

Select one of the following options:

- 1 - The operator will check if there is an ongoing association with this Host
- 2 - The Guest will associate with the Host
- 3 - The Guest can end the association with the Host.

Step 4

Once the association has been made with the Host phone, Guests using the Polycom Soundpoint 450 and Soundpoint 650 will visibly see their own extension number on the Host device display. Guests using other handsets will continue to see the display name and extension of the Host.

Login will disassociate after 24 hours.

Hunt Groups

As a company administrator within the Hosted PBX system you have the ability to establish a variety of hunt groups to route calls to multiple locations when an incoming call is made. Each user will be called in the order of the group until a free user is reached.

Circular – sends the incoming calls to users according to their position in the list. After a call has been answered the next call will be answered by the person following the user who answered the call even if this is at the top of the list

Regular – sends the incoming call to the next available user in the hunt group. Regular hunt groups will restart from the 1st member of the group when a new call is delivered.

Simultaneous – sends incoming calls to all users in the group at the same time. Once the call has been answered, the remaining calls to the other users will be released.

Uniform – sends the incoming call to the user who has been idle the longest. After a user has answered a call they move to the bottom of the queue.

Weighted – sends the incoming call to the users according to a percentage you assign with the Hosted PBX system.

Setting up a Hunt Group

Within this section you can click on the “Create a New Hunt Group” button which will prompt you to allocate the hunt group to a site, as well as defining a name and username. Finally on this first page you’ll be asked to confirm what Calling Name should be presented when the call is delivered to the users, i.e. Sales Hunt Group.

Create Hunt Group

Account > Options > Select Users > Assign Number

H2W

Location

Site:

WH?T

Group Details

Name:

Department:

Username: @ whitelabtestpurpledev.com

WH?T

Caller ID

Calling ID First Name:

Calling ID Last Name:

WH?T

Clicking on the “Continue” button after completing this form will then prompt you to confirm what type of hunt group you’d like to apply, along with also how you’d like to manage the calls if all users are busy or on the phone.

If you choose to enable “Call Waiting” on your hunt group then the caller will hear continuous ringtone until the call is answered. Within the system the call will continue to route around the hunt group setup until a free agent comes available. A time limit of 3 minutes is applied to this feature, therefore if the call is not answered within this timeframe the caller will be cut off. At present the only way to forward the call is to use the “Forward Call” option and define this to the maximum limit you would want people to hold till forwarding to another number.

Once you have setup your hunt group then clicking on the “Continue” button will allow you to define the users who are to be part of this hunt group, through searching for them and clicking on “Add Selected” to move them over to the main view.

The screenshot shows the 'Create Hunt Group' interface with the 'Select Users' step active. The breadcrumb trail at the top indicates the sequence: Account > Options > **Select Users** > Assign Number. The main area is titled 'Select Users' and contains a search bar with the text 'Search...'. Below the search bar is a list of five users: Roy Farrow, Natasha Holloway, Andrew Robinson, Richard James, and Tom Edwards. To the right of this list is a large empty rectangular box. At the bottom left of the user list is a button labeled '+ Add Selected'. At the bottom right of the interface are two buttons: 'Cancel' and 'Continue'. The WH?T logo is visible in the bottom right corner.

To change the order of the users and who is at the top of the list for certain “Hunt Group Types” you can simply click on a user and drag them into the position you require, or if you would like to remove them from the list click on the white cross.

If you select a weighted hunt group then rather than displaying the list of users to set a priority, we will display a set of sliders so that you can set the % for each user. The total always needs to add up to 100%

The screenshot shows the 'Select Users' interface in a weighted mode. The search bar contains 'Search...'. The list of users is now displayed with a progress bar and a percentage value for each user, all currently set to 0%. Each user entry has a white 'X' icon to its right. The users listed are Roy Farrow, Natasha Holloway, Andrew Robinson, Richard James, and Tom Edwards. At the bottom left is the '+ Add Selected' button. At the bottom right, the text 'Total Weight: 0%' is displayed above the WH?T logo. A 'Save' button with a checkmark icon is located at the very bottom right of the interface.

Once you have set either the priority or the % for your hunt group you can click on the “Continue” button to go to the final page of assigning a number for the hunt group as well as an extension for internal call routing.

Apply a Schedule to a Hunt Group

For help on how to set up a Schedule, please see our Schedule section of this guide.

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Hunt Group". On the Hunt Group page click "Edit".

Step 2

Select the "Advanced Settings" tab and switch "Enable Virtual Package" to On.

Click the "Edit" button next to Schedule and this will load up the settings for Schedules. Then select "Use the following schedule". You should apply the out of hours schedule in the "Closed hours". With this you're telling the Cloud Telephony portal what times you want it to forward calls. Additional Routing allows you to set up another schedule to run alongside the main schedule, such as Bank Holidays.

If you don't put any schedule in Closed Hours and only use Additional Routing, the calls will always forward instead of following the schedule.

If you haven't actually set up a schedule yet, you can use the "+" icon to set up a new schedule. Please see the Schedules section of the document on how to create schedules for Hunt Groups.

Listening to your Hunt Group Voicemail

Step 1

Dial the Voice Portal extension or full number.

If you are dialling from a Cloud Telephony Company handset then you should press "*" and then enter the hunt group extension number.

If you dial the full number from a phone that is not on the Cloud Telephony Company then you will be prompted to enter the extension number of the Hunt Group.

Step 2

Enter the Voicemail Passcode for the Hunt Group and then press 1 to access the voicemail box.

Resetting a Hunt Groups Voicemail Passcode

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Hunt Group". On the Hunt Group page click "Edit".

Step 2

Select the "Voicemail" tab and press the "Change Voicemail Passcode" button.

Account	Options	Select Users	Assign Number	Voicemail	Advanced Settings
Voicemail <input checked="" type="checkbox"/> Enable Voicemail ?					
Voicemail Settings ?					
Announcement <input checked="" type="radio"/> Use Default with Personalised Name Audio <input type="text"/> <input type="button" value="Browse"/> ? <input type="radio"/> Use My Audio file <input type="text"/> <input type="button" value="Browse"/> ?					
Notification Settings <input type="checkbox"/> Notify Me at This Address <input type="text"/>					
Voicemail Options Send All Calls to Voice Mail <input type="checkbox"/> Send Busy Calls to Voice Mail <input checked="" type="checkbox"/> Send Unanswered Calls to Voice Mail <input checked="" type="checkbox"/>					
<input type="button" value="Change Voicemail Passcode"/>					<input type="button" value="Save"/>

Step 3

Enter the new PIN and then confirm the PIN.

Account	Options	Select Users	Assign Number	Voicemail	Advanced Settings
Voicemail <input checked="" type="checkbox"/> Enable Voicemail ?					
Voicemail PIN					
Create New Voicemail PIN New PIN <input type="text"/> <input type="text"/> Confirm PIN <input type="text"/> <input type="text"/>					
<input type="button" value="Back"/>					<input type="button" value="Save"/>
Passcode Rules It cannot have Sequential digits <small>Sequentially ascending digit patterns are those that increase by one from each number to the next. Sequentially descending digit patterns are those that decrease by one from each number to the next. Any sequence of 3 sequential digits in a passcode will be rejected by MyPABX. Examples of rejected passcodes: 123545, 365472, 123456, 426987</small> It cannot have repeated Digits <small>Any sequence of 3 repeated digits will be rejected by MyPABX. Examples of rejected passcodes: 111537, 485552, 342333, 444444</small> It cannot have Repeating Sequences <small>If the passcode is only formed by repeating sequences, the passcode will be rejected by MyPABX. Examples of rejected passcodes: 24 24 24, 747 747, 9123 9123</small> It cannot have the Extension on passcode <small>If the passcode contains the extension or the reverse of the extension on the passcode, the passcode will be rejected by MyPABX. Example: Passcode 6074 Example of rejected passcodes: 607434, 360744, 534706, 470606</small> It cannot be part of the phone number <small>If the passcode is part of the phone number or the reverse of the passcode is part of the phone number, the passcode will be rejected by MyPABX. Example: Phone Number 02054275924 Example or rejected passcodes: 205427, 275924, 295724, 245020</small>					

Instant Conference Group

As the company administrator you have the ability to setup a conference group allowing up to 15 different people to be called automatically once the conference has been started. You may choose to use this to create incident bridges or similar instant conference groups for your company for this to be activated the conference group can be started by any user calling the conference number, which will then trigger calls to other group members.

In order to setup an instant conference group you need to click on “Instant Conference Group” under group management, where you will need to assign it to site, as well as defining a name, username, and caller id to be displayed on the phones when ringing.

Create Instant Conference Group Account Options Select Numbers Assign Number

Location
Site: Choose One

Group Details
Name:
Department: Choose One
Username: @whitelabtestpurpledev.com

Caller ID
Calling ID First Name: Calling ID Last Name:

Cancel Continue

Once you have completed this form you can click on the “Continue” button which will then ask you to define the maximum ring time for the user phones to be dialled if unanswered to avoid ongoing ringing.

Maximum Call Time Settings


Enable Maximum Call Time for Unanswered Calls

Maximum Call Time for Unanswered Calls: 10 Minutes.

Cancel Continue

Clicking on “Continue” will then prompt you to search and confirm the numbers that need to be added to this conference group, and this can simply be done by selecting the required number and then clicking on the “Add” button.

Instant Conference Group Number List



Once you're happy with the group members you can then click on "Continue" to finally assign a number to the instant conference group and any extension for internal call routing, prior to clicking on either "Finish and Edit", or "Finish and show list" to establish this conference group.

Create Instant Conference Group

Account Options Select Numbers **Assign Number**

Find a Fixed Number

Search...

WH?T

Extension

Extension:

WH?T

Music on Hold

The company administrator has the ability under the “Site Management” section to set music on hold for your site. Within this section there are a number of options as to when you want Music on Hold to be implemented and whether you want different music for internal or external calls.

General Settings

- Enable during call hold
- Enable during call park
- Enable while caller holding

Once you have agreed the call scenarios music on hold should be implemented in, you can then either use the system default or upload your own branded or created music using the “Browse” button.

The preloaded default audio files may be used freely as part of the Cloud Telephony system. Where the customer chooses to upload and use other audio files then it is the customer’s responsibility to obtain the necessary licence rights for their use, and the Service Provider accepts no responsibility for any breach of third party rights as a result of the use of such files by the customer. By using the upload facility the customer agrees to indemnify the Service Provider against any claims for such infringement. Please also note that the Cloud Telephony system cannot support live feed music.

To create a file for use with music on hold, it needs to be in the following format:

- .wav format and encoded with CCITT A-Law
- Formatted at 8 KHz sample rate, 8 bit mono, 7 kb/sec

External Calls

- Use System Default
- Custom Audio File

Upload File

Internal Calls

- Use a different source for internal calls
- Use System Default
- Custom Audio File

Upload File

Clicking on the “Save” button will then ensure these settings are saved and the files uploaded to the Cloud Telephony portal for the site.

Nuisance Call Management for Call Groups

This is the ability to reject incoming calls from a user defined list and/or anonymous numbers directly via the Hunt, Auto Attendant (AA) Call Queue (CQ) and Call Centre (CC) type Call Groups as part of the Advanced Settings option.

Incoming calls with a caller ID found to exactly match a number on the Blacklist will be rejected with an appropriate announcement before automatically terminating the call. The end user can enter up to a maximum of 12 numbers onto the Blacklist per Call Group instance.

Incoming calls where the caller ID is anonymous or withheld can also be set to reject to an appropriate announcement before being terminated.

The announcements are system wide and cannot be customised on a per Company or Call Group basis.

Nuisance Call Management will be available to a Company as part of the Virtual Power Pack (VPP) subscription and, if not already assigned to the Call Group, can be assigned to the Company by your Service Provider. Each Hunt, AA, CQ or CC will need a VPP per instance if Nuisance Call Management (NCM) is required.

Your Company Administrator can also check if there are any spare VPP's to assign via the Administration>Subscription Centre menu on the Cloud Telephony portal.




To configure NCM select the Call Group type from the drop down menu on the Cloud Telephony portal and choose the specific category the Call Group number is configured as.

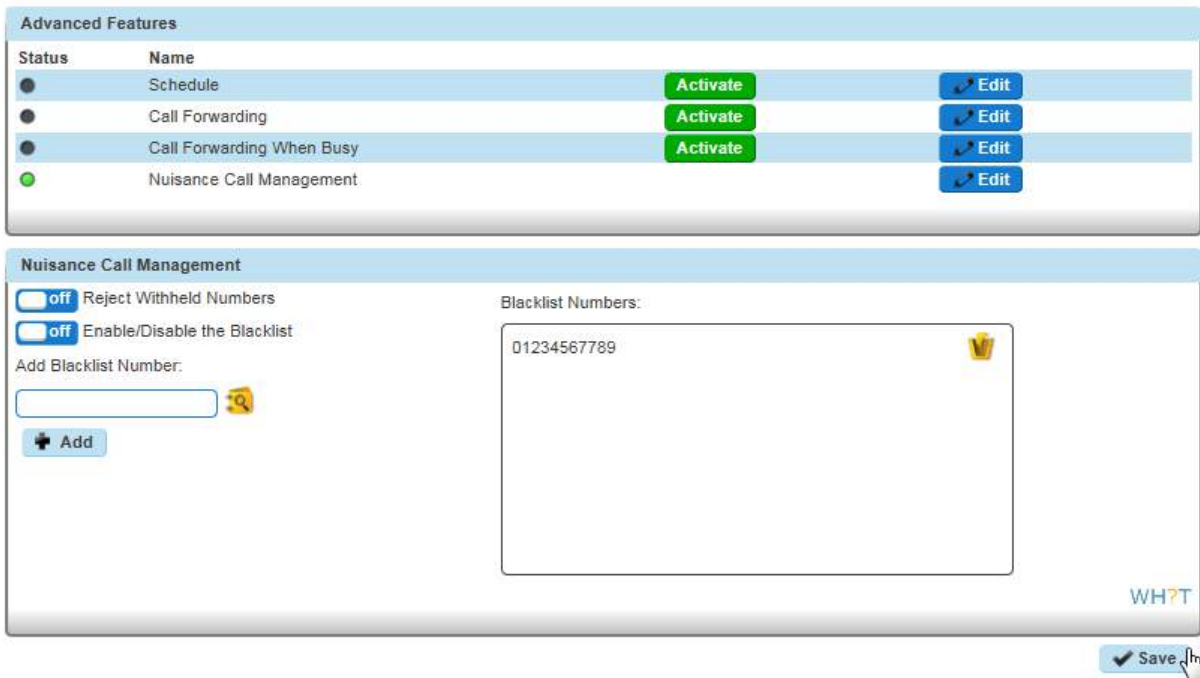
To set up the NCM option for a Call Group find the particular group you wish to modify and click edit.

The NCM feature can be found under the Advanced Settings tab for all 4 Call Group types.

If not already, enable the Virtual Package by toggling the button to on and the relevant options will appear for the Call Group. Click on the Nuisance Call Management edit button for the configuration panel.

Status	Name	Activate	Edit
●	Schedule	Activate	Edit
●	Call Forwarding	Activate	Edit
●	Call Forwarding When Busy	Activate	Edit
●	Nuisance Call Management	Activate	Edit

You can add specific numbers to the Blacklist of numbers by typing them freehand into the highlighted panel and clicking the button,  there is also the option to add numbers from the Company Directory via the  icon. To delete a number from the Blacklist click the  icon.



The screenshot displays two main sections of a web interface. The top section, titled "Advanced Features", contains a table with the following data:

Status	Name	Activate	Edit
●	Schedule	Activate	Edit
●	Call Forwarding	Activate	Edit
●	Call Forwarding When Busy	Activate	Edit
●	Nuisance Call Management		Edit

The bottom section, titled "Nuisance Call Management", includes two toggle switches: "Reject Withheld Numbers" (off) and "Enable/Disable the Blacklist" (off). Below these is an "Add Blacklist Number:" field with a search icon and an "Add" button. To the right, a "Blacklist Numbers:" box contains the number "01234567789" with a trash icon. A "WH?T" logo is visible in the bottom right corner of the panel, and a "Save" button is located below the panel.

To enable or disable the NCM feature you now just need to toggle the appropriate button between on and off.

Availability Profiles

Availability (Express) Profiles enables users to pre-configure multiple profiles for managing incoming calls differently based on the user's status. There are four pre-set profiles with the available options:

Profile	Option 1	Option 2	Option 3
Available In Office	Also ring this number	If I'm busy: Send to Voicemail Forward call to...	If I don't answer: Send to Voicemail Forward call to...
Available Out of Office	Send to voicemail	Forward call to...	Send me an email at...
Busy	Send all calls to voicemail...	But forward the following numbers to...	Send me an email at...
Unavailable	Send all calls to voicemail...	But forward the following numbers to...	Have voicemail take the call using: No answer greeting Unavailable greeting

If a user elects to use Availability Profiles then this takes precedence over all other service settings associated with processing incoming calls. A user can have either one or no profile activated at any one time.

Give permission to a user to use Availability Profiles

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then select "List Users" so you can search for the user that you want setup Availability Profiles for. Locate the user and click the "Edit" button.

Step 2

Click the "Permissions" tab and select "This user can use Profile" to "On" or "Off".

Profile | Personal Details | DDI | Services | Call Setup | **Permissions** | Phone | Barring | Call Centre

Access and Permissions

This User can enable Always Forward To off

This User can use Advanced Call Setup off

This User can use CLI presentation off

This User can use Profiles off

This User can use Remote Office off

WH?T

Device Customisation Permissions

This User can customise their linekeys on

Save

Set up and Edit Availability Profiles as a User

Log into the Cloud Telephony portal as a user and select the profile that you're wanting to edit by clicking the corresponding "Edit" button accessed via Dashboard/Manage Profiles.

If you cannot see the "Manage Profiles" button then you need to be granted this access by the Company Administrator.

Dashboard | Call Setup | Directory | My Features | Remote Office | Hot Desk | Queue Groups

[Dashboard](#) / [Manage Profiles](#)

Manage Profiles

Profiles		
Status	Name	
<input checked="" type="radio"/>	Available In Office	Activate Edit
<input checked="" type="radio"/>	Available Out Of Office	Activate Edit
<input checked="" type="radio"/>	Busy	Activate Edit
<input checked="" type="radio"/>	Unavailable	Activate Edit

Remote Office

Remote office allows a Cloud Telephony user to use any phone as their 'Cloud Telephony phone' - meaning they won't need to pay locally for calls and their Cloud Telephony number will be presented on outgoing calls. This can be particularly useful in the likes of hotels, where calls can often be costly.

If a user has a restriction to mobile phones (calling them or transferring to them) then Remote Office to a mobile phone will not work. A "This call cannot be completed" message will be played.

Give permission to a user to use Remote Office

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then select "List Users" so you can search for the user that you want grant Remote Office permissions to. Locate the user and click the "Edit" button.

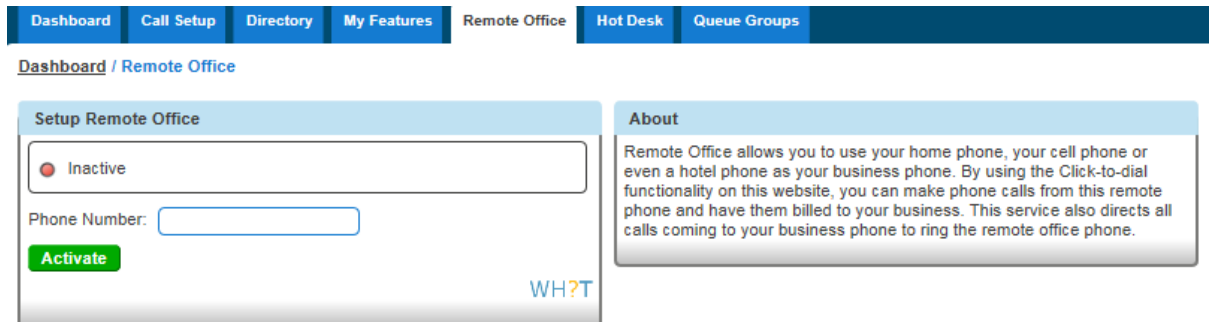
Step 2

Click the "Permissions" tab and select "This user can use Profile" to "On" or "Off".

Activate and Deactivate Remote Office as a User

Log into the Cloud Telephony portal as a user and if you have permission to use Remote Office the "Remote Office" option will be visible in the menu bar. Select this to load up the Remote Office page.

You can then input the phone number you'd like to use for remote office and click 'Activate' or 'Deactivate'.



The screenshot shows the 'Remote Office' page in the Cloud Telephony portal. The top navigation bar includes 'Dashboard', 'Call Setup', 'Directory', 'My Features', 'Remote Office', 'Hot Desk', and 'Queue Groups'. Below the navigation bar, the breadcrumb trail reads 'Dashboard / Remote Office'. The main content area is divided into two sections: 'Setup Remote Office' and 'About'. The 'Setup Remote Office' section contains a radio button labeled 'Inactive', a 'Phone Number:' label with an input field, and a green 'Activate' button. The 'About' section contains a text box explaining that Remote Office allows users to use their home phone, cell phone, or hotel phone as their business phone, and that calls are billed to the business and directed to the remote office phone. The WH?T logo is visible in the bottom right corner of the 'Setup Remote Office' section.

Making outgoing calls using Remote Office

Make sure that Remote Office is activated (see above) then click the telephone icon next to someone in the Company Directory.

Directory & Contacts



First Name: Last Name:
Number: Extension:
Company: Department:
Contact Type:

My Directory					
<input type="checkbox"/>	First Name	Last Name	Number	Company	Email Address
<input type="checkbox"/>	Andrew	Robinson			
<input type="checkbox"/>	James	Bushell			
<input type="checkbox"/>	Main Number				
<input type="checkbox"/>	Natasha	Test			
<input type="checkbox"/>	Natasha	Holloway			
<input type="checkbox"/>	Richard	James			
<input type="checkbox"/>	Roy	Farrow			



Receiving calls using Remote Office

Incoming calls will be delivered directly to the number that's been enabled for Remote Office.

Sequential Ringing

Sequential Ringing enables users to define a list of phone numbers that are alerted sequentially for incoming calls that match specified criteria. While the Cloud Telephony solution searches for the user, the calling party is provided with a greeting followed by periodic comfort announcements. The caller can also interrupt the search to leave a message by pressing a telephone key. The user must set the number of rings after which the sequence will continue to the next phone number.

Sequential ringing works in the same way a Hunt Group would, in that you can define a set of numbers for an incoming call to try when an incoming call is made to your number.

Enable/Disable Sequential Ringing

A Company Administrator sets up Sequential Ringing for a user.

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then "List Users" so you can search for the user that you want set up Sequential Ringing for. Locate the user and click the "Edit" button.

Step 2

Click the "Call Setup" tab and under "Incoming Calls" select Advanced and Sequential Ringing. Within the Sequential Ringing setup you can enable/disable.

For basic Sequential Ringing you can enter up to five numbers to call moving on to the next number after a defined number of rings (between 2 and 5 rings).

Step 3

If you would like to have Sequential Ringing for just certain numbers, or would like to use Sequential Ringing during certain hours then click on the "Advanced Button".

Please see the "Schedules" section of this document for help with setting up schedules and how to apply them.

Edit Natasha Holloway

Profile	Personal Details	DDI	Services	Call Setup	Permissions	Phone	Barring	Call Centre
---------	------------------	-----	----------	-------------------	-------------	-------	---------	-------------

Incoming Calls

- Call Handling
- Twinning
- Blacklist
- Settings
- Advanced ▲
- Call Notify
- Sequential Ring
- Busy Lamp

Outgoing Calls

- Speed Dial
- Settings

In Call Options

- Call Transfer
- Settings

Settings

- Hot Desk
- Manage Profile
- Remote Office
- Call Forwarding

Sequential Ring

Enable Sequential Ring

Enable Sequential Ring off

My Phone Numbers

Phone number:

<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	

WHAT

Settings

Move on to next number after rings

Sequential Ring

Restrict by Calling Number

Apply to call from any number Apply to these numbers

Restrict by Schedule

Use ringing all the time Use ringing during a schedule

Back

✓ Save

Schedules

The schedule functionality allows you to define events so that some of the Cloud Telephony features can be different depending on the time and/or day, such as opening and closing hours. You can make these events a regular occurrence or you can also setup Holiday events to allow for different routing during different times of the year.

Setting up Schedules

Manage WhitelabTestSite Schedule

Manage WhitelabTestSite
◀ ▶ today December 2017 month week day

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Open Hours Closed Hours

Schedules

<input type="checkbox"/>	Name	Type
No Records Found		

Delete Selected Add

On the calendar the Cloud Telephony portal will show all events you have setup for this specific site, this view can be customised by the options in the top right to show a month, week, or day view.

To create an event such as work hours as an example you can click on the “Add” button and this will open another window to create a schedule.

Within here you need to give the Schedule a name, such as “Working Hours”, select the type, whether it is a holiday or time, and finally choose a colour for it to be shown on the Schedule in.

Clicking on “Create” will then allow you to specify the detail of this event.

Unticking the “All Day Event” check box will allow you to adjust the start date and time, as well as setting the end date and time.

If you would then like to set any reoccurrence of this event you can do so from the drop down menus where different screens will then display

Daily

Weekly

This event recurs every week(s)

Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Stop recurring

Never
 After occurrences
 On 12

Monthly

This event recurs every month(s)

On the of every month
 On the of every month

Stop recurring

Never
 After occurrences
 On 12

Yearly

This event recurs every year(s)

On the of every
 On the of every

Stop recurring

Never
 After occurrences
 On 12

Once you have set the occurrence and completed the other details you can then click on “Create” where this event will be added to your calendar view.

Twining

Twining is a service that allows a user to use their mobile phone, or any other non- Cloud Telephony handset to behave as if it was part of the Horizon Company. For example, if someone calls your Cloud Telephony handset and you've got twining enabled to a mobile phone, your mobile will ring at the same time as your Horizon handset, allowing you freedom to answer your calls from anywhere.

Enable/Disable Twining as an Administrator

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then "List Users" so you can search for the user that you want Twining set up for. Locate the user and click the "Edit" button.

Step 2

Click "Call Setup" and then under the "Incoming Calls" section of the side-menu, click "Twining".

From here you can enable twining; enter the number(s) that you'd like to add for a user. You can have up to 7 numbers per user.

The screenshot shows the user management interface for 'Natasha Holloway'. The top navigation bar includes 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. The breadcrumb trail is 'Dashboard / User Management / Edit User'. The main title is 'Edit Natasha Holloway'. Below this is a sub-navigation bar with 'Profile', 'Personal Details', 'DDI', 'Services', 'Call Setup', 'Permissions', 'Phone', 'Barring', and 'Call Centre'. The 'Call Setup' section is active, showing a 'Twining' configuration panel. This panel has a sub-section 'Enable Twining' with a toggle switch set to 'on' and the text 'Enable twining for all numbers'. Below this is another 'Twining' section with a large empty box for a list of numbers. To the right of this box are input fields for 'Name' and 'Number', and an 'Add' button with a plus sign. A 'WH?T' logo is visible in the bottom right corner of the panel.

Enable/Disable Twining as a User

Enable / Disable Twining using the Horizon Portal

Log into the Cloud Telephony portal as a user and from the menu bar select Call Setup and the Twining.

From here you can add a new number and give it a name (though you don't have to) and then click Add. You can also delete any numbers by clicking the Bin icon.

If there is a green light next to a number, this means that twining is active with that number. A red light means that this is switched off.

A user can have up to 7 numbers set up for twinning.

Enable / Disable Twinning using the PC Soft Client

A user can enable / disable Twinning using the PC Soft Client by clicking the Settings icon, Twinning and then you can either select "Configure" to add/delete numbers, or by selecting/de-selecting an already configured number.

Company Voice Portal

The Company Voice Portal provides an interactive voice response (IVR) application that can be called by any user, from any phone. The IVR allows the user to manage their services and voice mailbox, as well as changing their passcode if needed.

For this feature to work a site DDI needs to be setup under the Site Management pages.

To setup the Company Voice Portal you simply need to assign it to a site, and select a free number, whilst giving it an extension if required for easier internal access.

Setting up a Company Voice Portal

The Company Voice Portal provides an interactive voice response (IVR) application that can be called by any user, from any phone. The IVR allows the user to manage their services and voice mailbox, as well as changing their pass code if needed. For this feature to work throughout a site, the site DDI needs to have been setup under the “Site Management” section.

To setup the Company Voice Portal you simply need to assign it to a site, and select a free number, whilst giving it an extension if required for easier internal access

The Company Voice Portal can then be accessed through pressing the message key on your desk phone, or alternatively and if outside of the Cloud Telephony system, through dialling the extension or free number assigned. Further details on accessing the Company Voice Portal are detailed in the user sections around accessing your Voicemail.

Company Voice Portal
HOW

Information

The voice portal will be created on a company level, and it will be available for all users across all of the sites within the company.

Find a Fixed Number

[01635886393](#)

[01887440362](#)

[01887440364](#)

WH?T

Extension

Extension:

WH?T

Portal Passcode

Change Password:
Re-enter Password:

WH?T

Managing a Company via the Voice Portal

Option 1 - Voicemail

1 - Messages

This plays all new or saved messages

2 - Change the busy greeting

Within this option you can:

- Record a new Busy greeting - allows you to record a fully personalised message without any additional messaging.
- Play the saved message - lets you listen back to the current saved message.
- Implement the system default - to reset the message to the system default with your personalised name greeting. To manage your name greeting, use Option 3 on the voice portal.
- Please note the personalised name greeting is a maximum of 10 seconds

3 - Change the no answer greeting

Within this option you can:

- Record a new No Answer greeting - allows you to record a fully personalised message without any additional messaging.
- Play the saved message - lets you listen back to the current saved message.
- Implement the system default - to reset the message to the system default with your personalised name greeting. To manage your name greeting, use Option 3 on the voice portal.
- Please note the greeting maximum is 120 seconds (2minutes)

5 - Record and Send Messages

This enables you to record a message and forward it to another user's mailbox. To do this, follow the in-call instructions to record your message, type the extension and send.

7 - Delete all messages

Allows you to delete all stored messages on your mailbox.

Option 2 - Voicemail Express

To use this option, you need to set up an Availability Profile - e.g. Available, Unavailable, Busy - in the Cloud Telephony Portal. Once set up, you have the option to implement each profile, whether you're in the office or on the move, by selecting the corresponding option.

Changes made in Voicemail Express will also appear in the Cloud Telephony portal.

Option 3 - Recording your name greeting

This lets you record or adjust your mailbox name greeting, as well as being the name used on the system default voicemail greeting.

Option 4 - Call Forwarding

This can also be set up and managed through the Cloud Telephony portal, where you will also have the ability to define, activate, and de-activate call forwarding on your user account. See Call Forwarding for more details.

Option 8 - Call Forwarding

You can change your passcode using the voice portal or via the Cloud Telephony portal.

Voicemail

For Voicemail to work, the Cloud Telephony Company needs the Voice Portal to be set up first.

- Voicemails have a 30-day limit. This applies to all messages left on the voice portal, including saved messages. If you wish to save certain messages, we recommend using the "Notification Settings" when editing a user to send an email with a file of the voicemail by selecting "Notify Me at the address".
- The capacity on a voicemail is 100 minutes. After this, the caller will be unable to leave a voicemail message.
- The user can skip to the end of the voicemail message by pressing 6.

Setting up Voicemail for a user

Step 1

Log into the Cloud Telephony portal and click the "Users" option and then "List Users" so you can search for the user that you want Voicemail set up for. Locate the user and click the "Edit" button.

Step 2

Click on "Services" and ensure that you've got enough Voicemail services left, and then tick the tick box. If you haven't then please contact your Service Provider who can apply more voicemail subscriptions.

The screenshot shows the 'Edit User' page for 'Natasha Holloway'. The navigation bar includes 'Dashboard', 'Users', 'Site Management', 'Call Groups', 'Device Management', 'Administration', and 'Statistics'. The breadcrumb trail is 'Dashboard / User Management / Edit User'. The page title is 'Edit Natasha Holloway'. The 'Services' tab is selected, and the 'Voice Mail' service is checked under 'Optional Extras'.

Service Pack	Optional Extras
<input checked="" type="radio"/> Premium 9 Left	<input type="checkbox"/> Call Queue Group User 9 Left
	<input type="checkbox"/> Integrator CRM 10 Left
	<input type="checkbox"/> Integrator EMIS 10 Left
	<input type="checkbox"/> TAPI Driver 10 Left
	<input type="checkbox"/> Integrator 10 Left
	<input type="checkbox"/> Receptionist 10 Left
	<input checked="" type="checkbox"/> Voice Mail 9 Left

Step 3

Click "Call Setup" and under the Settings header, click "Voicemail Settings". Here, you can choose which file is to be played upon no answer as well as choosing to receive an email notification when a voice mail is left.

Step 4

Now select "Call handling" under the Incoming Calls menu so that you can set up what calls should be sent to the user's voicemail, and when.

Setting up Voicemail from a handset

You can setup voicemail directly from a user's handset, including personalised name greetings, no answer greetings and busy greetings. This can be applied to both a user or a group telephone number.

Step 1

Dial the company Voice Portal and enter the user or group extension number when prompted for an ID.

Step 2

Enter the passcode of the user / group.

If the user does not know their password, then this can always be reset in the "Edit User" tab on the Cloud Telephony Portal.

A hunt group the passcode can be manually set in the "Edit Hunt Group" page under the Voicemail tab.

Step 3

If the user is accessing this voicemail box for the first time, then the Voice Portal will ask the user to change the passcode.

The Voice Portal will then proceed to ask the user to record a personalised name greeting. The user must do this in order to proceed.

Step 4

After this is complete the user should be presented with the following message:

"You are now ready to use your voicemail system. To access your voice mailbox, press 1".

Press '1' to listen to your messages, to change 'your mailbox busy greeting', press '2' and to change 'your mailbox no answer greeting' press '3'.

Step 5

Finally, you will need to specify on the Horizon Portal what message you would wish to use during "No Answer" and "Busy" actions

Changing a user's passcode for Voicemail

Step 1

Log into the Cloud Telephony portal and click the "Call Groups" option and then select "Hunt Group" or "Call Queue Group". Locate the call group and click the "Edit" button.



Step 2

Click on "Voicemail" from here you can edit the Settings, and if you want to enable voicemail.

Now select Call handling under the Incoming Calls menu so that you can set up what calls should be sent to the group voicemail, and when.

Contacts



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