



BUSINESS VOICE PORTAL USER GUIDE

USER GUIDE | May 2023

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What's New?

- The Users and Devices pages in Admin Portal will be updated with new design elements. These updates have little to no impact on user workflow, the pages will look a little different. Screenshots can be found throughout the Admin guide.
- Field labels now are at the top, rather than on the left. Supporting text is below.
- The way to save changes have been adjusted. In the previous design, users had to scroll down and save their changes at the bottom of each page. Now, changes can be saved by section.
- You can now drag and drop your files into a selected field, i.e. Voicemail Greetings.

Voice Portal Guide Limited Users

VOICE PORTAL

The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

Sign In for Voice Portal

When your account was created, an email was requested for all Users that intended to access the Voice Portal. That contained your username, a link to create your password, and the portal URL was sent to you. Keep that email safe so you can refer to it later. If you haven't received it, check your junk mail or spam filters first, and then contact Customer Support if necessary.

1. Go to <https://penteledata.user.alianza.com/login>.
2. Enter your username (not email) and password.
3. Check *Remember Me* if you want to save your username and password.
4. Click [Sign in].



The screenshot shows the PenTeleData login interface. At the top is the PenTeleData logo. Below it is the heading "Login". There are two input fields: "Username" and "Password". The "Username" field is currently empty and has a red border with the error message "Username is Required" below it. The "Password" field is also empty. Below the password field is a checkbox labeled "Remember Me" which is unchecked. At the bottom of the form is a grey "Login" button.

FIRST-TIME ACCESS

The first time you sign in, you'll be prompted to set a password. Your password must be 8-16 characters long and include uppercase and lowercase letters and at least one number. It cannot contain any part of your username.

User Info

The User Info section shows your account name and number, your direct phone number(s), your E911 address, which phone number is being used as your outbound caller ID, and the device(s) assigned to you.

User Info - Sarah Jane (s.jane)

Account Name **Documentation Demo**

Account Number **Business Cloud Comm.**

Direct Phone Numbers **1 (435) 628-3774**

E911 Address **CP-8851 256 Somerset Ln, Santa Clara, UT 84765**

Outbound Caller ID **14356283774**

Devices **CP-8851 - Line 11**
CP-8851 - Line 2

IMPORTANT

If any of this information is NOT correct, especially the E911 address, please contact Customer Service right away to get it updated.

Phone Numbers

This is a list of the phone number(s) that are routed to you and your device(s). To add or remove a phone number, please contact Customer Support.

Phone Numbers

Routed to User **1 (435) 628-2065**
1 (435) 628-7082

Call Handling

Call Handling determines how your incoming calls will be routed under different circumstances.

Call Handling

Scheduling 3 Schedules

Call Waiting

Do Not Disturb **Send incoming calls to voicemail**
If you'd like callers to hear a busy tone, remove the voicemail box.

No Answer after seconds

Busy

Out of Service

FEATURE	DESCRIPTION
---------	-------------

Scheduling	Create or manage schedules that determine how incoming calls are routed during specific times. See Schedules for more information.
Call Waiting	<p>Check this box to enable Call Waiting, which will allow a second call to ring through while you are already on the phone.</p> <ul style="list-style-type: none"> ENABLED: When you're on a call, you'll hear a tone to let you know a second caller is trying to reach you. DISABLED: While you're on a call, incoming calls will hear a busy tone.
Do Not Disturb	<p>Check this box to enable Do Not Disturb.</p> <ul style="list-style-type: none"> ENABLED: incoming calls are sent directly to your voicemail box. DISABLED: Incoming calls follow your Call Handling settings.

If DND is enabled but you don't have a voicemail box, callers will hear a busy tone. If you have a voicemail box but want callers to hear a busy tone, your voicemail box will need to be removed.

Ring Phone

This is the path incoming calls will follow when the call isn't answered, the line is busy, or the device is out of service. For each circumstance, callers can be sent to voicemail, hear a busy tone, be forwarded to another number, or ring forever.

No Answer after seconds

Busy

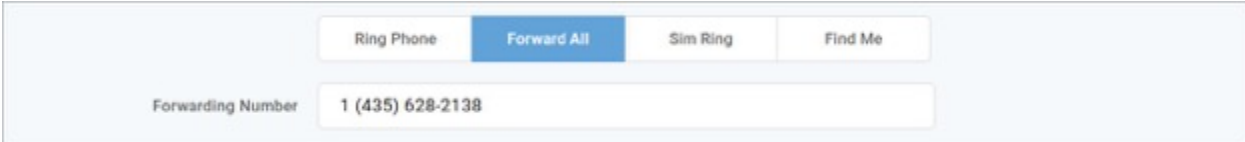
Out of Service

FEATURE	DESCRIPTION
No Answer	The call is unanswered after a specified number of seconds.
Busy	The device is busy (already in use and Call Waiting is not enabled).
Out of Service	The device has lost power or is otherwise not registering as an active device.

Forward All

Working on the go and need all the calls that come into your desk phone to get to you? Do all incoming calls need to be redirected elsewhere? Forward All does this by sending your callers to the phone number that you enter here.

Once a *Forwarding Number* is entered, this feature can be enabled or disabled from the device by dialing star codes.

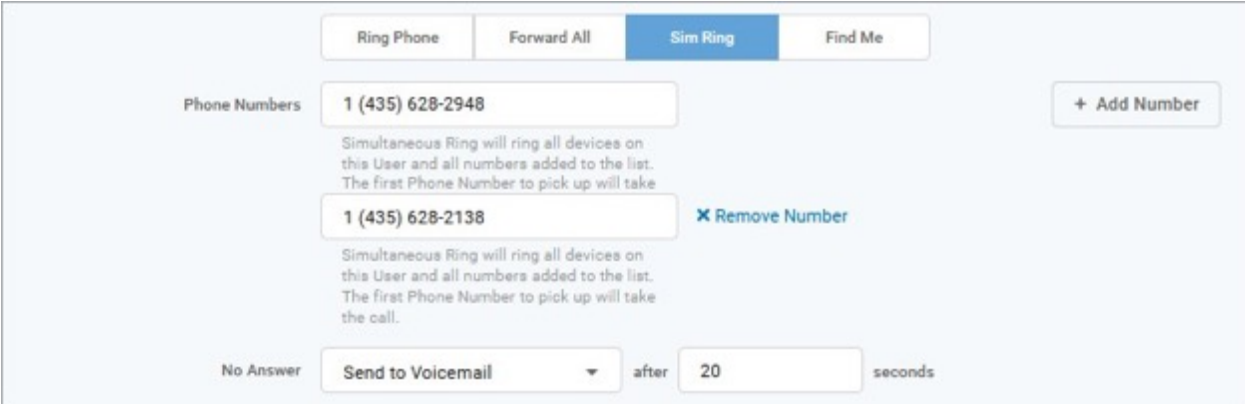


The screenshot shows a configuration panel with four tabs: Ring Phone, Forward All (selected), Sim Ring, and Find Me. Below the tabs is a text input field labeled "Forwarding Number" containing the value "1 (435) 628-2138".

Simultaneous Ring

Simultaneous Ring, or Sim Ring, will ring all numbers added to the list until the call is answered or times out. The first phone number to pick up will take the call.

You can add a limit to how long the call will ring, and after it's timed out have it sent to voicemail, forwarded to another number, or given a busy tone. If you like, you can also set the call to ring indefinitely.



The screenshot shows a configuration panel with four tabs: Ring Phone, Forward All, Sim Ring (selected), and Find Me. Under the "Phone Numbers" section, there are two input fields, each containing "1 (435) 628-2948" and "1 (435) 628-2138". Below each field is a descriptive text: "Simultaneous Ring will ring all devices on this User and all numbers added to the list. The first Phone Number to pick up will take the call." There is a "+ Add Number" button to the right and an "X Remove Number" button next to the second number. At the bottom, there is a "No Answer" section with a dropdown menu set to "Send to Voicemail", followed by "after 20 seconds".

FEATURE	DESCRIPTION
---------	-------------

Phone Numbers Enter the phone number(s) that will ring. To add another number to the list, click [+Add Number].

Choose what happens when the call is unanswered:

No Answer

- Busy Tone
- Forward to (add a forwarding number)
- Ring Forever
- Send to Voicemail

Also, enter the number of seconds the call will ring before the action is triggered. Calls that ring longer than 120 seconds may be disconnected by the carrier.

VOICEMAIL

It is possible that voicemail for these other numbers could pick up the call before the timeout, if the user's timeout is shorter than what is set here.

Find Me/Follow Me

Life happens and often drags you away from the desk. What's a caller to do when they need to find you? Find Me/Follow Me will route your incoming calls to a customizable sequence of destinations to create a unique dial plan just for you and your line.

The screenshot shows the 'Find Me' configuration page. At the top, there are four tabs: 'Ring Phone', 'Forward All', 'Sim Ring', and 'Find Me' (which is active). A '+ Add Destination' button is located in the top right corner. Below the tabs, there are three destination rows. Each row has a dropdown menu with a phone handset icon and either a '#', a handset icon, or both. The first row is set to 'Devices' with a handset icon and '#', a ring time of 20 seconds, and a 'Send to Voicemail' timeout action. The second and third rows are set to 'Phone Number' with a handset icon and '#', a ring time of 20 seconds, and a 'Send to Voicemail' timeout action. The phone numbers are '1 (435) 628-2133' and '1 (435) 628-1234' respectively. At the bottom, there is a note: 'Find Me Follow Me will ring each Destination sequentially. If the call isn't answered by any of the destinations, the call will be sent to the Timeout Action.'

FEATURE

DESCRIPTION

Destinations

Indicate if calls should route through Devices or Phone Numbers by clicking the respective icons.

- Use the arrows to reorder the destinations.
- Click [+ Add Destination] to add more destination fields.

Devices

In the field provided, enter a timeout setting. Remember, calls that ring longer than 120 seconds may be disconnected by the carrier.

Phone Number

Enter the phone number calls should progress to and how long each number will ring.

Timeout Action

Choose what will happen to the call after all destinations have timed out:

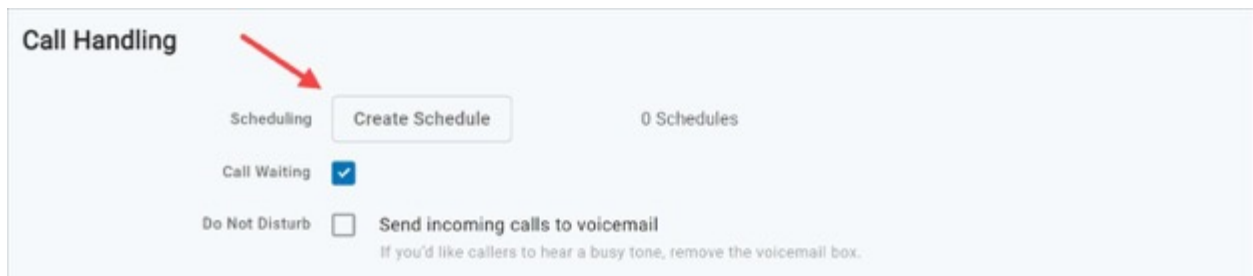
- Busy Tone
- Send to Voicemail

Schedules

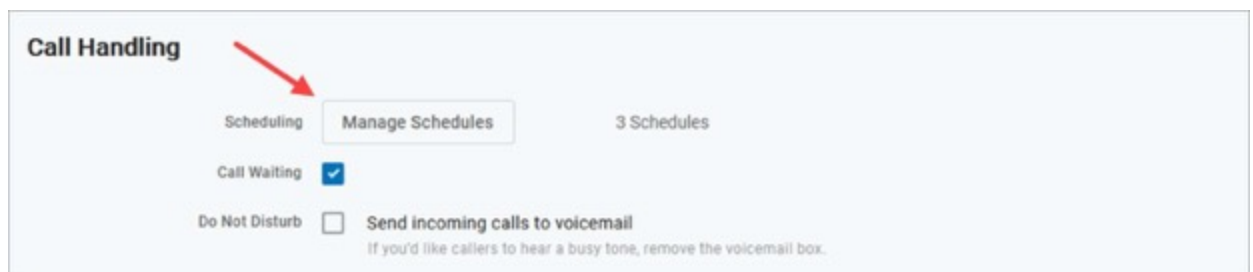
Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

Within the scheduler, the Call Handling options are: Ring Phone, Forward All, Sim Ring, and Find Me. The main Call Handling section will take effect *outside* of these hours.

1. Within the Call Handling section, click [Create Schedule].




- If there are already schedules set up on the account, the button will say [Manage Schedules].



2. In the Scheduling window, click [+Add Schedule].

Scheduling



Name	Type
No items	

Custom

Schedule Name

Custom Weekly

Date

Start Time End Time

3. **SCHEDULE NAME:** Give the schedule a name.

4. **TYPE:** Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).

- On a Custom schedule, click [+ Add a Day] to add another section.

Custom

Schedule Name


Custom Weekly

Date

Start Time End Time

Date

Start Time End Time



- On a Weekly schedule, enter the start and end times for the days of the week you want this call handling to be in effect.

Weekly

Schedule Name

Custom
Weekly

Sun	Start Time	<input type="text"/>	End Time	<input type="text"/>
Mon	Start Time	<input type="text"/>	End Time	<input type="text"/>
Tue	Start Time	<input type="text"/>	End Time	<input type="text"/>
Wed	Start Time	<input type="text"/>	End Time	<input type="text"/>
Thu	Start Time	<input type="text"/>	End Time	<input type="text"/>
Fri	Start Time	<input type="text"/>	End Time	<input type="text"/>
Sat	Start Time	<input type="text"/>	End Time	<input type="text"/>

5. **CALL HANDLING.** Choose what will happen to calls *during* the schedule.

Call Handling

Call Waiting

Do Not Disturb **Send incoming calls to voicemail**
If you'd like callers to hear a busy tone, remove the voicemail box.

Ring Phone
Forward All
Sim Ring
Find Me

No Answer after seconds

Busy

Out of Service

6. Click [Confirm] and then [Save].

Example of a Custom Schedule

In the custom schedule example below, calls received between 5:00 AM and 5:00 PM on November 15, 2019, will be forwarded to 1-208-582-1676. Any call outside of that specific time will follow the call handling set up in the main Call Handling section.

Thanksgiving
Custom

Schedule Name

Custom

Weekly

+ Add a Day

Date

Start Time

End Time

Call Handling

Call Waiting

Do Not Disturb Send incoming calls to voicemail
If you'd like callers to hear a busy tone, remove the voicemail box.

Ring Phone

Forward All

Sim Ring

Find Me

Forwarding Number

Delete

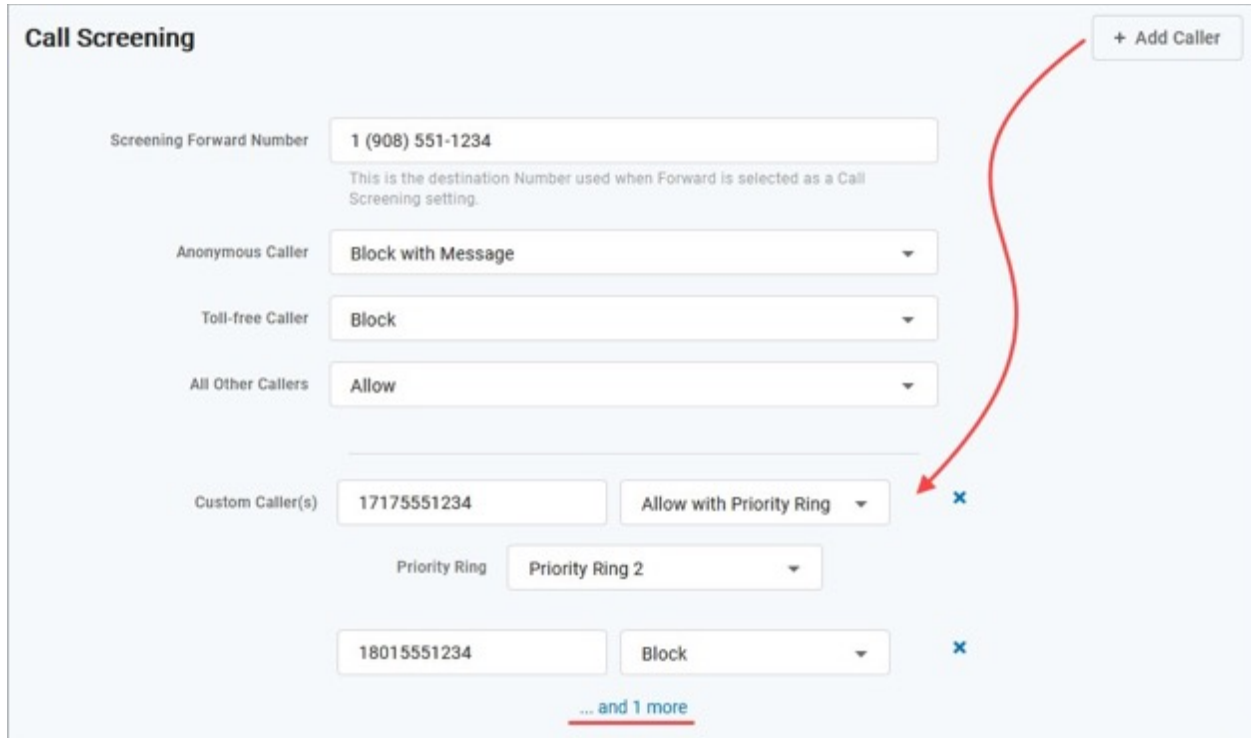
Cancel

Confirm

Call Screening

Call Screening can help block unwanted calls from reaching you, and you can decide what happens to the calls you turn away. Are they hung up on automatically, or do they hear a message first? Do you forward them to another number, or do you send them to your voicemail?

Choose how calls from anonymous numbers, toll-free numbers, and other callers— including Custom Callers (specific phone numbers)—will be handled. For each category, choose a screening behavior from the drop-down menu.



Call Screening Categories

FEATURE	DESCRIPTION
[+ Add Caller]	Starts the process of setting up call screening behaviors for a specific phone number.
Screening Forward Number	Enter a destination phone number that will be used when This is the destination number used when a call screening category is set to <i>Forward</i> .
Anonymous Caller	Choose what happens to incoming calls that don't send caller ID.
FEATURE	DESCRIPTION
Toll-Free Caller	Choose what happens to incoming calls from a toll-free number.

All Other Callers

Choose what happens to all other incoming calls, unless otherwise defined by a custom rule.

Custom Callers

Click [+Add Caller] to define the screening behavior for a specific phone number. If there are more than two custom callers, click ...and X more at the bottom to see them.

Call Screening Behaviors

For each category, choose a screening behavior from the drop-down menu.

FEATURE	DESCRIPTION
Allow	Allow the caller to ring through.
Allow with Priority Ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
Block	Block the caller from ringing through. Callers will hear a busy signal.
Block with Message	Block the call with a message: <ul style="list-style-type: none"> CUSTOM CALLERS: <i>"The number you have dialed is not accepting calls at this time."</i> TOLL-FREE CALLERS: <i>"The number you have dialed is not accepting calls from toll-free numbers at this time."</i> ANONYMOUS CALLERS: <i>"The number you have dialed is not accepting calls from anonymous numbers."</i>
Forward	If you choose to forward calls from the caller, you must choose the number those calls are forwarded to in the <i>Screening Forward Number</i> field.
Voicemail	Caller will be sent to your voicemail box.

[Voicemail and Unified messaging Guide](#)

Voicemail can be a big part of how we communicate, and it's getting more customizable every day. Here's a few quick instructions on how to access your voicemail from either your phone or remotely and how to personalize your voicemail greeting.

Voicemail and Unified Messaging

You can have your voicemail messages delivered to an email address or listen to your voicemail messages by dialing into the voicemail system.

Voicemail to Email

Voicemail messages can be converted to a .mp3 file and sent to an email address or list of email addresses. Voicemail to email can be setup using the online voice portal.

Access on Power/Connectivity Failure

In the event of a power outage, internet outage, or device failure; people that attempt to call you will go to your voicemail. Call Forwarding, Sim Ring, or Find-Me/Follow-Me will continue to function.

Remote Access to Voicemail

Even when you are away from your phone, you can call into your voicemail box to check voicemail messages. Dial “#” while listening to your voicemail message to access your voicemail box.

Note: You must have set up a PIN from your phone to be able to access your voicemail remotely.

Busy and No Answer Voicemail Greetings

You can let callers know a little more about why you did not answer the phone. You can have callers hear a different greeting when you are on the phone (busy) versus when you are not around to answer (no answer).

Voicemail Message Waiting Indicator (MWI)

A stuttered dial tone indicates your voicemail box has unread messages. This tone lets you know you have new messages or messages marked as unread in your voicemail box. A message waiting light will also light on a Cisco IP Phone or an Analog Phone with a FSK light.

Shared Voicemail

A voicemail box can be set up to be accessed by multiple people. Each user has an independent PIN to log into the voicemail box. Any user assigned to the voicemail box can listen to messages, set up a greeting, and forward messages to email.

Voicemail Box Greetings

Here, you can upload and manage your voicemail greetings (Basic, Busy, No Answer) and personal name recording. Click the field to select a file from your computer, then click [Upload]. The upload will accept WAVE, MP3, and OGG files that are less than 10MB.

Voicemail Box Greetings ?

Basic Greeting
Accepted files: WAV, MP3, and OGG files under 10MB

Personal Name
Accepted files: WAV, MP3, and OGG files under 10MB




Custom Greetings
 Any custom voicemail greeting upload here will override basic and personal name greetings.

Busy Greeting
Accepted files: WAV, MP3, and OGG files under 10MB



No Answer Greeting
Accepted files: WAV, MP3, and OGG files under 10MB

Messages

Voicemail messages saved to the box are listed here.

<input type="checkbox"/>	Date/Time ↓	Caller	Length	Status	
<input type="checkbox"/>	Nov 4, 2020 11:02 AM	1 (304) 454-2217	16 seconds	New	
<input type="checkbox"/>	Oct 14, 2020 10:23 AM	1 (877) 805-7744	17 seconds	New	  
<input type="checkbox"/>	Sep 23, 2020 10:44 AM	1 (801) 318-1683	3 seconds	New	
<input type="checkbox"/>	Sep 16, 2020 4:36 PM	1 (801) 633-4550	1 second	New	
<input type="checkbox"/>	Aug 28, 2020 4:07 PM	1 (801) 691-5660	1 second	New	
<input type="checkbox"/>	Aug 28, 2020 12:32 PM	1 (801) 214-5286	1 second	New	

Messages can be sorted by Time/Date, Length, and Status (New or Saved). Hover over an individual message to see the management tools on the right.

FIELD	DESCRIPTION
 Download	Save a copy of the message to your computer as an MP3 file.
 Save	Change the status of the message to <i>Saved</i> .



Delete

Delete this message from the box.

To delete all or multiple messages at once, select the message on the left and then click the trash icon at the top right.

MESSAGE WAITING INDICATOR

The message waiting indicator (MWI) on your device notifies you when a new voicemail message waiting to be retrieved. When you've listened to, saved, or deleted the message, the MWI will turn off.

Message Settings

Message Settings

- Forward Voicemail to Email Forward voicemail messages
- Keep a copy in voicemail box
- Enable Transcription Enable Transcription of Messages

Enter email addresses, separated t

FORWARD VOICEMAIL TO EMAIL

Messages left on your voicemail box can be forwarded as an MP3 file to one or more email addresses. Users also have the option to keep a copy of the message in their voicemail box when it's forwarded.

1. Check Forward Voicemail to Email.
2. Optionally, check Keep a copy in voicemail box.
3. Enter one or more email addresses, each separated by a comma.
4. At the bottom of the section, click [Save].

Voicemail Transcription (BCC ONLY)

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription, available only on Business Cloud Communications, takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an MP3 file (depending on if you have forwarding enabled).

With voicemail transcription, you can:

Get important messages when you can't take a call

Browse your voicemails in email, rather than listening and re-listening

Keep searchable records of business voicemails

Easily forward messages you've received

Message Settings

The voicemail transcription setting can be enabled in the Admin Portal or the end user's Voice Portal for each voicemail box.

In the Admin Portal or Voice Portal, go to User > Voicemail.

Under Message Settings, check the box for "Enable Transcription."

Optionally, check the boxes for "Forward Voicemail to Email" to email an MP3 of the message and "Keep a copy in voicemail box" if you want to save a copy of the message in the voicemail box when it's forwarded.

In the field below, enter one or more email addresses in the field below separated by commas (required).

Click [Save].


Voicemail messages will be transcribed and sent to the email address(es) indicated here. If "Forward Voicemail to Email" is also enabled, an MP3 of the message will be attached to the email.



New voicemail from 15704600694 for voicemail box: Kevin Silliman

From: noreply@cymbus.com

To: kss

 vm_WIRELESS_CAL...21_10_28_08_57.mp3 (29.7 KB) [Download](#) | [Remove](#)



Hi Kevin,

You got a new voicemail. Here are the details of your message:

From: WIRELESS CALLER / 1 (570) 460-0694

Time: Thursday, October 28, 2021 at 8:57 AM

Duration: 00:07

Transcription:

This is a test of the email transcription. This is only a test. Thank you.
See attachment.

Thanks,

Penteledata Voice Team

Info

Voicemails can only be transcribed from US English. If a message cannot be transcribed for any reason, such as poor audio quality, an email will still be sent with a message saying, "Message could not be transcribed."

Voice Portal Guide Admin/Account Manager Users

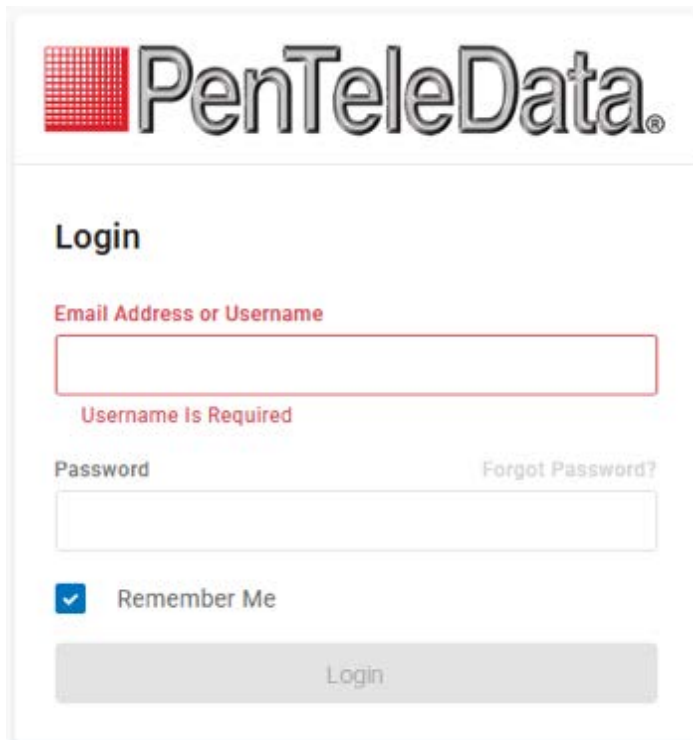
VOICE PORTAL

The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

As an Account Manager or Admin user, you also have access to manage not only your own services but those of other users on the account as well. You may also have access to manage Auto-Attendants and Phone Numbers (E911 addresses). If you don't see those sections in the menu, please contact your service provider to change those settings.

Sign In for Voice Portal Access

1. When your account was created, an email was requested for all Users that intended to access the Voice Portal. That contained your username, a link to create your password, and the portal URL was sent to you. Keep that email safe so you can refer to it later. If you haven't received it, check your junk mail or spam filters first, and then contact Customer Support if necessary.
2. Go to <https://penteledata.user.alianza.com/login>.
3. Enter your username (not email) and password.
4. Check *Remember Me* if you want to save your username and password.
5. Click [Sign in].




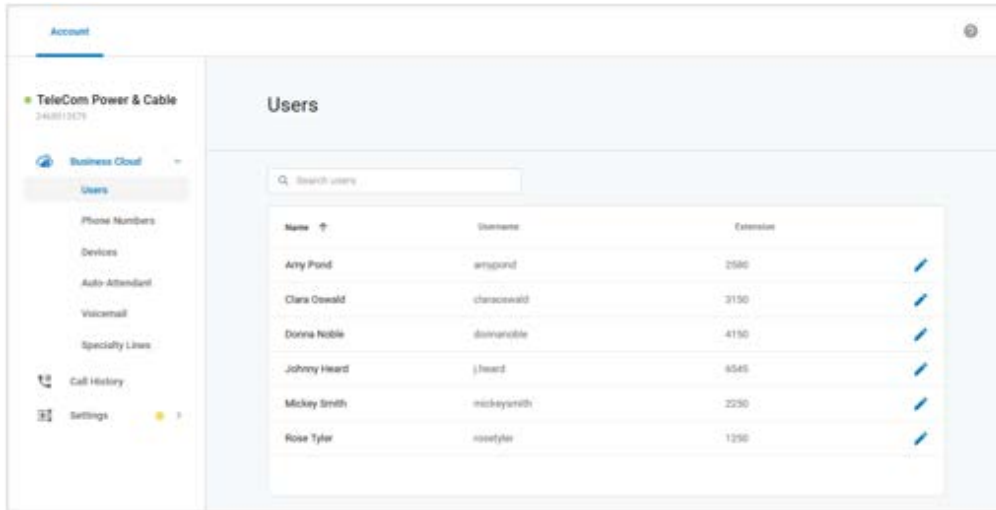
The screenshot shows the PenTeleData login interface. At the top is the PenTeleData logo. Below it is the heading "Login". There are two input fields: "Email Address or Username" and "Password". The "Email Address or Username" field has a red border and a red error message "Username Is Required" below it. To the right of the "Password" field is a link "Forgot Password?". Below the input fields is a checkbox labeled "Remember Me" which is checked. At the bottom is a "Login" button.







FIRST-TIME LOGIN

The first time you log in, you'll be prompted to set a password. Your password must be 8-16 characters long and include uppercase and lowercase letters and at least one number. It cannot contain any part of your username.

USERS

All users on your account are listed here. Search for users by name, username, extension, or tag, and the results will be displayed below. To edit the settings for a specific user, hover over the user and click  Edit on the right.



Name	Username	Extension	
Arny Pond	arnypond	2580	
Clara Oswald	claraoswald	3150	
Donna Noble	donna noble	4150	
Johnny Howard	jhoward	8545	
Mickey Smith	mickysmith	2250	
Rose Tyler	rosetyler	1250	

For each user, there are four tabs that organize the user's settings: Calls, Devices, Settings, and Voicemail.

Call Details

All phone numbers pointing to this user are listed here. Incoming calls to these numbers will follow the user's Call Handling and Call Screening options as defined below. To add or remove a phone number, please contact Customer Support.

Call Details

Phone number
1 (206) 555-5102

Extension *
202

Caller ID
1 (206) 555-5102 – Jane Sarah

Setting the caller ID to "None" could result in some carriers rejecting the call.

Enable Caller ID

FIELD	DESCRIPTION
Assigned Phone Number	The phone number routed to this user to contact them directly, if any. If a number has not yet been assigned, refer to Assign Phone Number to User for more information.
Extension Number	The dialable extension the user can be reached at on the account.
Caller ID Number	<p>The phone number displayed on the phone of the person being called. Users can choose the main account number, their phone number, or choose <i>None</i> to not send out any caller ID at all. This field is required.</p> <p>It is important to choose a number here, even if you choose to disable caller ID (below). If this field is set to <i>None</i>, outbound calls—even to 911—will be sent out as <i>Anonymous</i>, and the carrier may reject the call.</p>
Caller ID Name	<p>The name associated with the phone number that will display on the phone of the person being called.</p> <ul style="list-style-type: none"> • If <i>Caller ID Number</i> is set to <i>None</i>, this will say ANONYMOUS. • If <i>Caller ID Enabled</i> is unchecked, this will say BLOCKED. • If <i>Caller ID Enabled</i> is checked, this will reflect the caller ID name of the phone number selected above.
Caller ID Enabled	<p>Determines if the Caller ID Name will be shown or not on the phone of the person being called. This setting can also be managed by star code.</p> <ul style="list-style-type: none"> • Checked: Caller ID will be sent on all outbound calls. • Unchecked: Caller ID will be sent as BLOCKED. Calls to 911 will still send out the phone number selected in the <i>Caller ID Number</i>.

Unlimited Local Calling

A **Caller ID Number** is required for all users whose **calling plan(s)** allow *Unlimited Local Calling*, even if Caller ID is disabled. It is required to properly rate local calls as local.

Call Screening

Call Screening can help block unwanted calls from reaching you, and you can decide what happens to the calls you turn away. Are they hung up on automatically, or do they hear a message first? Do you forward them to another number, or do you send them to your voicemail?

Choose how calls from anonymous numbers, toll-free numbers, and other callers— including Custom Callers (specific phone numbers)—will be handled. For each category, choose a screening behavior from the drop-down menu. The options for each category are Allow, Allow with priority ring, Block, Block with message, Forward, and Voicemail.

Call Screening

Screening forward number

Forwarded calls are routed to this number.

Anonymous callers

Voicemail

Toll-free callers

Block

All other callers

Allow

CALL SCREENING CATEGORIES

FEATURE	DESCRIPTION
Screening Forward Number	Enter a destination phone number that will be used when This is the destination number used when a call screening category is set to <i>Forward</i> .
Anonymous Caller	Choose what happens to incoming calls that don't send caller ID.
Toll-Free Caller	Choose what happens to incoming calls from a toll-free number.
All Other Callers	Choose what happens to all other incoming calls, unless otherwise defined by a custom rule.

CALL SCREENING BEHAVIORS

For each category, choose a screening behavior from the drop-down menu.

FEATURE	DESCRIPTION
Allow	Allow the caller to ring through.
Allow with Priority Ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
Block	Block the caller from ringing through. Callers will hear a busy signal.
Block with Message	<p>Block the call with a message:</p> <ul style="list-style-type: none"> • CUSTOM CALLERS: "The number you have dialed is not accepting calls at this time." • TOLL-FREE CALLERS: "The number you have dialed is not accepting calls from toll-free numbers at this time." • ANONYMOUS CALLERS: "The number you have dialed is not accepting calls from anonymous numbers."
Forward	If you choose to forward calls from caller, you must choose the number those calls are forwarded to in the <i>Screening Forward Number</i> field.
Voicemail	Send the caller directly to voicemail.

Custom Screening

Custom screening rules define the call handling action for inbound calls from specific phone numbers. The screened phone numbers and associated action are listed here.

To add a custom rule, click [Add Rule], then enter the phone number and select an action, and click [Save] when you're done.

Custom Screening Add Rule

Number *
18015556789

Action
Allow

Items per page: 5 1 - 1 of 1 < >

Call Handling

Call Handling determines how incoming calls are routed under various circumstances. In the first section, create or manage your Call Handling Schedules, Call Waiting, and Do Not Disturb settings. Just below that, select and configure a ring strategy.

Call Handling

Call Waiting

Do Not Disturb ⓘ

Ring Phone Forward All SIM Ring Find Me

No answer
Send to Voicemail

Timeout (seconds) *
20

Busy
Send to Voicemail

Out of service
Send to Voicemail

FEATURE	DESCRIPTION
Scheduling	Create one or more schedules to dictate different behaviors based on the date/time the call comes in. See Schedules for more information.
Call Waiting	Checking this box will allow a second call to ring through while you are already on the phone. While Call Waiting is enabled and on an active call, you will hear a tone to let you know a second caller is trying to reach you. If this feature is not enabled, incoming calls will hear a busy tone while you're on an active call.
Do Not Disturb	Indicates if Do Not Disturb is enabled. While enabled, all incoming calls will be sent directly to voicemail.

If DND is enabled but you don't have a voicemail box, callers will hear a busy tone. If you have a voicemail box but want callers to hear a busy tone, the voicemail box will need to be removed.

RING PHONE

This is the path incoming calls will follow when the call isn't answered, the line is busy, or the device is out of service. For each circumstance, callers can be sent to voicemail, hear a busy tone, be forwarded to another number, or ring forever.

FEATURE	DESCRIPTION
No Answer	The call is unanswered after a specified number of seconds.
Busy	The device is busy (already in use and Call Waiting is not enabled).
Out of Service	The device lost power or is otherwise not registering as an active device.

FORWARD ALL

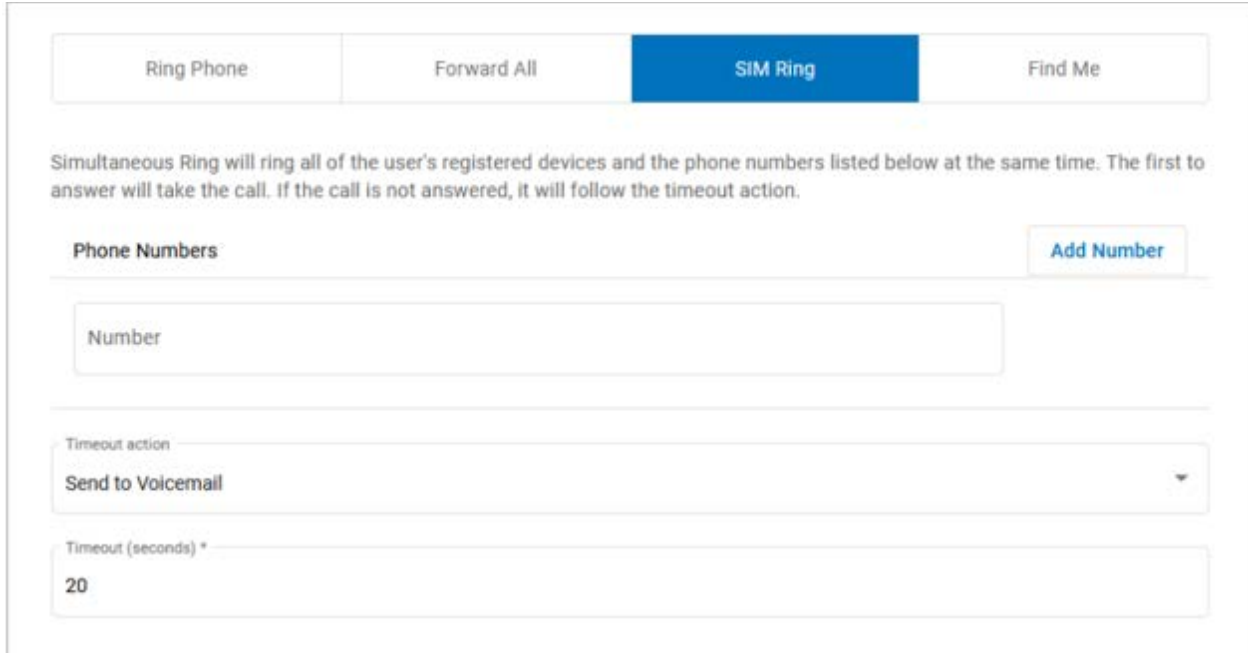
Working on the go and need all the calls that come into your desk phone to get to you? Do all incoming calls need to be redirected elsewhere? Forward All can do this by sending your callers to an alternative phone number that you enter here.

Once a *Forwarding Number* is entered, this feature can be enabled or disabled from the device by dialing star codes.

SIMULTANEOUS RING

Simultaneous Ring, or Sim Ring, will ring all numbers added to the list until the call is answered or times out. The first phone number to pick up will take the call.


You can add a limit to how long the call will ring, and after it's timed out have it sent to voicemail, forwarded to another number, or given a busy tone. If you like, you can also set the call to ring indefinitely.



FEATURE	DESCRIPTION
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [+Add Number].
No Answer	<p>Choose what happens when the call is unanswered:</p> <ul style="list-style-type: none"> • Busy Tone • Forward to (add a forwarding number) • Ring Forever • Send to Voicemail <p>Also, enter the number of seconds the call will ring before the action is triggered. Calls that ring longer than 120 seconds may be disconnected by the carrier.</p>

FIND ME/FOLLOW ME

Life happens and often drags you away from the desk. What's a caller to do when they need to find you? Find Me/Follow Me routes your incoming calls to a customizable sequence of destinations to create a unique dial plan just for you and your line.

- Click [Add Destination] to add a device or phone number destination.
- Drag  to reorder a destination or click the trash icon to delete it.

Ring Phone
Forward All
SIM Ring
Find Me

Find Me Follow Me will ring each destination sequentially. If the call is not answered by any of the destinations, the call will be sent to the timeout action. Calls that ring for longer than 120 seconds are subject to carrier disconnection.

	Destination	Ring Duration (seconds)	Add Destination
<input checked="" type="radio"/> Device <input type="radio"/> Phone number	Ring Devices	<input style="width: 100%;" type="text" value="20"/>	
<input type="radio"/> Device <input checked="" type="radio"/> Phone number	<input style="width: 100%;" type="text" value="Phone number"/>	<input style="width: 100%;" type="text" value="20"/>	

Timeout action

Send to Voicemail ▼

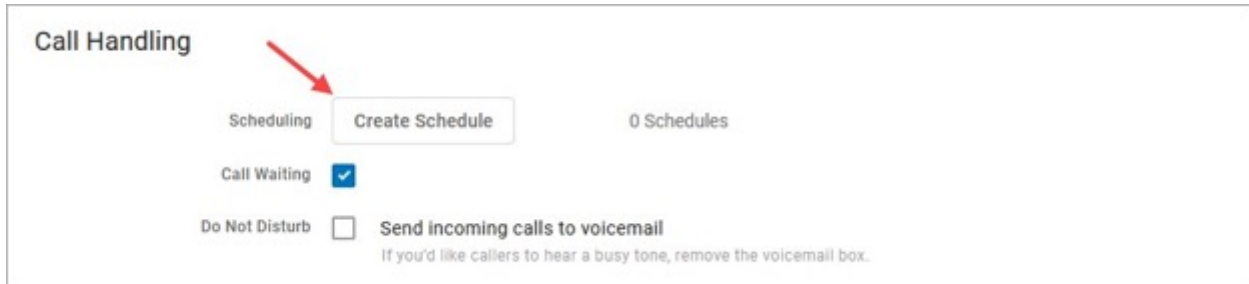
FEATURE	DESCRIPTION
Destinations	Indicate if calls should ring to all the user’s devices or a specific phone number. To add another one, click [Add Destination].
Devices	In the field provided, enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.
Phone Number	Enter the phone number calls should progress to and how long each number will ring.
Timeout Action	Choose what will happen to the call after all destinations have timed out: <ul style="list-style-type: none"> Busy Tone Send to Voicemail

SCHEDULES

Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

Within the scheduler, the Call Handling options are: Ring Phone, Forward All, Sim Ring, and Find Me. The main Call Handling section will take effect *outside* of these scheduled hours.

1. Within the Call Handling section, click [Create Schedule].
 - If there are already schedules on the account, the button is [Manage Schedules].



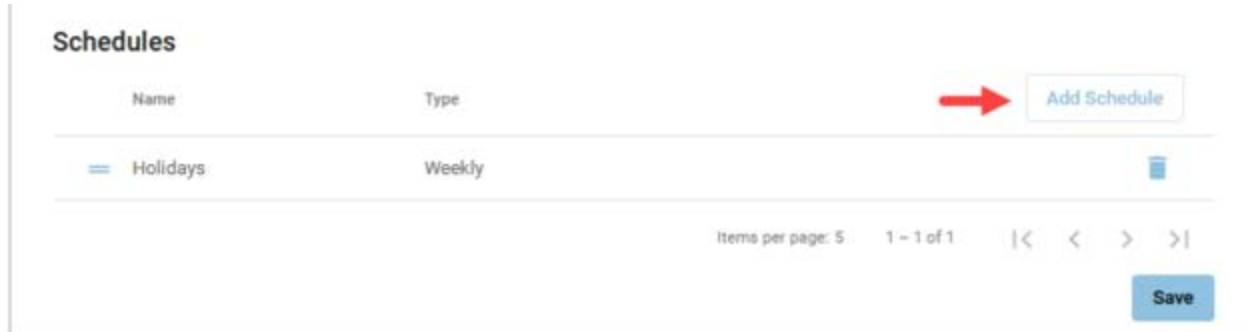
Call Handling

Scheduling **Create Schedule** 0 Schedules

Call Waiting

Do Not Disturb Send incoming calls to voicemail
If you'd like callers to hear a busy tone, remove the voicemail box.

2. In the Scheduling window, click [+Add Schedule].



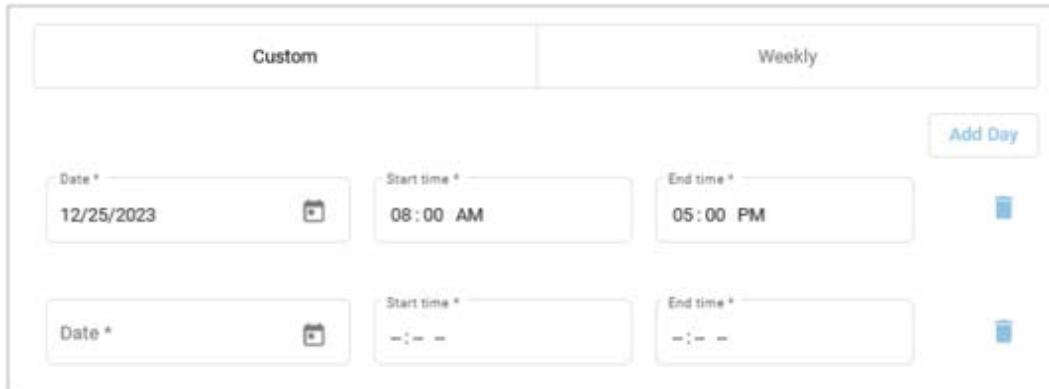
Schedules

Name	Type	
Holidays	Weekly	

Items per page: 5 1 - 1 of 1 |< < > >|

Save

3. **SCHEDULE NAME:** Give the schedule a name.
4. **TYPE:** Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).
 - On a Custom schedule, fill in the dates and times the schedule will be in effect. If not using a 24-hour time, include AM or PM. Click [Add Day] to add another section.



Custom Weekly

Add Day

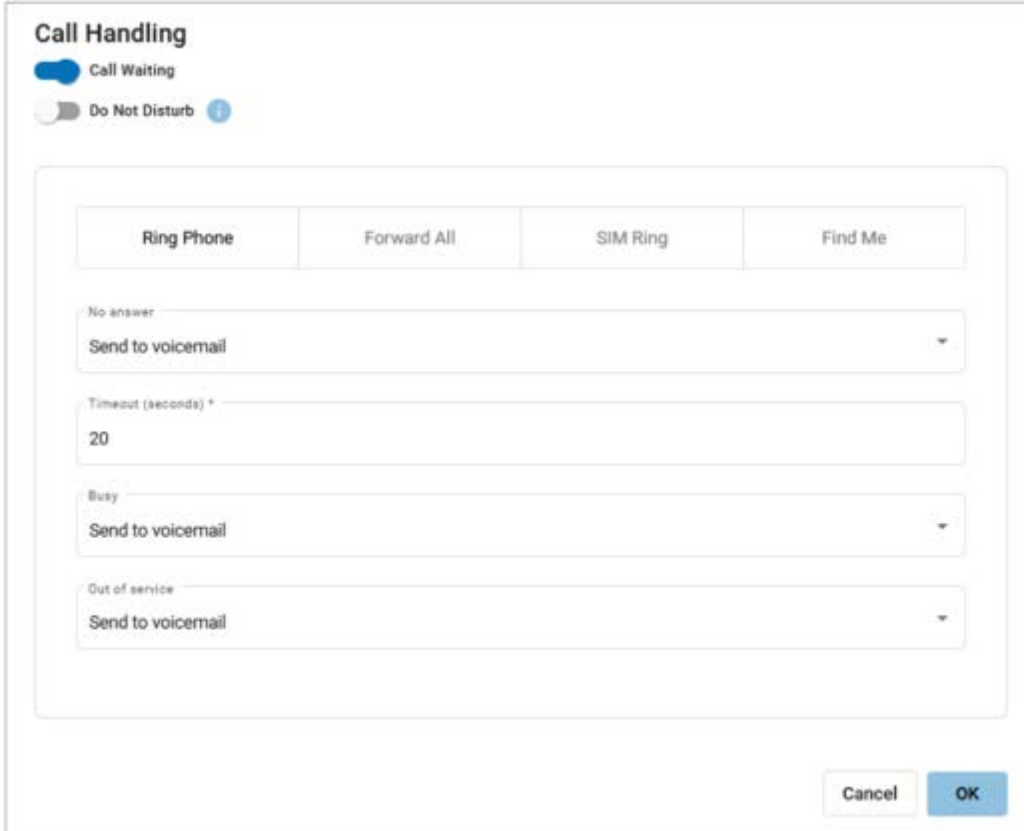
Date * 12/25/2023 Start time * 08:00 AM End time * 05:00 PM

Date * Start time * End time *

- On a Weekly, recurring schedule, enter the start and end times for the days of the week you want this call handling to be in effect.

	Custom	Weekly
Sun	Start time --:--	End time --:--
Mon	Start time * 08:00 AM	End time * 05:00 PM
Tue	Start time * 08:00 AM	End time * 05:00 PM
Wed	Start time * 08:00 AM	End time * 05:00 PM
Thu	Start time * 08:00 AM	End time * 05:00 PM
Fri	Start time * 08:00 AM	End time * 05:00 PM
Sat	Start time --:--	End time --:--

5. **CALL HANDLING:** Choose the call handling action that will occur *during* the specified times.



The image shows a 'Call Handling' configuration dialog box. At the top, there are two toggle switches: 'Call Waiting' (which is turned on) and 'Do Not Disturb' (which is turned off). Below these is a table with four columns: 'Ring Phone', 'Forward All', 'SIM Ring', and 'Find Me'. Under the 'Ring Phone' column, there are three rows: 'No answer' with a dropdown menu set to 'Send to voicemail', 'Timeout (seconds) *' with a text input field containing '20', and 'Busy' with a dropdown menu set to 'Send to voicemail'. Under the 'SIM Ring' column, there is one row: 'Out of service' with a dropdown menu set to 'Send to voicemail'. At the bottom right of the dialog are 'Cancel' and 'OK' buttons.

6. When you're done, click [Save].

Custom Schedule Example

In the custom schedule example below, calls received between 8:00 AM and 5:00 PM on December 25, 2023, will be forwarded to 1-208-555-1234. Any call outside of that specific time will follow the user’s primary call handling settings.

Scheduling

Schedule name *
Christmas

Custom Weekly

Add Day

Date * 12/25/2023 Start time * 08:00 AM End time * 05:00 PM

Call Handling

Call Waiting

Do Not Disturb ⓘ

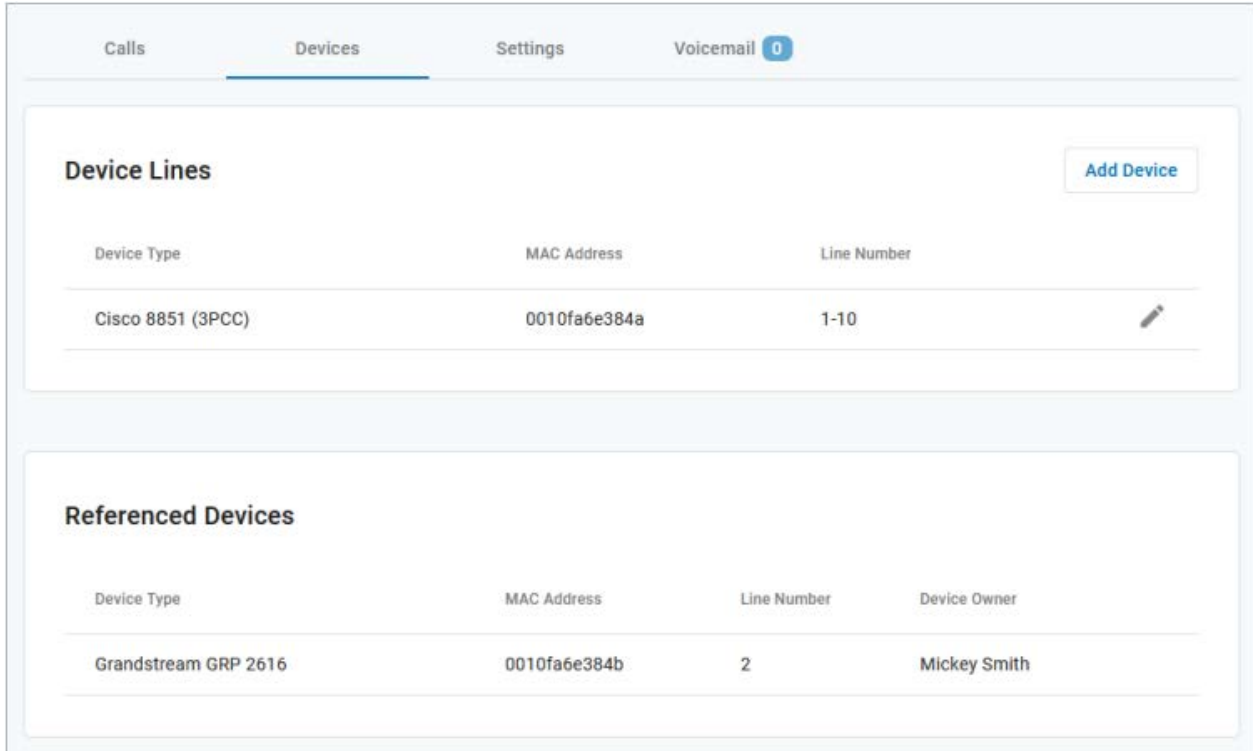
Ring Phone Forward All SIM Ring Find Me

Forwarding number
12085551234

Cancel OK

Devices

All devices assigned to the user are listed in the Device Lines section. If the user has a shared line on another user's device, it will be listed under Referenced Devices.



The screenshot shows the 'Devices' management interface. At the top, there are navigation tabs: 'Calls', 'Devices' (active), 'Settings', and 'Voicemail 0'. Below the tabs, there are two main sections:

- Device Lines:** A table with columns 'Device Type', 'MAC Address', and 'Line Number'. It contains one row: 'Cisco 8851 (3PCC)', '0010fa6e384a', and '1-10'. An 'Add Device' button is in the top right, and an edit icon is on the right of the row.
- Referenced Devices:** A table with columns 'Device Type', 'MAC Address', 'Line Number', and 'Device Owner'. It contains one row: 'Grandstream GRP 2616', '0010fa6e384b', '2', and 'Mickey Smith'.

Devices can be managed at the user level (here) or from the main [Devices](#) section in the left navigation menu. In either location, find the device and click Edit on the right to manage its settings:

- **DEVICE INFO:** View the MAC Address, Device Type, and Configuration Status. There you can also Swap the device for a new one or upload a Bulk Configuration file.
- **LINE CONFIGURATION:** On an IP phone, you can assign features to lines, including Call Park, Device Line, Paging Group, Presence/BLF, Shared Line, and Speed Dial.
- **SIDECAR:** Configure a sidecar (key expansion module) on the device.

See [Devices](#) for detailed information about these features and settings.

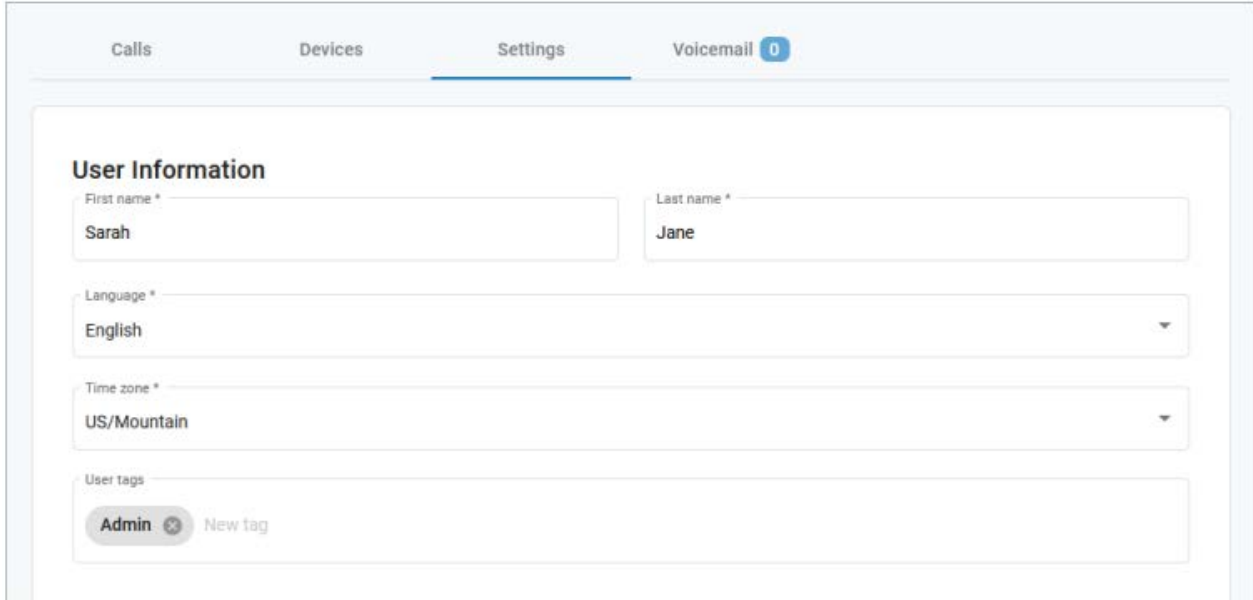
PENTELEDATA CYMBUS DEVICES

Only physical devices are listed in the Voice Portal. Users on Advanced or Professional plans are automatically assigned two PenTeleData Cymbus softphone devices that are not included here.

Settings

The user's Settings tab provides some quick information about the selected user. In this tab, you can reset the user's Voice Portal access and login information, grant Admin privileges (end user role), and manage their calling plans.

User Information



The screenshot shows the 'Settings' tab for a user. At the top, there are navigation tabs: 'Calls', 'Devices', 'Settings' (which is active), and 'Voicemail' with a '0' notification. Below the tabs is the 'User Information' section. It contains several input fields: 'First name *' with the value 'Sarah', 'Last name *' with the value 'Jane', 'Language *' with a dropdown menu set to 'English', and 'Time zone *' with a dropdown menu set to 'US/Mountain'. At the bottom of the section is a 'User tags' field containing a tag 'Admin' with a close button and a 'New tag' button.

USER TAGS

User Tags is an optional mechanism to organize and search for users by one or more custom identifiers, such as department, location, or anything else. If it would be useful to search for users by that term, enter it as a tag on the users it applies to.

Add User Tags

1. Log in to the Admin Portal and go to Account > Users.
2. Select the User you want to edit.
3. In the Settings tab, enter one or more tags in the User tags field.
4. Scroll down and tap [Save].

Search for Users by Tags

1. Go to Account > Users.
2. Enter a tag in the Search users field and hit enter. The matching users are displayed below.

Name ↑	Username	Extension
Amy Pond	amypond	2580

FIELD	DESCRIPTION
Name	The first and last name of the user of the account.
Language	The language heard in the telephone user interface (TUI) audio prompts for star codes and the IVR. Select English or French. This is separate from the Language setting on the Voicemail tab, which applies specifically to that voicemail box. Please remember to set both.
Time Zone	The time zone displayed on the user's device and call records.

Feature Plan (BCC only)

Feature plan

Feature plan

Standard

CODE	DESCRIPTION
Feature Plan	<p>For Business Cloud Communications only, select the user's feature plan:</p> <ul style="list-style-type: none"> • Standard: All basic voice features. • Advanced: All Standard features + the softphone app and Team Messaging. • Professional: All standard and advanced features + Video Conferencing and Screen Sharing.

Voice Portal

Not every user needs access to the Voice Portal, and we only need an email address for those who do. The new Voice Portal Access toggle will allow you to enable or disable online access for each user. The toggle is disabled for new users by default, so be sure to turn it on for those who need it.

- **Disabled:** The user will not have access to the Voice Portal, and the *Email* field is optional.
- **Enabled:** The user will have access to the Voice Portal, and the *Email*, *Username*, and *End-User Role* fields will be required.

Voice Portal

Enable Voice Portal access

Email *
sarah.jane@demo.com ✓

Username
rosetyler

End user role
Admin

[Resend Welcome Email](#) [Reset Password](#)

Last sent: Feb 14, 2022 7:04 AM

[Save](#)

CODE	DESCRIPTION
Voice Portal Access	This toggle allows you to enable or disable access to the Voice Portal for this user. It's disabled by default, so flip it ON for those who need it and leave it OFF for those who don't. See also: Voice Portal Access Toggle
Email	The user's email address. This is where their login information will be sent. A valid and unique email address is <i>required</i> if the Voice Portal Access toggle is enabled, but it's optional if the toggle is disabled.
Block Welcome Email	When a user is created, they will be sent an email with their Voice Portal login information. If you don't want the user to get this email right now, check this box to stop it from being sent. See also: Block the Welcome Email
Username	The username they use to log in to the Voice Portal.
End-User Role	The level of access this user will have in the Voice Portal. <ul style="list-style-type: none"> • Limited: Access to manage their own account features. • Admin: Access to manage features for all account users.

Calling Plans

The calling plan(s) assigned to the user dictates where that user can call and if calls will be rated or use plan minutes. Expand a plan to see how many minutes have been used.

Calling Plans		
Calling Plan	Minutes Used	Total Minutes
Default	0	50000

CONTACT SUPPORT

To add or modify the user's Calling Plan, please contact Customer Support.

Voicemail and Unified messaging Guide

Voicemail can be a big part of how we communicate, and it's getting more customizable every day. Here's a few quick instructions on how to access your voicemail from either your phone or remotely and how to personalize your voicemail greeting.

Voicemail and Unified Messaging

You can have your voicemail messages delivered to an email address or listen to your voicemail messages by dialing into the voicemail system.

[Voicemail to Email](#)

Voicemail messages can be converted to a .mp3 file and sent to an email address or list of email addresses. Voicemail to email can be setup using the online voice portal.

[Access on Power/Connectivity Failure](#)

In the event of a power outage, internet outage, or device failure; people that attempt to call you will go to your voicemail. Call Forwarding, Sim Ring, or Find-Me/Follow-Me will continue to function.

[Remote Access to Voicemail](#)

Even when you are away from your phone, you can call into your voicemail box to check voicemail messages. Dial “#” while listening to your voicemail message to access your voicemail box.

Note: You must have set up a PIN from your phone to be able to access your voicemail remotely.

[Busy and No Answer Voicemail Greetings](#)

You can let callers know a little more about why you did not answer the phone. You can have callers hear a different greeting when you are on the phone (busy) versus when you are not around to answer (no answer).

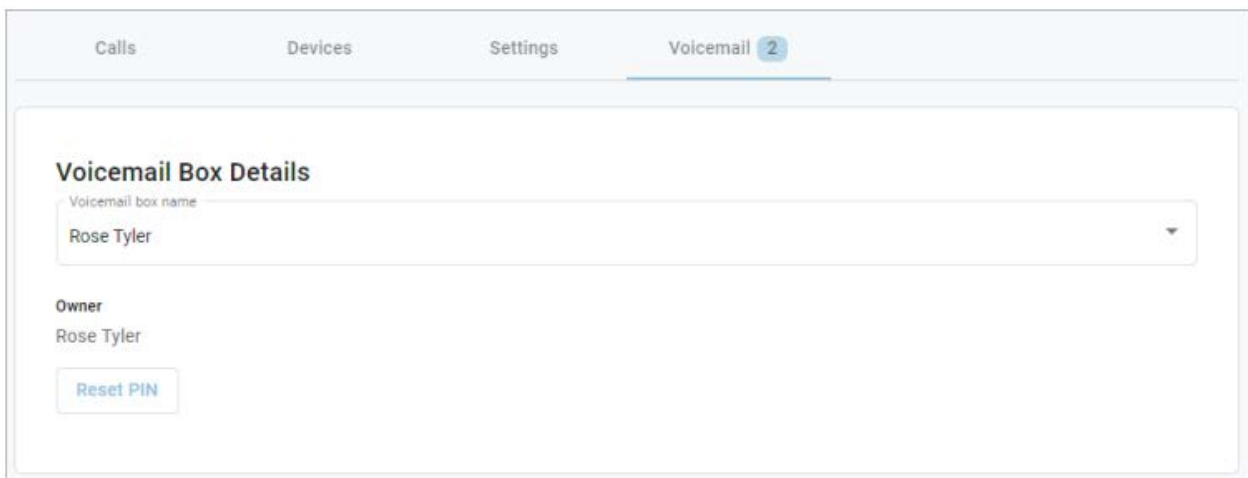
[Voicemail Message Waiting Indicator \(MWI\)](#)

A stuttered dial tone indicates your voicemail box has unread messages. This tone lets you know you have new messages or messages marked as unread in your voicemail box. A message waiting light will also light on a Cisco IP Phone or an Analog Phone with a FSK light.

[Shared Voicemail](#)

A voicemail box can be set up to be accessed by multiple people. Each user has an independent PIN to log into the voicemail box. Any user assigned to the voicemail box can listen to messages, set up a greeting, and forward messages to email.

Voicemail Box Details



Calls Devices Settings Voicemail 2

Voicemail Box Details

Voicemail box name
Rose Tyler

Owner
Rose Tyler

Reset PIN

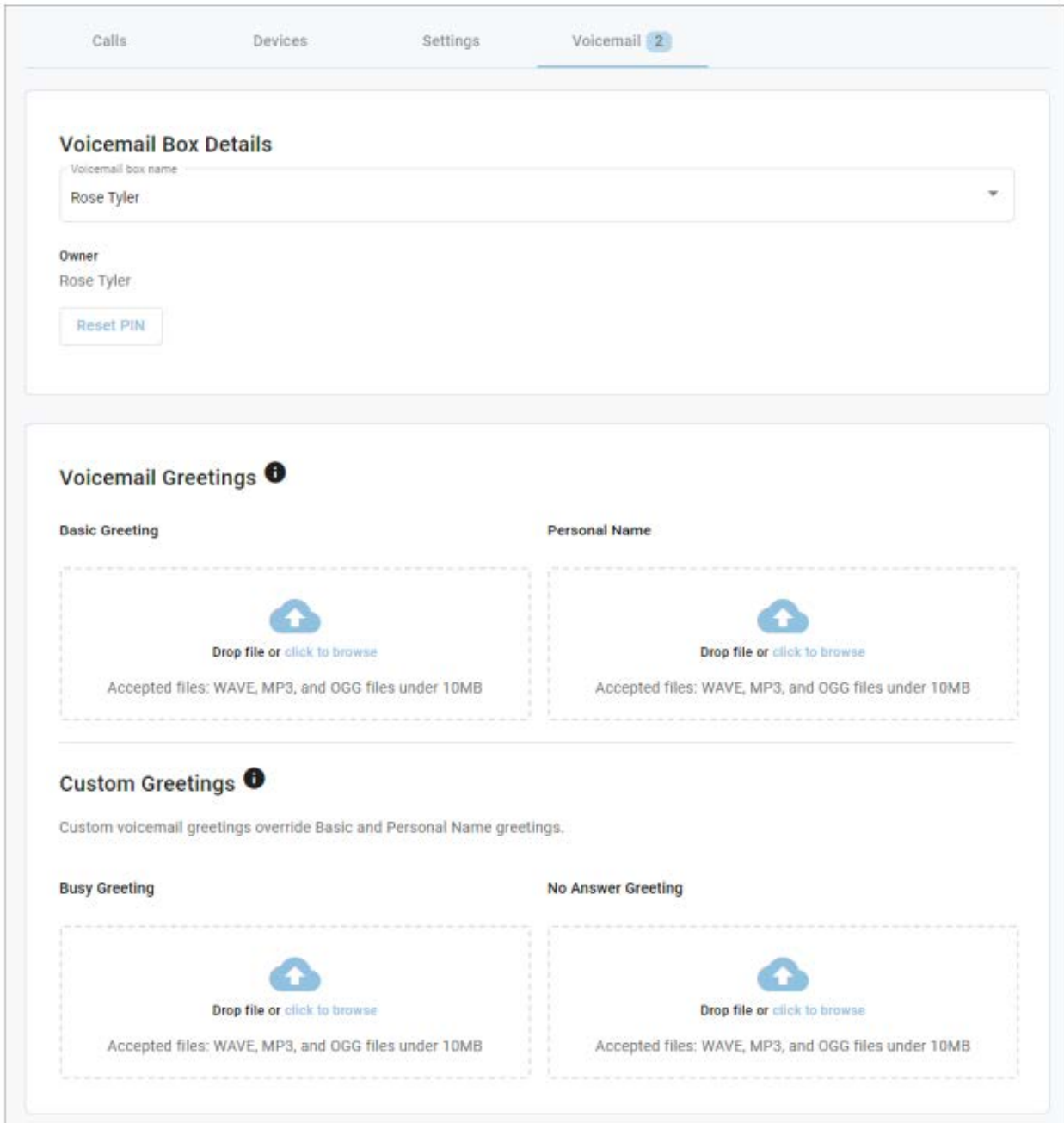
FIELD	DESCRIPTION
Voicemail Box Name	The name of the voicemail box.
Owner	Lists the name of the Owner of the Voicemail Box. This is not an editable field.
Reset PIN	If the user can't remember their voicemail PIN, click this button to reset it to 1234. The next time the user logs in, they'll be asked to choose a new PIN.

VOICEMAIL MANAGEMENT

Voicemail boxes can be managed at the user level (here) or in the Voicemail section of the Voice Portal. The settings for Voicemail Box Greetings, Messages, and Message Settings are the same in both locations.

Voicemail Box Greetings

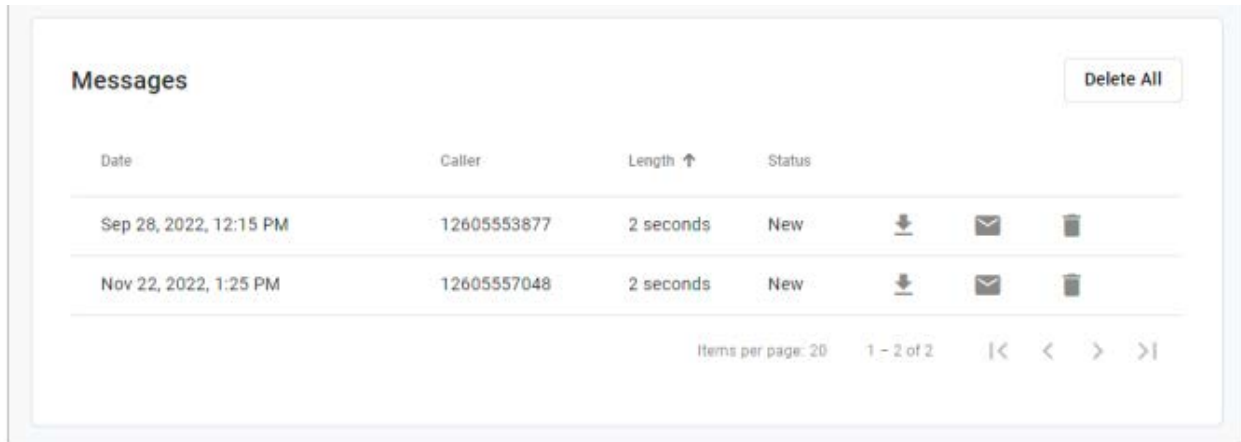
Users can upload and download their voicemail greetings and personal name recordings. Click the field to select a file from your computer or drag a selected file to their respective spot. The upload will accept WAVE, MP3, and OGG files that are less than 10MB.



The screenshot shows a web interface for configuring voicemail settings. At the top, there are navigation tabs: "Calls", "Devices", "Settings", and "Voicemail" (which is selected and has a "2" notification). Below the tabs is a "Voicemail Box Details" section with a dropdown menu for "Voicemail box name" set to "Rose Tyler", the "Owner" listed as "Rose Tyler", and a "Reset PIN" button. The main section is titled "Voicemail Greetings" and contains four upload areas: "Basic Greeting", "Personal Name", "Busy Greeting", and "No Answer Greeting". Each area has a dashed border, a cloud icon with an upward arrow, and the text "Drop file or click to browse". Below each upload area, it states "Accepted files: WAVE, MP3, and OGG files under 10MB". A "Custom Greetings" section is also present, with a sub-header and a note: "Custom voicemail greetings override Basic and Personal Name greetings."

Messages

Here are all of the voicemail messages saved to the voicemail box. Messages can be sorted by Time/Date, Length, and Status (New or Saved).



Date	Caller	Length ↑	Status			
Sep 28, 2022, 12:15 PM	12605553877	2 seconds	New	↓	✉	🗑
Nov 22, 2022, 1:25 PM	12605557048	2 seconds	New	↓	✉	🗑

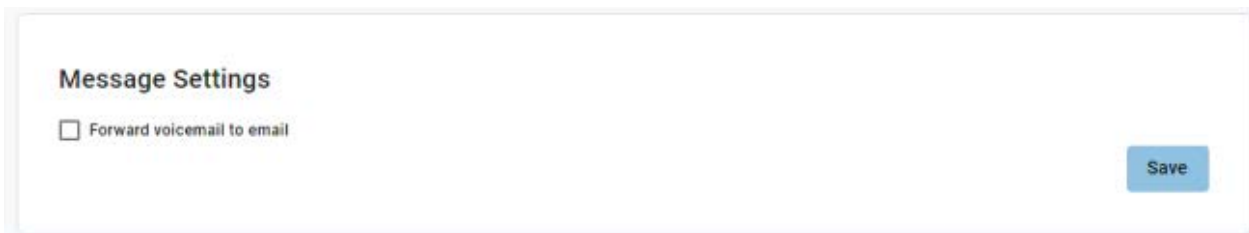
Items per page: 20 1 - 2 of 2 << < > >>

Hover over an individual message to see the management tools on the right.

FIELD	DESCRIPTION
Save	Change the status of the message to <i>Saved</i> .
Delete	Delete this message from the box. To delete all or multiple messages at once, select the message on the left and then click the trash icon at the top right.

Message Settings

Messages left on the user’s voicemail box can be forwarded as an MP3 file to one or more email addresses.



Message Settings

Forward voicemail to email

Save

FIELD	DESCRIPTION
Forward Voicemail to Email	<p>Check the appropriate boxes to have our system forward voicemail messages to a given email address, and if you want a copy of the voicemail kept in the voicemail box.</p> <p>When checked, the message waiting indicator (MWI) on the user's device will stay on until the user listens to or deletes the message from their device or the Voice Portal.</p>
Enable Transcription	Transcribe voicemail messages and forward it to email. (BCC only)
Email Address	The email address(es) voicemails will be forwarded to. This feature must be enabled via the appropriate check box for emails to be forwarded.

DEVICES


This section allows you to see all the devices on the account without having to go to the specific user. To locate a particular device, you can search for the owner's name, or MAC address. The list can also be sorted by MAC Address or Device Type.






The screenshot shows the 'Devices' management page. On the left is a sidebar with navigation options: Business Cloud, Users, Phone Numbers, Devices (highlighted), Auto-Attendant, Groups, Voicemail, and Call History. The main content area is titled 'Devices' and includes a search bar labeled 'Search devices'. Below the search bar is a table with the following data:

MAC Address ↑	Device Type	Owners
0010fa6e384a	Cisco 8851 (SPCC)	Sarah Jane
0010fa6e384b	Grandstream GRP 2616	Mickey Smith

At the bottom of the table, there are pagination controls: 'Items per page: 20', '1 - 2 of 2', and navigation arrows. A red arrow in the image points to the edit icon (pencil) next to the first device entry.

To view and manage device settings:

- Go to either:
 - Account > Business Cloud or Cloud PBX > Users > Devices tab
 - Account > Business Cloud or Cloud PBX > Devices
- Locate the device you want to manage and click on the  icon to edit a device.

MAC Address ↑	Device Type	Owners	
0010fa6e384a	Cisco 8851 (3PCC)	Sarah Jane	Edit Device  
0010fa6e384b	Grandstream GRP 2616	Mickey Smith	
0010fa6e386a	Yealink T58W	Donna Noble	
102ab12dc351	Cisco 8851 (3PCC)	Donna Noble	

PENTELEDATA CYMBUS DEVICES

Only physical devices are listed in the Voice Portal. Users on Advanced or Professional plans are automatically assigned two PenTeleData Cymbus softphone devices that are not included here.


Device Info

Here you can see the device's MAC Address, Device Type (make and model), and Configuration Status.

Device Info

MAC Address
0010fa6e384a

Device Type
Polycom VVX 300

Configuration Status
Yes  [Details](#)

Configuration Status Details

IP Address
123.30.156.68

Most Recent Download
Apr 6, 2023, 3:35 AM

Download Response
200

User Agent
FileTransport PolycomVVX-VVX_300-UA/5.9.6.2327 Type/Application

[Close](#)

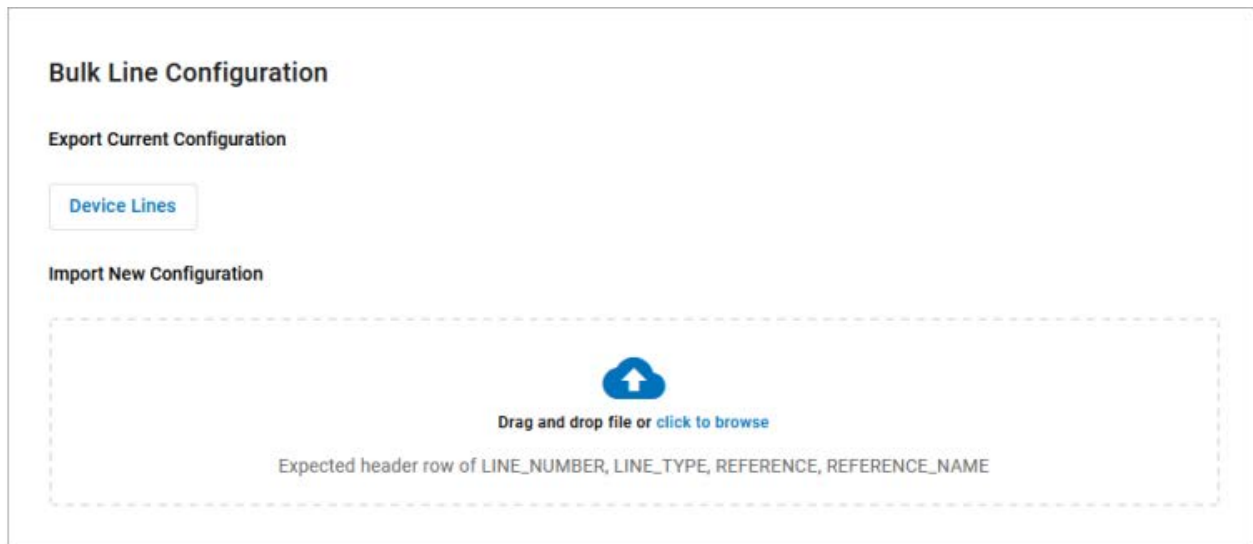
Configuration Status

The Configuration Status indicates if the device is provisioned and registering on the voice server. If yes, the device is online and available for use. If no, make sure the device is on and the MAC address is correct. If it isn't, please contact Customer Support to update it.

Bulk Line Configuration

Using Bulk Line Configuration, you can import (upload) a CSV file to quickly set up the lines on an IP phone, or to export (download) the current line configuration.

If you need to configure multiple IP phones in basically the same way, you can use a single CSV file with the standard configuration and upload it to each device. When necessary, you can make minor changes to the CSV file to give a user a unique setup. It's an easy way to configure multiple IP phones quickly and easily.



IMPORT FILE FORMAT

An import file for IP phone setup requires specific headers and must be a Comma Separated Value (CSV) file to be accepted. These are the required header and field values:

HEADER ROW VALUES	FIELD VALUES
LINE_NUMBER	The numeric line number on the device. The import does not accept line numbers that don't exist on the device.

LINE_TYPE	Enter one of the following values to assign a feature to that line: <ul style="list-style-type: none"> • Line: Device line assigned to the owner of the IP phone. <ul style="list-style-type: none"> – Line 1 <u>must</u> be set to <i>Line</i>. It cannot be set to another type. • ReferencedUser: Shared line with another user on the account. • PresenceBlfUser: Assignment of the device line to monitor the state of another user on the same account. • SpeedDialUser: Assignment of the device line to another user on the account as a speed dial. • SpeedDialTn: Assignment of the device line to an external number or star code. • CallParkingSpot: Assignment of the device line to a parking spot. • SipPaging: Assignment of the device line to a paging group. • Blank: Device Line is <i>Deactivated</i>.
REFERENCE	The 3- to 6-digit extension of other users on the account (SpeedDialUser), or a speed dial phone number (SpeedDialTN).
REFERENCE_NAME	The user or object that owns the <i>Reference</i> . This field is listed on an export but is not required for an import.

EXAMPLE IMPORT FILE


LINE_NUMBER	LINE_TYPE	REFERENCE	REFERENCE_NAME
1	Line		
2	ReferencedUser	4000	Gary Summers
3	SpeedDialUser	4000	Gary Summers
4	PresenceBlfUser	8888	Doug Manager
5	SpeedDialTn	18014403529	Higgins Mobile
6	CallParkingSpot	103	Parking Spot 4

Line Configuration

Individual lines on an IP phone can be assigned to a custom feature. Line 1 is the device owner's main line and is always a *Device Line* type; it cannot be changed. All other lines are set to *Deactivated* by default, but another feature can be assigned from here, including:

- [Call Park](#)
- [Paging Group](#)
- [Shared Line](#)
- [Device Line](#)
- [Presence/BLF](#)
- [Speed Dial](#)

Line Configuration		
Line Number	Type	Assignment
1	Device Line	
2	Call Park	Parking Spot 1
3	Shared Line	Donna Noble
4	Presence/BLF	Mickey Smith
5	Presence/BLF	Donna Noble
6	Paging Group	Back Office
7	Deactivated	

[Edit Device Line](#) 

To assign a feature to a line on a user’s device:

1. Go to either:
 - Account > Business Cloud or Cloud PBX > Users > Devices tab.
 - Account > Business Cloud or Cloud PBX > Devices
2. Locate and expand the device you want to configure.
3. Under Line Configuration, expand the line you want to assign a feature to.
 - Line 1 will always be assigned the *Device Line* type. It cannot be changed.
4. Fill out any required fields and click [Save] when you’re done.

CONTACT SUPPORT

For any other device changes, please contact Customer Support.

Call Park

Parking spots can be assigned to a line on the device. This allows a user to take an active call and put the caller in a designated parking spot at the press of a button. The call can then be picked up on any phone that has the parking spot set up in their line configuration by picking up the phone and pressing the line key assigned to the Call Park feature.

Device Line Info

Line Number
2

Type
Call Park

Assignment *
Parking Spot 2

To add parking spots to the account, please contact Customer Support.

- **TYPE:** Call Park
- **ASSIGNMENT:** Choose a parking spot.

Device Line

A Device Line functions as an additional line assigned to the owner of the device. It is a traditional line, able to place calls with the user's outbound caller ID as well as receive or pick up calls sent to the user.

Line 1 is always set to Device Line; it cannot be changed. This is the primary line belonging to the device's owner.

FAX ENABLED

To enable fax on this line, expand the SIP Credentials menu and check the box. This should only be enabled if this line is primarily for receiving faxes as these settings will *negatively* affect voice quality.

Device Line Info

Line Number
2

Type
Device Line

911 callback number
1 (206) 320-5102 - 1555 Broadway E, Seattle, WA...

Registration Status
No ✖

Cancel Save

Paging Group

Paging Groups are used to make one-way announcements to one or more devices. By assigning users to a Paging Group, all of the users assigned to that group can be contacted at once via their device's speaker, just by pressing the paging group set up in the line configuration of the device.

To set up a Paging Group on the account, please contact Customer Support.

- **TYPE:** Paging Group
- **ASSIGNMENT:** Select a group from the list

Device Line Info

Line Number
2

Type
Paging Group

Assignment *
Back Office

Cancel Save

Presence/BLF

This feature will let you add other users to extra lines on your phone, so you'll know when they are on a call, have a call coming in, or are free. Lines assigned to Presence/BLF will also enable speed dialing between users.

- **TYPE:** Presence/BLF
- **ASSIGNMENT:** Select a user from the list

Device Line Info

Line Number
2

Type
Presence/BLF

Assignment *
Sarah Jane

Presence states include busy, available and ringing of 1 or more of their devices is on a call. Lines assigned to presence will also enable speed dialing between users.

Cancel Save

Shared Line

A shared line allows this user to receive and place calls as another user from their own phone.

Inbound calls ring on both devices and either user can answer it on their IP phone. Outbound calls from the shared line utilizes the outbound caller ID as the shared user. Dialing a star code (for forwarding calls, accessing voicemail, etc.) while on the shared line also affects the assigned user.

For users that have been assigned as a shared line on another device, that device will be listed in the user's Devices tab under Referenced Devices.

- **TYPE:** Shared Line
- **ASSIGNMENT:** Select a user

Device Line Info

Line Number
2

Type
Shared Line

Assignment *
Sarah Jane

Cancel Save

EXAMPLE OF A SHARED LINE

In the first image, when we edit Sarah Jane’s device, we see that Line 3 is shared with Donna Noble.

Users < Details < Device

Edit Device

Line Configuration

Line Number	Type	Assignment	
1	Device Line		
2	Call Park	Parking Spot 1	
3	Shared Line	Donna Noble	
4	Presence/BLF	Mickey Smith	

In the second image, we see in Clara’s Devices tab that the Cisco 8851 belonging to Sarah Jane is shown in the Referenced Devices section.

Users < Details

Donna Noble

[Calls](#)
[Devices](#)
[Settings](#)
[Voicemail](#) 0

Device Lines

[Add Device](#)

Device Type	MAC Address	Line Number	
Yealink T58W	0010fa6e386a	1-27	

Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
Cisco 8851 (3PCC)	0010fa6e384a	3	Sarah Jane

Speed Dial




Speed Dial type allows you to configure quick one-touch dialing from your IP phone. Speed Dial can be configured to dial other users on your account, an outside phone number, or a star code for Pick Up Group star code.

Device Line Info

Line Number
2

Type
Speed Dial

Assignment *
Sarah Jane

Line Number	Type	Assignment
Sidecar 1 Page 1 Line 1	Deactivated	
Sidecar 1 Page 1 Line 2	Deactivated	 

ASSIGNING A SPEED DIAL

This will allow you to dial other users on your account at the touch of a button.

- **TYPE:** Speed Dial
- **ASSIGNMENT:** Choose a user from the list

ASSIGNING A CUSTOM SPEED DIAL

This will allow you to speed dial an outside line or a star code, like a [Pick Up Group](#).

- **TYPE:** Speed Dial
- **ASSIGNMENT:** Custom Speed Dial
- **SPEED DIAL:** Enter a phone number or star code.
- **SPEED DIAL DISPLAY NAME:** Enter a name for the group that will be displayed on your phone for the line.

Device Line Info

Line Number
2

Type
Speed Dial – Custom


Speed Dial *

Speed Dial Display Name *
Line 2

Sidecar

Sidecars, also called Expansion Modules, can be provisioned on an IP phone for additional line keys and functionality. Expand an IP phone device and scroll down past the Line Configuration section to see the Sidecar option.

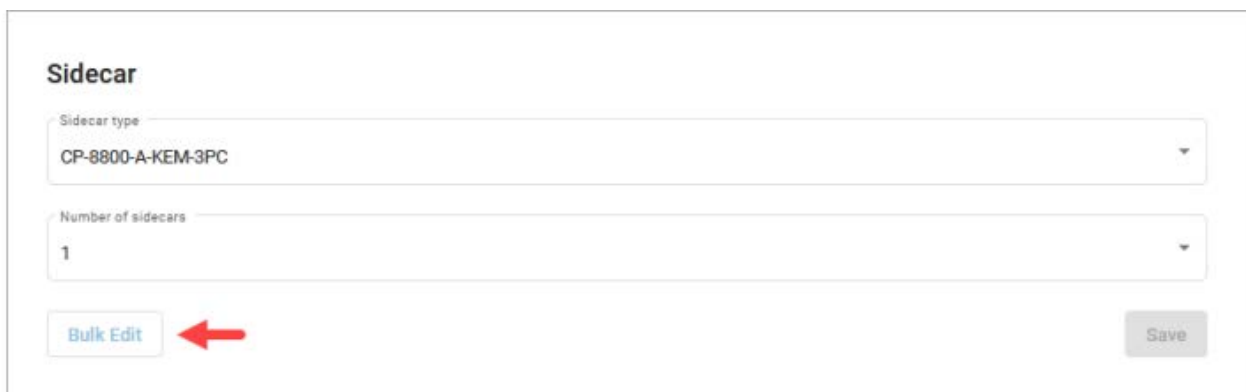


- **SIDECAR TYPE:** Select a sidecar type from the menu. This list will only display options that are compatible with the IP phone being managed.
- **NUMBER OF SIDECARS:** Select the number of sidecars being added to the IP phone.
- Click [Save]. The sidecar lines are displayed below.
- To configure a line, click  Edit and assign a feature to it as appropriate.

Bulk Sidecar Setup

Use Bulk Sidecar Setup to automatically assign users (speed dial) to lines on the sidecar all at once. If there are more users than lines, some users may not be added.

1. To perform a sidecar bulk edit, click [Bulk Edit]



2. Select an option from the Setup dropdown, then click [Save] to implement it.

There are three bulk sidecar setup options:

- **ALPHABETICALLY:** Add all possible users in order by last name.
- **BY EXTENSION:** Add all possible users in order by their extension number.
- **CUSTOM:** Choose specific users as sidecar lines in a single operation.

IMPORTANT

Any bulk setup operation will overwrite the current sidecar configuration—it cannot be undone!










ALPHABETICALLY

Users are assigned to lines in reverse alphabetical order.

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	Bob Johnson	
Sidecar 1 Page 1 Line 2	Speed Dial	Chris Jenson	
Sidecar 1 Page 1 Line 3	Speed Dial	Donna Noble	
Sidecar 1 Page 1 Line 4	Speed Dial	Jack Murphy	
Sidecar 1 Page 1 Line 5	Speed Dial	John Miller	
Sidecar 1 Page 1 Line 6	Speed Dial	Mickey Smith	
Sidecar 1 Page 1 Line 7	Speed Dial	Ron Williams	
Sidecar 1 Page 1 Line 8	Speed Dial	Timothy Lee	
Sidecar 1 Page 1 Line 9	Speed Dial	Zack Davis	

BY EXTENSION

Users are assigned to lines in order of the user’s extension number.

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	Timothy Lee	
Sidecar 1 Page 1 Line 2	Speed Dial	Mickey Smith	
Sidecar 1 Page 1 Line 3	Speed Dial	Bob Johnson	
Sidecar 1 Page 1 Line 4	Speed Dial	Donna Noble	
Sidecar 1 Page 1 Line 5	Speed Dial	Jack Murphy	
Sidecar 1 Page 1 Line 6	Speed Dial	Chris Jenson	
Sidecar 1 Page 1 Line 7	Speed Dial	Zack Davis	
Sidecar 1 Page 1 Line 8	Speed Dial	John Miller	
Sidecar 1 Page 1 Line 9	Speed Dial	Ron Williams	

CUSTOM










Use the arrows to move Unassigned Users to the Assigned Users list.

Sidecar Bulk Edit

Setup
Custom

Select	Username
<input checked="" type="checkbox"/>	John Miller
<input checked="" type="checkbox"/>	Zack Davis
<input checked="" type="checkbox"/>	Jack Murphy
<input type="checkbox"/>	Ron Williams
<input type="checkbox"/>	Donna Noble
<input type="checkbox"/>	Bob Johnson
<input type="checkbox"/>	Chris Jenson
<input type="checkbox"/>	Timothy Lee
<input type="checkbox"/>	Mickey Smith

Cancel Save

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	John Miller	
Sidecar 1 Page 1 Line 2	Speed Dial	Zack Davis	
Sidecar 1 Page 1 Line 3	Speed Dial	Jack Murphy	
Sidecar 1 Page 1 Line 4	Deactivated		
Sidecar 1 Page 1 Line 5	Deactivated		
Sidecar 1 Page 1 Line 6	Deactivated		
Sidecar 1 Page 1 Line 7	Deactivated		
Sidecar 1 Page 1 Line 8	Deactivated		
Sidecar 1 Page 1 Line 9	Deactivated		

Reassign End User Accounts

No matter your industry or size, all businesses experience growth and decline. This feature allows you to reassign an end user's account settings to another user. So, if one employee leaves the organization, their phone number, caller ID, device lines, IVR/Auto-Attendant references, etc. can be reassigned to their replacement with the click of a button. It's an absolute time saver.

Account Managers and Admin end users can use this feature in the Voice Portal.

How It Works

When an end user account is reassigned, it is renamed and given to a new user. Not all of the previous user's settings make the switch, though. Here's how it works:

New user default settings

The name, username, and email address are updated with the new user's information. For privacy reasons, the following features and settings are reset to default:

- Call Handling
- Call Screening
- Voicemail greetings, messages, and PIN

Account and Call History Records

The *userID* tied to the account remains unchanged. This means that the Call History records will reflect the original user's name before the reassignment, and the new user's name after the reassignment.

Features and settings that switch

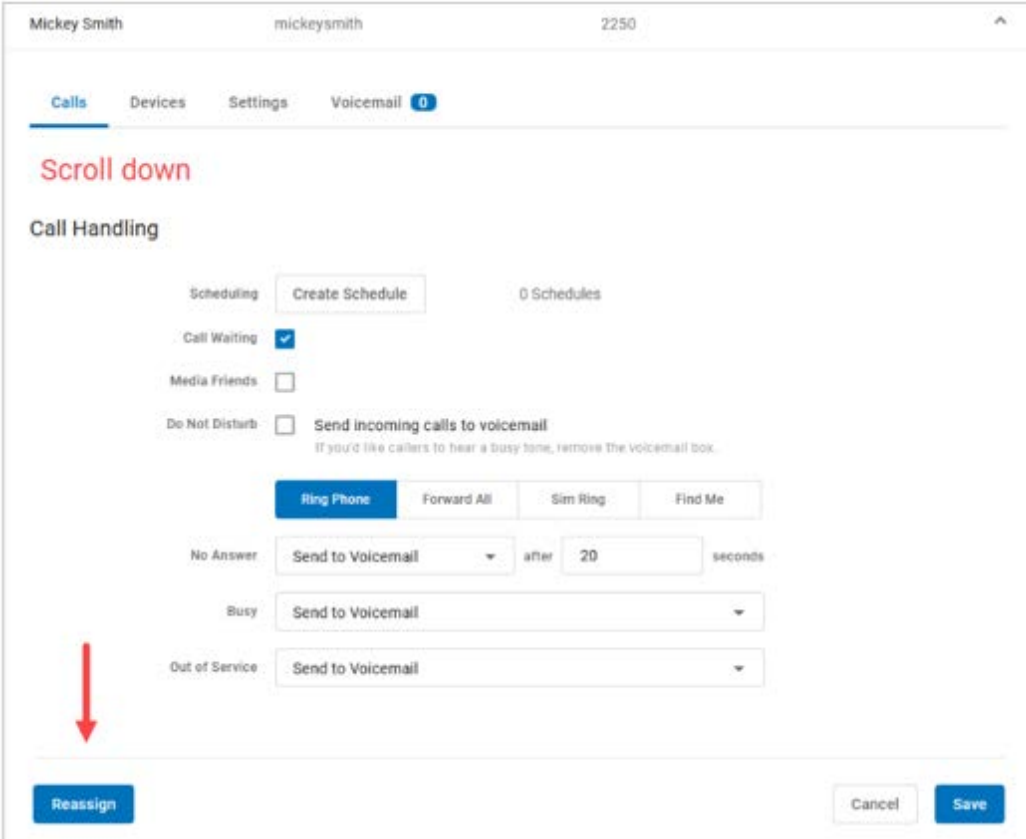
The original end user's features and settings will be assigned to the new user, including but not limited to:

- Calling plan assignments
- Product tier
- Voice Portal access
- End user role (Admin or Limited)

- Caller ID phone number and settings
- Device lines assigned to the user
- Phone numbers routing to the user
- Cymbus softphone device lines
- Extension number
- Language
- Time zone
- Shared lines, speed dials, and BLFs owned by or reference the user
- Paging and Pick Up Groups to which the user belongs
- Queues to which the user belongs
- IVR/Auto-Attendant references that point to the user, their device lines, or their voicemail box

Steps to Reassign an End User Account

1. In the Admin Portal, go to Users and expand the user whose account you want to reassign.



Mickey Smith mickeysmith 2250

Calls Devices Settings Voicemail 0

Scroll down

Call Handling

Scheduling 0 Schedules

Call Waiting

Media Friends

Do Not Disturb Send incoming calls to voicemail
If you'd like callers to hear a busy tone, remove the voicemail box.

No Answer after seconds

Busy

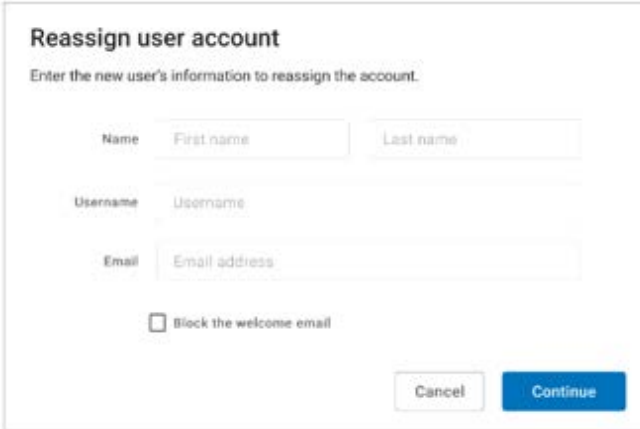
Out of Service

2. In the user's Calls tab, scroll down to the bottom and click **[Reassign]** on the left.

Account Managers and Admin end users can also manage this setting, if given the right permissions. See End User Access below for details.

3. Enter the new user's information.

Enter the name, username, and email address for the new user. If you do not want the user to receive the welcome email yet, check *Block the welcome email*. Then click **[Continue]**.



Reassign user account
Enter the new user's information to reassign the account.

Name

Username

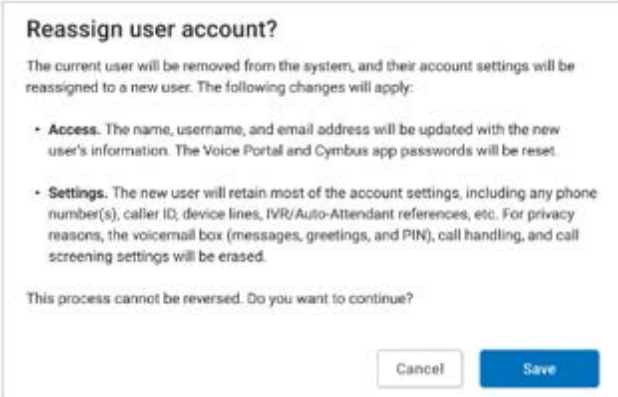
Email

Block the welcome email

4. Read and agree to the warning.

The current user will be removed from the system, and their account settings will be reassigned to a new user. Please read the warning message carefully to understand what will and will not be switched.

If you still want to proceed with the reassignment, click **[Save]**.



Reassign user account?

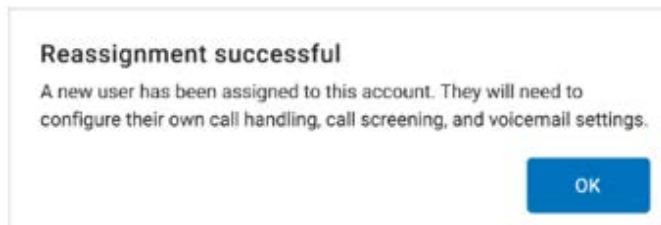
The current user will be removed from the system, and their account settings will be reassigned to a new user. The following changes will apply:

- **Access.** The name, username, and email address will be updated with the new user's information. The Voice Portal and Cymbus app passwords will be reset.
- **Settings.** The new user will retain most of the account settings, including any phone number(s), caller ID, device lines, IVR/Auto-Attendant references, etc. For privacy reasons, the voicemail box (messages, greetings, and PIN), call handling, and call screening settings will be erased.

This process cannot be reversed. Do you want to continue?

5. Reassignment successful.

The original user's account settings have been successfully reassigned to a new user. Unless it was blocked, the new user can click the link in the Welcome email to create a password and log in to the Voice Portal.



Info

Please remind the new user to configure their own call handling, call screening, and voicemail settings.

AUTO-ATTENDANT (Business Cloud Only)

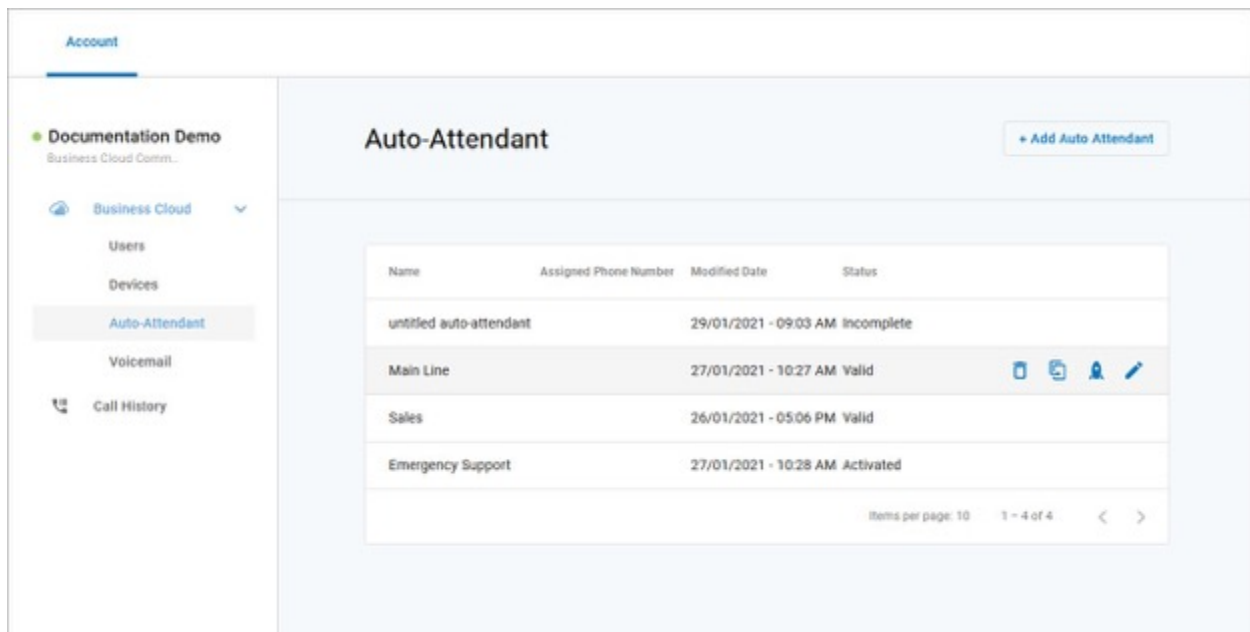
Managing inbound calls is a crucial part of how an organization handles everyday business. Auto-attendants enable identification, segmentation, and routing of callers to the most appropriate agent within your team. It's a simple, effective, and completely customizable tool which will significantly reduce costs and increase efficiency within any company.

Auto-attendants are easy to build and modify. The editor lays out your routes into clear columns and rows so you can see exactly what you're building and how it all fits together. Changes are saved in real time, so you won't lose any edits—even if you close the window. Incomplete auto-attendants will also be saved so they can be edited and completed later.

Overview

In Business Cloud > Auto Attendant, you can see all the auto-attendants on the account, including the assigned phone number(s), last modified date, and status. You can build and keep as many auto-attendants as you need. Changes are saved in real time, so you can start building now and come back to finish it later.

If you don't see Auto-Attendant in the menu, please contact Customer Support.












Name	Assigned Phone Number	Modified Date	Status
untitled auto-attendant		29/01/2021 - 09:03 AM	Incomplete
Main Line		27/01/2021 - 10:27 AM	Valid
Sales		26/01/2021 - 05:06 PM	Valid
Emergency Support		27/01/2021 - 10:28 AM	Activated

Items per page: 10 1 - 4 of 4

FIELD	DESCRIPTION
[+Add Auto-Attendant]	Start creating a new auto-attendant. The builder will open in a new window, so you can look back at the auto-attendant list if you need to reference it.
Name	The name of the auto-attendant. If a name wasn't saved, it will be named "untitled auto-attendant" by default.
Assigned Phone Number	The phone number(s) directed to this auto-attendant. A phone number must be assigned before calls can be directed through the auto-attendant. If this is blank, contact Customer Support for assistance.
Modified Date	The last date the auto-attendant was modified: month, day, year, time.
Status	<ul style="list-style-type: none"> • INCOMPLETE: There are open routes that need to be closed before the auto-attendant can be launched. • VALID: All routes are closed and it's ready to be launched (activated). • ACTIVATED: The route has been launched and it can now be assigned to a phone number. • LINKED: A phone number is assigned, and this auto-attendant is live.

Tools

Hover over an auto-attendant to see the tools on the right.

FIELD	DESCRIPTION
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> Rural Electric Co-Op 27/01/2021 - 10:27 AM Valid <div style="text-align: right;">     </div> </div>	
 Delete	Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.
 Duplicate	Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one.
 Launch	When the status is <i>Valid</i> , click the Launch icon to activate it so the attendant will be available as a destination in the Phone Number menu.
 Deactivate	Deactivate the auto-attendant. <i>Activated</i> status will be downgraded to <i>Valid</i> , and <i>Linked</i> status will be downgraded to <i>Activated</i> .
 Edit	Make changes to an inactive auto-attendant in the builder. Changes are saved in real time, so active auto-attendant cannot be edited.

Auto-Attendant Setup

Managing inbound calls is a crucial part of how an organization handles everyday business, and the process here is simple, straightforward, and fully customizable. By implementing auto-attendants, you can customize where your callers are routed based on a schedule. Whether they're calling the phone number for a specific or trying to reach the regional office, you get to decide what happens when they call.


Add an Auto-Attendant

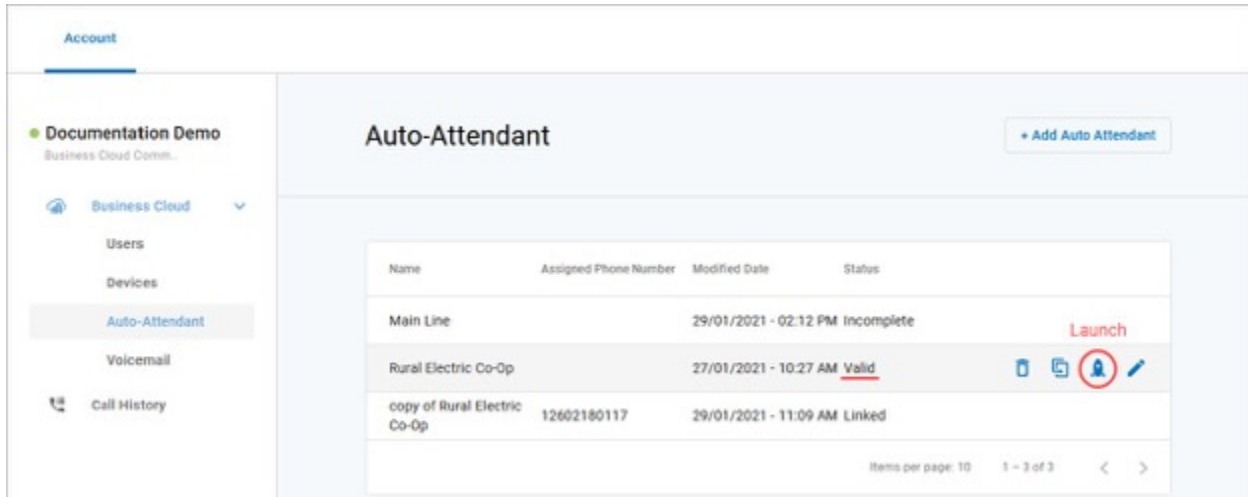
1. Click **[+ Add Auto-Attendant]**.
2. The auto-attendant builder will open in a new window. If your browser doesn't allow pop-ups, it may ask if you want to allow this one.
3. Enter a name for this auto-attendant.
4. Click the **+** **Add** icon to select and add a new route (see the summary below). When a route is selected, the editor will slide out on the right of your window.
5. Configure the route as needed, then click **Save**.
6. Back on the auto-attendant builder, there is now a **+** **Add** icon next to each new route. Click the icon to add the next route.

AUTO-ATTENDANT ROUTES SUMMARY

FIELD	DESCRIPTION
Schedule	Routes the caller to a call flow based on a defined schedule.
Menu	Plays a recording, typically the readout of the phone menu, and waits for the touchtone input from the user to determine the next route.
Message	Plays a pre-recorded sound clip.
Group	Routes the caller to a group of users (not devices). This route also supports call queuing.
User	Routes the caller to a specific user's devices or the user's voicemail. The call will follow the user's call handling settings.
Hang Up	Ends the call.
Reference	Redirects the caller to another route in this auto-attendant. For example, if a call is routed to a user but the user doesn't answer, instead of ending the call there so they have to call back, you could reference the Main Menu so the caller can start over.

Activate an Auto-Attendant

When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to "Valid." At this point, you can click the  Launch icon to activate it.

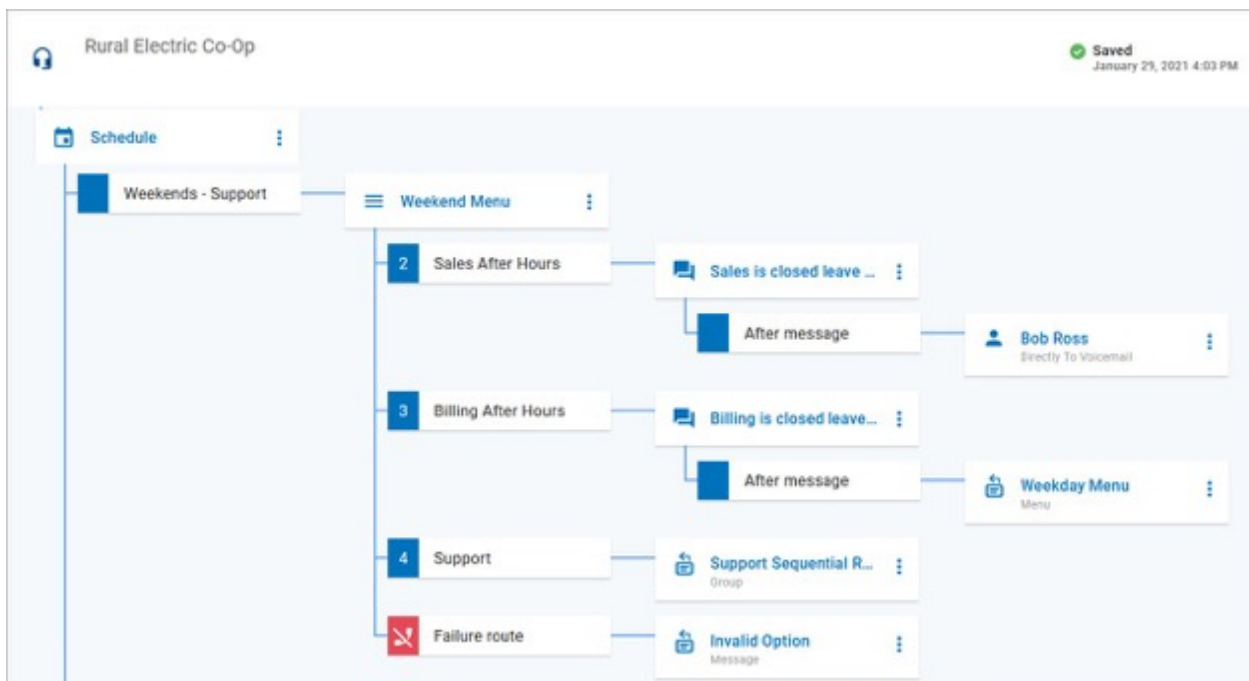


Name	Assigned Phone Number	Modified Date	Status
Main Line		29/01/2021 - 02:12 PM	Incomplete
Rural Electric Co-Op		27/01/2021 - 10:27 AM	Valid
copy of Rural Electric Co-Op	12602180117	29/01/2021 - 11:09 AM	Linked

ASSIGN A PHONE NUMBER


Once the auto-attendant is activated, please contact Customer Support to assign it a phone number. This step is required before calls can be directed through the auto-attendant.

EXAMPLE OF A COMPLETED ROUTE



Auto-Attendant Routes

The auto-attendant builder is comprised of various routes that work together to route calls. As routes are added to the builder, they're arranged in neat rows and columns so you can see how it all fits together. Routes can be easily found, moved around, and connected as the auto-attendant is built.

When you're done configuring a route, click [Save], and it will be added to the builder canvas. Routes that have an  Add icon after it *require* another route.


To edit a route, click on the primary card to open it on the right.

INFO

For best results, use Chrome or Firefox (not Safari).

Schedule

Set your phone system to direct incoming calls to different destinations depending on when they call in, such as business hours, lunch hours, holidays, after-hours, etc.

A schedule requires at least one rule, but you can add as many as needed. Calls will be routed to the first rule that matches the time of the incoming call, based on the priority order in which the rules are set. To change the order of your rules, click the  icon to the right of the rule and drag it to the correct position.

1. **SCHEDULE NAME:** Enter a name for this schedule (20-character max).
2. **TIME ZONE:** Select which time zone should be applied.
3. **RULE NAME:** Enter a name for this rule.
4. **WEEKLY/CUSTOM:** Choose a rule type: Weekly (recurring) or Custom (one-time).
 - **DAY/DATE:** For a Weekly rule, select the days of the week that this rule applies to. For a Custom rule, choose one or more dates (but not a range).
 - **TIME:** Enter the start and end times. You can type it in or click the clock icon on the right to use the drop-down menu (Chrome only).
 - For a Weekly rule, you can split the rule into different times during the day.
Click + Add Time Range and then enter the other time.
 - **SAVE:** When you're done, click the checkmark in the top right.
5. If needed, click [+ Add Rule] to add another rule to this schedule.
6. When you're done adding rules to the schedule, click [Save].

Weekdays
Weekly (Mo - Fr)

Rule name
Weekdays

Weekly Custom

Mo Tu We Th Fr Sa Su

08 : 00 : 00 AM 12 : 30 : 00 PM
01 : 00 : 00 PM 05 : 30 : 00 PM

+ Add Time Range

Holidays
Custom (12/24/2021) +1

Rule name
Holidays

Weekly Custom

Date & Time
12/24/2021




08 : 00 : 00 AM 05 : 30 : 00 PM

Date & Time
12/25/2021

08 : 00 : 00 AM 05 : 30 : 00 PM


+ Add Custom Date

DELETE A RULE

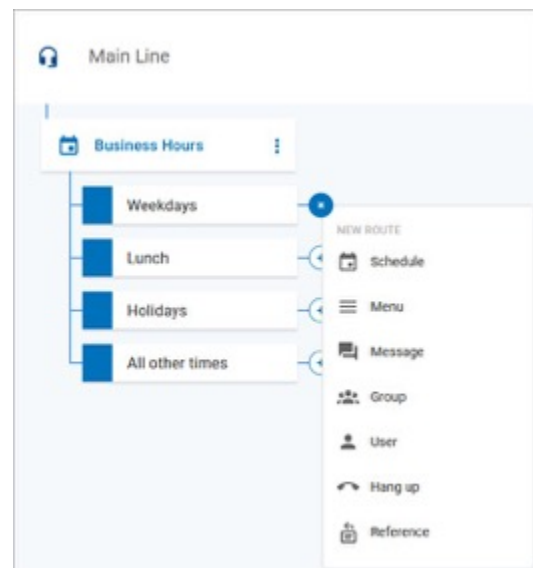
To delete a rule, click the  trash icon. The rule will be crossed out, but if you change your mind, it can still be  restored or  edited until the schedule is saved. Once you save the schedule, though, any deleted rules will be deleted permanently.



SAVE

After you set up and save your schedule, the routes are added to the Auto-Attendant builder canvas. Click the  Add icon to add another route.

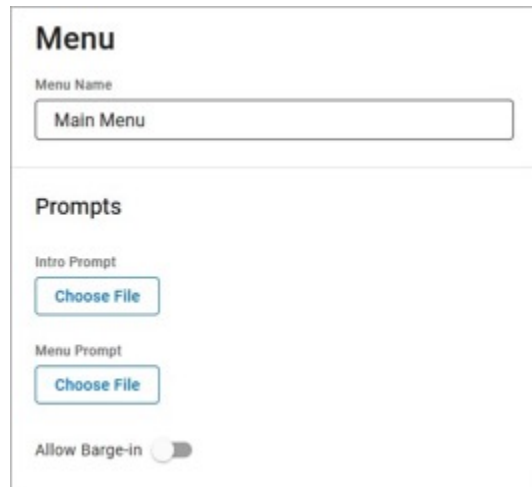
By default, an "All other times" route will be added to determine where calls are routed during times that aren't specified by a rule.



Menu

A Menu directs the caller to a message and DTMF (Dual-tone Multi-Frequency signaling, commonly referred to as touch-tones) options for call routing based on the key dialed.

Enter a name for this menu and then upload your prompts.

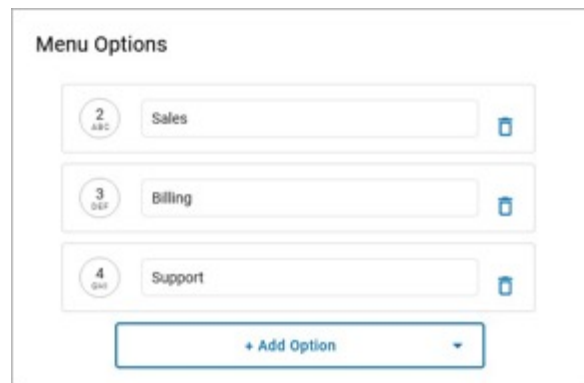


FIELD	DESCRIPTION
Intro Prompt	The recorded audio that a caller will hear upon entering the menu. A WAV file must be uploaded before the menu can be saved.
Menu Prompt	The recorded audio that a caller will hear after the introduction prompt has completed. A WAV file must be uploaded before the menu can be saved. WAV files must be less than 5 MB and in an 8-bit mono U-Law file format. Example: "Thank you for calling Acme Corp. Press 1 for Sales, 2 for Support, or 3 for Billing."
Allow Barge-In	Allow callers to interrupt the Intro prompt by dialing an option (DTMF input) before they hear it. Regardless of this setting, callers can always interrupt the Menu prompt.

MENU OPTIONS

Add DTMF (touchtone) options (0-9, *, #). Each option needs a name and a completed route.

1. Click [+ Add Option].
2. Select a DTMF option (0-9, *, or #).
3. Enter a name for the menu option.
4. Repeat steps 1–3 for other menu options.



FAILURE ROUTING

Choose what happens if the caller dials an invalid option or fails to make a selection within a specified time.

Failure Routing

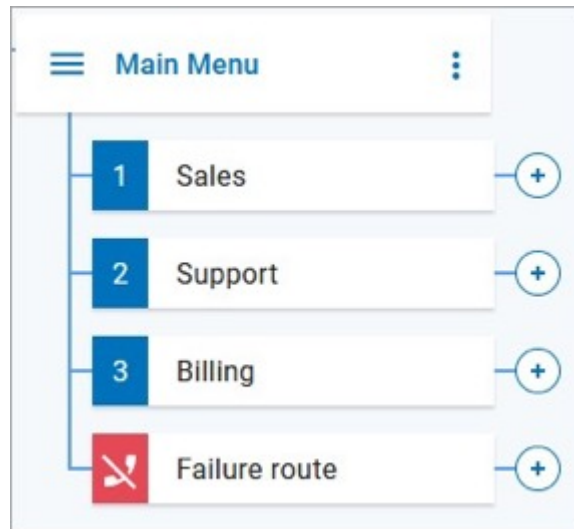
Menu Timeout (Seconds)

Max Invalid Selections

Invalid Prompt

FIELD	DESCRIPTION
Menu Timeout	The number of seconds delay before directing the call into the failure route.
Max Invalid Selections	The number of invalid DTMF (touchtone) selections that will be allowed prior to directing the call into the failure route.
Invalid Prompt Upload	<p>Upload a recorded audio file (WAV or WAVE) that a caller will hear after dialing an invalid DTMF option (required). Files must be less than 5 MB and in 8-bit mono U-Law format.</p> <p>Example verbiage: "The number you entered was invalid. Please try again."</p>

When you're done configuring the menu, click [Save]. The menu will be added to the autoattendant builder canvas.



Message

The caller will hear a pre-recorded message.

FIELD	DESCRIPTION
Message Name	Enter a name for this particular message.
Message	Upload a recorded audio file (WAV or WAVE under 5 MB) that will play when the caller reaches this point in the route.

Group

A Group allows the call to ring to multiple users (not devices). All user call handling rules will be honored. The first user (or user's call handling rule) to answer will take it.

Group

Group Name

Allow Call Queuing

Max # of Calls

Queue size is required.

Max Time (Minutes)

Max Time is required.

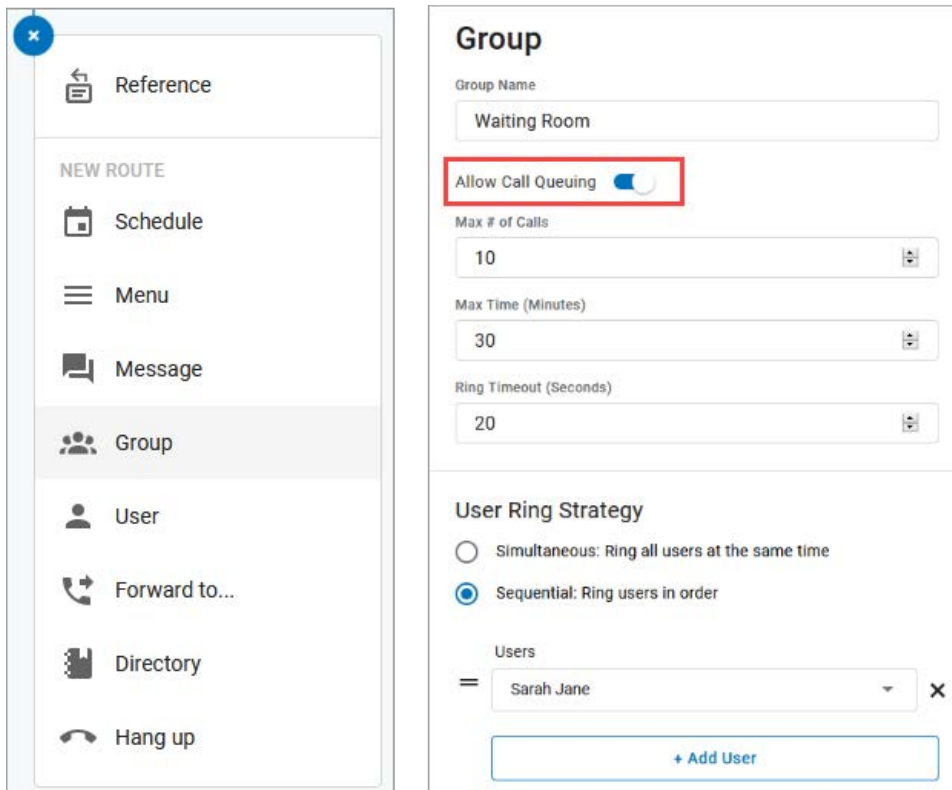
Ring Timeout (Seconds)

Timeout value is required.

FIELD	DESCRIPTION
Group Name	Enter a name to identify this group.
Allow Call Queuing	Allows calls to enter a queue.
Max # of Calls	Enter the number of calls that can be in the queue at one time (1–50).
Max Time (Minutes)	Enter the number of minutes that a call is allowed be in the queue (limit 360). Once the max time is reached, the call is sent to the failure route.
Ring Timeout (Seconds)	Enter the number of seconds that a call is allowed to ring to each line (limit 120). If a user does not answer, the call is pushed back to the front of the queue and users are rung again until the Max Time is reached.

CALL QUEUEING

Long calling queues have an undeniably negative impact on your customer's experience. For 66% of callers, two minutes on hold is their breaking point. While call queuing is not a new idea, not all tools are created equal. The Auto-Attendant feature helps your business pre-set and manage large call volumes without increasing operational costs, through the easy to use, intuitive Voice Portal.



1. In the Auto-Attendant, add a Group route.
2. Slide the toggle for Allow Call Queueing. This will enable the ability to have incoming calls placed in a "waiting room" where hold music will play while they wait for the next available representative.
 - Because hold music is set at the account level, not at the queue level, custom music cannot be set for each individual queue.
3. Enter the following information:
 - Max # of Calls. How many people can wait on hold at a time.
 - Max Time. How long can each call be on hold before the failure routing takes effect.
 - Ring Timeout. The number of seconds the call will attempt to route to this group before moving on to the next route.
4. Next, choose a ring strategy:
 - Simultaneous: Ring all users at the same time.

- Sequential: Ring users in order. The amount of time it routes to each user added to the group until the max time parameter has been met which will then route the call to the next route.
5. Finally, add individuals to the group.
 6. When you're done, click [Save].

User Ring Strategy

Choose if calls will ring to all users at once or in order.

User Ring Strategy

Simultaneous: Ring all users at the same time

Sequential: Ring users in order

Users

= (choose a user) ✕

Valid user must be selected.

+ Add User

Ring Timeout (Seconds)

Number of seconds (1-120) ✕

Timeout value is required.

User Ring Strategy

Simultaneous: Ring all users at the same time

Sequential: Ring users in order

Users

= Bob Ross ✕

Timeout (Sec)

15 ✕

= Alice Cooper ✕

15 ✕

Total Ring Time: 0 min 30 sec

+ Add User

FIELD	DESCRIPTION
Simultaneous	Rings all devices in the group at the same time. The first user to answer gets the call.
Sequential	Rings one device in the group at a time in a specified order until the call is answered. For a sequential strategy, enter each user and the number of seconds the call will ring for that user before going on to the next.
Users	Add a user to the group.
Ring Timeout	The number of seconds the call will attempt to route to this group. After the timeout, calls will route to the next specified route.

User

Routes to a single user whose personal call handling setting will apply as normal. If "Send calls directly to user's voicemail" is selected, the call bypasses the user's call handling rules and routes directly to the user's voicemail box.

User

Bob Ross ▼

Send calls directly to user's voicemail

Directory

Allows the caller to dial a user in the directory using text to speech. When the caller reaches this point, they will hear, “Dial by last name” or “Dial by first name.” The caller will dial 3 or more characters of the user’s name and press #. If there is more than one matching user, the caller will select a user from a list of options.

DIAL BY...

Choose if callers can dial the user by their last name or first name.

Directory

Dial by...

Last Name

First Name

CUSTOM AUDIO

Optionally, upload custom audio prompts to provide callers with customized guidance. WAV files must be less than 5 MB. If a custom file is not used, the caller will hear the default prompts.

Custom Audio

Intra Prompt (Optional)

Please upload a .wav file (under 5 MB).

Invalid Selection (Optional)

Please upload a .wav file (under 5 MB).

FAILURE ROUTING

A failure route is required in case the caller is unable reach the user they were looking for.

Failure Routing

Note: If the (*) key is pressed the caller will be guided through the Failure Route.

Timeout (Seconds)

Timeout value is required.

Max Invalid Selections

Max invalid selections is required.

FIELD	DESCRIPTION
Timeout (seconds)	Enter the number of seconds the call can be in the directory. (1-999)
Max Invalid Selections	Enter the number of invalid selections the caller can try before the call is redirected to the failure route. (1-10)

Hang Up

Terminates any call that reaches this point. Click Save to keep this route.

Hang_up

Hang up will terminate any call that reaches this route.
Click 'Save' to keep this route.

Reference

A Reference when you redirect the call to another route. When a change is made in the original route, any references that use it will also be updated.

Choose which Group, Menu, Message, Schedule, or User a caller will be redirected to once they reach this point in the route, then click [Save].

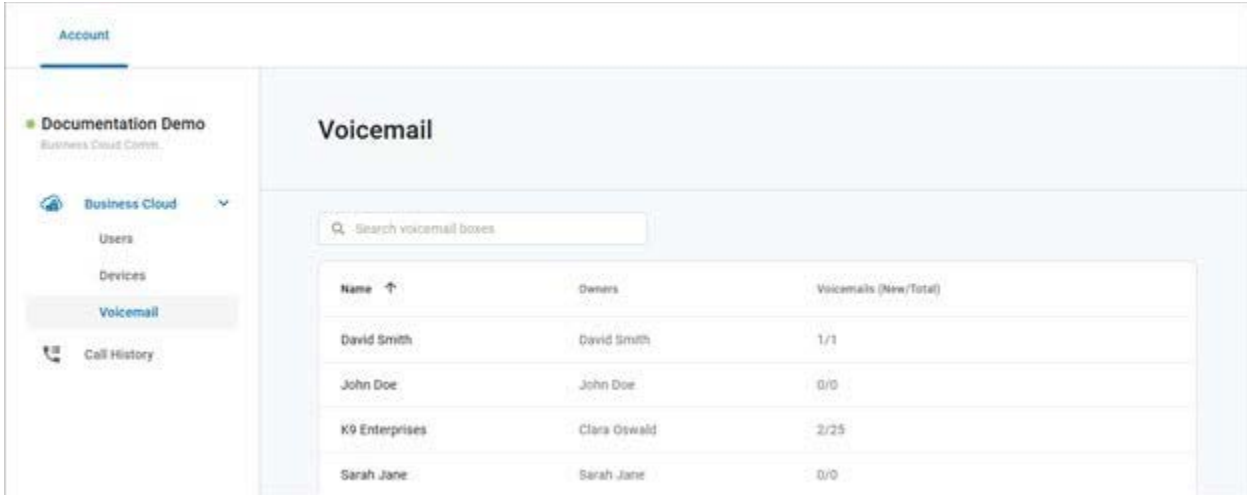
Reference

A reference is a copy of route and all the actions that come after. When a change is made within a branch...

GROUP
Support Sequential Ring
MENU
Weekday Menu <input checked="" type="checkbox"/>
Weekend Menu
MESSAGE
Billing is closed leave a msg
Invalid Option
No one is home, leave a msg
Sales is closed leave a msg
SCHEDULE
Schedule
USER
Alice Cooper
Bob Ross
Bob Ross

VOICEMAIL

This section houses *all* the voicemail boxes set up on the account. The settings here are the same as they are in the [Users > Voicemail](#) tab. Expand a voicemail box to view the details.



The screenshot shows the 'Voicemail' section of the account management interface. It features a search bar at the top and a table listing voicemail boxes. The table has three columns: Name, Owners, and Voicemails (New/Total).

Name ↑	Owners	Voicemails (New/Total)
David Smith	David Smith	1/1
John Doe	John Doe	0/0
K9 Enterprises	Clara Oswald	2/25
Sarah Jane	Sarah Jane	0/0

Voicemail Box Details

The Voicemail Box Details includes the name of the box and its owner. The Voicemail Box Name can be edited here, if needed.



The screenshot shows the 'Voicemail Box Details' form for a box named 'Amy Pond'. The form displays the current name and owner, and provides a text input field for editing the name.

Amy Pond Amy Pond 0/0

Voicemail Box Details

Voicemail Box Name

Owner **Amy Pond**

Voicemail Box Greetings

Users can upload their voicemail greetings (Basic, Busy, No Answer) and personal name recordings. Click the field to select a file from your computer, then click [Upload]. The upload will accept WAVE, MP3, and OGG files that are less than 10MB.

Voicemail Box Greetings ?

Basic Greeting

Accepted files: WAVE, MP3, and OGG files under 10MB

Personal Name

Accepted files: WAVE, MP3, and OGG files under 10MB

Custom Greetings

Any custom voicemail greeting upload here will override basic and personal name greetings.

Busy Greeting

Accepted files: WAVE, MP3, and OGG files under 10MB

No Answer Greeting

Accepted files: WAVE, MP3, and OGG files under 10MB

Messages



Voicemail messages saved to the box are listed here. Messages can be sorted by Time/Date, Length, and Status (New or Saved). Hover over an individual message to see the management tools (Save and Delete) on the right.

Please note, messages cannot be downloaded from the Voice Portal.

Messages ?

<input type="checkbox"/>	Date/Time ↓	Caller	Length	Status
<input type="checkbox"/>	May 28, 2021 5:15 PM	1 (801) 534-4672	3 seconds	New ✉ 🗑
<input type="checkbox"/>	Jan 20, 2016 10:40 AM	2001	2 minutes, 59 seconds	New
<input type="checkbox"/>	Jan 20, 2016 10:36 AM	2001	2 seconds	New

1-3 of 3 < >

Field	Description
 Save	Change the status of the message to <i>Saved</i> .
 Delete	Delete this message from the box.

To delete all or multiple messages at once, select the message on the left and then click the trash icon at the top right.

MESSAGE WAITING INDICATOR

The message waiting indicator (MWI) on the user's device notifies them when a new voicemail message is available. Once the message has been listened to or deleted, the MWI will turn off.

Message Settings

Message Settings

- Forward Voicemail to Email Forward voicemail messages
- Keep a copy in voicemail box
- Enable Transcription Enable Transcription of Messages

Enter email addresses, separated t

FORWARD VOICEMAIL TO EMAIL

Messages left on your voicemail box can be forwarded as an MP3 file to one or more email addresses. Users also have the option to keep a copy of the message in their voicemail box when it's forwarded.

7. Check Forward Voicemail to Email.
8. Optionally, check Keep a copy in voicemail box.
9. Enter one or more email addresses, each separated by a comma.
10. At the bottom of the section, click [Save].

Voicemail Transcription (BCC ONLY)

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription, available only on Business Cloud Communications, takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an MP3 file (depending on if you have forwarding enabled).

With voicemail transcription, you can:

- Get important messages when you can't take a call
- Browse your voicemails in email, rather than listening and re-listening
- Keep searchable records of business voicemails
- Easily forward messages you've received

Message Settings

- The voicemail transcription setting can be enabled in the Admin Portal or the end user's Voice Portal for each voicemail box.
- In the Admin Portal or Voice Portal, go to User > Voicemail.
- Under Message Settings, check the box for "Enable Transcription."
- Optionally, check the boxes for "Forward Voicemail to Email" to email an MP3 of the message and "Keep a copy in voicemail box" if you want to save a copy of the message in the voicemail box when it's forwarded.
- In the field below, enter one or more email addresses in the field below separated by commas (required).
- Click [Save].
- Voicemail messages will be transcribed and sent to the email address(es) indicated here. If "Forward Voicemail to Email" is also enabled, an MP3 of the message will be attached to the email.



New voicemail from 15704600694 for voicemail box: Kevin Silliman

From: noreply@cymbus.com

To: kss

 vm_WIRELESS_CAL...21_10_28_08_57.mp3 (29.7 KB) [Download](#) | [Remove](#)



Hi Kevin,

You got a new voicemail. Here are the details of your message:

From: WIRELESS CALLER / 1 (570) 460-0694

Time: Thursday, October 28, 2021 at 8:57 AM

Duration: 00:07

Transcription:

This is a test of the email transcription. This is only a test. Thank you.
See attachment.

Thanks,

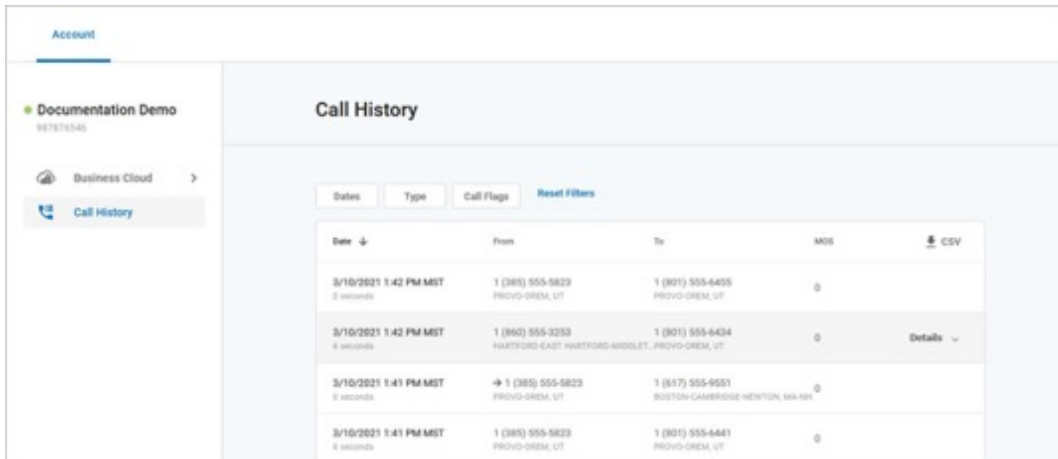
Penteledata Voice Team

Info

Voicemails can only be transcribed from US English. If a message cannot be transcribed for any reason, such as poor audio quality, an email will still be sent with a message saying, "Message could not be transcribed."

CALL HISTORY

Call History holds the records of all calls made and received on the account. Calls are presented in chronological order with the most recent call at the top. At the top right of the table, the current record list can be downloaded as a CSV file.

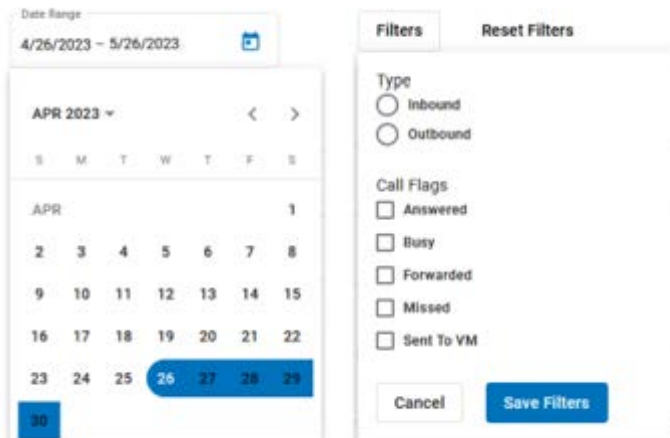


Date	From	To	MS	CSV
3/10/2021 1:42 PM MST 0 seconds	1 (385) 555-5823 PROVO-OREM, UT	1 (801) 555-6455 PROVO-OREM, UT	0	
3/10/2021 1:42 PM MST 8 seconds	1 (860) 555-3253 HARTFORD-EAST HARTFORD-MIDDLET, PROVO-OREM, UT	1 (801) 555-6434 PROVO-OREM, UT	0	Details
3/10/2021 1:41 PM MST 0 seconds	→ 1 (385) 555-5823 PROVO-OREM, UT	1 (817) 555-9551 BOSTON-CAMBRIDGE-NEWTON, MA NE	0	
3/10/2021 1:41 PM MST 8 seconds	1 (385) 555-5823 PROVO-OREM, UT	1 (801) 555-6441 PROVO-OREM, UT	0	

Filters

Call records can be filtered by Date, Type, and/or Call Flags. These filters allow you to identify patterns in the calls, such as how many calls are being sent to voicemail, what calls are being missed, etc.

Click the filter buttons to set your criteria. If necessary, click [Reset Filter] to remove any parameters and display ALL calls again. Once your parameters are set, the matching call records are displayed below.



Date Range: 4/26/2023 - 5/26/2023

APR 2023

APR: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30

Filters

Reset Filters

Type

Inbound

Outbound

Call Flags

Answered

Busy

Forwarded

Missed

Sent To VM

Cancel Save Filters

Details

For more information about a call, click the three dots menu on the right of a call to view the details or technical details of the call. For inbound calls, you may also have the option to block the number.

August 3, 2022 at 2:52 PM MDT 28 seconds	1001 Extension	1000 Extension	⋮
---	-------------------	-------------------	---

Block Number

Details

Technical Details

Details

Time and Length

Start Time August 3, 2022 at 2:52 PM MDT

Connected Time August 3, 2022 at 2:52 PM MDT

End Time August 3, 2022 at 2:52 PM MDT

Billed Length 0 seconds

Actual Length 28 seconds

Cost

Cost \$0.00

In Calling Plan Yes

Rate Per Minute \$0.00

Origination

Number 1001

Location Extension

Category OnNet

Termination

Number 1000

Location Extension

Category OnNet

Close

Technical Details

```

id "6bb68bef-bad1-4a98-a77e-1d2461a873d3"
startTime "August 3, 2022 at 2:52 PM MDT"
connectTime "August 3, 2022 at 2:52 PM MDT"
endTime "August 3, 2022 at 2:52 PM MDT"
actualCallLengthSeconds 28
billCallLengthSeconds 0
ratePerMinute 0
cost 0
inPlan true
origNumber "1001"
origLocation "Extension"
origCarrier "ALIANZA"
origCallCategory "OnNet"
termNumber "1000"
termLocation "Extension"
termCarrier "ALIANZA"
termCallCategory "OnNet"
legType "Origination"
callType "OUTBOUND"
disconnectType "hangUpOther"
sessionId "f6bb8e2401b857ebf4b98fcc4c2ed5d9b32ca7c"
accountReferenceNumber "110199219001"
                    
```

Close

FIELD	DESCRIPTION
-------	-------------

Block

If necessary, you can block the inbound caller. Click [Block] to add the inbound caller to the user's or account's blocked caller list (in Call Handling).

Select Screening Location

User

Account

Cancel Confirm

Time and Length	Start time, connected date and time, end date and time, billed length, and actual length.
Cost	The total cost, whether it was included in the calling plan, and the rate per minute.
Origination	The originating number, location, and category (On or Off Network).
Termination	The terminating number, location, and category (On or Off Network).
Technical Details	View all the technical details of the call. This can be helpful to Customer Support when troubleshooting call issues

ACCOUNT SETTINGS

Emergency Notification System

In recent years, the FCC has passed Kari's Law and RAY BAUM's Act to help expedite response to emergency services to callers and improve outcomes. As part of Kari's Law, all multi-line telephone systems (MLTS) must be preconfigured to send a notification to an on-site location (like a front desk or security office) when a 911 call is made.

The Emergency Notification System benefits 911 callers by speeding up response times, enterprise management and staff by providing detailed location information and reducing delays when the emergency response teams arrive, and first responders by reducing time spent locating the caller.

How It Works

Emergency notifications are configured in the PenTeleData Admin Portal for each account:

1. Identify the email address(es) and SMS-capable phone number(s) that will be notified when an emergency call is placed from a number on the account.
2. Enter or delete those email addresses and phone numbers in the Admin Portal and send a test to make sure it's working.
3. Confirm that they have received the test notifications and the recipients understand what the notification is for.
4. When someone on the account dials 9-1-1, the emergency call is processed and a notification is sent to the recipients configured in the Admin Portal, so they are made aware of the situation and can assist emergency responders upon arrival.

Update E911 Records

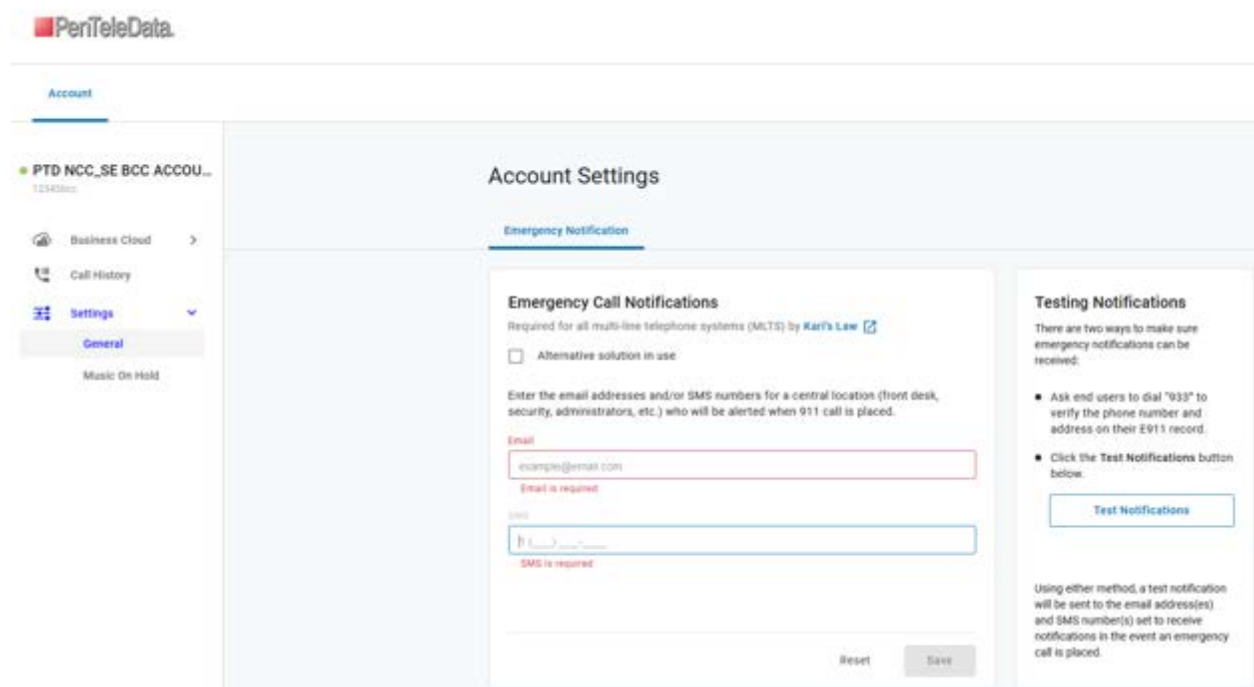
For Emergency Call Notifications to work, each phone number on the account must be successfully configured with a valid E911 record, which includes the physical address where the device is located and any other information necessary to precisely identify the caller's location. It is the customer's responsibility to keep this information up to date. Please contact PenTeleData for and needed E911 address changes.

Configure Notifications

Emergency Call Notifications are **required** for all MLTS manufactured, imported, sold, leased, or installed after **February 16, 2020**. information up when your account PenTeleData originally set this with

customer contact coordination at installation.

Customer's may change the **Emergency Notification** settings in the Admin Portal, by navigating to **Settings/General** on the left side of the Admin Portal.



The screenshot shows the PenTeleData Admin Portal interface. On the left is a navigation menu with options like 'Business Cloud', 'Call History', 'Settings', and 'General'. The main content area is titled 'Account Settings' and 'Emergency Notification'. It features a section for 'Emergency Call Notifications' with a checkbox for 'Alternative solution in use'. Below this are input fields for 'Email' (with a red error message 'Email is required') and 'SMS' (with a red error message 'SMS is required'). A 'Test Notifications' button is present, along with 'Reset' and 'Save' buttons at the bottom. A sidebar on the right provides instructions on how to test the notifications.

Alternative solution in use

Check this box only if you are already using a solution for emergency notifications, such as an on-premises PBX, and you do not need the PenTeleData **Emergency Notification** solution to be compliant with the law.

Testing Notifications

PenTeleData strongly recommends testing the service after setting or changing the configuration to ensure it is properly configured. There are two ways to do this:

1. Dial 933 to verify the emergency call record with their E911 provider.
 - The call will be connected to an automated 911 verification service, which will play back the dialing phone number and its associated address. The customer is expected to contact PenTeleData if the information is incorrect or any changes are needed.
2. You can additionally click the **[Test Notifications]** button.

Using either method, test notifications will be sent to the email address(es) and SMS number(s) configured for the account. Confirm that all recipients have received the notifications and that they understand its purpose.

Emails will come from noreply@cymbus.com and text messages will come from 1(833)210-3911. Be sure to send test notifications to make sure the end user's spam filters (text and email) will not prevent notification delivery.

Additionally to confirm the receipt of these test notifications view the Emergency Notification Log below. If a notification has failed, verify the correct email address or phone number and try again.

Example SMS Text Notifications

```
SMS notifications include the type of message and caller details.  
911 NOTIFICATION: Shirley Bennent (801-489-7891) 20MAY20 6:15 PM MST  
Location: 1242 N 400 W, Suite 980, Pleasant Grove UT 84023  
933 NOTIFICATION: Shirley Bennent (801-489-7891) 20MAY20 6:15 PM MST  
Location: 1242 N 400 W, Suite 980, Pleasant Grove UT 84023  
TEST NOTIFICATION: In the event a 911 call is placed, you will receive  
a text like this one to notify you that first responders may be on  
their way and may need your assistance.
```

Example Email Notifications

Test notifications have a blue banner and 911 notifications have a red banner. The email will include the name, phone number, and address on the E911 record, and additional details including the name of the device owner, the extension, device type, line name, and MAC address.

Test Emergency Call Alert No emergency call has been made.	Emergency Call Alert Please assist emergency responders upon arrival.
<p>A 933 call to verify the emergency services configuration was placed on:</p> <p>May 20, 2020 at 6:15 PM MDT.</p> <p>Record Name Shirley's Sandwiches</p> <p>Phone Number 1 (801) 489-7891</p> <p>Address 1243 N 400 W Suite 980 Pleasant Grove, UT 84023</p> <p>Please add noreply@cymbus.com to your contact list. These notifications are too important to be filtered out of your inbox.</p>	<p>A 911 emergency call was been placed on:</p> <p>May 20, 2020 at 6:15 PM MDT.</p> <p>Record Name Shirley Bennent</p> <p>Phone Number 1 (801) 489-7891</p> <p>Address 1243 N 400 W Suite 980 Pleasant Grove, UT 84023</p> <p>Please add noreply@cymbus.com to your contact list. These notifications are too important to be filtered out of your inbox.</p>
<p>Additional Details</p> <p>Device Owner Shirley Bennent</p> <p>Extension 8907</p> <p>Device Type Polycom 2804</p> <p>Line Name Line 1 (Main Office)</p> <p>MAC Address 2909ff0s8hn</p>	<p>Additional Details</p> <p>Device Type Arris TM604G</p> <p>Line Name Line 3 (Main Office)</p> <p>Port Number 3</p> <p>MAC Address 2909ff0s8hn</p>

Emergency Notification Log

The Emergency Notification Log contains a complete history of all test and emergency call notifications sent for this account. The notification type is identified on the left, followed by the date and time and sent status:

- **Successful:** The notification was successfully sent to all parties.
- **Partially Failed:** The notification was sent to some but not all parties.
- **Failed.** The notification was not sent.

Expand an entry for details.

Emergency Notification Log															
Notification Type ↑	Date	Sent Status													
Test Notification	02/20/2020 - 12:22 PM	Partially Failed	^												
Test Notification															
<table border="1"> <thead> <tr> <th>Email</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>jBrady@bado.com</td> <td>✓ Sent</td> </tr> <tr> <td>Email2@test.com</td> <td>✗ Failed</td> </tr> </tbody> </table>		Email	Status	jBrady@bado.com	✓ Sent	Email2@test.com	✗ Failed	<table border="1"> <thead> <tr> <th>SMS</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1 (801) 400-2324</td> <td>✓ Sent</td> </tr> <tr> <td>1 (801) 400-9284</td> <td>✗ Failed</td> </tr> </tbody> </table>		SMS	Status	1 (801) 400-2324	✓ Sent	1 (801) 400-9284	✗ Failed
Email	Status														
jBrady@bado.com	✓ Sent														
Email2@test.com	✗ Failed														
SMS	Status														
1 (801) 400-2324	✓ Sent														
1 (801) 400-9284	✗ Failed														
Emergency Call	02/20/2020 - 12:22 PM	Successful	∨												
Test Notification	02/20/2020 - 12:22 PM	Failed	∨												
1 of 1 < >															

Music On Hold

On hold music and messaging is a proven marketing tool for any company. Silence, bad music, or playing the radio is a wasted opportunity to create a positive customer experience. With the right audio, callers are less likely to hang up and are more likely to be in a good mood.

Music On Hold can be managed in by Account Managers and Admin end users in the Voice Portal.

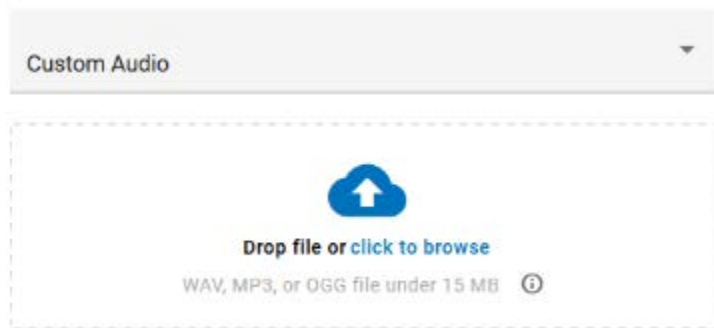
1. Go to **Settings > Music On Hold**.
2. Select a setting from the drop-down menu to apply it to the account:
 - **None (Intermittent Beep)**. The caller will hear two short beeps every 15 seconds.
 - **Standard Options**. Choose from one of three looped, copyright-free audio files.
 - **Custom Audio**. Upload any WAV, MP3, or OGG file under 15 MB.
3. The new setting will be applied to the account *immediately* — no saving necessary.

Listen to the audio file in your browser

To hear what a file sounds like, click the **play** button on the right. Standard options can be played before (and after) you make a selection, and a custom audio file can be played once it's been uploaded.

Upload Custom Audio

Give the account a personal touch by uploading custom music for callers to listen to while on hold. Use any WAV, MP3, or OGG file under 15 MB that you have rights to. See [Music On Hold Best Practices](#) for tips.



1. To upload a custom audio file, do one of the following:
 - Drag and drop the file from your computer to the upload area.
 - Click the link in the upload area, then select an audio file from your computer and click **[Open]**.
2. Once uploaded, the file will be converted and optimized for use by the phone system, which *will* result in some degree of quality loss. To hear what it sounds like, click the **play** button on the right or call a phone number on your account and ask to be placed on

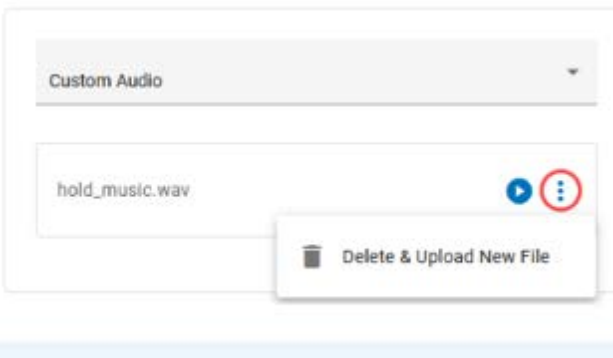
hold.

Please note, once the page is refreshed, the file will be renamed to **hold_music.wav**.



Change Custom Audio

Only one custom audio file can be uploaded to the account at a time. To change the current audio file, open the three dots menu on the right and select *Delete & Upload New File*, then drag and drop the new file to apply it to the account. Between the time one file is deleted and another is applied, Music On Hold will be set to *None (Intermittent Beep)*.



Music On Hold Best Practices

According to CallTrackingMetrics, more than **80 percent** of people are put on hold every time they contact a business. You now have the opportunity to leverage Music On Hold to influence your customers' experiences for the better.

The Benefits of Music On Hold Marketing

Silence, bad music, or playing the radio is a wasted opportunity to create a positive customer experience. With the right audio, callers are less likely to hang up and are more likely to hold longer, exhibit interest in the product, and be in a good mood. Simply put, Music On Hold improves the customer experience. Here's how:

Increase Quality Time

Music and messaging influence how callers perceive the length and quality of their wait time. Hold music is more effective in **decreasing a caller's estimate of time passed** than listening to the radio or no music at all.

Enhance Their Brand

Mixing music with a verbal message is an extension of your brand identity and an **opportunity to tailor the content** to ensure a positive on-hold experience.

Impact Callers Mood

Comparing customized on-hold music to the radio or silence, callers are **more likely to hold longer, exhibit interest** in the advertised product, and be in a good mood.

Tips for the Perfect Music On Hold

Picking the best hold music for your business is crucial because there are a lot of things to consider, like genre, length, quality, and more. The audio should match your brand identity and help the customer pass time.

Here are a few tips for selecting the perfect hold music for your business:

- **Be on-brand.** Choose a track or song that represents the feel of your business.
- **Add useful messaging.** Record custom voice tracks to let callers know how to reach a specific extension or department, announce a new feature, or
- **Keep it simple.** Avoid repetitive and dynamically variable music, which can cause the on-hold sound to cut in and out.
- **Avoid lyrics.** Phone systems aren't designed to handle lyrics, so it's more likely to sound off to your callers. Also, you can't include a branded message over the top.

- **Don't apologize.** Messages like "Your call is important to us, and we will answer your call as soon as possible," are impersonal and interrupt the music, making callers think their call is getting answered.

Finding Affordable, Legal Music

You are responsible for independently securing all necessary licensing rights and permissions to use any music or audio file with your phone service. Music licensing is complex, so it's best to use a commercial music service.

Picking the best hold music for your business is crucial. There are a lot of things to consider, like genre, length, quality, and more. Luckily, there are plenty of royalty-free tracks available online, some of which are free to use. We've gathered some options to get you started.

- [Beatsuite](#) has some great resources to help you [pick the perfect hold music](#).
- [Musopen.org](#) is a massive database of royalty- and copyright-free classical music. Search by instrumentation, time period, or mood categories like "Relaxing" and "Happy."
- [Melody Loops](#) offers a large selection of royalty-free on-hold music with genres spanning from acoustic guitar and atmospheric, to categories like warm and light.

Sound Quality

Music does not sound the same on a call as it does on your computer because phone audio is designed to handle voices, not music. As a call travels from point to point, the data is compressed using algorithms that enhance voice conversations and get rid of background noise, which can make music sound like it's going through tin cans.

When an audio file is uploaded to Music On Hold, PenTeleData automatically converts and optimizes it for use by the phone system. You can upload any WAV, MP3, or OGG audio file under 15 MB (that you have the rights to), but the conversion process will result in some degree of quality loss.

Recommendation

For best results, use a standard definition, u-law encoded WAV file (8 kHz, mono, 8-bit PCM) that is less than 10 minutes long and under 5 MB.

To hear what it sounds like, call into the account yourself and place your own call on hold or play the audio file in your browser. If it isn't right, you can upload a different file and try again. Once uploaded, the audio file is immediately applied to the account, so test your files during less busy hours.