Welcome!

We want to help your business connect. We’re sure you will enjoy the benefits of these services. Plus our plans will save you money. One call. One bill. One company. Easy.

This User Guide explains how you can benefit from this service. If you have questions about your service, call our customer service team 24 hours a day 7 days a week.

1-888-276-5255
or visit
optimumbusiness.com

NOTE: some of the services and features described in this guide may not be available in your specific service implementation.
Quick Reference Guide

In the event of an emergency, dial 911.

Using The Headset or Speaker

1. Use the Speaker button 🎤 to turn speaker ON/OFF.
2. Use the Headset button 🎧 to use a headset once one has been connected.

Making A Call

1. Take Handset/Headset off-hook or press Speaker button or an available LINE key (activates speakerphone).
2. The line will have dial tone and the corresponding line’s LED will turn green.
3. If you wish, select another LINE key.
4. Enter the phone number.

Phone number may be entered (and corrections made with “Backspace” soft key) before taking handset/ headset off-hook

5. Press the SEND button 🔄 or press the “DIAL” soft key.

Redial

1. Take the phone off-hook.
2. Press the SEND button 🔄 or press the “REDIAL” soft key.

Answering Calls

Single Incoming Call:
Answer call by lifting Handset/Headset, pressing SPEAKER, or by pressing the corresponding account LINE button.

Multiple Incoming Calls:
1. When there is a call waiting, you will hear a Call Waiting tone.
2. The next available line will flash red.
3. Answer the incoming call by pressing its corresponding LINE button.
4. The current call will be put on hold.
5. Toggle between the calls using LINE button.

Ending A Call
End a call by pressing the “End Call” soft key or hang up the phone.

Call Hold/Resume

1. Hold: Place a call on “hold” by pressing the hold button 🔄 🔄.
2. Resume: Resume call by pressing the corresponding blinking LINE or by pressing the HOLD button 🔄 🔄 again.

Call Transfer

If you are in a call and wish to transfer the call to another party.

Blind Transfer:
1. Press transfer button 🔄 🔄.
2. To complete transfer of active call, dial the number and press the send button 🔄 or the “Blind Transfer” soft key.

Attended Transfer:
1. Press an idle line key to make a new call and the active LINE will be placed on hold automatically.
2. Once the call is established, press transfer button 🔄 🔄 followed by the blinking LINE button of the held line to transfer the call.
3. After the call is transferred, phone will display idle screen.
3-Way Calling
Assuming that you are already in a conversation and wish to bring a third party together in a 3-way conference.

1 Press conference button [ ] to bring up the conference dialing screen.

2 Dial the third party number followed by SEND button [ ].

3 When the call is established to the third party, press the “ConfCall” soft key to initiate 3-way conference.

4 To re-establish a 3-way call after putting one party on hold to consult privately with the other party, press the conference button and then select the other blinking LINE.

Cancel a Conference Call:
1 Press “Kick” soft key in conference dialing screen to remove a party and resume a two-way conversation.

2 Using the ARROW buttons, select the party to remove and then press the round button in the middle of the ARROW buttons.

Hold The Conference:
1 Press the hold button [ ] to hold the conference call with all parties on hold.

2 Press hold button [ ] again to resume conference call; or select a blinking LINE to speak with one party.

End The Conference:
The conference will be terminated for all three parties if the conference initiator hangs up or presses “End Call” key.

Voicemail Message
A blinking red MWI (Message Waiting Indicator) indicates a message is waiting.

Press the Message button [ ] to retrieve the message. You will be prompted through the process of message retrieval.

Mute/Unmute
1 Press the MUTE button [ ] to mute/unmute the microphone.

2 The Mute icon [ ] indicates whether the microphone is muted.

Volume Adjustments
Use the volume button [- +] to adjust the ring volume when the phone is idle.

Press the volume button during an active call to adjust the call volume.

Using Your Personal Portal
The portal’s homepage includes the following:

Personal Area – for configuring your user account, including changing the password

Language – select the language to be used throughout your portal

Help – access help for the page you currently are on

Exit – securely exit the portal

Home – access the areas within your portal

My Services – an overview of your services as a user

My Calls – a list of your outgoing, answered and missed calls

My Contacts – a list of your personal and corporate contacts

Call Forwarding – Always
This service forwards all of your incoming calls to an alternative number selected, without ringing your telephone first.

Call Forwarding is always turned on either with the User Portal or a code entered on the phone keypad (*72 to activate and *73 to deactivate Call Forwarding). In the Portal, Call Forwarding is turned on by selecting Call Forwarding in the My Services area and then entering the number forwarded from and the number forwarded to.
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User
1 Seat Types

Following are lists of the services included with the Basic Seat and the Business Seat, plus additional services. Instructions for using each service are provided later in this document.

Basic Seat

This package is for locations not assigned to a specific user. Examples include conference rooms, break rooms, waiting rooms and lobbies.

- Anonymous Call Rejection
- Authorization Codes
- Automatic Redial
- Call Hold
- Call Park
- Call Trace
- Call Transfer
- Music on Hold
- Caller ID Name and Number
- Corporate Speed Dial
- Direct Call Pickup
- Directory - Company
- Directory - Personal
- Group Call Pick Up
- Intercom Paging
- Overhead Paging Access
- Personal Speed Dial
- Originating Identity Presentation
- Originating Identity Restriction
- Outgoing Call Barring
- Unlimited Domestic U.S. Calling

Business Seat

Standard user offering for business employees that adds a rich set of additional features

Includes all services in Basic Seat plus:

- 3-Way Calling
- Call Forwarding
- Call Pull
- Call Waiting
- Do Not Disturb
- Hunt Group
- Remote Access to Call Forwarding
- Single Number Reach
- User Portal & Soft Client
- VIP (Distinctive) Ringing
- Voicemail with Notification
- Voice to Email

Additional Services

- Account Codes
- Attendant Console
- Authorization Codes
- Waiting Queue
- Interactive Voice Response
- International Calling
- Music on Hold
- Pre-Answer
- Toll Free Number
Some services can be turned on either with the User Portal, or by using a designated key on the phone, or by using a code entered on the phone keypad.

**In the event of an emergency, dial 911.**
The portal has two versions. One version is for an end user in your organization. The second version is for the administrator of Business Hosted Voice service for your organization.

The end user portal and the administrator portal are both accessed by going to the URL provided to you by Optimum and logging in through your web browser with the user name and password created when your service is activated.

The portal’s homepage includes:

- Home
- My Services
- My Calls
- My Profiles
- My Contacts

Click on an item to configure a service or to see more information about the service.
2.2 When I Call

Account Codes
This service lets the user assign an Account Code to a call that he makes. This Account Code will then be included in the detailed invoice of the organization, allowing an aggregation of these costs, for example in a law firm presents the costs for calls associated with the process of a given customer.

Once assigned to a customer, all associated users have the possibility to see and use all customer Account Codes.

To enter an Account Code, dial *96 plus the Account codes plus (after the voice prompt) the telephone number.

A record of the call and the Account Code can be found in the user portal in “Call List”, “Advanced”

Authorization Codes
The user must enter this code in order to make certain types of calls (e.g., international long distance codes) that otherwise are restricted for that user.

Corporate Speed Dial
Check your company’s speed dial codes in the Corporate Speed Dial service. The following information is arranged in table format:

<table>
<thead>
<tr>
<th>Code</th>
<th>Destination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: You cannot make any changes to this service.

On-Net Display
Use this service to configure the format of the origin that is displayed to the destination for internal calls. Configure your On-net Display service in the following way:

1. Set the status of the On-net Display service:
   - Active – for setting short outgoing numbers of internal calls
   - Inactive – only set long outgoing numbers for internal calls

2. If you have activated the service, choose one of the following options for the type of information that is displayed:
   - Display short only for short number dialing
   - Display short for all internal dialing

Note: The configuration of this service can be modified only by your service provider
Originating Identity Restriction
Restricts the display of your identification at the destination.

1. Select one of the origin options:
   • All My Phones - the rule set in the table will be applied to all your telephones
   • Phone to Phone - you can set a rule for each telephone

2. Set the destination in the table (for all your telephones or for each telephone individually):
   • Inactive - none of your telephones will make anonymous calls
   • All numbers - all calls will be anonymous
   • Internal numbers - only calls to internal numbers will be anonymous
   • External numbers - only calls to external numbers will be anonymous

Note: Your administrator/manager may decide to block editing of some parts of this service by anyone who is not an administrator/manager.

Outgoing Call Barring
You can use this service to block destinations so calls cannot be made to them.

1. Choose one of the following from the When I Call From box:
   • All my Telephones - the rule will be applied to all your telephones
   • User Telephones - the rule will only be applied to the telephone(s) of the selected user(s)
   • Fixed Telephones - the rule will be applied to all your fixed telephones

2. In the Block section, you can set blocking of:
   • Number - you can set the target number in the box below
   • General Prefix - you can select the target prefix from the list or enter a regular expression in the box below

3. In the Except When I Call From section, you can set the situations in which calls are not going to be blocked:
   • In the Except When I Call From box you have the same selection options available as you do in the When I Call From Section, except for “User Telephones”
   • In the to box, you have the same selection options available as you do in the Block option above

Notes:
• You cannot repeat rules for a given user
• Exceptions are only applied to blockings at the same level
• If no blocking has been set, you cannot set exceptions
• There may be some preset configurations (non-editable). Your administrator and/or manager may have set these and only they can change them. Such settings have priority over any settings you make.

When you configure prefixes you should enter regular expressions that define the range of numbers to which the rule is to be applied. In most cases, you only need to define the first few digits of a number, for example: “21*”. The portal will carry out a number of verification checks on the prefix you have defined. For example, it will check that it ends with an “*” and is, therefore, really a prefix. The Call Barring service has priority over the Outgoing Numbers service. In other words, if one of the blocking rules applies then the call will be blocked and cannot be made.

Note: The configuration of this service can be modified only by your service provider
Outgoing Numbers

Use this service to set the numbers that are shown by each phone when you make calls. Configure your Outgoing numbers service in the following way. From **When I Call From** select the number displayed at the destination by each of your telephones and for different types of calls:

**Present This Number For All External Destinations** – the number used when the destination is external.

**For Internal Calls Use** – the number to use for internal calls (if you want to have the option of choosing short numbers, the On-net Display (see below) service must be active).

The numbers configured above may be set as For display and billing. Alternatively, set different numbers for display (the number that will appear on the destination device) and billing (number used to calculate the duration of the call). If you do this, and you choose the option No Number Configured in the For billing box, you will not be able to set a number For display.

Note: Changes to the numbers displayed can be made only by your service provider.

Personal Speed Dial

Use the Personal Speed Dial service to check and alter your personal speed dial codes.

The information is arranged in table format. View and modify the following columns:

- **Code** – code you enter into your telephone to call the destination (selection of preset codes)
- **Destination** – number that is going to be dialed when the code is entered
- **Description** – optional text field to help you identify the code

Note: You can create up to 10 personal speed dial codes.
2.3 When They Call Me

Anonymous Calls Rejection

Use this service to automatically reject calls when these calls are made anonymously (i.e. when there is no identification of the originating number).

Set the service status for All Numbers or for each number individually

- **Active** - the call will be rejected
- **Inactive** - the call will not be rejected

Note: Your administrator/manager may decide to block editing of some parts of this service by anyone who is not an administrator/manager.

The Anonymous Calls Rejection service has priority over the Single Number Reach service. In other words, if one of the rules set here applies then the call will be rejected and will not be delivered to any telephone.

The Anonymous Calls Rejection service does not have priority over the Manager Assistant or Call Forwarding (Type: Always) or Call Forwarding (Type: Schedule) services. If one of these services forwards a call then it will not be rejected.

Call Forwarding – Unconditional; Busy; No Answer; Not Reachable

Use this service to select the numbers for which incoming calls will be forwarded, on the basis of certain conditions. Configure an Unconditional rule, one or more Schedule rules and one Off-Schedule rule for each Call Forwarding configuration.

Configure your Call Forwarding service in the following ways:

1. Choose one of the following from the If They Call Me box:
   - **Any Number** – the rule will be applied to all your numbers
   - **User Number** – the rule will only be applied to the number(s) of the selected user(s)

2. Optionally add origins in the If They Call Me From any number section by clicking on “+”.
   The description of this section changes to If They Call Me From and then select number(s)/prefix(s) so that the rule will only be applied if the call is made from one of these numbers/prefixes.

3. **Always Forwarding** – the Always forwarding has priority over the other forward rules;
   if it is configured, then it is set to be active, so other configurations will not be applied.

4. In the Exceptions section, set numbers and/or prefixes from which calls, when received, will not be forwarded.
   The following options are available:

   - **Number** – set the target number in the box below
   - **General Prefix** – select the target prefix from the list or enter a regular expression in the box below Schedule Rule

The Do Not Disturb service has priority over the Single Number Reach service. In other words, if one of the rules set here applies then the call will be rejected and will not be delivered to any telephone. The Do Not Disturb service does not have priority over the Manager/Assistant or Call Forwarding (Always) or Call Forwarding (scheduled) services. If one of these services forwards a call, it will not be rejected.

If there is not any schedule rule configured, the forwarding’s type is “No schedules defined”.
There can be different configurations such as “always”, “if busy”, “if not answered” and “if not available”.
By clicking on “Set Schedules”, it becomes possible to configure one or more Schedule rules and one Off-Schedule rule.

In an off-schedule rule, define the behavior when none of the off-schedule rules apply. In an off-schedule rule there can be different configurations (always, if busy, if not answered, if not available).
In a schedule rule configure the following options:

1. Choose the Schedule Menu name

2. On Schedule tab, define a schedule:
   - **Rule Validity** – start and end dates, or always
   - **Rule Applicability** – weekday (Monday to Sunday, holidays) and the hour range to apply in each day

3. In the Forward section, set the condition(s) for forwarding:
   - **Always** – calls are forwarded unconditionally. This rule takes priority over all other rules
   - **If Busy** – calls are only forwarded if your selected number(s) are busy, that is, if the number is currently taking a call or if the call is rejected
   - **If Not Answered (after 30 secs)** – the call is only forwarded after 30 seconds, and only if it has not been answered
   - **If Not Available** – the call is only forwarded if the number is unavailable because, for example, of a network failure or the number has been disconnected

4. In the following box select the forwarding destination:
   - **Number** – enter the number the call is to be forwarded to in the box below
   - **Voicemail** – the call is forwarded directly to the Voicemail Platform
     - This option will only be visible if you have a number that has Voicemail.

Notes: You cannot repeat a rule for the same user number with the same pair. “If they call me to/for” and “If they call me from”; “If call me from any number” and the origin “*” is interpreted the same way (this means that they cannot coexist for the same “If they call me to/for” condition).

Exceptions are only applied to forwarding at the same level.

If no forwarding has been set, you cannot set exceptions.

There may be some preset configurations (non-editable). Your administrator and/or manager may have set these and only they can change them. Such settings have priority over any settings you make.

The schedules are applied according to the number’s region time zone (the number configured on “If they call me to/for”). If the number has no associated region, then the organization time zone applies. When you configure prefixes, enter regular expressions that define the range of numbers to which the rule is to be applied.

The configured schedules cannot overlap. However, if for the same time range a holiday and a weekday configuration have been designated, and if it happens that the weekday is a holiday, the holiday configuration will be applied.

The Call Forwarding service has priority over the configurations set in the Single Number Reach service. In other words, if one of the forwarding rules set here applies, then the call will be forwarded. Call Forwarding does not have priority over Do Not Disturb, Anonymous Rejection and Incoming Call Blocking services. Call Forwarding does not have priority over Manager/Assistant. Calls are forwarded according to the rules of Manager/Assistant and not Call Forwarding.

If the Blocking of Outgoing Calls service is configured for the incoming number used for forwarding, the call will not be made if the forwarding destination has been used to set the conditions for the Blocking of Outgoing Calls.

Call Forwarding configured in the portal has priority over call forwarding configured in the mobile terminal (for the same type of Call Forwarding). For example, if the number linked to the mobile terminal is configured in the portal as call forwarding for the number A and in the mobile terminal it’s configured as an in condition call forwarding to the number B, when the destination number is the number linked to the mobile terminal, the call is forwarded to the number A.
Call Forwarding – Alternative “Star Code” Method
This service forwards all of your incoming calls to an alternative number selected if the line is busy, is not answered, or is busy and another call is waiting. This service forwards all of your incoming calls to an alternative number selected, without ringing your telephone first.

To Activate Call Forwarding Always
1. Listen for a dial tone then dial *72.
2. Wait for confirmation tone, then dial the number to which to forward.
3. Listen for the confirmation tones.
4. Hang up the telephone.

To Deactivate Call Forwarding Always
1. Listen for a dial tone then dial *73.
2. Wait for confirmation tone.
3. Hang up the telephone.
Note: Two short tones indicate that you have turned Call Forwarding off.

Call Waiting
This service notifies you that a second call is on the line and lets you switch between the calls. You are notified by a tone when the call is waiting.

When you hear a Call Waiting tone during a call, you have several options: End the original call and answer the waiting call. Hang up the telephone and the new call will ring with the second caller.
Place the original call on hold and answer the waiting call. Press and release the hook switch to put the first person on hold and answer the second call. Alternate between the two calls and both conversations will remain private.
Ignore the Call Waiting tone and use Call History to identify the second caller once you have finished the original call and return the call.
Ignore the Call Waiting tone and let the second call go to Voicemail (if selected).

Call Trace
When you get a harassing call, start the trace immediately. If you get another call before you begin, it is too late.
1. Hang up after receiving the call. Then immediately pick up again and listen for a dial tone.
2. Press *57 and listen for the announcement.
3. Write down the date and time you received the call.
4. Contact local law enforcement for further investigation if necessary.
Do Not Disturb

Use this service to ensure that all the calls made to a phone number are rejected.

Configure your Do Not Disturb service in the following way:
Set the service status for all numbers or for each number individually

**Active** – the call will be rejected
**Inactive** – the call will not be rejected

Note: Your administrator and/or manager may decide to block editing of some parts of this service.

Incoming Call Barring

Use this service to block origins so calls cannot be received.

1. Choose one of the following from the *If They Call Me To/For* box:
   - **All My Numbers** - the rule will be applied to all your telephones
   - **User Number** - the rule will only be applied to the number(s) of the selected user(s)

2. In the *Setting Incoming Call Barring* section, you can set blocking of:
   - **Number** - you can set the target number in the box below
   - **General Prefix** - you can select the target prefix from the list or enter a regular expression in the box below

3. In the *Exceptions* section, you can set the numbers and/or prefixes for which calls are not going to be blocked.
   The following options are available:
   - The options for the exceptions are the same as those described above for *Barring*.

Notes:
- You cannot repeat rules for a given user number
- Exceptions are only applied to blockings at the same level
- If no blocking has been set, you cannot set exceptions
- There may be some preset configurations (non-editable). Your administrator and/or manager may have set these and only they can change them. Such settings have priority over any settings you make

When you configure prefixes you should enter regular expressions that define the range of numbers to which the rule is to be applied.

In most cases, you only need to define the first few digits of a number, for example: "21*". The portal will carry out a number of verification checks on the prefix you have defined. For example, it will check that it ends with an "*" and is, therefore, really a prefix. The Incoming Call Barring service has priority over the Single Number Reach service. In other words, if one of the blocking rules applies then the call will be blocked and will not be delivered to any telephone.

The Incoming Call Barring service does not have priority over the Manager-Assistant or Call Forwarding (Type: Always) or Call Forwarding (Type: Schedule) services. If one of these services forwards a call then it will not be blocked.
Originating Identity Presentation

With this service you can set, as the receiver of the call, whether or not you receive information on the caller’s ID.

1. Set the service status for All Numbers or for each number individually
   • **Active** - the call will be identified
   • **Inactive** - the call is displayed as anonymous

Note: Your administrator/manager may decide to block editing of some parts of this service by anyone who is not an administrator/manager

Single Number Reach

Use the service to choose which telephones will ring when calls come in for the selected numbers. Decide whether all your telephones should ring simultaneously or sequentially if the ring type is cyclical, and what the time interval should be between ringing different telephones.

1. Choose one of the following from the If They Call Me To/For section:
   • **Any Number** - the rule will be applied to all your numbers
   • **User Number** - the rule will only be applied to the number(s) of the selected user(s)

2. Select how the telephones will ring in the Ring section:
   • **Simultaneously** - your telephones will all ring at the same time
   • **Sequentially** - your telephones will ring in the order set in Selected Telephones

3. If you choose the Sequential option, you will also have to set:
   • **Sequence Type**:
     - **Non-Cyclical** - if nobody has answered the call, after all the Selected Telephones have rung, it will be disconnected
     - **Cyclical** - after the last Selected Telephone has rung, the ring will cycle back to the first telephone again
   • **Time before the ring passes to the next phone (seconds)** - the time each telephone will ring for, before the ring moves to the next telephone

4. The My Telephones box shows your available telephones (these are not normally editable). These can be configured for this service by dragging them to Selected Telephones. The Selected Telephones box contains those telephones that will ring when you receive a call at any of the telephones you initially selected.

The Single Number Reach does not have priority over the Manager-Assistant or Call Forwarding (Type: Always) or Call Forwarding (Type: Schedule) services. If one of these services has been configured to forward a call then this call will be delivered to the configured telephone. In the same way, the service has priority over the Do Not Disturb, Anonymous Rejection and Incoming Call Barring services. That is, if one of the forwarding rules set here applies then the call is rejected and is not delivered to any telephone.
For any numbers for which no configuration is set, calls made to this number will be delivered to the telephone as per the settings in the My Telephones section on the Start page. If the number is listed in My Free Numbers, the call will only be delivered if the number in question is configured in the Manager-Assistant or Call Forwarding (Types: Always and Schedule) services.

If you do not set any rules for this service, the default configuration for the associated numbers and telephones will be loaded, as per the information in the My Telephones section on the Start page. You will receive the following warning: “Default configuration of associated Telephones and Numbers”.

**Vip Ringing**

Permits users to set up a list of numbers to ring a different alert tone for calls received from those numbers.

1. Choose the ring tone you want for the list of numbers in the **Ring with** box

2. In the section **If They Call Me** it is possible to set the numbers to which you want to create the list

3. In the **Of/from** section, you can set the ring tones from:
   - **Number** - you can set the target number in the box below
   - **General Prefix** - you can select the target prefix from the list or enter a regular expression in the box below

4. In the **Exceptions** section, you can set the numbers and/or prefixes for which incoming calls will not have the ring set previously. The following options are available:
   - **Number** - you can set the target number in the box below
   - **General Prefix** - you can select the target prefix from the list or enter a regular expression in the box below

**Notes:**
- You cannot repeat rules for a given user number
- Exceptions are only applied to ring tones defined at the same level
- If no ring tone has been set, you cannot set exceptions
- There may be some preset configurations (non-editable). Your administrator and/or manager may have set these and only they can change them. Such settings have priority over any settings you make.
- When you configure prefixes you should enter regular expressions that define the range of numbers to which the rule is to be applied.
Voicemail

If any of your lines are equipped with Line Voicemail, use the following instructions.

Setting Up Your Voicemail Box
You will need to set your Voicemail up before using it. Once set-up is complete, your Voicemail will be ready to receive messages.

Personalizing Your Voicemail Box
1. From your own phone press the Message button or dial *99. When the automated voice answers, follow the voice prompts.
   a. The Voicemail system will ask for your temporary password — which is the last 4 digits of your telephone number.
      Follow the voice prompts to change your password.
   b. The Voicemail system will then prompt you to select a 4-digit password and to press the # key.
      Select a password that is easy to remember, but difficult for someone else to guess.
      - Please note that your password cannot contain # or *.
   c. The Voicemail system will ask you to confirm your password by pressing the “1” key.

2. The Voicemail system will ask you to set up your personal preferences including your personal greeting.

Note: If you forget your password, call Customer Service at 1-888-276-5255

Voicemail Notification
Your Business Hosted Voice phone will notify you when you have a message waiting with:
• A blinking red MWI (Message Waiting Indicator) on the top left corner of your phone.
• A stutter dial tone after picking up your handset.

Retrieving Voicemail Messages
You have several options available to retrieve your Voicemail Messages.
Retrieving Voicemail Messages From your Own Business Phone.
A blinking red MWI (Message Waiting Indicator) indicates a message is waiting.
1. Press the Message button to retrieve the message. You will be prompted through the process of message retrieval.
2. Dial *99 and wait for your Voicemail to answer. Enter your password after the system prompt.

Using any Other Phone
1. Lift the handset of any touch-tone phone and listen for dial tone.

2. Dial your 10-digit phone number.

3. Wait for your call to go into the Voicemail system. You will hear your Voicemail greeting.

4. Press the * key. If the Voicemail is on a Hunt Group, any line in that Hunt Group can retrieve a message by dialing *99 plus the Hunt Group pilot number.

5. Enter your password. The Voicemail system will tell you how many new Voicemail messages you have and play them.

Voicemail Delivery via Email
This service provides delivery of voicemails to one or more email addresses specified by the user.

A .wav file with the content of the voicemail is attached to the email. The recipient may listen to the .wav file by clicking on the attachment, and may also save the .wav file.

Note: The configuration of this service can only be performed by your service provider.
2.4 Other Services

3-Way Calling
Assuming that you are already in a conversation and wish to bring a third party together in a 3-way conference.

1. Press conference button 📣 to bring up the conference dialing screen.

2. Dial the third party number followed by SEND button 📞

3. When the call is established to the third party, press the “ConfCall” soft key to initiate 3-way conference.

Cancel a Conference Call:
1. Press “Kick” soft key in conference dialing screen to remove a party and resume a two-way conversation.

2. Using the ARROW buttons, select the party to remove and then press the round button in the middle of the ARROW buttons.

Hold The Conference:
1. Press the hold button 🔄 to hold the conference call with all parties on hold;

2. Press hold button 🔄 to resume conference call; or select a blinking LINE to speak with one party.

End The Conference:
The conference will be terminated for all three parties if the conference initiator hangs up or presses “EndCall” key.

Notes: You may use 3-Way Calling to add another person, no matter who placed the first call. However, when you hang up the other two people will also disconnect. When the 3-Way call includes long distance, you pay only for the call(s) you make. Call Waiting does not work during a 3-Way call.

Attendant Console
The Attendant Console is a Web console, accessible through authentication, which provides for an operator or receptionist to control all the calls for an organization—such as answer, transfer, hold, resume—as well as monitor a list of internal contacts.

Access to the console is available through a link in the User or Admin portal or directly through the link to access the service.

Navigation
The home screen is divided into four main areas:
• incoming calls
• active call
• call waiting and call history
• corporate and personal contacts and monitoring numbers

In the top menu bar are the following:
• Console state
  • Online – when there is a connection with the service and the call between the service “Attendant Console” and the user terminal is established
  • Terminal – when there is a connection with the service but the call between the service “Operator Console” and the user terminal is not established
  • Offline – when there is no connection to the service
• User State
• Access to the console settings
• Do Not Disturb and Call Forwarding Unconditional are configured directly in the Operator Console
• Access help information
• Log Off
Authentication
You only need to authenticate once to access or terminate either the User Portal or Operator Console. To end a session in the Operator Console, click on the top left corner of the screen.

Console Use
After logging in the application, a call is triggered to the terminal that is configured for use with the service “Operator Console”. The call must be answered to the console over state “Terminal” to the status “Online”, so you have full access to the services of the console. Whenever a call is disconnected, the console assumes the status “Terminal”. Calls currently managed on the console are delivered sequentially on the operator in order of arrival, allowing you to work uninterrupted. You can replace the console when in the “Online” status at any time, which triggers a new call to the terminal operator.

States of Calls
Calls on the console are shown in the following states:
• In conversation
• On hold
• Attempting to connect
• Trying to put on hold
• Attempting to transfer
• Attempting forward
• Trying to finish

Incoming Calls
A new incoming call is represented by the number of the caller, the contact’s name (if known) and the call ring time.
Options available on incoming calls
The actions available for incoming calls are:
• Answer call
• Reject call

Call Hold
A call on hold is represented by the calling number, the contact’s name (if known), the talk time and on-hold time.
The actions available on a waiting call are as follows:
• Resume call
• End the call
• Transfer to the active call, only available when a call conversation is on the screen
• Transfer to a call on hold, only available when there is at least one call on hold
• Transfer the call to a number/contact

Active Call
The available actions on the active call are as follows:
• Put a call on hold
• End the call
• Mute or unmute the call
• Transfer to a call on hold, only available when there is at least one call on hold
• Transfer the call to a number/contact – you can search for a contact from the contact list or manually enter the number

Make a New Call
A new call can be initiated in several ways:
• From the screen using ‘Redial’, in the area of active call
• From the contact list
• From the detail of a contact
• From the call history
• From the monitored numbers
Call History
Incoming and outgoing calls from the console are displayed on the home screen. Each telephone number’s call history is represented by the type of call, the number of source and destination of the call, the contact’s name (if known), the date of the call and its duration.

Contacts Monitored
Monitored contacts are corporate contact numbers marked contacts to monitor in the Portal. For each of these numbers state numbers are displayed in accordance with the Busy Lamp Field service. There are two ways to query the monitored contacts:
• Through the tab “My contacts monitored”
• Through the button “Launch pop up monitored”

Busy Lamp Field
This service provides for the display of other extensions’ status on the phone. Allowed status subscription indicates if the user can use his phone to add his status.

Configure the Busy Lamp Field service at the “When my state is subscribed” section in the following way:

1. Choose one of the following options from the Consider to Ringing/Busy State section:
   • All Phones - the rule (active/inactive) defined in the table will be applied to all your phones;
   • Phone to Phone - it is possible to define one rule (active/inactive) for each phone.

2. Define the rule in the table (to all the phones or to each phone individually):
   • Active - it is possible to subscribe the phone state;
   • Inactive - it is not possible to subscribe the phone state.

3. In the Consider busy when you can define the algorithm to apply in the busy state definition:
   • At Least One Phone Busy - if one of the phones defined as active is busy, the number state will be busy;
   • All Phones Busy - all of the phones defined as active must be busy in order to the number state be busy.

Note: Your service provider or administrator/manager may decide to block editing of some parts of this service by users.

Call Forward - Remote Access
You will be assigned a default PIN code to use with RACF. The default PIN for RACF is the last four digits of your telephone number. The PIN must be changed from your phone prior to the first use of RACF.

To set up your PIN (must be completed from the phone to which the number is assigned):
1. Lift the handset.
2. Dial *98.
3. When prompted to enter your PIN code, dial your default PIN code, followed by “#”.
4. When prompted to enter new PIN code, enter a new 4-digit PIN code, followed by “#”.
5. When prompted to re-enter new PIN code, re-enter the new PIN code, followed by “#”.
6. Listen for confirmation announcement, then, hang up.

You may now use the global access number to access your Call Forward features and settings.

To forward your calls
1. Dial the Remote Access to Call Forwarding phone number 844-843-5131.
2. Dial your 10-digit telephone number. Then press #.
3. Enter your PIN. Then press #.
4. Press 1 for Call Forward Activation
5. Dial the “forward-to” number, including 1 + area code if required, and press #.
6. After the “forward-to” number is read back, press 1 to confirm.

To cancel Call Forwarding
1. Dial the Remote Access to Call Forwarding phone number 844-843-5131.
2. Dial your 10-digit telephone number. Then press #.
3. Enter your PIN. Then press #.
4. Press 2 for Call Forward Deactivation

When you are using Remote Access to Call Forwarding, you have three chances per call to enter your phone number and PIN. If you make an error on the third try, you will be disconnected. Just hang up and try again.

To change your PIN (must be completed from the phone to which the number is assigned)
1. Dial *98.
2. When prompted to enter your PIN code, dial your current PIN code, followed by “#”.
3. When prompted to enter new PIN code, enter a new 4-digit PIN code, followed by “#”.
4. When prompted to re-enter new PIN code, re-enter new PIN code, followed by “#”.
5. Listen for confirmation announcement, then hang up.

If you forget your PIN, call 1-888-276-5255.

**Call Pull**

This service lets the user transfer (or “pick up”) an ongoing call (i.e., in conversation) to another phone, belonging to the same user, and continue the conversation.

Configure your Call Pull service in the following way:

1. Select one of the options:
   - **All My Telephones** - the rule set in the table will be applied to all your telephones
   - **Phone to Phone** - you can set a rule for each telephone

2. Set the configuration in the table (for all your telephones or for each telephone individually):
   - **Inactive** - it is not possible to transfer the ongoing call through the service, that is, pick up the ongoing call from this phone to another one or pick up the ongoing call from another phone to this one;
   - **Active** - any call can be transfer/pick up through the service to and from the phone.

Notes: Your administrator/manager may decide to block editing of some parts of this service by anyone who is not an administrator/manager.
Call Transfer

The Call Transfer service transfers both made and received calls.

The Call Transfer Service must be Active in the portal.

If you are in a call and wish to transfer the call to another party

Blind Transfer:
1. Press “Transfer” soft key.
2. Dial the number and press the “blind Transfer” soft key (or the Send button to complete transfer of active call).

Attended Transfer:
1. Press an idle line key to make a new call and the active LINE will be placed on hold automatically.
2. Once the call is established, press transfer button followed by the LINE button of the held line to transfer the call.
3. After the call is transferred, phone will display idle screen.

Conference Calling – Ad Hoc

You can use this service to create a conference call in which you add on each individual participant one at a time until all participants are connected.

Your seat will have one of the following statuses
- **Active** - it’s possible to create conferences
- **Inactive** - it’s not possible to create conferences

To establish a conference call
1. Dial the phone number of the first conference call participant and wait until answered
2. Press the CONFERENCE button to bring up the conference dialing screen
3. Dial the next party’s number followed by the SEND button or press the “Dial” soft key
4. Dial the next party’s number followed by the SEND button or press the “Dial” soft key
5. And so on until all participants are joined to the call and then press the “Conference Call” soft key.

Put the conference call on hold
1) Press the Hold Button to put all participants on hold
2) Press the Hold Button again (or press the “ReConf” soft key to resume the conference call

Remove a participant
1. Press the “Kick” soft key in the conference dialing screen to remove a party

End the conference
Conference initiator hangs up or presses the “EndCall” soft key
Direct Call Pickup
This service provides for call pickup of ringing phones by using the service access code followed by the extension of the user to pick up, as long as both users belong to the same call pickup group. If the user doesn’t belong to any group, the user can pick up a call from another user that doesn’t belong to another group. This service is divided in two sections.

- Listing of the user groups, with the following information:
  - **Name** - name given to the Direct Call Pickup group
  - **Users** - users belonging to the group; that is, those who can pick up calls and for whom calls are picked up
- Configuration of the phones on which the user wants to enable Direct Call Pickup

To pick up a ringing phone in your pickup group, Dial *12 and then dial the extension number of the ringing phone.

Group Call Pickup
This service lets you to pick up a ringing call at another user’s number, provided you both belong to the same pickup group. This service is look-up only. The following information is available:

- **Name** - name given to the Group Call Pickup
- **Call Type** - sets which call will be picked up when there is more than one simultaneous call within the group
  - **Most Recent Call** - if more than one call is ringing, the most recent one is picked up
  - **Oldest Call** - if more than one call is ringing, the oldest one is picked up
- **Users** - users belonging to the group, that is, those who can pick up calls and for whom calls are picked up
- **Numbers** - the numbers for each user that can be call picked up

To pick up a ringing phone in your pickup group, Dial *11.

Hunt Group
Use this service to distribute calls to multiple destinations, based on different types of function. This service is look up only. The following information is available:

- **Name** - name of the Hunt Group
- **Incoming Numbers** - numbers used to contact the Hunt Group
- **Members** - numbers to which calls coming into the Hunt Group will be forwarded
- **Type** - the way in which calls will be handed off to members (in the case of sequential types, information on the number of cycles to be run may be displayed. If it is not, then after all numbers have been rung whatever action is described in Forward will be carried out)
  - **Simultaneously** - the call is simultaneously delivered/delivered in parallel to all members
  - **Random Sequence** - the call is randomly delivered to one member at a time
  - **Fixed Sequence** - the call is delivered to one member at a time, in the order shown
  - **Changed Sequence** - the call is delivered to one member at a time, in the order shown. Once the call to the Hunt Group is over the answering order is altered with the member in first place moving down to last place.
  - **Sequential by Member** - the call is delivered to one member at a time, in an order based on the number of Hunt Group calls each member has answered. The member with the fewest calls answered will be in first place.
- **Forward** - the call is forwarded to the indicated number according to the following possibilities:
  - **Not Applicable** - no forwarding takes place
  - **If No One Answers** - the call is forwarded if it rings at all members but no one answers it
  - **If All Busy** - the call is forwarded if it is delivered to all members but they are all busy
  - **If Delivery Fails** - the call is forwarded if delivery to the various members fails
Note: If forwarding is set it takes place at the end of the first cycle, irrespective of whether the Hunt Group is configured to permit a higher number of cycles per call.

**Last Number Redial**

To redial the last number dialed, lift the handset or push the speaker button and then press the SEND/REDIAL button on your phone or press the “Redial” soft key.

**Manager/Assistant**

Use this service to forward calls to your assistant(s). Configure one or more Schedule rules and one Off-Schedule rule for each call forwarding configuration.

Configure your Manager/Assistant service in the following way:

1. **Description** – configured Manager/Assistant description.

2. Choose one of the following from the **If They Call Me On** box:
   - Any Number – the rule will be applied to all your numbers
   - User Number – the rule will only be applied to the number(s) of the selected user(s)

3. **State** – if the configuration is active, then the rule applicability is used. Otherwise the rule is ignored.

4. In the Exceptions section, set numbers and/or prefixes from which calls will not be forwarded. The following options are available:
   - **Number** – set the target number in the box below
   - **General Prefix** – select the target prefix from the list or enter a regular expression in the box below

Notes: The Blocking of Incoming Calls service has priority over the Single Number Reach service. In other words, if one of the blocking rules applies, the call will be blocked and will not be delivered to any telephone. The Blocking of Incoming Calls service does not have priority over the Manager/Assistant, Call Forwarding (Always) or Call Forwarding (Schedule) services. If one of these services forwards a call, it will not be blocked.

If there are no schedule rules configured, the forwarding’s type is “No schedules defined”, and there can be different configurations (always, if busy, if not answered, if not available). By clicking on “Set Schedules”, it becomes possible to configure one or more Schedule rules and one Off-Schedule rule. In an off-schedule rule, define the behavior when none of the off-schedule rules applies. An off-schedule rule can have different configurations (always, if busy, if not answered, if not available).

In a schedule rule configure the following options:

1. Choose the Schedule Menu name.

2. On Schedule tab, define a schedule:
   - **Rule Validity** – start and end dates, or always
   - **Rule Applicability** – weekday (Monday to Sunday, holidays) and the hour range to apply in each day

   Set the number(s) calls should be forwarded to in the Forward to an internal number section. Only the organization’s internal numbers will be accepted.

Notes: You cannot configure the same assistant for the same manager with different forward rules. Exceptions are only applied to Manager/Assistant at the same level. If no Manager/Assistant has been set, you cannot set exceptions.
There may be some non-editable preset configurations. Your administrator and/or manager may have set these and only they can change them. Such settings have priority over any settings you make. The schedules are applied according to the number’s region time zone (the number configured on “if they call me to/for”). If the number has no associated region, then the organization time zone applies. When you configure prefixes, enter regular expressions that define the range of numbers to which the rule is to be applied.

The Manager/Assistant service has priority over the Single Number Reach service. In other words, if one of the forwarding rules set applies, the call will be forwarded and will not be delivered to the telephone.

In the same way, the service has priority over the Call Forwarding service. If one of the forwarding rules set here applies, the call will not be forwarded according to the Call Forwarding rule but will be forwarded according to the Manager/Assistant rule. In a similar fashion, the service has priority over the Do Not Disturb, Anonymous Rejection and Incoming Call Blocking services. That is, if one of the forwarding rules set applies, then the call is forwarded and is not rejected.

If the Outgoing Call Blocking service is configured for the manager, the call will not be made. This is in accordance with configuration set in the Outgoing Call Blocking service.

Single Number Reach does not have priority over the Manager/Assistant or Call Forwarding (Always) or Call Forwarding (Schedule) services. If one of these services has been configured to forward a call then, this call will be delivered to the configured telephone.

In the same way, the service has priority over the Do Not Disturb, Anonymous Rejection and Incoming Call Blocking services. That is, if one of the forwarding rules set here applies then the call is rejected and is not delivered to any telephone.

For any numbers for which no configuration is set, calls made to this number will be delivered to the telephone as per the settings in the My Telephones section on the Start page.

If you do not set any rules for this service, the default configuration for the associated numbers and telephones will be loaded per the information in the My Telephones section on the Start page. You will receive the following message, “Default configuration of associated Telephones and Numbers”.

Music On Hold
Use this service to activate or deactivate the playing of music when you put calls on hold.

Configure your Call Hold Music service in the following way:
1. Set whether or not the service is active in the Music on Hold field:
   - **Active** - the person called will hear the music when the call is put on hold by the caller
   - **Inactive** - when the call is put on hold, no music is played to the called destination
2. If the service has been activated in the previous step, select the item to play, while the call is on hold, from the Music box.
   If the service is inactive, this field will not be shown.

Note: Your administrator/manager may decide to block editing of this service by anyone who is not an administrator/manager.

Paging - Intercom
Enables a user to dial a code that is assigned to another phone and will immediately connect the caller to the other phone without ringing it and speak to the called party over the phone’s speaker or over the handset.

A button is programmed on the phone (or the optional expansion module if available) with the number to be paged. The button is pushed by the caller to establish the intercom page.

Note: Your service provider or administrator/manager may decide to block editing of some parts of this service by end users.
Paging - Overhead

Enables a user to dial an on-net number that is assigned to a single paging-enabled device responsible for broadcasting a real-time audio (vocal page) to all connected speakers.

Dial the number assigned to the overhead paging system and make your announcement.

Your specific overhead paging system may require the entry of additional digits (for example to access specific paging zones) after you are connected to the system. Compatible ATA is required for connecting your paging system.

Pre-Answer

The Pre-Answering service answers the call by playing an announcement before delivering it to the destination (user number). This service is look-up only. The following information is available:

- **Name** - name of the Pre-Answering option
- **Pre-Answer Number** - the number contacting Pre-Answering
- **Pre-Answering Destination** - the number to which calls coming in to Pre-Answering are then forwarded
- **Announcement** - announcement that is heard by anyone contacting Pre-Answering
- **After Announcement** - forwarding to the Pre-Answering destination

Shared Virtual Fax

This service is for sending and receiving faxes using your email instead of a fax machine. This service is look-up only. The following information is available:

- **Number** - incoming/outgoing number (contact number used for receiving a virtual fax and the number shown when a fax is sent)
- **Format** - format of the email annex used in receiving email faxes. There are 2 possible formats:
  - tiff
  - pdf
- **Description** - descriptive name for the fax
- **Archiving Time** - maximum time files are stored on the platform, in days
- **Email(s) for Sending Faxes** - email accounts that faxes can be sent from, identified with the Virtual Fax account number
- **Email(s) for Fax Reception** - email accounts that faxes can be received at, sent to the Virtual Fax account number

To send a fax, send an email to <destination number>@vfax.businesshostedvoice.com. You will receive a delivery report indicating success or failure.

Multiple annexs can be attached to a single fax. The following file formats are supported for annexs.

- Received faxes are deposited in your email account.
Universal Communications Soft Client

Calls can be made from your desktop or laptop computer using the Business Hosted Voice softphone.

UC Desktop configuration (for Windows and Mac OS) is implemented as a WebRTC endpoint, running on a WebRTC compliant browser.

The following browsers are supported:
- Chrome
- Firefox

The softphone is provided with each Business Seat.

Access the Softphone by going to https://mobile.businesshostedvoice.com/login

To dial a call, click on or press the corresponding number and then click the send button 📞

To answer a call, click the send button 📞

Ensure that your speaker and microphone are unmuted as necessary on your computer.

Click on 📈 to open the dial pad.

Click on 📊 to open a list of calls made and received and their time of call and duration.

Information about the Softphone is available by clicking on the Menu icon.

Waiting Queue

The Waiting Queue service is used to organize calls into a queue. Callers will hear the configured announcement until their call is answered (by your number). If the queue has reached its maximum size, further calls are rejected after hearing the announcement.

This service is look up only. The following information is available:
- Name: name of the call queue
- Incoming Numbers: incoming numbers sent to the call queue
- Destination No.: number to which calls entering the queue will be forwarded
- Max. No. Calls: maximum number of calls that can be waiting and be listening to music while waiting to be answered by the destination
- Entry Announcement: announcement that will be heard by anyone calling one of the incoming numbers, when this number is busy
- Queue Full Announcement: announcement heard by anyone calling one of the incoming numbers, when the Waiting queue has reached the Maximum Number of Calls.

Note: When looking up the calls made to a Waiting queue, the recorded time refers to the incoming call to the queue and not the call sent to the destination from the queue.
2.5 My Calls

Calls List
On this page view the list of voice and fax calls both sent and received. This service is not allowed if more than one call is active. Before making any search, you must first select the time period. The calls list is organized into the following tabs:

- **Calls Made** – list of calls made by users
- **Answered Calls** – list of calls received by users
- **Missed Calls** – list of calls received but not answered by users of the selected organization

Note: Your administrator and/or manager may decide to block editing of some parts of this service.

Outgoing Calls
The fields displayed in the list of calls made offer the following information:

- **Start Date** – date and time at which the call started
- **Ring Time** – the approximate time for which the call was ringing
- **Duration** – call duration
- **End Date** – date and time at which the call ended
- **Time Zone** – call time zone
- **Origin** – number used to make the call
- **Destination** – number the call was made to
- **Final Destination** – indicates the final destination for the call.
  
  For example, if the call was forwarded, the number it was forwarded to is displayed.

Destination Category – if the call is:
- **Intra-Access** – between an origin and destination with the same access
- **Inter-Access** – between an origin and destination with different organization accesses
- **External** – to a destination outside the organization
- **Service** – indicates the service used in the call
- **Origin Telephone** – the telephone used to make the call
- **Cost** – cost of the call in dollars (not displayed for calls that are not answered)
- **Routing Type** – indicates the routing service or type, if applied to the call
- **Answered** – indicates whether or not the call was answered at the destination
- **Telephone Type** – the origin telephone type
- **Call Identification** – unique call identifier
- **Identification of a Forwarded Call** – for correlating the records of the call received and the call made (forwarded) in the context of a single call

Classification of Destination – indicates the call destination type:
- **Virtual on Net** – destination is a Virtual Member of the organization, contacted using the short number
- **On Net** – destination is an organization short number
- **Forced on Net** – destination is an organization long number
- **Off Net** – destination is external to the organization
- **Call Type** – indicates whether the call went to the destination or if it was forwarded
- **Forwarding Route** – destinations contacted in a forwarded call
- **Recorded Call** – if the call has been recorded the following actions are available:
  - **Download** – for downloading the call recording as a file
  - **Delete** – for deleting the record of the call having been recorded but retaining the call record
Answered Calls

The fields displayed in the list of calls received offer the following information:

- **Start Date** – date and time at which the call started
- **Ring Time** – the approximate time for which the call was ringing before being answered
- **Duration** – call duration
- **End Date** – date and time at which the call ended
- **Time Zone** – call time zone
- **Origin** – number from which the call was made
- **Destination** – number at which the call was received
- **Final Destination** – indicates the final destination (number/telephone) for the call. For example, if the call was forwarded, the number it was forwarded to is displayed.
- **Service** – indicates the service used in the call
- **Cost** – cost of the call in dollars (not displayed for calls that are not answered)
- **Routing Type** – indicates the routing service or type, if applied to the call
- **Path in Hunt Group** – indicates the path the call took in the Hunt Group before being answered
- **Call Waiting Time** – indicates the time the call spent in the call waiting queue before being answered
- **Telephone Type** – type of telephone that answered the call, if applicable
- **Call Identification** – unique call identifier
- **Identification of a Forwarded Call** – for correlating the records of the call received and the call made (forwarded) in the context of a single call
- **Recorded Call** – if the call has been recorded the following actions are available:
  - **Download** – for downloading the call recording as a file
  - **Delete** – for deleting the record of the call having been recorded but retaining the call record

Missed Calls

The fields displayed in the list of calls that are not answered include the following information:

- **Start Date** – date and time at which the call started
- **Ring Time** – the approximate time for which the call was ringing before being terminated
- **End Date** – date and time at which the call ended
- **Time Zone** – call time zone
- **Origin** – number from which the call was made
- **Destination** – number at which the call was received
- **Final Destination** – indicates the final destination (number/telephone) for the call. For example, if the call was forwarded, the number it was forwarded to is displayed.
- **Service** – indicates the service used in the call
- **Routing Type** – indicates the routing service or type, if applied to the call
- **Path in Hunt Group** – indicates the path the call took in the Hunt Group before being answered
- **Call Waiting Time** – indicates the time the call spent in the call waiting queue before being answered
- **Telephone Type** – type of telephone contacted, if applicable
- **Call Identification** – unique call identifier
- **Identification of a Forwarded Call** – for correlating the records of the call received and the call made (forwarded) in the context of a single call
- **Lost Call Reason** – indicates the reason that the call was not answered: busy destination, call picked up or not answered in a time limit
The Search options are as follows:

- **Set Time Interval** – text boxes for inputting the start and finish dates for the search
- **Search** – any change to the above-mentioned search fields is not automatically reflected in the display table. Click on this button to update the records.
- **Type of Information to show** – selection box for choosing the Basic/Premium display type
- **Delete Recordings** – you may select one or more recorded calls for deletion
- **Clear Search** – clears the filters for the fields in the table and refreshes to a display of the search fields mentioned above
- **Page Navigator** – for choosing which page you want to see, with shortcuts to the First/Last and Previous/Next pages
- **Export to File** – for exporting the current search results and filters to a file and send it by email to the user
- **Number of Objects Per Page** – for selecting the number of records to display per page (25, 50, 100 or 200)

The results may be filtered by any of the fields in the table, so that relevant results can be filtered in. There are four types of search:

- **Text search** – for searching by key words, the wild cards “!” and “*” “<” “>” may be used, the latter two only in number or time fields
- **Search by selection** – one or more of the displayed choices may be selected
- **Time search** – for searching for values (seconds) or time in the format hours:minutes:seconds (equal to).
  - The symbols “<”, “>” and “!” may also be used. Examples: >30:59:59 or !10
- **Search for numerical values** – for searching by values (equal to). The symbols “<”, “>” and “!” may also be used

If you want to order the display information, click on the corresponding column. The icon will appear in the column, for you to choose an ascending or descending order.
2.6 My Profiles

Use this page to access and manage a list of all your profiles. Here, you can create, delete, edit name, manage profile, activate a profile and see an overview of all configurations. To change the name of a Profile, just edit it and then click on “Save”.

To add a new Profile, click on +. This will insert a new line for you to enter the name of the new profile and set whether or not the profile is active. To finalize the creation of the new profile, click on “Save”. To delete an existing profile, just click the x on the line of the target profile. To finalize deletion of the selected profile(s), click on “Save”.

The Manage Profile option lets you configure the services in a profile that is currently inactive. In services common to all profiles, changes made to one of the profiles are automatically made in all of them.
The See all Configurations option brings up an overview of all configurations.

Note: The configuration of this service can be modified only by your service provider.
2.7 My Contacts

Personal Contacts
The Personal Contacts page lists personal contacts. You may take the following actions:
- Search contacts
- Add contacts
- Delete contacts
- Edit contacts
- Make a call to a contact via the portal (commonly known as click-to-call).
  Upon clicking, you will be asked to select the telephone that is to receive the call
- Send an email to a contact via the tool used in your operating system for sending emails

When you create a new profile, it takes on the configurations of the Single Number Reach and Outgoing Numbers for the active profile (where these services are available to you). Profiles can only be deleted when they are not active. There are services common to all profiles (such as Personal Speed Dial). When you edit such a service you will see the message: “Service shared by all profiles”.

Note: In click-to-call, if the terminal of origin is a Business Hosted Voice device and has call forwarding configured, the forwarding doesn’t occur. However, if the terminal of origin is mobile and as call forwarding configured within the terminal, the call forwarding occurs.

Corporate Contacts
The Corporate Contacts page lists corporate contacts of the following types:
- Internal Corporate Contacts: users of the Organization, including info of their numbers and Email
- External Corporate Contacts: contacts who are external to the organization, available if organization has the service “External Corporate Contacts”
- Corporate Speed Dial codes: corporate speed dials codes, listed if organization has the service “Corporate Speed Dial”

You may take the following actions:
- Search contacts
- Make a call to a contact via the portal (commonly known as click-to-call). Upon clicking, you will be asked to select the telephone that is to receive the call
- Send an email to a contact via the tool used in your operating system for sending emails

Note: In click-to-call, if the terminal of origin is Business Hosted Voice device and has call forwarding configured, the forwarding doesn’t occur. However, if the terminal of origin is mobile and has call forwarding configured within the terminal, the call forwarding occurs.
The service provides an app for mobile and tablet use of Business Hosted Voice.

The app is implemented as a WebRTC endpoint, running as a hybrid native iOS and Android app.

The app is supported on the following mobile platforms. Call customer service to confirm current versions supported.
  • iOS
  • Android

Tablet configuration is supported in the following mobile platforms:
  • Android
  • iOS

**Mobile App**

To download the mobile app go to the App Store for iOS devices or to Google Play for Android devices, search for “Business Hosted Voice” and download the app. You will need your Business Hosted voice user name and password to access the app.

When the app is downloaded you may open the app and dial and receive calls on it as well as perform other functions.

Ensure that the actuation slider button in the top right corner of the app screen is moved to the right and the button is highlighted in green.

To dial a call, click on or press the corresponding number and then click the send button

To answer a call, click the send button

Ensure that your speaker and microphone are unmuted as necessary on your mobile device.

Click on to open the dial pad.

Click on to open the contacts list.

Click on to open a list of calls made and received and their time of call and duration.
Directory Assistance — Dial 411
If you need to contact directory assistance to get a local or long distance phone number, dial 411. Additional charges may apply.

International Long Distance Rates
International rates vary based on the call destination. For current international pricing visit www.optimum.com/business/business-phone

Billing Information
If you have any questions regarding your monthly billing statement, please call customer service.

All prices are subject to change.
4 Telephone Sets

Premium Phones GXP2140 & GXP2170
The GXP2140 supports 4 lines and the GXP2170 supports 6 lines and are compatible with the GXP2200 LCD extension module (GXP2200 EXT) making these phones ideal for receptionists and users who handle high call volumes. The GXP2140 and the GXP2170 include HD audio, a 4.3 inch color screen, and built-in Bluetooth supports use of Bluetooth headsets.

Standard Phone GXP1625
The GXP1625 is a 2-line IP phone that includes 3-way conferencing. A backlit LCD screen creates a clear display for easy viewing. Additional features such as dual-switched 10/100 Mbps ports, HD audio, multi-language support, programmable soft keys.

Using The Headset Or Speaker
1. Use the Speaker button to turn speaker ON/OFF.
2. Use the Headset button to use a headset once one has been connected.

Making A Call
1. Take Handset/Headset off-hook or press Speaker button or an available LINE key (activates speakerphone).
2. The line will have dial tone and the corresponding line’s LED will turn green.
3. If you wish, select another LINE key.
4. Enter the phone number.

Multiple Incoming Calls:
1. When there is a call waiting, you will hear a Call Waiting tone.
2. The next available line will flash red.
3. Answer the incoming call by pressing its corresponding LINE button.
4. The current call will be put on hold.
5. Toggle between the calls using LINE button.

Ending A Call
End a call by pressing the “EndCall” soft key or hang up the phone.

Call Hold/Resume
1. Hold: Place a call on “hold” by pressing the hold button.
2. Resume: Resume call by pressing the corresponding blinking LINE or by pressing the HOLD button again.

Call Transfer
If you are in a call and wish to transfer the call to another party.

Blind Transfer:
1. Press transfer button.
2. To complete transfer of active call, dial the number and press the send button or the “Blind Transfer” soft key.

Redial
1. Take the phone off-hook.
2. Press the SEND button or press the “DIAL” soft key.

Answering Calls

Single Incoming Call:
1. Answer call by lifting Handset/Headset or pressing SPEAKER or by pressing the corresponding account LINE button.

Phone number may be entered (and corrections made with “Backspace” soft key) before taking handset/headset off-hook
**Attended Transfer:**

1. Press an idle line key to make a new call and the active LINE will be placed on hold automatically.

2. Once the call is established, press transfer button (transfer) followed by the blinking LINE button of the held line to transfer the call.

3. After the call is transferred, phone will display idle screen.

**3-Way Calling**

Assuming that you are already in a conversation and wish to bring a third party together in a 3-way conference.

1. Press conference button to bring up the conference dialing screen.

2. Dial the third party number followed by SEND button.

3. When the call is established to the third party, press the “ConfCall” soft key to initiate 3-way conference.

4. To re-establish a 3 way call after putting one party on hold to consult privately with the other party, press conference button and then select the other blinking LINE.

**Cancel a Conference Call:**

1. Press “Kick” soft key in conference dialing screen to remove a party and resume a two-way conversation.

2. Using the ARROW buttons, select the party to remove and then press the round button in the middle of the ARROW buttons.

**Hold The Conference:**

1. Press the hold button (hold) to hold the conference call with all parties on hold;

2. Press hold button (hold) again to resume conference call; or select a blinking LINE to speak with one party.

**End The Conference:**

The conference will be terminated for all three parties if the conference initiator hangs up or presses “EndCall” key.

**Voicemail Message**

A blinking red MWI (Message Waiting Indicator) indicates a message is waiting.

Press the Message button to retrieve the message. You will be prompted through the process of message retrieval.

**Mute/Unmute**

1. Press the MUTE button to mute/unmute the microphone.

2. The Mute icon indicates whether the microphone is muted.

**Volume Adjustments**

Use the volume button to adjust the ring volume when the phone is idle.

Press the volume button during an active call to adjust the call volume.
Expansion Module GXP2200EXT

Up to four expansion modules may be added to a GXP2140 premium phone.

To set up buttons on the Expansion Module, press the middle button between the arrow buttons on your phone.

Use the arrow keys to scroll to the “Preference” icon on the screen.

Hold the selected button on the Expansion Module for 5 seconds.

Use arrow key to select the desired “Mode”.

Use the arrow key to select the desired Account telephone number.

Type in any Description you want using letters on the keys of the dial pad. Continue pushing the key until the desired letter is selected.

Wait 3 seconds at the end of an entry.

Enter the phone number or code desired in the “Value” field.

Press “Save” soft key to save setting.

Press the button you are setting on the Expansion Module to activate the function.
Installation
To install the SoundStation IP 6000, plug one end of the network cable into the network port on the bottom of the SoundStation IP 6000 console, and plug the other end of the network cable into your data port with PoE.

External Microphones
Connect external microphones (optional accessories).
A maximum of one set of two microphones may be connected.

Services
<table>
<thead>
<tr>
<th>Speaker</th>
<th>Soft Keys</th>
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</thead>
<tbody>
<tr>
<td>Microphone</td>
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<td>Microphone</td>
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<td>LED Indicator</td>
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<td>Microphone</td>
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<td>LCD Display</td>
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</tr>
<tr>
<td>Menu Key</td>
<td>Select Key</td>
</tr>
<tr>
<td>Exit Key</td>
<td></td>
</tr>
</tbody>
</table>

Startup
After it has been connected to the network, the SoundStation IP 6000 automatically powers up via Power over Ethernet (PoE) and begins a process of establishing itself on the network.

For more information, refer to the SoundStation IP 6000 User Guide, available online at: http://support.polycom.com
These Administrator instructions pertain to the Business Hosted Voice Administrator’s Self Care portal and pages within that portal. The Business Hosted Voice Administrator’s Self Care portal provides the capability for your organization’s administrator to manage Business Hosted Voice services.
Corporate Contacts

The Corporate Contacts page lists the following corporate contacts types:

• Internal Corporate Contacts: users of the Organization, including info of their numbers and Email
• External Corporate Contacts: contacts that are external to the organization, available if organization has service “External Corporate Contacts”
• Corporate Speed Dial codes: corporate speed dials codes, listed if organization has the service “Corporate Speed Dial”

You may take the following actions:

• Search contacts
• Import external contacts from file
• Export contacts to file

This section details the contacts for the organization’s users, as shown in the following figure. The contact type is shown on the top right corner of the contact panel.

The option on the left “Add new external contact” will show a form to create a new external contact for the Organization:

• Name
  - the name to identify the external contact. Must be unique within the Organizations’ external contacts
• description + number/Email
  - for each external contact is possible to add one or more contact numbers and Emails
  - each number or Email must have a description (for example: home, work, mobile, personal)

The Save link will create the new external contact and save any changes made to the opened contact.

To add more numbers or Emails to the external contact there is a link; Add Information.

The Delete option will delete the external contact, or only the chosen number/Email.

When trying to delete an External Contact, the user will be prompted to confirm the removal of the contact.

Contacts Upload

The system allows the management of the Organizations’ External Corporate Contacts by the upload of a file, of type CSV (Excel) or vCard.

Supported formats:

• CSV / Excel
  - 1 contact per line. Must be used semicolon (;) as the separator between fields within the same line

• fields (4)
  • Name - Name of the External Contact. Must be unique within the Organization
  • Description - description associated with the contact’s number or Email
  • Number/Email - contact’s number or Email to add, update or remove.
  • Action - letter to indicate the action that must be made:
    • ‘A’: to add contact, number or Email. Default behavior.
    • ‘S’: to substitute (update) the contact’s number or Email associated with the provided description
    • ‘R’: to remove the external contact (if only provided the contact name) or to remove the contact’s number or Email (if provided the contacts name and number/Email description)
- Example for a CSV file to associate the number ‘1234’ and an Email to an external contact, and to remove another contact:
  John Jones;extension;1234;A
  John Jones;Email;xpto@company.com;A
  Donald Vieri;;;;R

- **vCard** *(version 3.0 / 4.0)*
  - files with extension *.vcf or *.vcard

  vCard 2.1 is *partially* supported: The number/Email description will not be filled for the new contacts

  The upload using vCard files does not permit the usage of the field ‘Action’. This way, the upload with vCard will only permit the creation of new external contacts.

- allows the upload of several contacts within the same file

- external contact fields obtained from vCard:
  - **Name** - will be used the field FN (full name)
  - **Description** - will be obtained from the field TEL (when a number) or from the field Email
  - **Number** - will be obtained from the field Tel
  - **Email** - will be obtained from the field Email

- Example for a vCard file to create an external contact with a number ‘1234’ and an Email:

  BEGIN:VCARD
  VERSION:3.0
  FN:John Jones
  EMAIL;TYPE=mail:xpto@company.com
  TEL;TYPE=extension:1664
  END:VCARD

After the uploaded file has been processed, it will appear a popup window so the user can download the result file *(Save option)*.

The **result file** is a CSV file with the following format, regardless if the file uploaded was **CSV** or **vCard**:

- **Name** - Name of the external contact
- **Description** - Description of the provided number/Email
- **Action** - Action performed
- **Result** - OK (success), NOK (failure)
- **Reason** - failure reason, in case of result NOK

The first line of the file includes an header with the fields description, and the filename has the format “import_contacts_result_<username>_<timestamp>.csv”
Result file for the upload of the CSV previously mentioned file:

Name;Description;Action;Result;Reason
John Jones;extension;A;OK;
John Jones;Email;A;OK;
Donald Vieri;;R;NOK;Contact nonexistent

External Business Contact after upload:

Contacts Export
You can download a copy of the Organization’s contacts on the Corporate Contacts page using the link: “Export contacts to file…”

Type of Contacts that can be Exported:
- Internal Corporate Contacts
- External Corporate Contacts
- Speed Dial Codes
- All (all the contacts from the listed types)

Type of Files for Export:
- CSV (Excel)
- vCard 3.0

The export of external corporate contacts is only available if the Organization has the service “External Corporate Contacts”

The export of speed dial codes is only available if the Organization has the service “Corporate Speed Dial”

The file with the exported contacts will be available for 24h on the page Download Manager.

Format of the exported contacts:

- CSV
  - file with 1 contact detail per line, where each line has the fields separated with semicolon (;)
  - type of exported contact:
    - Internal / External Business Contact
    - Name
    - Description
    - Number/Email
    - Description/Name
    - Email
    - Speed Dial Code
    - Speed Dial Destination
When exporting a file for **All** types of contacts, the output file has one first field indicating the type of each exported contact

- **Example**
  - Export of **Internal / External Corporate Contacts**:
    - John Jones;Email;xpto@company.com
      
    John Jones;extension;1234

  - Export of **All** types of contacts (for Organizations with services “External Corporate Contacts” and “Corporate Speed Dial”):
    - Internal Business Contact;Joao Silva;;zejoao@company.com
    - Internal Business Contact;Joao Silva;Extension;1000
    - Internal Business Contact;Joao Silva;Mobile;980200432
    - External Business Contact;John Jones;Email;xpto@company.com
    - External Business Contact;John Jones;extension;1234
    - Speed Dial Code;Mart Institute;;*51003;15723412
      
    Speed Dial Code;;;*51002;234567890

- **vCard** (version 3.0)
  - file with 1 vCard for each exported contact
  - vCard fields
    - **FN** - Name of the Contact, or description of the Speed Dial Code
    - **N** - Name of the Contact. Only for Internal Corporate Contacts there is a division for first and last name
    - **EMAIL** - Email of the contact. Includes the description for Internal and External Corporate Contacts
    - **TEL** - number of the contact. Includes the description for Internal and External Corporate Contacts.
      
    For Speed Dial Codes, the description field is used to distinguish between the speed dial Code and the Destination number.

- **Example**
  - Export of **Internal / External Corporate Contacts**:
    - BEGIN:VCARD
    - VERSION:3.0
    - EMAIL;TYPE=Email;xpto@company.com
    - FN:John Jones
    - N:John Jones;;;
    - TEL;TYPE=extension;1234
    - END:VCARD
export of All types of contacts (for Organizations with services “External Corporate Contacts” and “Corporate Speed Dial”):
• BEGIN:VCARD
  • VERSION:3.0
  • EMAIL;TYPE=:zejoao@company.com
  • FN:Joao Silva
  • N:João;Silva;;;
  • TEL;TYPE=Extension:1000
  • TEL;TYPE=Mobile:980200432
  • END:VCARD
• BEGIN:VCARD
  • VERSION:3.0
  • EMAIL;TYPE=Email:xpto@company.com
  • FN:John Jones
  • N:John Jones;;;;
  • TEL;TYPE=extension:1234
  • END:VCARD
• BEGIN:VCARD
  • VERSION:3.0
  • EMAIL;TYPE=:
  • FN:Mart Institute
  • N:Mart Institute;;;;
  • TEL;TYPE=Destination:15723412
  • TEL;TYPE=Code:*51003
  • END:VCARD
• BEGIN:VCARD
  • VERSION:3.0
  • EMAIL;TYPE=:
  • FN:
  • N;;;;
  • TEL;TYPE=Destination:234567890
  • TEL;TYPE=Code:*51002
  • END:VCARD

On this page, you can view the list of voice calls, Faxes and Data sent and received by the organization’s users.
Call List

The calls list is divided into different tabs for:

- **Outgoing Calls** - list of calls made by the users of the selected organization
- **Answered Calls** - list of calls received and answered by the users of the selected organization
- **Missed Calls** - list of calls received but not answered by the users of the selected organization

**Outgoing Calls**
The fields in the calls made list contain the following information:

- **User** - user who made the call
  (if the record shows no user, the call has been forwarded by a Premium service, such as Call Waiting)
- **Start Date** - date and time the call started at
- **Ring time** - approximate time the call rang for
- **Duration** - call duration
- **End Date** - date and time the call ended at
- **Time zone** - call time zone
- **Origin** - number used in making the call
  (part of the number given may contain a mask to protect the user’s privacy)
- **Destination** - the number the call was made to
  (part of the number given may contain a mask to protect the user’s privacy)
- **Final Destination** - indicates what the final destination of the call was.
For example, if the call was forwarded, it shows the number it was forwarded to
  (part of the number given may contain a mask to protect the user’s privacy).
- **Destination Category** - whether the call is:
  - **Intra-Access** - between an origin and destination of the same access
  - **Inter-Access** - between an origin and destination belonging to two of the organization’s accesses
  - **External** - to a destination outside the organization
- **Service** - the service used in the call:
  - Voice Call
  - Fax
  - Data
- **Number of Pages in the Fax** - number of pages sent in fax
- **Phone Origin** - telephone the call was made from
- **Value** - cost of the call in Euros (not shown for calls that were not answered)
- **Location Type** - indicates whether the call was made in roaming
  - National
  - Roaming
- **Forwarding Type** - indicates the service or type of routing applied to the call
- **Answered** - indicates if the call was answered or not at the destination
- **Phone type** - the type of the origin telephone
- **Call Identification** - unique identifier for the call
- **Forwarded Call Identification** - for correlating the records of the call received and the call made (forwarded) in the context of the same call
• **Rating Destination** - indicates the destination type for the call:
  - Virtualonnet - destination is a Virtual Member of the organization, contacted using the short number
  - Free - destination is a free number
  - Onnet - destination is an organization short number
  - Forcedonnet - destination is an organization long number
  - Forcedvirtualonnet - destination long number associated to organization’s virtual member
  - Offnet - destination is external to the organization
• **Call Type** - indicates if the call went to the destination or if it was forwarded
• **Forwarding Path** - destinations contacted in a routed call
• **Country** - country where the call was made

**Answered Calls**
The fields in the calls received list contain the following information:

• **User** - user who received and answered the call
  (if the record shows no user, the call was made by an Premium service, such Call Waiting)
• **Start Date** - date and time the call started at
• **Ring time** - approximate time the call rang for
• **Duration** - call duration
• **End Date** - date and time the call ended at
• **Time zone** - call time zone;
• **Origin** - number used in making the call
• **Destination** - the number the call was made to
• **Final Destination** - indicates what the final destination of the call was.
  For example, if the call was forwarded, it shows the number it was forwarded to
• **Service** - the service used in the call:
  - Voice Call
  - Fax
  - Data
• **Location Type** - indicates whether the call was made in roaming
  - National
  - Roaming
• **Forwarding Type** - indicates the service or type of routing applied to the call
• **Hunt Group Path** - indicates the path the call took through the Hunt Group before being answered
• **Time Queue** - indicates the time the call spent in the Waiting queue before being answered
• **Phone Type** - the type of the telephone that answered the call, if applicable
• **Call Identification** - unique identifier for the call
• **Forwarded Call Identification** - for correlating the records of the call received and the call made (forwarded) in the context of the same call
• **Country** - country where the call was received
Missed Calls
The fields in the unanswered calls list contain the following information:

- **User** - user who received and answered the call (if the record shows no user, the call was made by an Premium service, such Call Waiting)
- **Start Date** - date and time the call started at
- **Ring time** - approximate time the call rang for before being terminated
- **End Date** - date and time the call ended at
- **Time Zone** - call time zone;
- **Origin** - number used in making the call
- **Destination** - the number the call was made to
- **Final Destination** - indicates what the final destination of the call was. For example, if the call was forwarded, it shows the number it was forwarded to
- **Service** - the service used in the call:
  - Voice Call
  - Fax
  - Data
- **Forwarding Type** - indicates the service or type of routing applied to the call
- **Hunt Group Path** - indicates the path the call took through the Hunt Group before being terminated
- **Time Queue** - indicates the time the call spent in the Waiting queue before being terminated
- **Phone type** - the type of the telephone that answered the call, if applicable
- **Call Identification** - unique identifier for the call
- **Forwarded Call Identification** - for correlating the records of the call received and the call made (forwarded) in the context of the same call
- **Lost Call Reason** - indicates the reason that the call was not answered: busy destination, call picked up or not answered in a time limit
The following search options are available:

1. **Set Time Interval** - text boxes for inserting the start and end dates for the search
   (these must be in the format shown in the figure. A picker is provided to make this easier)
2. **Search** - any change in the above search fields (with the exception of the organization selection box)
   is not automatically reflected in the results table. You need to click on this button to update the display.
3. **Type of Information to Show** - selection box for selecting Premium/Basic view
4. **Delete Recordings** - you can select and delete one or more recordings of calls for deletion
5. **Clear Search** - clear any field filters you have set in the table to return to a display of the information as per the above search fields
6. **Page Navigator** - for choosing the page you want to see, with shortcuts to the First/Last and Next/Previous pages
7. **Export to File** - for exporting the search results and current filters to a file and send it by email to the user
8. **Number of Objects Per Page** - for choosing how many records you want to see on each page (25, 50, 100 or 200)

The displayed results can be filtered by all table fields, so you can filter in relevant records.
The following types of search are available:

- **Text search** - you can search by keywords and can use the “!” and “#” “<” “>” wild cards.
  The last two of these can only be used in numerical or time fields.
- **Search by Selection** - you can select one of the available options
- **Search by Time** - you can search by periods (seconds) or (matching) clock times, in the format hours:minutes:seconds.
  You can also use the symbols “<”, “>” and “!”. Valid examples: >30:59:59, !10
- **Search by Numerical Value** - you can search by (matching) values and also use the “<”, “>” and “!” symbols

If you want to order the information to be displayed, click on the corresponding column and the column icon
will indicate if the display has been arranged in ascending or descending order.
Account Codes

This service lets the user assign an Account Code to a call that he makes. This Account Code will then be included in the detailed invoice of the organization, allowing an aggregation of these costs, for example in a law firm it will present the costs for calls associated with the process of a given customer.

Once assigned to a customer, all associated users have the possibility to see and use all customer Account Codes.

Configuration

By expanding the service it is possible to manage the Organization Account Codes, which are listed in a table containing the following information:

- **Code** - Numerical sequence of the Account Code.
- **Description** - Description of the Account Code.

To add a new Account Code you need to click the ‘+’ button, fill the new entry fields and click ‘Save’ button. To delete an Account Code you need to click the ‘x’ button of the entry you want delete and click ‘Save’ button.

A code may be entered for the purpose of identifying a specific account to which a particular call should be associated. Your organization will determine the 4-digit codes assigned to specific accounts (organizations, departments, employees, etc.).

Note: Only your organization’s administrator may be permitted to establish and change Account Codes.

To use an Account Code:
1. Take the phone off hook and dial *96.
2. Listen for the 3-pulse confirmation tone.
3. Enter the 2 to 4-digit account code you wish to use followed by # and listen for dial tone.
4. Dial the number you are calling.

Authorization Codes

Authorization Codes

On this screen the Manager can view, create/edit and enable/disable the Customer’s Authorization Codes.

When you open the screen, the existing Authorization Codes are displayed in a list containing the following information:

- **Call types** - List of Call Types. For each Call Type the respective checkbox indicates whether the restriction applies.
- **Active** - Indicates if the Authorization Code is active at Customer level.


**Create / details of an Authorization Code**

For each Authorization Code the Administrator can configure the following parameters:

- **Description** - Optional field containing the description of the Authorization Code.
- **Call Types** - List of Call Types. For each Call Type the respective checkbox indicates whether the restriction applies.
- **Active** - Indicates if the Authorization Code is active at Customer level.
Tips
• To edit an existing Authorization Code you must click the “Code” field of the respective row in the list table, which opens the edit form. After changing the parameters you need to click “Save”.
• To activate an Authorization Code on the Customer it is necessary to place the “check” in the respective “Active” checkbox and click “Save”. Note that you can only have one active Authorization Code for the Customer, which follows that by putting the “check” on one of the Authorization Codes it is automatically taken from the remaining.
• To disable an Authorization Code it is necessary to remove the “check” from the respective “Active” column and click “Save”.

Call Detail Records
To access Call Detail Records (CDRs) click on General and then Call List. All calls are presented and may be exported to a .csv file by clicking on “Export List to File” at the bottom of the window.

Customer Announcements
You can view, edit the audio announcements available to the organization on this page. These announcements may be configured for services that support the playing of announcements.

You can also view the system music.

If service Customer Announcements Listen Capability is active, you can listen and download the customer announcements and the system music.

The option Create Music permits you to create new announcement
• For creating a new announcement is necessary to fill the field Name, if the announcement will be Active, if it will be Available for All services and the option Upload file or Text to Speech.
• In case of the option Available for All Services is not checked, the service options that appear are IVR Menu, Music on Hold, Pre-Answer and Waiting Queue.
• In case the selected option is Upload file, it’s necessary to choose the file to upload. The valid extensions are: .wav and .g722.
• In case the selected option is Text to speech, it’s necessary to choose Language and Voice wanted, such as Advert text.
• The button Listen allows to listen the announcement before you Save it.
Customer Holidays

At the Customer Holidays service you can manage the customer holidays:
• Visualize the holidays by year;
• Add, edit or remove holidays;
• Copy all holidays from a year to another; the destiny year must be in the future and without any configured holidays.
• Enforce the non-appliance of a national holiday at the customer level

It is not possible to add, edit or remove past holidays.
At the National Holidays area, the manager can uncheck the national holidays that are not to be applied to the customer (by default, the national holidays apply to all customers).
At the Customer Holidays area are presented the holidays configured in the customer scope.
In both areas, the holidays are presented by year in a tabular form with the fields:
• **Name** – holiday description
• **Date** – date when the holiday occurs, defined by day, month and year

The holidays have to be added manually every year by the operator.

Copy holidays

Use the Copy Holidays option to copy all customer holidays from a year to another; the destiny year must be in the future and without any configured holidays.

• **Copy All Holidays** – the year you want to copy the holidays to

By clicking on “New Holiday” a new row is added to the customer holidays table. It is not possible to create more than one holiday in the same day.
Between National and customer holidays may exist duplicated names/dates.
The number of customer holidays do not include the system holidays exclusions for the customer.

Direct Call Pickup

This service provides for call pickup of ringing phones by using the service access code followed by the extension of the user to pickup, as long as both users belong to the same call pickup group. If the user doesn’t belong to any group, the user can pickup a call from another user that doesn’t belong to another group. This service is divided in two sections.

• Listing of the user groups, with the following information:
  • **Name** - name given to the Direct Call Pickup group
  • **Users** - users belonging to the group, that is, those who can pick up calls and for whom calls are picked up
• Configuration of the phones on which the user wants to enable Direct Call Pickup

You can manage the Direct Call Pickup Groups in the administrator’s portal. The groups are displayed in a table list containing the following information:

• **Name** - name given to the Direct Call Pickup group (includes a hyperlink to the group in the portal)
• **Active** - sets whether the configuration is active or not:
  • if the options is checked the service configuration is applied for the users
  • if the options is not checked the service configuration will both be applied
• **Delete** - allows you to delete Direct Call Pickup Groups, excluding the Organization Direct Call Pickup Group (this group includes all users of the organization that are not in any of the others groups created)

In this page you can set the type of all Direct Call Pickup Groups, which define which call to capture:
• **Capturing the Most Recent Call** - in case there are more than one ringing call, it captures the most recent one;
• **Capturing the Oldest One** - in case there are more than one ringing call, it captures the oldest one.
You can click on “Create Direct Call Pickup” to be taken to the page for creating a new pickup group.
Create Direct Call Pickup Groups

You can add a new group on this page by completing the following form:

- **Name of the Direct Call Pickup Group** - name of the Direct Call Pickup group
- **Type of Direct Call Pickup group** - sets the call to be picked up
  (this is an organization configuration and can only be defined in Direct Call Pickup Listing):
  - **Pick Up the Most Recent Call** - if there is more than one call ringing in the group, the most recent one will be picked up
  - **Pick Up the Oldest Call** - if there is more than one call ringing in the group, the oldest one will be picked up
- **Active** - indicates whether or not the configuration is active
- **Users** - users who belong to the group, that is, those who can pick up calls and from whom calls can be picked up

If the Active option is not selected it will not be possible to pick up calls in the configured way.

Add users
You can add a user to the group in the following way:
1. In the Add User option, start writing the user name until the user appears in the listing.
2. Select the user you want.
3. Click on [+].

Remove users
You can remove a user from the group in the following way:
1. Click on [x] for that user

Direct Call Pickup Group Details
You can configure the following options for an existing Direct Call Pickup Group on this page:

- **Name of the Direct Call Pickup Group** - name of the Direct Call Pickup group
- **Type of Direct Call Pickup group** - sets the call to be picked up
  (this is an organization configuration and can only be defined in Direct Call Pickup Listing):
  - **Pick Up the Most Recent Call** - if there is more than one call ringing in the group, the most recent one will be picked up
  - **Pick Up the Oldest Call** - if there is more than one call ringing in the group, the oldest one will be picked up
- **Active** - indicates whether or not the configuration is active
- **Users** - users who belong to the group, that is, those who can pick up calls and from whom calls can be picked up

If the Active option is not selected it will not be possible to pick up calls in the configured way.

Add users
You can add a user to the group in the following way:
1. In the Add User option, start writing the user name until the user appears in the listing.
2. Select the user you want.
3. Click on [+].

Remove users
You can remove a user from the group in the following way:
1. Click on [x] for that user
Group Call Pickup

This service lets you to pick up a ringing call at another user’s number, provided you both belong to the same pickup group. This service is look-up only. The following information is available:

- **Name** - name given to the Group Call Pickup
- **Call Type** - sets which call will be picked up when there is more than one simultaneous call within the group
  - **Most Recent Call** - if more than one call is ringing, the most recent one is picked up
  - **Oldest Call** - if more than one call is ringing, the oldest one is picked up
- **Users** - users belonging to the group, that is, those who can pick up calls and for whom calls are picked up
- **Numbers** - the numbers for each user that can be call picked up

To pick up a ringing phone in your pickup group, Dial *11.

You can manage the Call Pickup Groups in the administrator’s portal. The groups are displayed in a table list containing the following information:

- **Name** - name of the Call Pickup Group (hyperlink to the group in the portal)
- **Active** - indicates if the configuration is active or not:
  - if this option is selected, the service configuration is applied to the indicated contact numbers
  - if this option is not selected, the service configuration will not be applied to the indicated contact numbers
- **Users** - set of users whose numbers are associated with the group
  You can click on “Create Call Pickup Group” to be taken to the page for creating a new pickup group.

Create Call Pickup Group

You can create and configure a new group on this page, using the following options:

- **Name of the Call Pickup Group** - name of the Call Pickup Group
- **Type of Call Pickup Group** - sets the call to be picked up
  - **Pick Up the Most Recent Call** - if there is more than one call ringing in the group, the most recent one will be picked up
  - **Pick Up the Oldest Call** - if there is more than one call ringing in the group, the oldest one will be picked up
- **Users** - users who belong to the group, that is, those who can pick up calls and from whom calls can be picked up
- **Numbers** - numbers belonging to each user and associated with the group.
  Calls to these numbers can be picked up by other group users.
- **Active** - indicates whether or not the configuration is active
  If the Active option is not selected it will not be possible to pick up calls in the configured way.

Add Users and Their Numbers

You can add a user to the group in the following way:
1. Click on [*].
2. In the Users option, select the target user
3. In the Numbers option, select:
  - All numbers - all the numbers belonging to the selected user are associated with the group
  - Specific user number(s) - only the number(s) selected will be associated with the group
Remove Users and Their Numbers
You can remove a user from the group in the following way:
1. Select the target user.
2. Click on [x], for that user

You Can Remove a User Number From The Group in The Following Way:
1. Select the target user
2. Select the target number
3. Click on [x], for that number

Call Pickup Group Details
You can configure the following options for an existing Call Pickup Group on this page:
• Name of the Call Pickup Group - name of the Call Pickup Group
• Type of Call Pickup Group - sets the call to be picked up
  - Pick up the most recent call - if there is more than one call ringing in the group, the most recent one will be picked up
  - Pick up the oldest call - if there is more than one call ringing in the group, the oldest one will be picked up
• Users - users who belong to the group, that is, those who can pick up calls and from whom calls can be picked up
  - Numbers - numbers belonging to each user and associated with the group.
  Calls to these numbers can be picked up by other group users.
• Active- indicates whether or not the configuration is active
If the Active option is not selected it will not be possible to pick up calls in the configured way.

Add Users and Their Numbers
You can add a user to the group in the following way:
1. Click on [+].
2. In the Users option, select the target user
3. In the Numbers option, select:
  • All numbers - all the numbers belonging to the selected user are associated with the group
  • Specific user number(s) - only the number(s) selected will be associated with the group

Remove Users and Their Numbers
You can remove a user from the group in the following way:
1. Select the target user.
2. Click on [x], for that user

You Can Remove a User Number From The Group in The Following Way:
1. Select the target user
2. Select the target number
3. Click on [x], for that number
Hunt Group

Use this service to distribute calls to multiple destinations, based on different types of function. This service is look-up only. The following information is available:

- **Name** - name of the Hunt Group
- **Incoming Numbers** - numbers used to contact the Hunt Group
- **Members** - numbers to which calls coming into the Hunt Group will be forwarded
- **Type** - the way in which calls will be handed off to members (in the case of sequential types, information on the number of cycles to be run may be displayed if it is not, then after all numbers have been rung whatever action is described in **Forward** is carried out)
  - **Simultaneously** - the call is simultaneously delivered/delivered in parallel to all members
  - **Random Sequence** - the call is randomly delivered to one member at a time
  - **Fixed Sequence** - the call is delivered to one member at a time, in the order shown
  - **Changed Sequence** - the call is delivered to one member at a time, in the order shown. Once the call to the Hunt Group is over, the answering order is altered with the member in first place moving down to last place.
  - **Sequential by Member** - the call is delivered to one member at a time, in an order based on the number of Hunt Group calls each member has answered. The member with the fewest calls answered will be in first place.
- **Forward** - the call is forwarded to the indicated number according to the following possibilities:
  - **Not Applicable** - no forwarding takes place
  - **If No One Answers** - the call is forwarded if it rings at all members but no one answers it
  - **If All Busy** - the call is forwarded if it is delivered to all members but they are all busy
  - **If Delivery Fails** - the call is forwarded if delivery to the various members fails

Note: If forwarding is set it takes place at the end of the first cycle, irrespective of whether the Hunt Group is configured to permit a higher number of cycles per call.

1. The Hunt Groups service may be configured in the following way:
   - **Name** - name of the Hunt Group
   - **Ring** - the way in which calls will be handed off to members:
     - **Simultaneously** - the call is simultaneously delivered/delivered in parallel to all members
     - **Random Sequence** - the call is randomly delivered to one member at a time
     - **Fixed Sequence** - the call is delivered to one member at a time, in the order shown
     - **Changed Sequence** - the call is delivered to one member at a time, in the order shown. Once the call to the Hunt Group is over, the answering order is altered with the member in first place moving down to last place
     - **Sequential by Member** - the call is delivered to one member at a time, in an order based on the number of Hunt Group calls each member has answered. The member with the fewest calls answered will be in first place.
   - **Ring Time** - the time the call rings at each member of the Hunt Group before being delivered to the next member. This option is only editable if the ring type for the Hunt Group is anything other than **Simultaneously**.
   - **Cyclical** - indicates if the Hunt Group is cyclical or non-cyclical. This option is only editable if the ring type for the Hunt Group is anything other than **Simultaneously**.
     - If the option is selected, once the call has rung at all the destinations but not been answered, it will cycle back to the beginning of the sequence. If it is the last cycle the call will terminate.
     - If the option is not selected, once the call has rung at all the destinations but not been answered, it will terminate.
   - **Max Cycles** - indicates the maximum number of ring cycles for the Hunt Group for each call. This option is only editable if the ring type for the Hunt Group is anything other than ‘Simultaneously’ and if the ‘Cyclical’ option is selected.
   - **Active** - indicates whether or not the configuration is active.
     - If the Active option is not checked, the Hunt Group will not function.

2. You can set the following options in the Hunt Group configurations section:
   - **Numbers** - numbering used to contact the Hunt Group
Tip
If there are no DIDs in the Numbers (for example, if they are short numbers) and the configured destination is external, the organization must have general numbering set. Otherwise, the call will not be made as there will be no public numbering to use in the forwarding.

- **Members** - numbers to which the calls coming into the Hunt Group are going to be forwarded.
  (NOTE: If the Hunt Group does not have any members it will behave as if it were deactivated).
- **Permit To Apply Forwards To The Contacted Member** - Select yes or no
- **Forward** - the call is forwarded to the indicated member according to these options:
  - **Not Applicable** - no forwarding takes place
  - **If None Answer** - forwarding takes place if the call rings at all members but none of them answer it.
    (NOTE: This option is only visible if the ring type for the Hunt Group is anything other than ‘Simultaneously’).
  - **If all busy** - forwarding takes place if the call rings at all members but all of them are busy.
    (NOTE: This option is only visible if the ring type for the Hunt Group is anything other than ‘Simultaneously’).
  - **If delivery fails** - forwarding takes place if delivery of the call to the various members fails

Note 1: If forwarding is set to take place, it takes place at the end of the first cycle, irrespective of whether or not the Hunt Group is configured to permit a greater number of cycles per call.

Note 2: When the number set as the destination belongs to an organization’s user, and the **Active** option has been checked, this configuration is visible to the user associated with this number.

**Interactive Voice Response (IVR)**

The IVR (Interactive Voice Response) Menu service is used to set up navigable menus that can be selected by the origin using telephone signals (DTMF). An IVR menu can be set up for any function whose interface can be broken down into menu choices.

You can manage the IVR Menus on this page. The menus are displayed in a table list format containing the following information:

- **Name** - name of the IVR Menu (includes a hyperlink to the menu on the portal)
- **Active** - indicates whether or not the menu is active
- **Delete** - for deleting the IVR Menu

You can click on the “Create IVR Menu” hyperlink, which will take you to the page for creating a new menu

**Create IVR Menu**

You can configure the IVR Menu service in the following way:

1. Choose the IVR Menu name in **Menu Name**

2. In the **Access Numbers** option, set the numbering that will be connected to the IVR Menu.
   You may choose various entry numbers, short or DIDs.
   - Note: The Access Numbers always belong to the organization’s free numbering
If there are no DIDs in the Access Numbers (for example, if they are short numbers) and the configured destination is external, the organization must have general numbering set. Otherwise, the call will not be made after the IVR menu as there will be no public numbering to use in the forwarding.

3. In the **Initial Announcement** option, set the announcement that is going to be heard when a call arrives at one of the Menu Access Numbers (the menu’s welcome message).

4. In the **Inactivity** area, set the **Timeout**, in seconds, after which if no Code is entered, triggers the **Action** defined below and before repeating the Initial Announcement. When the defined **Attempts** limit is reached, the chosen **Final Action** is triggered. In those Actions it can be defined the text (TTS) or announcement that will play, or (only for the Final Action) the transfer, with or without announcement, for a number.

5. In the **Invalid Option** area, set the **Action** to be executed when the selected Code does not match a valid code of IVR menu and before repeating the Initial Announcement. When the defined **Attempts** limit is reached, the chosen **Final Action** is triggered. In those Actions it can be defined the text (TTS) or announcement that will play, or (only for the Final Action) the transfer, with or without announcement, for a number.

6. In **Active**, set whether a call to one of the access numbers will trigger the IVR menu or not.

   If the Active option is not checked, the IVR menu will not run.

7. It is also possible to add and/or remove schedule rules.

   If there is not any Schedule Menu configured, the IVR Menu’s type is “No schedules defined”. By clicking on “Set Schedules”, it becomes possible to configure one Unconditional rule, one or more Schedule rules and one Off-Schedule rule.

   If the Unconditional rule is checked, it has priority over all the other rules. This means that if the Unconditional menu is set to be active, then other menus will not be applied.

**In a Schedule Rule You Can Configure The Following Options:**

1. Choose the Schedule Menu name

2. On Schedule tab, you can define a schedule:
   - **Rule Validity** – start and end dates, or always;
   - **Rule applicability** – weekday (Monday to Sunday, holidays) and the hour range to apply in each day.

   The configured schedules cannot overlap. However, if for the same time range (validity) a holiday and a weekday configuration has been done, and if it happens that the weekday is a holiday – in those scenarios, the holiday configuration will be applied.

3. On Menu tab, you can define the following options:
   - The **Menu Announcement** option is for setting the announcement to be heard in the main menu (in-schedule) or in the only menu in the case of an “Always” menu.
   - In the table below this you can set the dialogues that are going to be options in the IVR Menu:
     - **Code** - what is dialed on the telephone to select the given action (0 to 9)
     - **Action** - the action that is triggered when the code is selected:
       - **Terminates** - the call is disconnected following selection of this option
       - **Terminate with Announcement** - it is necessary to indicate the announcement that the call is going to terminate with following selection of this option (TTS - Text To Speech - Function)
- **Transfer** - it is necessary to indicate the number to which the call is transferred following selection of this option
- **Transfer with Announcement** - it is necessary to indicate the number to which the call is transferred following selection of this option and to indicate which announcement is heard before the transfer
- **Transfer with Text** - it is necessary to indicate the number to which the call is transferred following selection of this option and to indicate which text is heard before the transfer (TTS)
- **Back to Menu** - Return to menu
- **Dial by Extension**
- **Forward to Voicemail**
- **Delete** - for deleting the combination of code/action

In an **Off-Schedule Rule**, you can set what will happen in the **Off-Schedule Option**:
- **Menu** - you can set a new IVR menu, different from the schedule menu, to run in the off-schedule period (interface similar to the menu).
- **End with Announcement** - the IVR Menu ends with the selected announcement when access is off-schedule
- **Transfer** - the call is transferred to the set number when access is off-schedule

**Notes:**
In case of service Customer Announcements Listen Capability is active, it is possible to listen to the announcements by clicking the Play/Pause button.

**IVR Menu Details**
You can view and edit the following information on the IVR Menu in the following way:

1. Choose the IVR Menu name in **Menu Name**
2. In the **Access Numbers** option, set the numbering that will be connected to the IVR Menu.
   - You may choose various entry numbers, short or DIDs.
   - **Note**: The Access Numbers always belong to the organization’s free numbering.
   
   If there are no DIDs in the Access Numbers (for example, if they are short numbers) and the configured destination is external, the organization must have general numbering set. Otherwise, the call will not be made after the IVR menu as there will be no public numbering to use in the forwarding.

3. In the **Initial Announcement** option, set the announcement that is going to be heard when a call arrives at one of the Menu Access Numbers (the menu’s welcome message).
4. In the **Inactivity** area, set the **Timeout**, in seconds, after which if no Code is entered, triggers the **Action** defined below and before repeating the Initial Announcement. When the defined **Attempts** limit is reached, the chosen Final Action is triggered. In those Actions it can be defined the text (TTS) or announcement that will play, or (only for the Final Action) the transfer, with or without announcement, for a number.
5. In the **Invalid Option Area**, set the **Action** to be executed when the selected Code does not match a valid code of IVR menu and before repeating the Initial Announcement. When the defined **Attempts** limit is reached, the chosen Final Action is triggered. In those Actions it can be defined the text (TTS) or announcement that will play, or (only for the Final Action) the transfer, with or without announcement, for a number.
6. In **Active**, set whether a call to one of the access numbers will trigger the IVR menu or not.

If the Active option is not checked, the IVR menu will not run.
7. It is also possible to add and/or remove schedule rules.

If there is not any Schedule Menu configured, the IVR Menu’s type is “No schedules defined”. By clicking on “Set Schedules”, it becomes possible to configure one Unconditional rule, one or more Schedule rules and one Off-Schedule rule.

If the Unconditional rule is checked, it has priority over all the other rules. This means that if the Unconditional menu is set to be active, then other menus will not be applied.

In a Schedule Rule You Can Configure The Following Options:

1. Choose the Schedule Menu name

2. On Schedule tab, you can define a schedule:
   - **Rule Validity** – start and end dates, or always;
   - **Rule Applicability** – weekday (Monday to Sunday, holidays) and the hour range to apply in each day.

   The configured schedules cannot overlap. However, if for the same time range (validity) a holiday and a weekday configuration has been done, and if it happens that the weekday is a holiday – in those scenarios, the holiday configuration will be applied.

3. On Menu tab, you can define the following options:

4. The **Menu Announcement** option is for setting the announcement to be heard in the main menu (in-schedule) or in the only menu in the case of an “Always” menu.

5. In the table below this you can set the dialogues that are going to be options in the IVR Menu:
   - **Code** - what is dialed on the telephone to select the given action (0 to 9)
   - **Action** - the action that is triggered when the code is selected:
     - **Terminates** - the call is disconnected following selection of this option
     - **Terminate with Announcement** - it is necessary to indicate the announcement that the call is going to terminate with following selection of this option
     - **Terminate with Text** - it is necessary to indicate the text that the call is going to terminate with following selection of this option (TTS - Text To Speech - Function)
   - **Delete** - for deleting the combination of code/action

In an Off-Schedule rule, you it is possible to set what will happen in the Off-Schedule Option:

- **Menu** - you can set a new IVR menu, different from the schedule menu, to run in the off-schedule period (interface similar to the menu).
- **End with Announcement** - the IVR Menu ends with the selected announcement when access is off-schedule
- **Transfer** - the call is transferred to the set number when access is off-schedule

Notes:
In case of service Customer Announcements Listen Capability is active, it is possible to listen to the announcements by clicking the Play/Pause button.
IVR – Dial by Name

This feature enhances the IVR Menu service with the “Dial By Name” (DBN) functionality. The caller spells the name of the intended party, using the numerical DTMF keypad.

Upon identifying a unique entry match in the Corporate Directory Contact, the caller is played the name of the called party and is then transferred.

When the user has more than one match in the Corporate Directory Contact, a mechanism is used to select the intended destination party.

In scenarios where a given user has more than one number, the user may define a preferred contact number for the call to be transferred. If the user does not define a preferred contact number, the user will be prompted to select the type of number to transfer (fixed or mobile number), for example:
- “To transfer to primary number press 1”
- “To transfer to alternate number press 2”.

In case there is more than one contact number for each type of number (fixed/mobile), the lowest number criteria will be selected.

There is also a privacy option, enabling the user to remove himself from the “dial by name” option.

When a name is added to the corporate directory, it is automatically added to the IVR DBN using Text To Speech (TTS) functionality.

A customer Administrator or an end user has the capability to remove a/his or her name from the IVR DBN. This capability can be blocked for End Users on an account basis by the Administrator.

The default configuration will be that the Administrator is permitted to remove a name from the IVR DBN and End Users will not be permitted to remove their names from the IVR DBN.

The service may be configured by the Administrator to allow name dialing with the first name or the last name.

A Dial by Name can be configured in the following 3 ways:
- Dial by first name - dial the first letters of the party’s first name (three or more letters).
- Dial by last name - dial the first letters of the party’s last name (three or more letters).
- Dial by first or last name - dial the first letters of the party’s first or last name (three or more letters).

This option (#3) will be the default configuration.
Dial by name invocation

- The IVR Menu service answers an incoming call and plays the Welcome menu.
- Welcome Menu

- The caller presses the key that indicates “name dialing” 
  (for example: “if you know the name of the person you are trying to reach, press X”)

- The IVR Menu service plays the audio file selected for name dialing, which prompts the caller to spell the name of the person he
  is trying to reach using the DTMF keypad (for example, please enter the first few letters of the name followed by the pound key.”).

1. If the caller spells the name (either starting with the first name or with the last name of the user), the following three options apply;

   a. If there is a unique name match within ABC, the caller is played an announcement with the name of the called party and
      informing the caller that the call is being transferred, and the call is then transferred to the called party.

   b. If there is more than one match, there is a confirmation mechanism to understand the correct match

   c. If the user is not recognized, the IVR Menu plays an audio file, “Your party cannot be identified.”

2. If the caller does not dial any name, IVR Menu service inactivity procedures will be applied.

3. If at the end of a call, it was impossible to identify the destination name (because the caller didn’t press any keys, no names were
   found, too many names were found, etc.) the service may be configured (by the Manager) with one of the following options:

   a. Play an announcement and terminate the call

   b. Terminate the call

   c. Return to the IVR Menu

   d. Play an announcement and transfer the call to a default number. This option (“d”) is the default configuration.

   e. Transfer the call to a default number

Playing the Destination User Name

When the IVR Menu service asks to confirm the destination name or before transferring the call, 
the user name must be played using one of the following options:

- Play a pre-recorded file for each user name present in the Corporate Directory Contact
- Letter Spell (used only when the above method is not available)
Pre-Answering

The Pre-Answering service answers the call by playing an announcement, before delivery of the call to the configured destination (it can also play an announcement and then disconnect the call).

You should configure the Pre-Answering service in the following way:

1. In the **Pre-Answering Numbers** option, set the numbering that will be connected to Pre-Answering.
   • Note: The Pre-Answering Numbers always belong to the client’s free numbering. If there are no DIDs in the Pre-Answering Numbers (for example, if they are short numbers) and the configured destination is external, the client must have general numbering set. Otherwise, the call will not be made as there will be no public numbering to use in the forwarding.

2. In the **Pre-Answering Name** option, set the name for the Pre-Answering service.

3. In the **Announcement** option, set the announcement heard by anyone contacting the Pre-Answering service.

4. In the **After the Announcement** option, select one of the following:
   • **Ends** - when the announcement ends, the call is disconnected
   • **Forward** - when the announcement ends, the call is forwarded to the set number.
     (Note: on selecting this option, a new field will appear for you to set the forwarding destination)

5. The **Active** option indicates whether or not the configuration is active.
   If the Active option is not checked, the Pre-Answering service will not run.

Notes:
In case of service Customer Announcements Listen Capability is active, it is possible to listen to the announcements by clicking the Play/Pause button.

When the number set as the destination belongs to a client’s user, and the **Active** option has been checked, this configuration is visible to the user associated with this number.

Service Access Codes
Service Access Codes provide access to features using two digit codes on the phone dial pad. This service is look up only.
**Shared Virtual Fax**

The Shared Virtual Fax service is for sending and receiving faxes using email instead of a fax machine. You configure the Shared Virtual Fax service in the following way:

1. In the **Number** option, select the contact number for the Shared Virtual Fax. This number is used to receive faxes and is also the number displayed on sent faxes.
   - Note: The Shared Virtual Fax number must always be one of the client’s free numbers.

2. In the **Format** option, set the format for the email annex used when faxes are received in the email account.
   - The following 2 options are available:
     - `tiff`
     - `pdf`

3. In the **Description** option, give a name to the fax account.

4. In the **Store Time** option, set the maximum time, in days, that files are to be kept on the platform.

5. In the **Email(s) for Sending Faxes** option, set the email accounts from which faxes can be sent.
   - These faxes will be identified with the Virtual Fax account number.

6. In the **Email(s) for Receiving Faxes** option, set the email accounts that can receive faxes that have been sent to the Virtual Fax account number.

7. The **Active** option indicates whether or not the configuration is active.

**Notes:**
If the Active box is not checked it will not be possible to send or receive faxes.

**Note 1:** Various email addresses, belonging to users associated with the same Virtual Fax account, can be configured for the Shared Virtual Fax service.

**Note 2:** When the number configured as a destination belongs to a client’s user, and the **Active** option has been selected, this configuration will be visible to the user associated with this number.

**Tips**
- To send a fax, send an email to `<destination number>@vfax.businesshostedvoice.com`.
  - A delivery report indicating success or failure will be received.

- Multiple annexs can be attached to a single fax. The following file formats are supported for annexs:

- Received faxes are deposited in the configured email accounts.
Virtual User

This service is used to define short numbers that are to be mapped onto external destinations. This service is set up by your service provider and is look-up only. You can check the following information:

- **Short Number** - the number to dial to make an outside call
- **External Number** - the number the call will be made to

Waiting Queue

The Waiting Queue service is used to organize calls into a queue. Callers will hear the configured announcement until their call is answered by the destination. If the queue has reached its maximum size, further calls are rejected after hearing the announcement.

You should configure the Waiting Queue service in the following way:

1. In the **Name** option, set the name for the Waiting queue.
2. In the **Incoming Numbers** option, set the numbering that will enter the Waiting queue

Notes:
- The Incoming Numbers for the Waiting queue always belong to the client’s free numbering.
- If there are no DIDs in the Incoming Numbers (for example, if they are short numbers) and the configured destination is external, the client must have general numbering set. Otherwise, the call will not be made as there will be no public numbering to use in the forwarding.

3. In the **Destination No.** option, set the number to which calls entering the Waiting queue will be forwarded to.

4. In the **Max. No. of Calls** option, set the maximum number of calls that can be waiting and listening to music before they are answered by the destination.

5. In the **Entry Announcement** option, set the announcement to play to callers that are in the Waiting queue.

6. In the **Queue Full Announcement** option, set the announcement to play to those callers whose calls are rejected because the queue has reached the maximum number of calls on hold.

7. In the **Retry Time** option, set the time lapse in seconds between attempts to deliver a call that is on hold to the destination.

8. The **Active** option indicates whether or not the configuration is active.

Notes:
- If the Active option is not checked, it will not be possible for a call to enter the queue and the call will be terminated.
- In case of service Customer Announcements Listen Capability is active, it is possible to listen to the announcements by clicking the Play/Pause button.
- When the number set as the destination belongs to a client’s user, and the Active option has been checked, this configuration is visible to the user associated with this number.
Manage Telephones

You can manage the organization’s telephones on this page.

The fields in the table contain the following information:

- **ID** - unique identifier of the telephone in the system (includes a hyperlink to the telephone in the portal)
- **Alias** - name chosen by the user to identify the telephone in the portal (e.g. Home Telephone)
- **User** - user associated with the telephone (includes a hyperlink to the user in the portal)
- **Phone Name** - name of the terminal, as displayed in the list of associated physical telephones
- **Phone Type:**
  - **Geographical IP** - network identifiers provisioned in the IP domain, the usage of which will be limited to the areas defined by the geographical restriction
  - **Access** - parent access (if applicable) - access the telephone is associated with (includes a hyperlink to the accesses in the portal)
  - **Internal Outgoing Number** - number used to make internal calls from this telephone
  - **Outgoing DID** - number used in the telephone for calls to fixed destinations
  - **Associated Incoming Numbers** - set of numbers from which the telephone can receive calls.
    The numbers may be configured by the Single Number Reach
  - **Registered** - indicates whether or not the telephone is registered on the network, that is, whether it is in a position to make and receive calls. Only valid for IP telephones (Geographical, Nomadic or Business Trunk types)

The displayed results can be filtered by certain table fields, so you can filter in the relevant telephones.
The following filters are available:

- **Text Search** - you can search by keywords (and can use the “!” and “*” wild cards)
- **Search By Selection** - you can select one of the available options

You can also “Clear Search” to clear all filters in the table fields. All telephones will then be visible.

If you want to order the information to be displayed, click on the corresponding column and the column icon will indicate if the display has been arranged in ascending or descending order.

**Telephone Details**

You can view the following details of a telephone:

- **ID** - unique identifier of the telephone in the system (includes a hyperlink to the telephone in the portal)
- **User** - user associated with the telephone (includes a hyperlink to the user in the portal)
- **Phone Type:**
  - **Business Trunk IP** - telephone registered in an IP domain PBX
  - **Geographical IP** - network identifiers provisioned in the IP domain, the usage of which will be limited to the areas defined by the geographical restriction
  - **Nomadic IP** - network identifiers provisioned in the IP domain, without geographical restriction
  - **Access** - parent access (if applicable) - access the telephone is associated with (includes a hyperlink to the accesses in the portal)
  - **Internal Outgoing Number** - number used to make internal calls from this telephone
  - **Outgoing DID** - number used in the telephone for calls to fixed destinations
  - **Associated Incoming Numbers** - set of numbers from which the telephone can receive calls.
    The numbers may be configured by the Single Number Reach
  - **Registered** - indicates whether or not the telephone is registered on the network, that is, whether it is in a position to make and receive calls. Only valid for IP telephones (Geographical, Nomadic or Business Trunk - Pilot Number types)
  - **Registration expiry date** - registration expiry date for the IP telephone
You can configure the following aspects of a telephone:

- **Maximum no. of simultaneous calls** - sets the limit for the maximum number of simultaneous calls being received or made. The number set here will be limited by the number of associated physical telephone lines. This option is only available if the organization is subscribed to Maximum Number of Simultaneous Calls per Telephone service.

- **Alias** - name chosen by the user to identify the telephone in the portal (e.g., Home Telephone)

- **Password** - registration password on the SIP-URI network. Only available for IP telephones (you cannot use letters with accents or cedilla). The NA is contacted to update the information in the network elements and remotely provision the physical terminal.

- **Phone Name** - name displayed on the screen of the physical terminal. Only available for IP telephones. The NA is contacted to remotely provision the physical terminal.

In the case of an IP telephone you will have access to a further tab containing information on the telephone’s Registration History. If you have install permissions you will also see a tab with information on the Associated Physical Telephones.

**Registration History**

You can view the telephone’s Registration History in this tab:

- **Registration Date** - date on which the telephone’s registration was received

- **Registration IP** - indicates the IP at which the telephone is registered (may not be available)

- **Expiry Time (in seconds)** - registration expiry time

**Associated Physical Telephones**

As the installer, you can see the Associated Physical Telephones for this telephone.

The fields in the table offer the following information:

- **MAC** - unique Media Access Control address associated with the physical telephone on the network

- **Manufacturer** - manufacturer of the physical telephone model

- **Model** - model of the physical telephone

- **Software Version** - software version for the model of physical telephone

- **Configuration** - clicking on “See” will bring up the XML file containing the settings for the physical telephone

- **Reset** - clicking on “Reset” and then confirming will restore the physical telephone’s settings to the organization’s default settings for this model of physical telephone
Manage all the organization’s users on this page.

The fields in the table offer the following information:

- **Delete User** - for deleting a user. All the user’s service configurations are deleted and all the associated numbers and telephones are released. Users who were originally Basic and/or who had an associated Shared or Personal Virtual Fax cannot be deleted (where they have a Virtual Fax it is first necessary to remove the fax account. Users who were originally Basic can be removed by removing the mobile number with which they were created)
- **Name** - the user’s first and last name (includes a hyperlink to the user in the portal)
- **Username** - short name, unique in the system, used to identify the user
- **Email** - email to identify the user, used in virtual fax service, to login in selfcare portal, etc.
- **Service Profile** - sets the services that the user will have access to (includes a hyperlink to the profile in the portal)
- **Exceptions are configured** - indicates if there are configurations at the level of the user (configurations which are marked as being non-editable in the user’s services)
- **Numbers** - numbers assigned to this user
- **Phones** - telephones assigned to this user (includes a hyperlink to the telephones in the portal)
- **Access Profile** - defines the permissions for using the portal
- **Available** - indicates if any of the user’s telephones are registered
- **User Status** - influences the type of services that the user can use:
  - **Active** - an active user has access to all the services they are subscribed to
  - **Blocked** - a blocked user can only make calls to the destinations on the List of Always Accessible Numbers and/or the List of Toll-Free Numbers. The user can receive all calls.
  - **Deactivated** - a deactivated user cannot make or receive calls
- **Contact Directory Visible** - indicates whether or not the user is visible in contact directory
- **With Portal access** - indicates whether or not the user has access to the portal
- **Restore Service Profile** - removes all configurations made at the level of the user (configurations which are marked as being non-editable in the user’s services)
- **Enter as ...** - for entering the portal in the role of the user

Only **Name, Username, Access Profile** and **With Portal access** are shown for manager and installer users.

The displayed results can be filtered by certain table fields, so you can filter in the relevant users. The following filters are available:

- **Text search** - you can search by keywords (and can use the “!” and “*” wild cards)
- **Search by selection** - you can select one of the available options

You can also “Clear Search” to clear all filters in the table fields. All users will then be visible.

If you want to order the information to be displayed, click on the corresponding column and the column icon will indicate if the display has been arranged in ascending or descending order.
User Details
This page shows all the information relating to a user. It is divided into 5 tabs:

Users (Personal Data)
You can configure the following user characteristics by clicking on a user’s name:

• **Access Profile** - defines the permissions for using the portal. It is only possible to switch between access profiles for the same type of user (Basic profiles for Basic users and Premium profiles for Premium users)
• **First Name** - the user’s first name(s)
• **Last Name** - the user’s last name(s)
• **Username** - short name, unique in the system, used to identify the user
  (no spaces, it must begin with the organization’s alias followed by a forward slash “/”)
• **Display Name** - identification sent to the destination in the calls made by the user
• **Email Address** - email used by the portal to contact the user
  - If the user has already been created in the Login, this will be indicated (see figure).
  - If the user has not been created in the Login, a notice will inform you of the fact and you will then be prompted to create the user in the Login. You must provide an email address for the user.
• **Service Profile** - sets the services the user will have access to
• **Default Language for Portal** - preset language to be used throughout the portal
• **User Status** - influences the type of services that the user can use:
  - **Active** - an active user has access to all the services they are subscribed to
  - **Blocked** - a blocked user can only make calls to the destinations on the List of Always Accessible Numbers and/or the List of Toll-Free Numbers. The user can receive all calls.
  - **Deactivated** - a deactivated user cannot make or receive calls, and cannot access the portal
• **With Portal access** - indicates whether or not the user has access to the portal
  (The manager doesn’t have the possibility to edit the access to the portal by Basic Users).
• **Contact Directory Visible** - indicates whether or not the user is visible in contact directory

You have 3 further options available:

• **Contacts** - for accessing the user’s personal contacts
• **Open** - for entering the Self-care portal - User as if you were the user, with the exception of Click-to-Call/Email in the contacts, which is optionally made available
• **Delete** - for deleting the user. All the user’s service configurations are deleted and all the associated numbers and telephones are released. Users who were originally Basic and/or who had an associated Shared or Personal Virtual Fax cannot be deleted (where they have a Virtual Fax it is first necessary to remove the fax account. Users who were originally Basic can be removed by removing the mobile number with which they were created)

Phones
In the Telephones tab, you can see which telephones are associated with the user and you can associate/disassociate Nomadic IP and Geographical IP type telephones to/from the user. The other types of telephone are associated automatically with the user when the numbers are associated in the numbers tab.

To associate telephones with the user, choose from the selection of the organization’s available telephones and click on [+] to add.
To disassociate telephones from the user, just click on [x] next to the name of the telephone you wish to disassociate.
Numbers
In the Numbers tab, you can associate Numbers with the user, set the respective direct association with telephones (for those cases in which the Single Number Reach and Outgoing Numbers services are not set) and configure User Numbers.

There are two User Number sections:

- **Setting of General User Numbers** - section for setting the general numbers used by users when they do not have the Outgoing Numbers service configured:
  - **General Number Displayed for All External Destinations** - User number displayed when the user makes calls to external destinations, only available if the organization is not subscribed to the Convergent Access service
  - **General Number Displayed for Internal Destinations** - User number displayed when the user makes calls to internal destinations (for the user’s short numbers to be valid options for this selection, the user must have the On-Net Display service activated)

- **Associate Numbers with The User** - section for associating numbers with the user. There are two different tables in this section:
  - **Table for associating Numbers with User Telephones** - for each user telephone you can associate free organization numbering.
    - If a telephone is not configured in the Outgoing Numbers service, you can set the number to be displayed when the destination is of the following types:
      - **External Destination** - only available if the organization is not subscribed to the Convergent Access service
      - **Internal Destination** - short numbers can only be selected when the user has the On-Net Display service activated
  - **Table for associating numbers with the user without having an associated telephone** - it is possible to associate numbers with the user without directly associating a telephone

The manager can only assign a number with Voicemail.

If the telephone has already been configured in the Outgoing Numbers service, there will be a marker symbol next to the telephone to indicate this and you will not be able to set the standard configurations for calls to the various destinations.

If the telephone has already been configured in the Single Number Reach service, there will be a marker symbol next to the telephone to indicate this.

In scenarios of forwarding this setting is used to determine the applicable terminal forwarded to the number.

You can associate or disassociate short and/or long numbers. To associate a number, select it and click on [+] . To disassociate it, click on [x] next to the name of the number you wish to select and disassociate. To make these changes permanent, click on “Save”.
Service Profiles
You can use this tab to edit the services to be applied to the calls that are made/received by the telephones/numbers directly associated with the user. The services in the list below are those that it may be possible to configure, depending on whether or not they are available in the organization.

- Account Codes
- Anonymous Call Rejection
- Attendant Console
- Authorization Codes
- Busy Lamp Field
- Call Forwarding
- Call Pickup Group
- Call Pull
- Call Transfer
- Call Waiting
- Corporate Speed Dial
- Direct Call Pickup
- Do Anonymous Calls
- Do Not Disturb
- Hunt Group
- Incoming Call Barring
- Inhibition of Portability Announcement
- Manager-Assistant
- Maximum Simultaneous Calls by User
- Music on Hold
- On-Net Display
- Originating Identity Presentation
- Originating Identity Restriction
- Outgoing Call Barring
- Outgoing Numbers
- Personal Speed Dial
- Personal Virtual Fax
- Pre-Answer
- Service Access Codes
- Shared Virtual Fax
- Single Number Reach
- Switchboard
- Virtual User
Create user logins on this page. You can only do so for users who have an associated email and if the email does not already exist on the Login platform. Users are grouped by email.

Select the users for whom you wish to create an email on the Login platform and click on "Create".
Closed Users Groups List

Manage Closed Users Groups on this page.

The fields in the table contain the following information:

- **Name** - name of the group in the system (includes a hyperlink to the group in the portal)
- **Description** - optional description of the group
- **Delete** - for deleting groups

The displayed results can be filtered by certain table fields, so you can filter in the relevant groups. You can make text search of the fields and also search by keywords (and can use the “!” and “*” wildcards)

You can also “Clear Search” to clear all filters in the table fields. All groups will then be visible. Clicking on “Create Closed Users Group” will take you to the page for creating new groups.

Closed Users Group Details

You can see and edit Closed Users Group information on this page. It is divided into 3 tabs:

**Characteristics**

You can configure the following group details:

- **Name** - name of the group, unique in the client
- **Description** - optional description of the group
- **Maximum Number of Users** - maximum number of users that can be added to the group

**Blocking**

You can use this tab to configure the blocking of the group’s outgoing calls, setting numbers that the group users cannot call. You should configure the Outgoing Call Barring service in the following way:

1. In the **If group user calls from phones** box select one of the following options:
   - **All** - the rule is applicable to all the user’s telephones
   - **Mobile** - the rule is applicable to all the user’s mobile telephones
   - **Fixed** - the rule is applicable to all the user’s fixed telephone

2. In the **Call Barring for Users Group** section, you can set the blocking of calls to one or more of the available groups

**Notes:**

- You cannot repeat rules for a single group of telephones. In other words, you cannot configure 2 rules in which the first condition is the same.

**Users**

You can use this tab to add or remove users from the user group. The users in the group are arranged into a list that you can search by name. You can remove a user from the group by clicking on “Remove user from group”. To add a user, write the name or select the user from the list in “Add User” and then click on the small button to the right of this box.

Create Closed Users Group

You can add new user groups to the client on this page.