Hosted VoIP Administrator Portal Guide

July 2022

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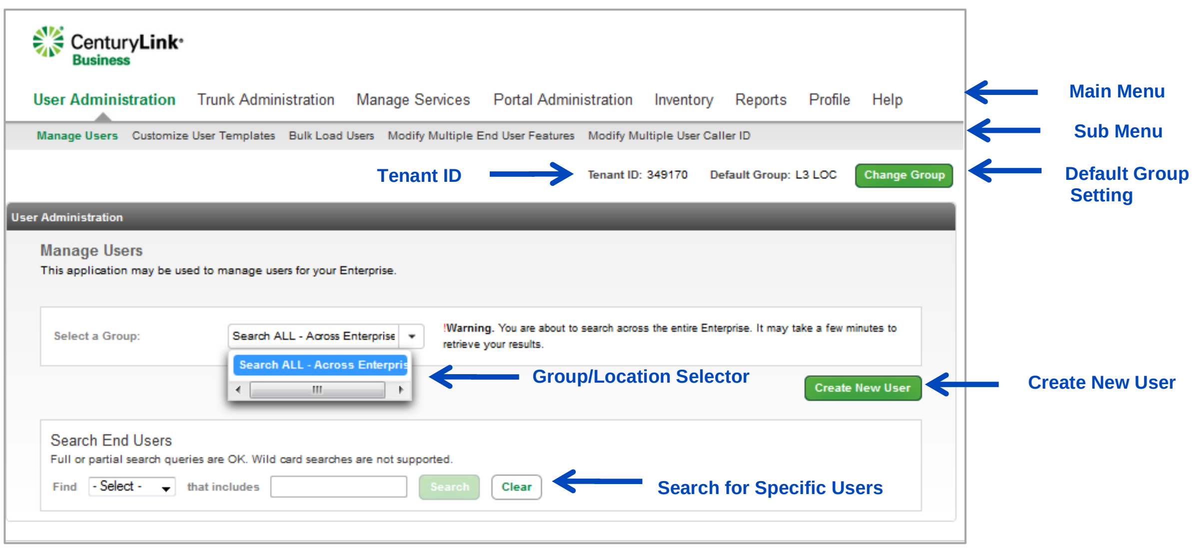
Portal Navigation

URL: https://centurylink.com/voip. Enter your **Administrator** user ID/password to access admin functionality within the portal. You should have received your administrator login details via email and will look similar to the following:

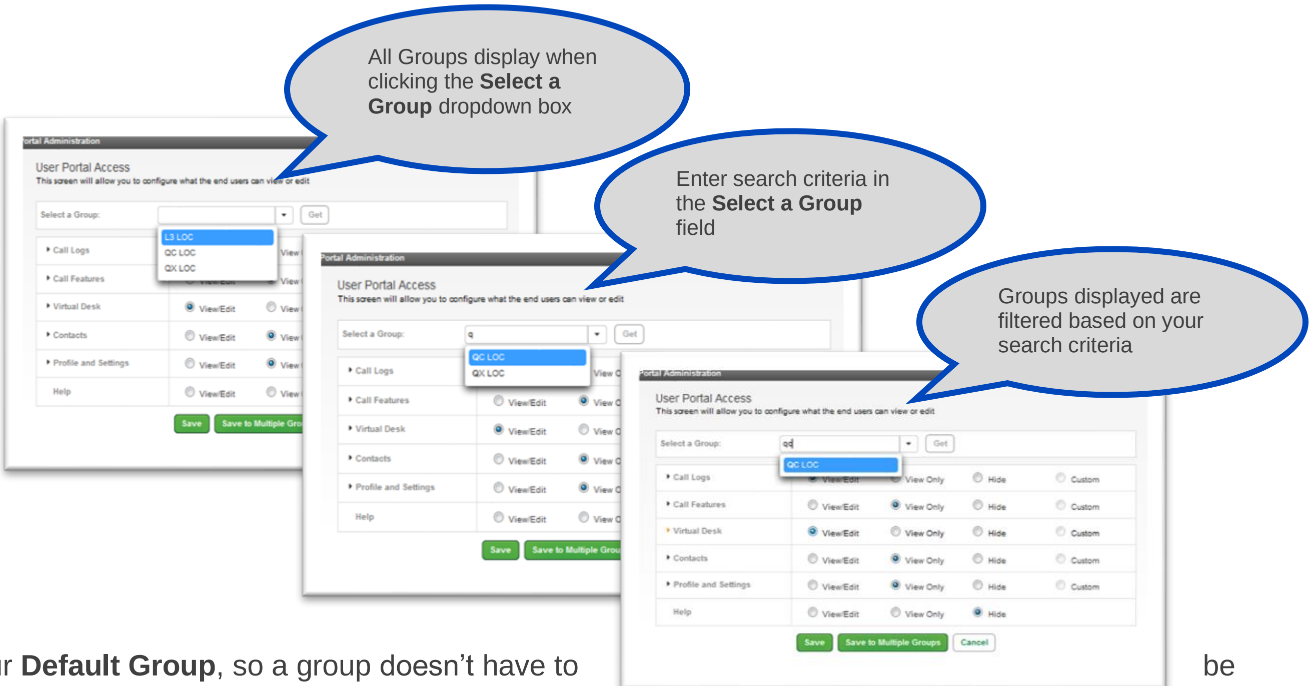
Administrator Portal URL: centurylink.com/voip
User Id: adminlogin here
Password: adminpassword here

Home Page

The **Default Group** option allows you to define which group you want as your default location. As you work in a specific group, managing users and features, this prevents you from having to define your group on each page as you navigate through the portal.

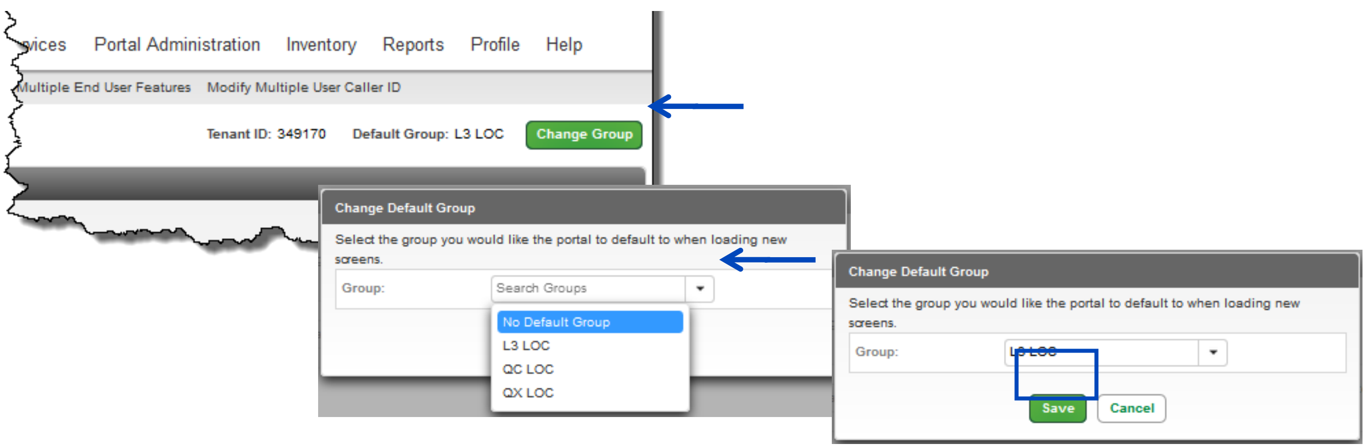


As you navigate throughout the portal, you'll have several opportunities to search for specific groups for managing inventory, creating or editing users, etc. You can enter search criteria in the **Search a Group** field, which filters which group is displayed, based on that search criteria.



Define your **Default Group**, so a group doesn't have to be selected on every page as you navigate through the portal:

1. Click the **Change Group** button.
2. In the **Change Default Group** window, click the arrow to search for the group, or enter a search or partial search of the group name in the **Group** field to refine your search.
3. If you don't want to set a default group, select **No Default Group** from the dropdown list.
4. Once you've selected your group, click the **Save** button.

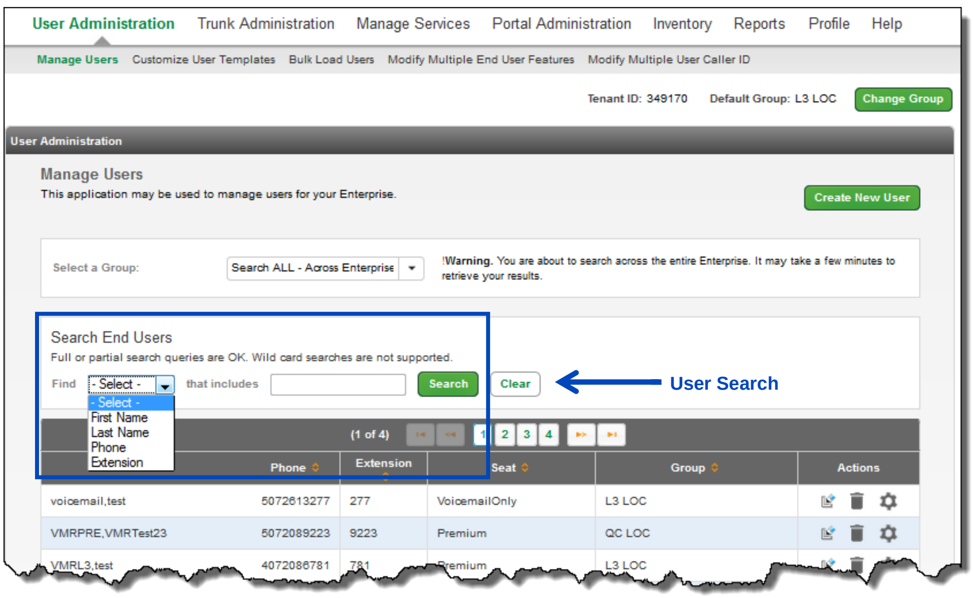


As you navigate from feature to feature within the portal, your default group automatically populates. A new **Default Group** can be redefined at any time, by following this same process.

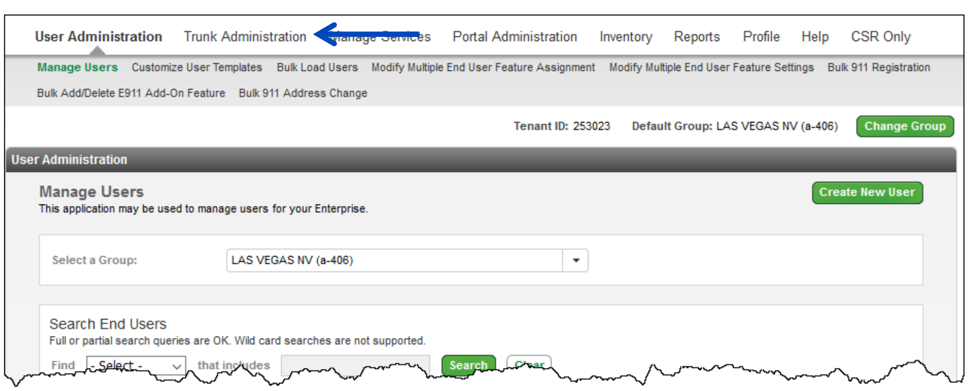
The **Search End Users** option is available throughout the portal. Click **Search** to display all users in the group.

If there are more than 1000 users, you'll be required to refine your search by selecting an option from the **Find** dropdown list. Depending on the page you are on, the **Find** dropdown list will let you search by:

First Name	Partial search supported.
Last Name	Partial search supported.
Extension	Partial search supported.
MAC Address	Partial search is not supported; the full 12-digit MAC address is required.



The **Trunk Administration** option within the main menu will only be visible for customers with **SIP Trunking** from CenturyLink. If you don't have **SIP Trunking**, the **Trunk Administration** option won't be available from your main menu.



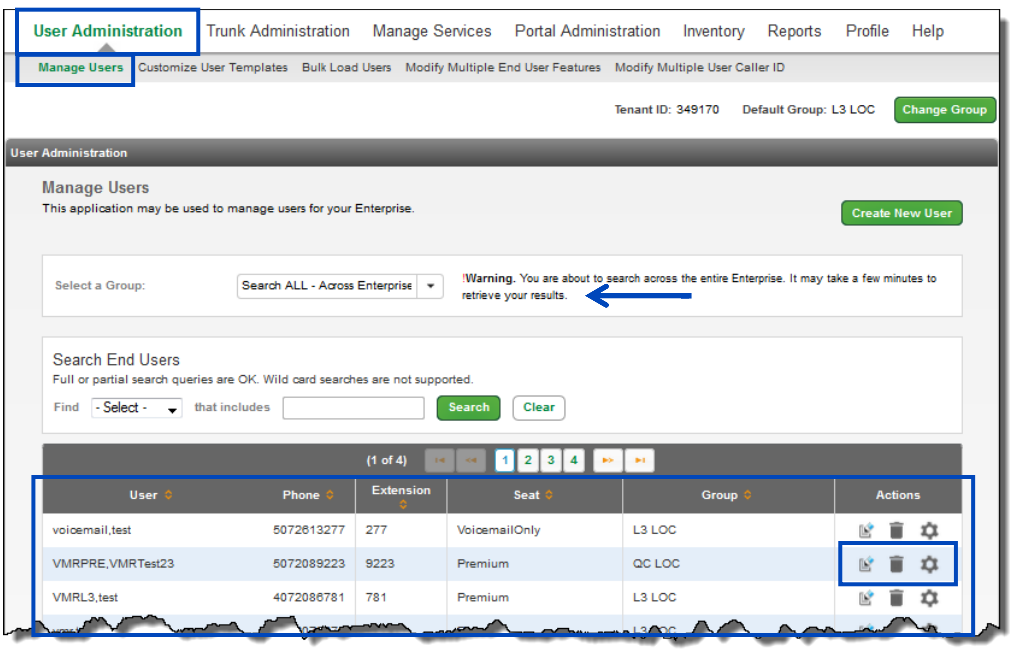
For details on specific features associated to our **SIP Trunking** product, refer to the **Hosted VoIP Trunk Administration Portal Guide**, found under Help from the main menu.

User Administration

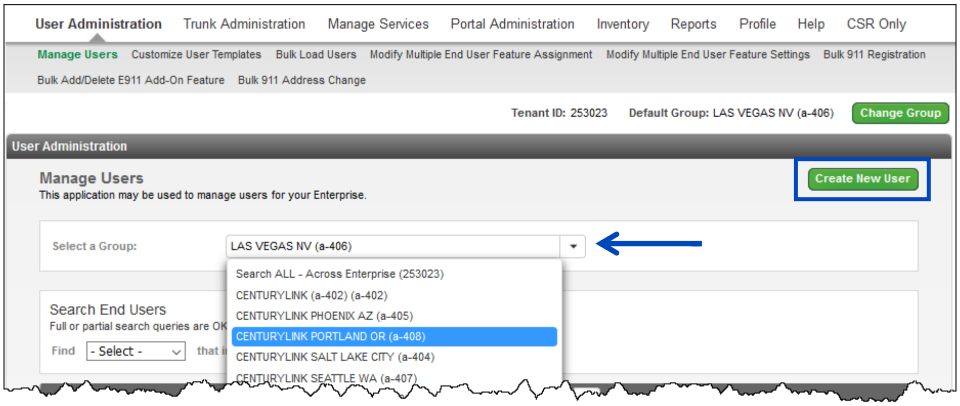
Within the **User Administration** section of the portal, **Manage and Create New** users, **Edit** existing users, create **Custom User Templates**, process **Bulk Uploads**, and modify multiple users with the **Modify End User Feature** tool.

Creating a New User

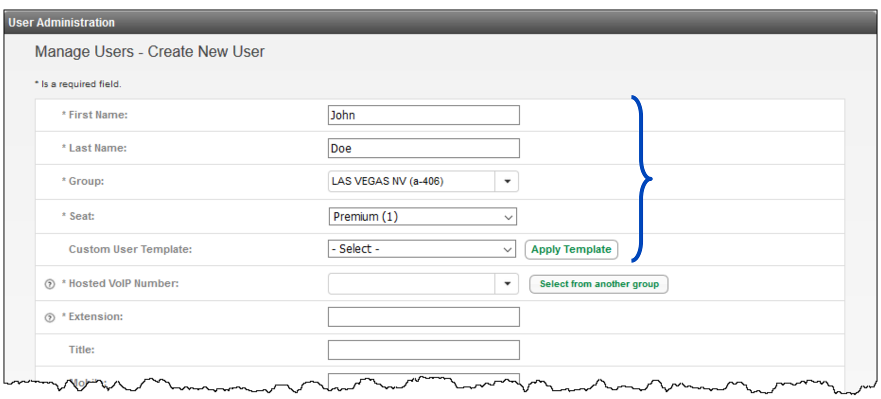
1. Click **User Administration** from the main menu.
2. Click **Manage Users** from the sub menu.
3. If your organization has only one group (location), users automatically appear for editing users, deleting users, etc., without having to select a group.
4. To edit or delete a user, click on the **Edit** or **Trash Can icon** next to the individual you plan to edit. The **Gear icon** allows you to access that user's end user portal, to manage individual features such as forwarding, simultaneous ring, etc., on their behalf.



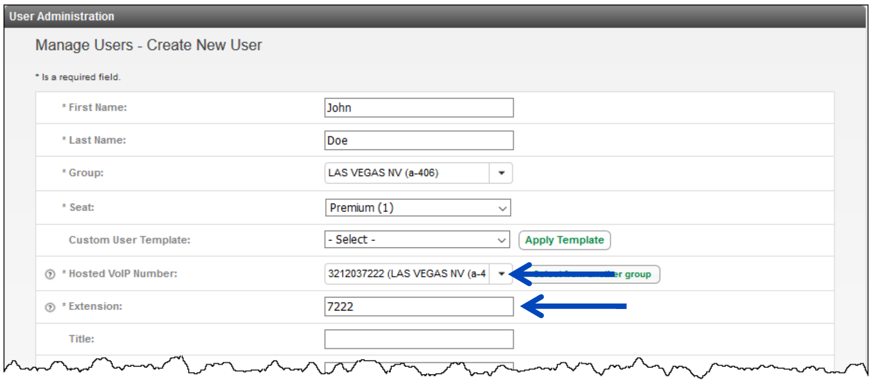
5. Click the **Create New User** button to load a **Manage User – Create New User** form.
6. If you have more than one group within your tenant, select the group from the **Select a Group** dropdown list where the user should be built; you can also select your group from the **Create New User** screen.



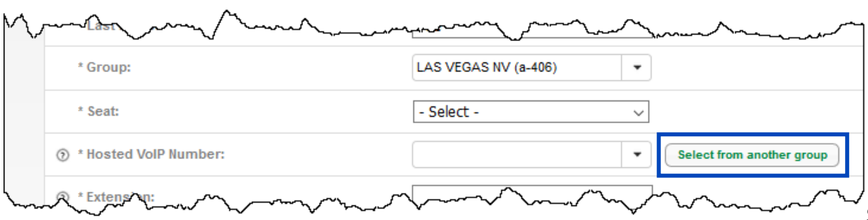
7. Complete the **Manage Users - Create New User** form. All fields denoted with an **asterisk (*)** are required fields and must be populated to successfully build the user.
8. Enter the user's **First Name** and **Last Name** in the appropriate fields.
9. Select the group (location) from the dropdown list if different than what's displayed.
10. Select the **Seat** type from the dropdown list; available options are based on your available inventory.
11. Apply a **Custom Template** (if applicable) by selecting your option from the dropdown list (optional).



12. Select a number from the **Hosted VoIP Number** dropdown list; number options within this list are based on telephone numbers available in your inventory within the selected group.
    Note: If you have more than one group in your tenant, all available (unassigned numbers) are shown in the dropdown list. It's suggested you use a number assigned to the group you're building the user in, however, you're allowed to create a user in one group with a number from another group.



13. To choose an available number from another group, click the **Select from another group** button.



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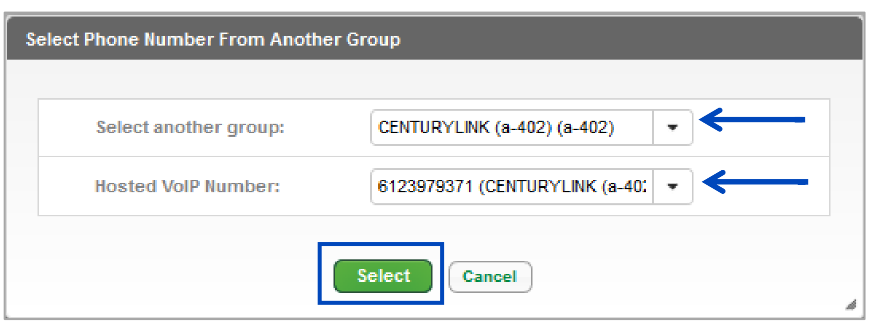
14. Select a group from the **Select another group** dropdown list.
15. From available numbers in that group, select a number from the **Hosted VoIP Number** dropdown list.
16. Click the **Select** button.

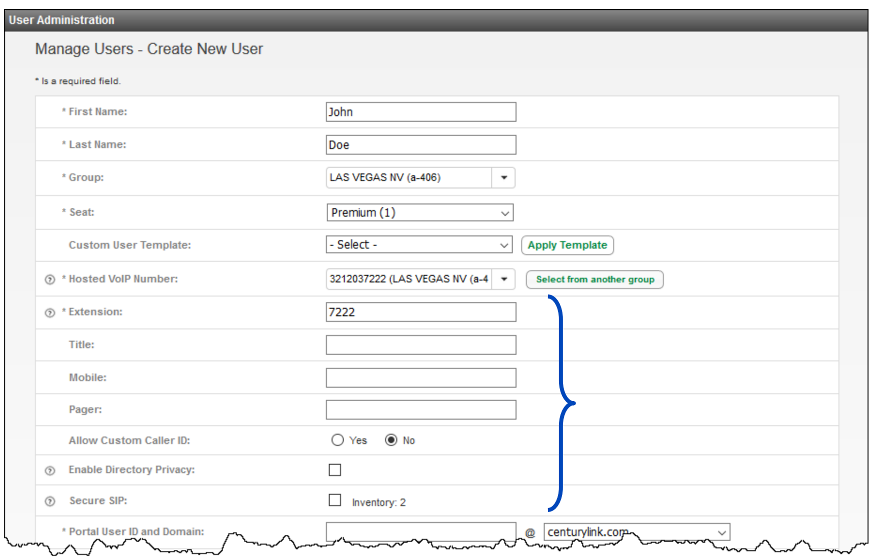


17. The **Extension** field automatically populates based on the telephone number selected.

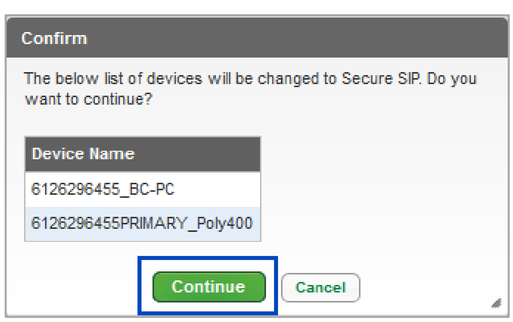
    Note: This field is editable, if you prefer extension not associated to the number, input the extension manually.

    Note: If you're using 3-digit internal extensions, you cannot use the following: 123, N11 (211, 311, 411, 511, 611, 711, 811, 911) and will be prompted with an error.
18. The **Title**, **Mobile** and **Pager** fields are optional; they don't have to be populated to build the user.
19. Click the **Allow Custom Caller ID** if you wish to change the 10-digit number that is sent for outbound calls; this will be described in more detail.
20. Check the **Enable Directory Privacy** box if you don't want others in this group to monitor this device within Business Communicator.
21. To encrypt this user's devices, check the **Secure SIP** checkbox; you must have inventory to enable this feature.

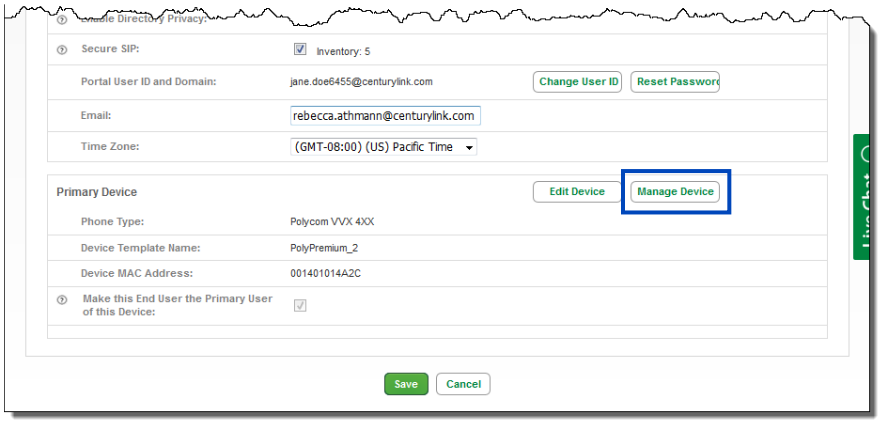
    Note: If enabled, this user's devices will be converted to Secure SIP, which enables SIP TLS/SRTP encryption. It will ONLY be enabled for supported devices. Some devices may not support Secure SIP.



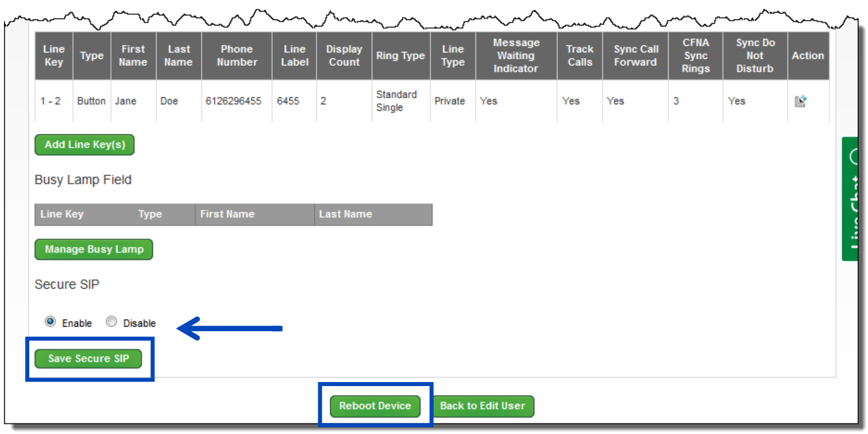
22. A window confirms Secure SIP was applied to this user, click the **Continue** button.



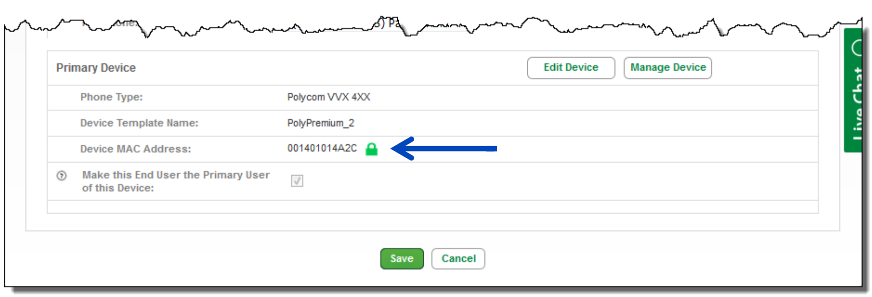
23. Once a user is created and a Secure SIP license is assigned, click the **Manage Device** button.



24. On the Manage Device screen, by default, Secure SIP is disabled, to enable, click the **Enable** radio button.
25. Click the **Save Secure SIP** button.
26. Click the **Reboot Device** button.

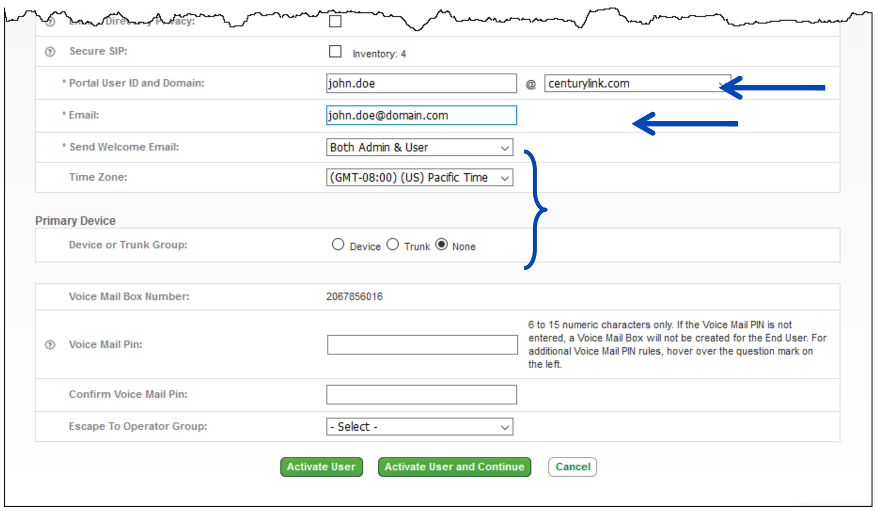


27. After the reboot, you're returned to the **User Settings** tab.
28. The **Lock** icon next to the device's MAC address is your indication that a license has been assigned to this user, and the license has been enabled.



29. Enter the **Portal User ID** and select the **Domain** from the dropdown list; this will be the user ID used to log into the user’s end user portal.
30. Enter the user’s email in the **Email Address** field, a welcome email is sent to this address and includes a user ID and password to sign into their portal.
31. From the **Send Welcome Email** dropdown list, choose who should receive the welcome email:
    - **Admin Only** – only the primary administrator will receive the welcome email
    - **User Only** – the user only receives the welcome
    - **Both Admin & User** – both the primary admin and user receive the welcome email
    - **Do Not Send** – neither party receives the welcome email – if this option is chosen, the welcome email can be sent later
32. From the **Time Zone** dropdown list, select the correct time zone if it is not displayed correctly or if changes are needed later.

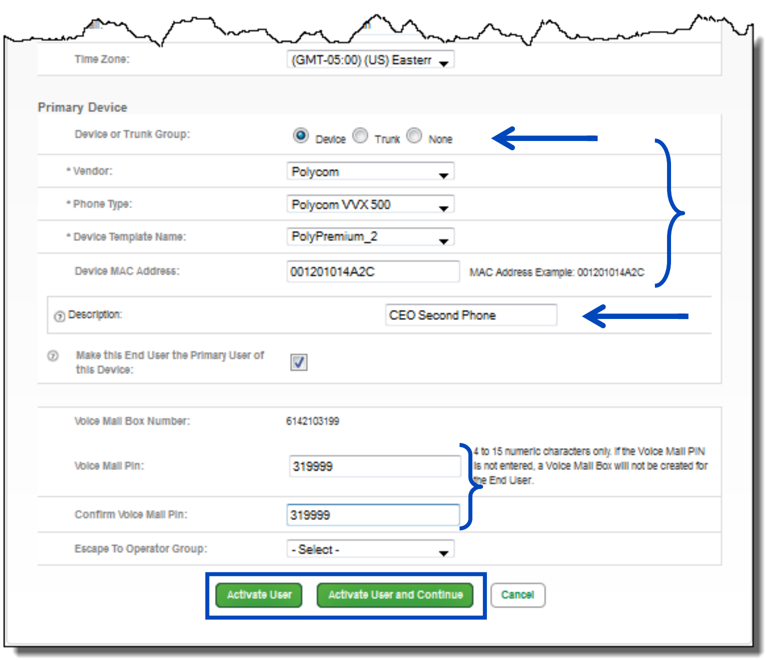
    Note: There is a unique time zone selection for Arizona.



33. Click the **Device** radio button; as options are selected from the dropdown lists, additional options appear based on the selection you made within each previous dropdown list.
34. From the **Vendor** dropdown list, select the manufacturer of the device you’re building.
35. From the **Phone Type** dropdown list, select the phone model you’re building.

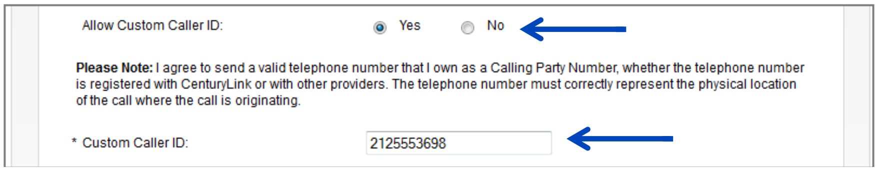
36. From the **Device Template Name** dropdown list, select the template you wish to assign to this device.
    - The template selected is based on the assigned seat type, i.e., **Premium** seat should be assigned a **Premium_x** template.
    - **"_1"**, **"_2"**, **"_3"** determines the number of lines built for the primary phone number of that device, i.e., 1, 2 or 3 lines.
37. Enter the 12-digit MAC address for your device in the **Phone MAC Address** field.
38. A unique name for that device can be added in the **Description** field, but it's not required.
39. Keep the **Make this End User the Primary User of this Device** check box checked.
40. Enter a numeric passcode in the **Voice Mail PIN** field, this will be included in the welcome email, and is used when first logging into voicemail.
41. Reconfirm the passcode by entering it in the **Confirm Voice Mail PIN** field.
    - Maximum greeting length for individual mailboxes is 180 seconds (3 minutes).

    PIN Requirements:
    - PINs are required.
    - PINs must be 6-15 numeric digits in length.
    - The PIN cannot solely consist of your VoIP telephone number or any part of your telephone number.
    - The same digit cannot be repeated more than twice.
        - **Allowed Examples:** 11xxxx, xxx88xxx, xxxxxx99
        - **Not Allowed Examples:** 222xxx, xxx444xx, 777777
    - The entire PIN value cannot be sequential; neither ascending or descending.
        - **Allowed Examples:** 012347, 98761, 01234560
        - **Not Allowed Examples:** 123456, 0123456789, 765432, 9876543210
42. Select an option from the **Escape To Operator Group** dropdown list, if escape to operator groups have been defined; this determines where callers go if they press "0" in the user's voicemail.
43. Click the **Activate User** button to return to the Manage Users page or click the **Activate User and Continue** button to continue making feature changes to the user.

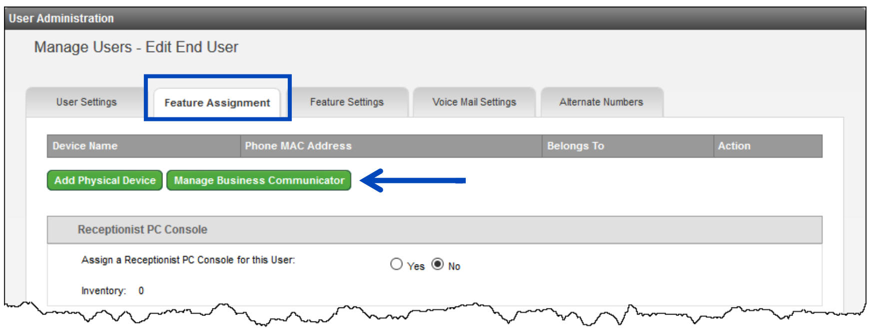


44. To change the outbound caller ID, click the **Allow Custom Caller ID Yes** radio button.
45. Enter the number you wish to display, in the **Custom Caller ID** field.

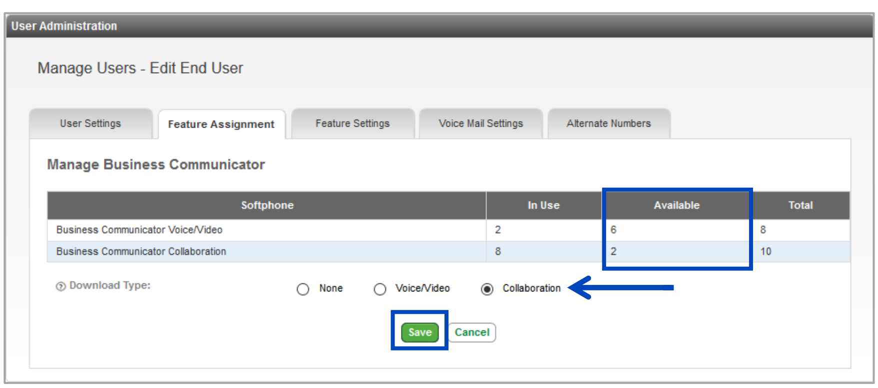
Note: You must agree that you're sending a valid telephone number owned by the calling party, whether the telephone number is owned by CenturyLink or another provider. The telephone number must correctly represent the physical location of the call where the call is originated.



46. Click on the **Feature Assignment** tab.
47. To add a Business Communicator (soft phone) to the user, click the **Manage Business Communicator** button.



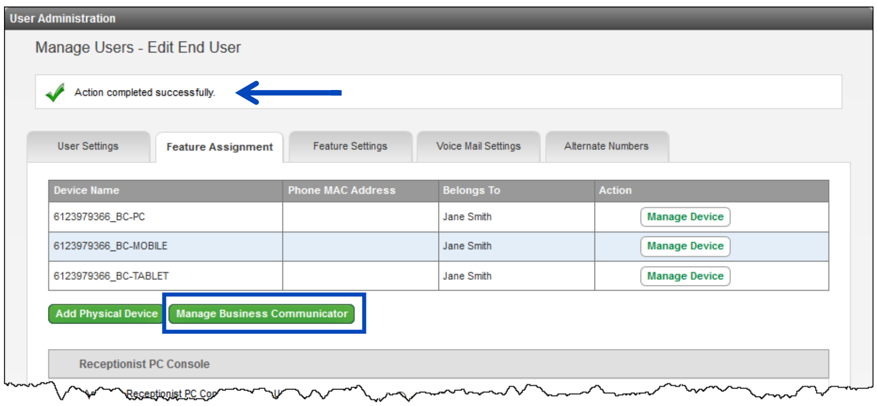
48. Click the **Voice/Video** or **Collaboration** radio button; licenses cannot be assigned if they are not available in inventory, make note of the number of licenses available in the **Available** column.
    - Voice/Video – desktop and mobile softphone that allow voice/video calling
    - Collaboration – provides the same features as the voice/video version and includes IM&P (instant messaging and presence).
49. Click the **Save** button.



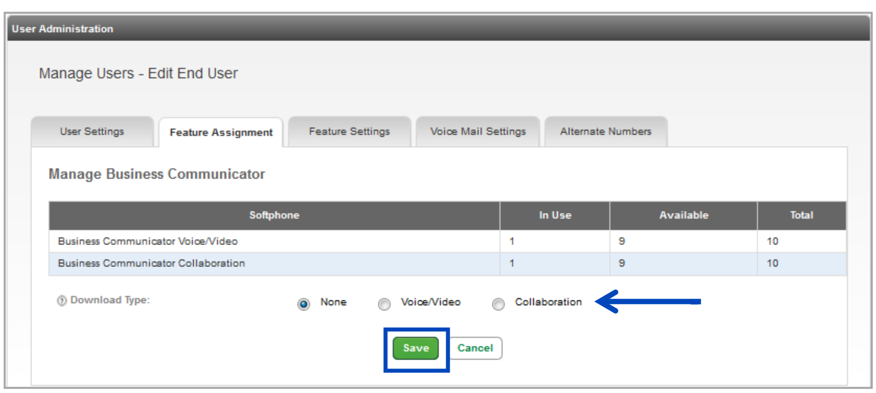
50. Receive a successful notice that the license has been assigned to that user.

Note: The user can download the necessary software from the end user portal, under Help from the main menu, within the Downloads section. They'll receive a welcome email notifying them that this feature has been added, and how to access the links. User guides for desktop and mobile applications are also available in the end user portal under Help.

51. To change or remove a Business Communicator license, click the **Manage Business Communicator** button.



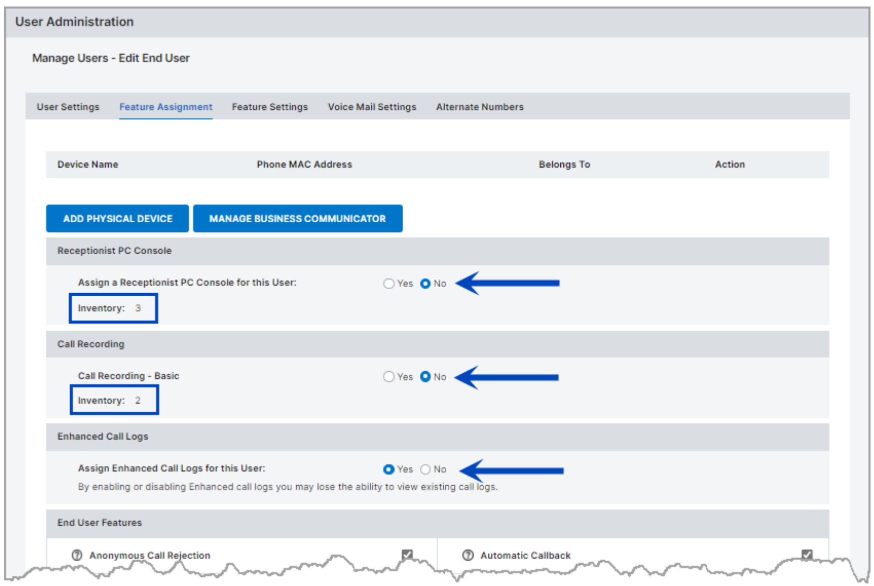
52. Change the license type by selecting either **Voice/Video** or **Collaboration** (the version they currently don't have).
53. Click the **Save** button.
54. To remove the license from the user, click the **None** radio button.
55. Click the **Save** button.
56. The unused license returns to your "**Available**" inventory and can be assigned to another user.



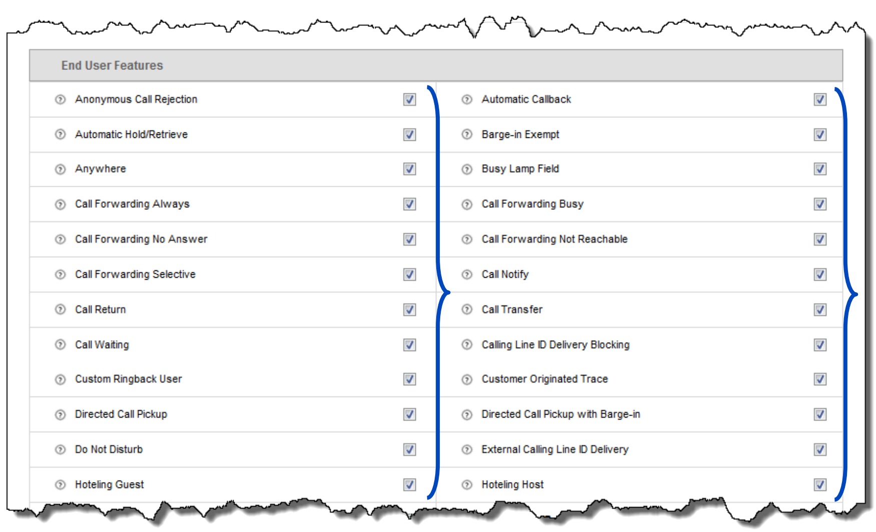
57. If the user requires access to the **Receptionist PC Console**, click the **Yes** radio button; if inventory is not available, the license cannot be assigned.
58. If the user requires access to **Call Recording**, click the **Yes** radio button; if inventory is not available, the license cannot be assigned.
59. If you would like to assign **Enhanced Call Logs**, click the **Yes** radio button. Historical call log data for up to 60 days is shown on an end user's device and in the end user portal.

    Basic Call Logs (default setting)
    The last 20 calls of each missed, dialed and received are available during this period.

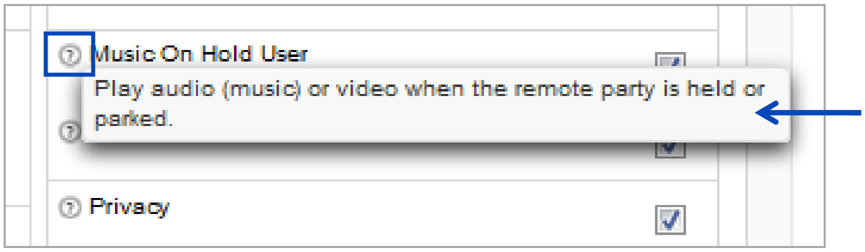
    Enhanced Call Logs
    The last 100 calls of each of missed, dialed and received are available during this period. Call duration will also show in call logs.



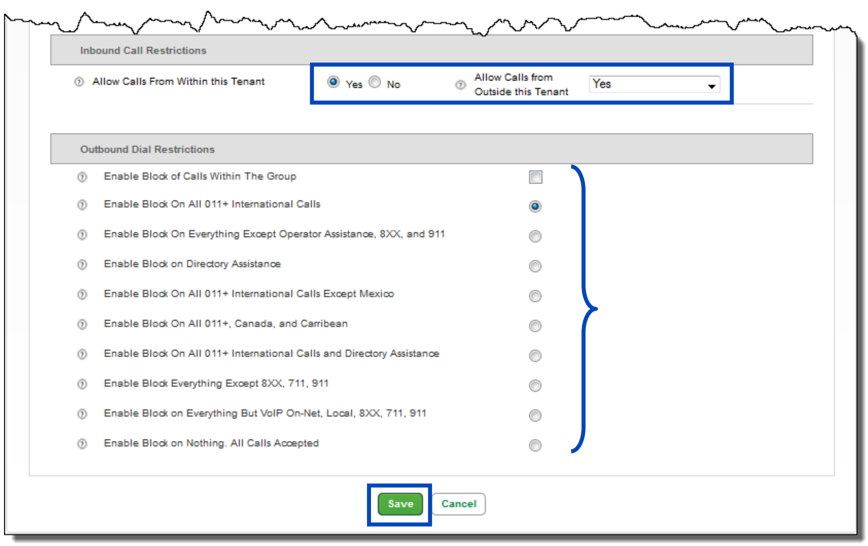
60. Available features are based on the seat type, i.e., **Basic**, **Standard**, **Premium**, **etc.**
61. All **Features** associated to that seat type are enabled by default.
62. To disable a **Feature**, uncheck the box for the feature(s) you wish to disable.



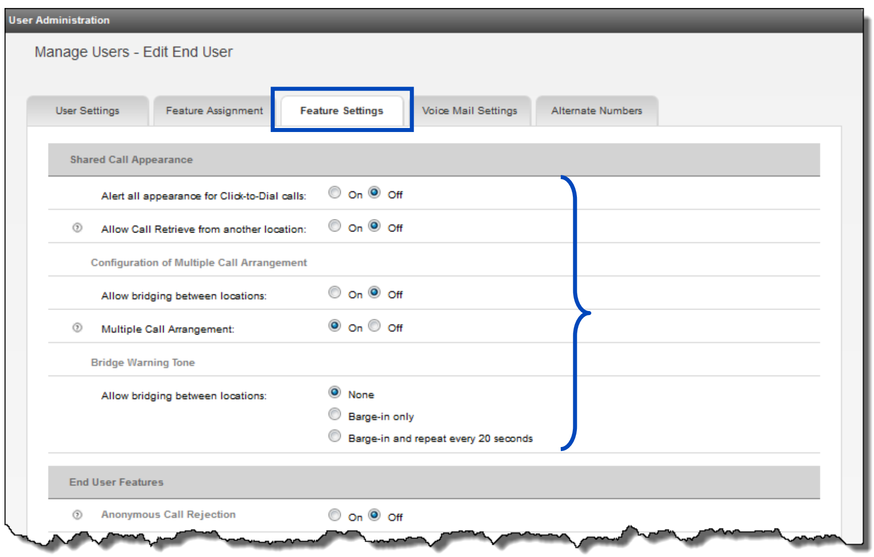
63. If you’re not familiar with a feature, hover over the “**?**” next to the feature, and you’re presented with a brief description.
64. This type of real time help can be found throughout the portal.



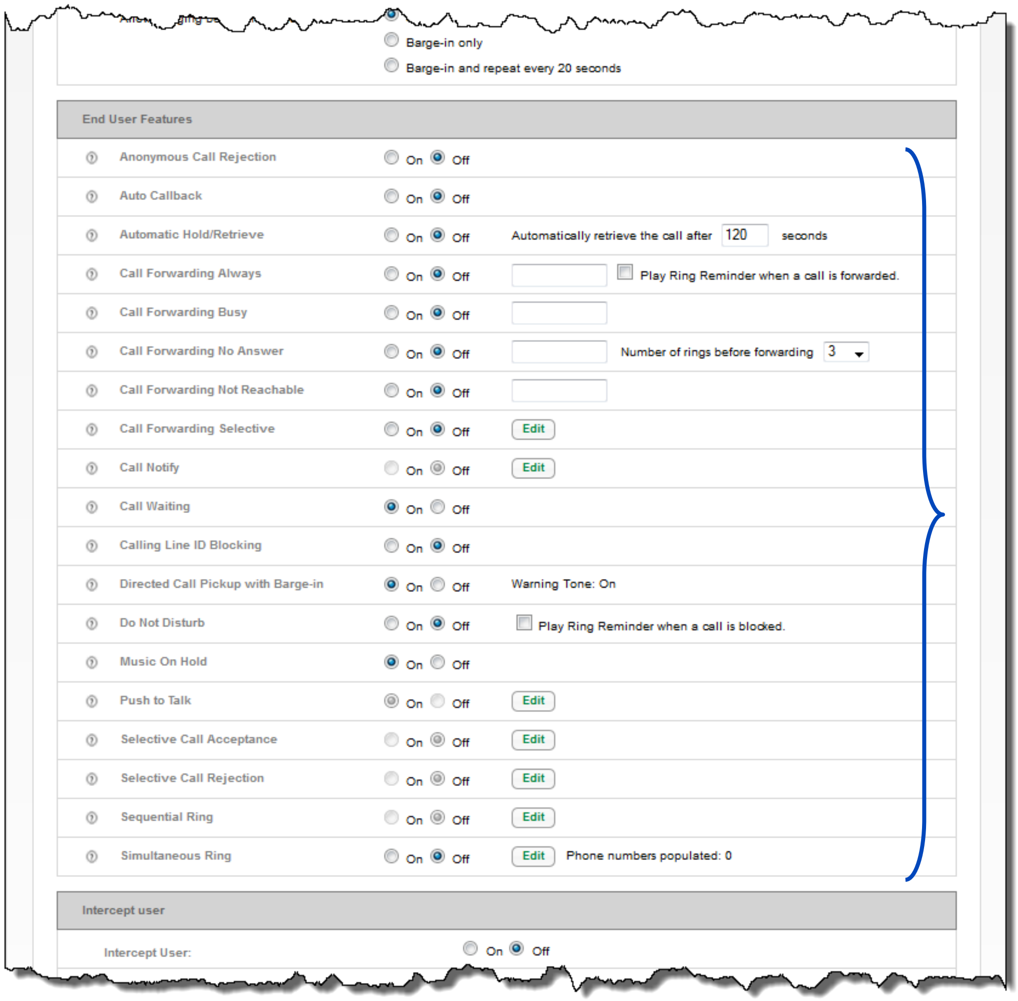
65. Click the **Yes** radio button for **Allow Calls From Within this Tenant** if you want the users to receive calls from employees at other locations. Click the **No** radio button to block those calls.
66. From the **Allow Calls from Outside this Tenant** dropdown list, select from the following:
    - **Yes –** the user’s allowed to receive inbound calls from outside of their tenant
    - **Transfer Calls Only –** the user’s allowed to receive outside calls transferred to them
    - **No –** the user won’t be allowed to receive any inbound calls from outside of their tenant
67. For **Dialing Restrictions**, click the radio button associated to the calling policy required for that user.
68. Click the **Save** button to save all feature setting changes.



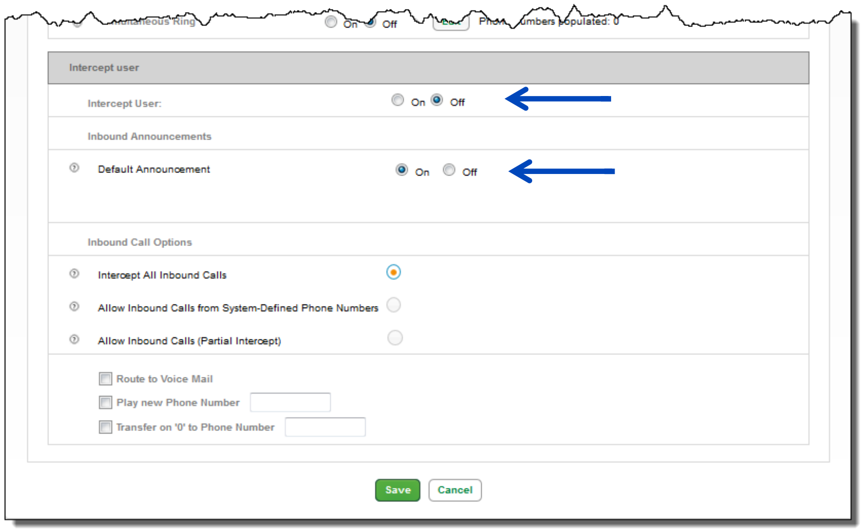
69. Click on the **Feature Settings** tab.
70. Next, select the appropriate feature(s) as they pertain to that user under **Share Call Appearance** by clicking the appropriate radio buttons:
    - Alert all appearance for Click-to-Dial
    - Allow Call Retrieve from another location
    - Configuration of Multiple Call Arrangement
        - Allow bridging between locations
        - Multiple Call Arrangement
    - Bridge Warning Tone: Allow bridging between locations
        - None
        - Barge-in only (no tone)
        - Barge-in and repeat every 20 seconds (tone repeats)



71. **End User Features** allow you to visually see what type of features the end user has set up in their portal or allows you to manage these features for them.
72. Make setting changes or enable/disable features to assist the users with personal call flows.
73. For a full description of each feature and how to program them, refer to the **End User Portal Guide**.

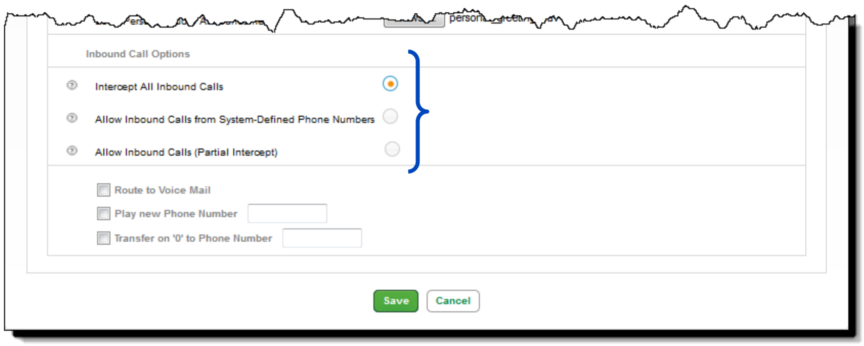


74. To enable the intercept feature, click the **Intercept User On** radio button.
75. To use the default greeting, click the **Default Announcement On** radio button.

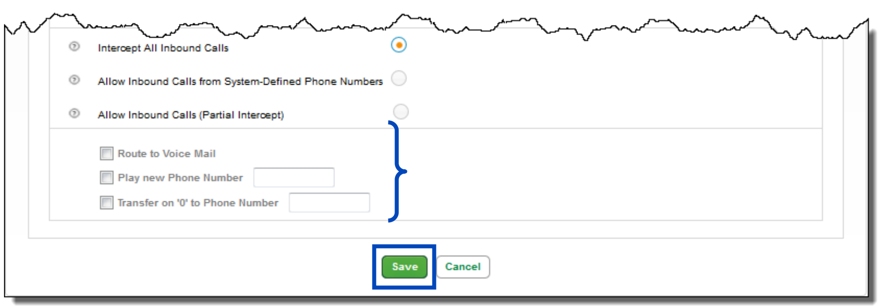


76. To customize the announcement, click the **Off Default Announcement** radio button.
77. Click the **Browse** button to search for your announcement as you would any other file.
78. Once uploaded, the file name displays next to **Load Personal Audio Announcement**.

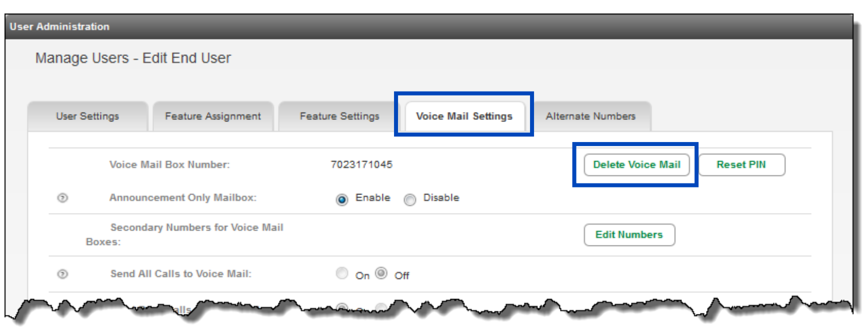
79. Choose from the following options:
   - **Intercept All Inbound Calls** – rolls to voicemail for announcement
   - **Allow Inbound Calls from System-Defined Phone Numbers –** matches incoming calling number
   - **Allow Inbound calls (Partial Intercept) –** choose partial intercept with alternate outbound blocking announcement



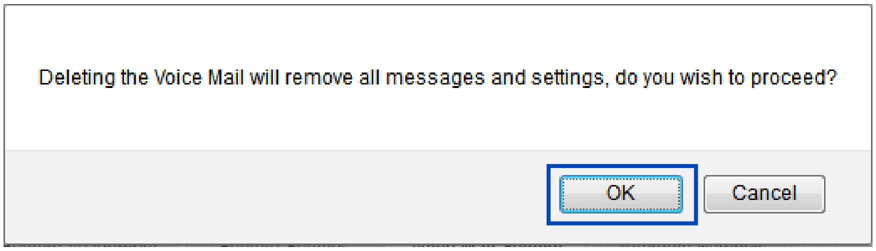
80. Choose from the following options:
   - **Route to Voice Mail –** caller hears full default or custom announcement
   - **Play new Phone Number –** play/announce the number replacing this telephone number
   - **Transfer on "0" to Phone Number –** caller goes to Escape to Operator destination when "0" is pressed
81. After making all feature setting changes, click the **Save** button.



82. Click the **Voice Mail Settings** tab to manage voicemail.
83. To delete a user's voicemail, click the **Delete Voice Mail** button.



84. Click the **Ok** button to confirm the deletion of the mailbox.
85. Click the **Cancel** button to cancel the mailbox deletion.
86. Receive notice that your action was successful, and the mailbox was deleted.



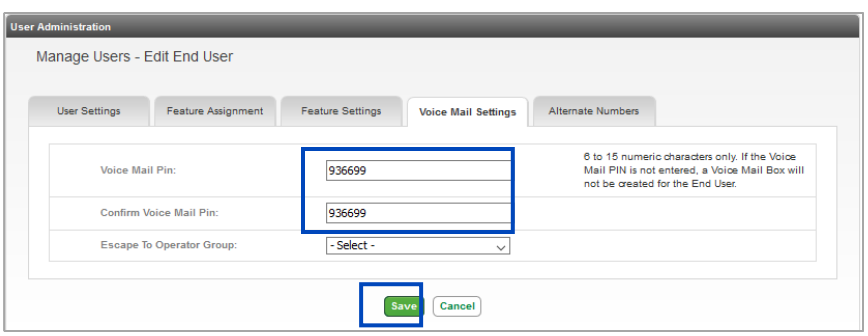
87. To add a new mailbox, enter a PIN in the **Voice Mail PIN** field.
88. Confirm the PIN by entering the same PIN in the **Confirm Voice Mail PIN** field.

PIN Requirements:

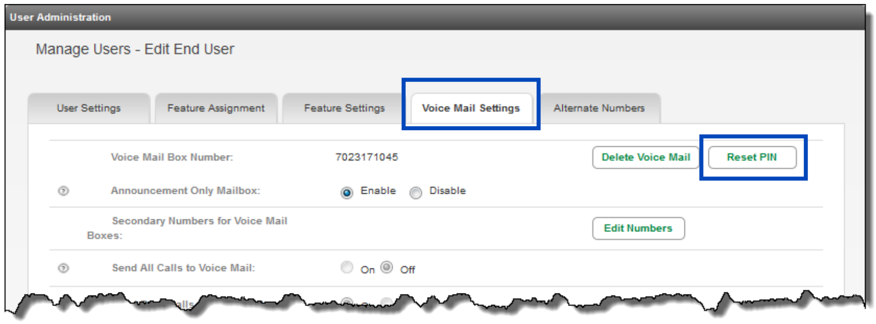
- PINs are required
- PINs must be 6-15 numeric digits in length
- The PIN cannot solely consist of your VoIP telephone number or any part of your telephone number
- The same digit cannot be repeated more than twice
  - **Allowed Examples:** 11xxxx, xxx88xxx, xxxxxx99
  - **Not Allowed Examples:** 222xxx, xxx444xx, 777777
- The entire PIN value cannot be sequential; or ascending or descending
  - **Allowed Examples:** 012347, 98761, 01234560
  - **Not Allowed Examples:** 123456, 0123456789, 765432, 9876543210

89. To assign an escape to operator group for the user, click the **Escape to Operator Group** dropdown list; this determines where callers go if they press “**0**” in the individual’s voicemail.
90. Select from any **Escape to Operator Group** already built under Manage Services --> Escape to Operator.
91. Click the **Save** button.

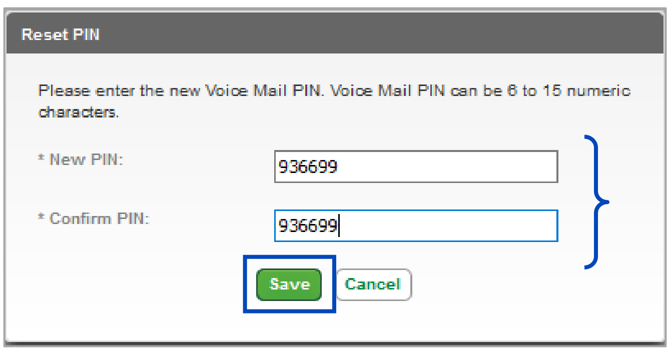
Note: Maximum **Greeting** length is 3 minutes Open and Closed; maximum **Message** length 3 minutes each (50,000 KB), maximum mailbox capacity is 150,000 KB.



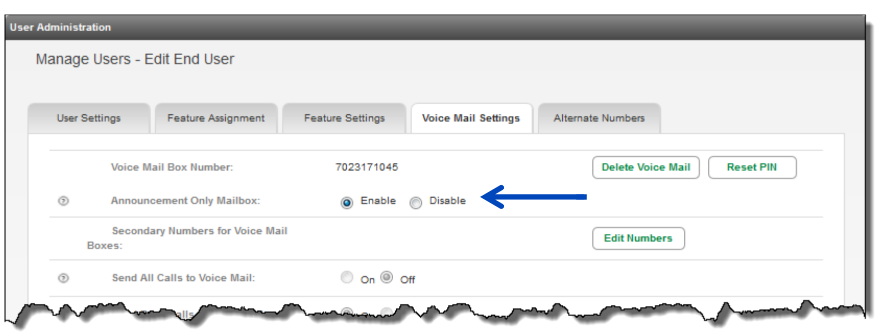
92. Click the **Reset PIN** button to reset the user's voicemail box passcode.



93. Enter the new PIN in the **New PIN** field.
94. Confirm the PIN by entering it in the **Confirm PIN** field, the PIN must be between 6 and 15 numeric characters.
95. Click the **Save** button.

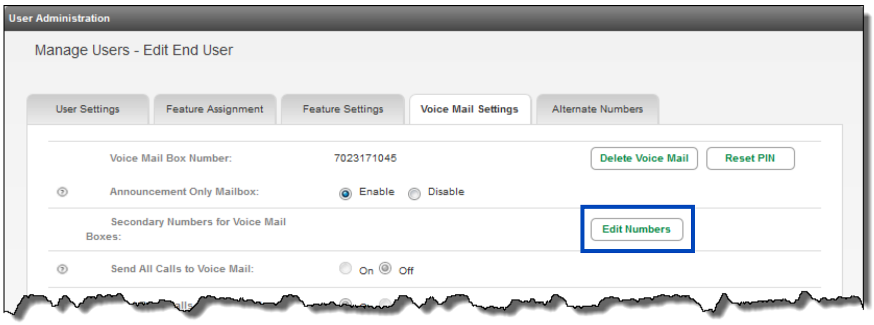


96. An announcement only mailbox provides a greeting for callers but doesn't allow them to leave a message; these mailbox types are for information only.
97. To enable, click the **Enable** radio button for **Announcement Only Mailbox**.
98. To change it back to a fully functional mailbox that can again accept messages, click the **Disable** radio button.

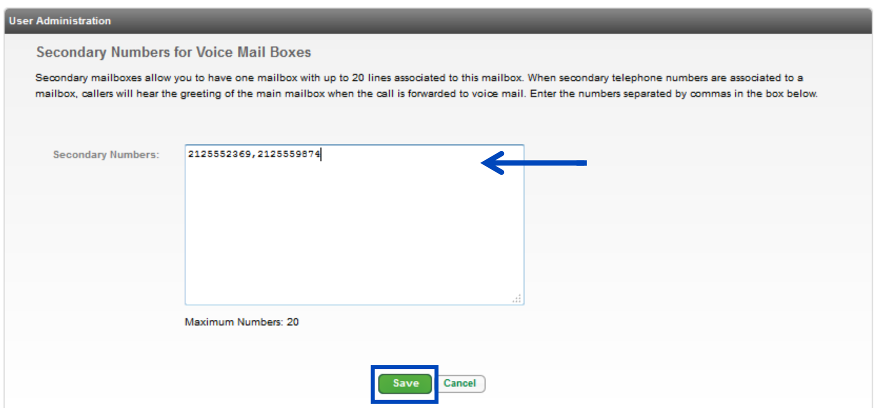


99. Click the **Edit Numbers** button to assign secondary numbers to this voicemail box.
100. This allows you to have one mailbox for up to 20 lines associated to this mailbox.

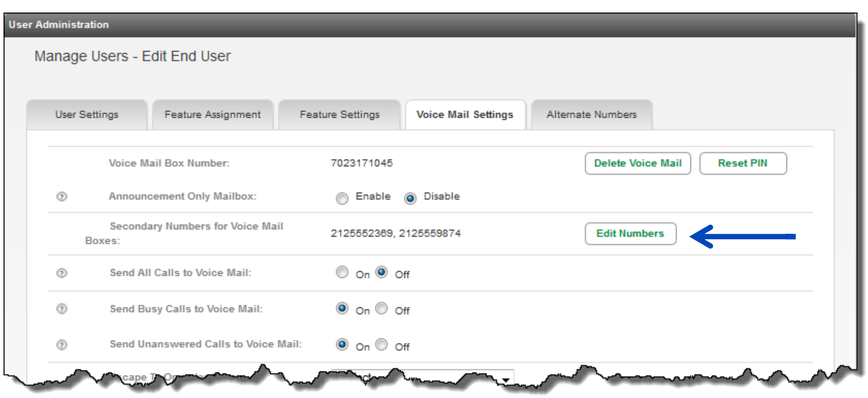
Note: When secondary numbers are associated to a mailbox, callers hear the greeting of the main (this) user's mailbox after their call rolls to voicemail.



101. In the **Secondary Numbers** field, enter up to 20 numbers, separated by a comma ",".
102. Click the **Save** button.



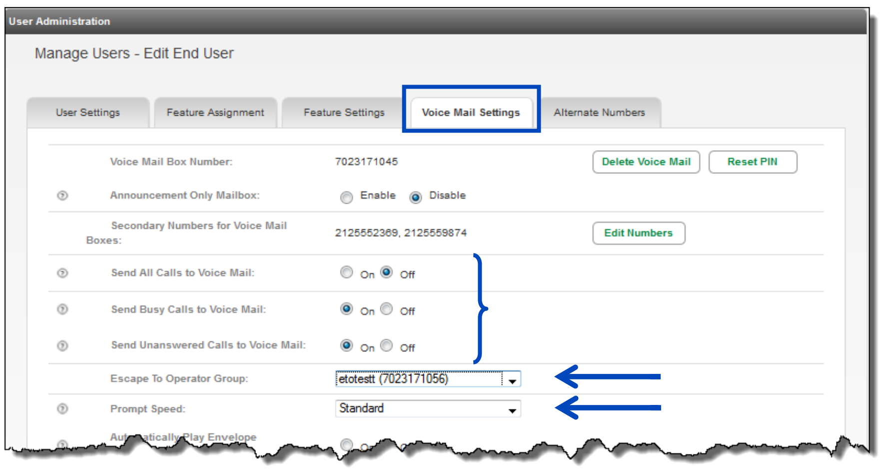
103. To edit or add to these numbers, click the **Edit Numbers** button adding or deleting numbers accordingly.



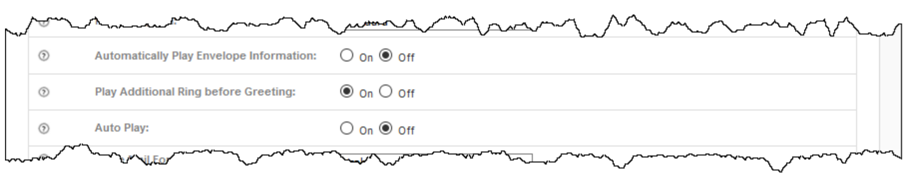
104. To **Send All Calls to Voicemail**, click the **On** radio button, click the **Off** radio button to disable this feature.
105. To enable or disable the **Send Busy Calls to Voicemail** and **Send Unanswered Call to Voicemail**, click the **On** or **Off** radio button.

Note: By default, busy and unanswered calls roll to voicemail; these settings should only be deviated from if calls to this user should roll elsewhere.

106. From the **Escape to Operator** dropdown list, select the location you want callers to be forwarded to if they press "**0**" in this individual's voicemail.
107. Choose the delivery speed of your emails from the **Prompt Speed** dropdown list.



108. Check or uncheck boxes, to enable or disable the following features:
    - **Automatically Play Envelope Information**
    - **Play Additional Ring before Greeting**
    - **Auto Play**



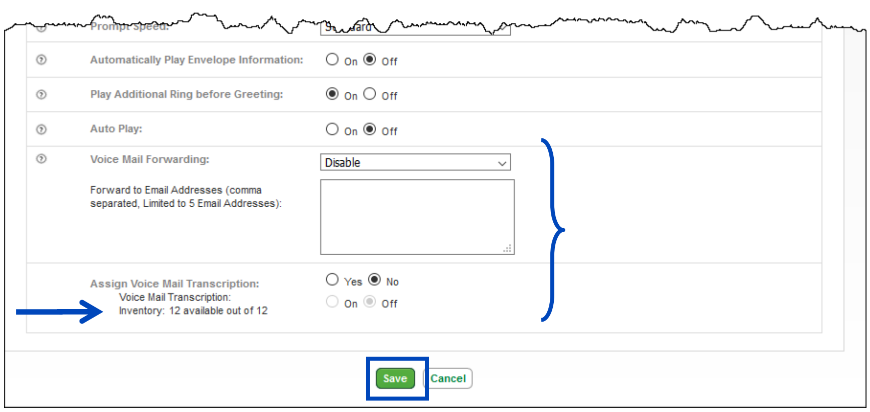
109. From the **Voice Mail Forward** dropdown list, select from the following:
   - **Disable –** voicemails won't be sent to email
   - **Forward & Delete –** voicemails will be sent to email, and **won't** be saved in your telephone's voicemail box
   - **Forward & Save –** voicemails will be sent to email, and a copy **will** also be saved in your telephone voicemail box (voicemails will need to be deleted via the voicemail box, or by clicking the 'delete' link in the email envelope)

   Note: If **Forward & Delete** is the selected option for voice mail forwarding, the Out Call Notification and/or Text Notification features defined in the user's portal won't work; notifications won't be sent if a message is NOT left in the user's mailbox.

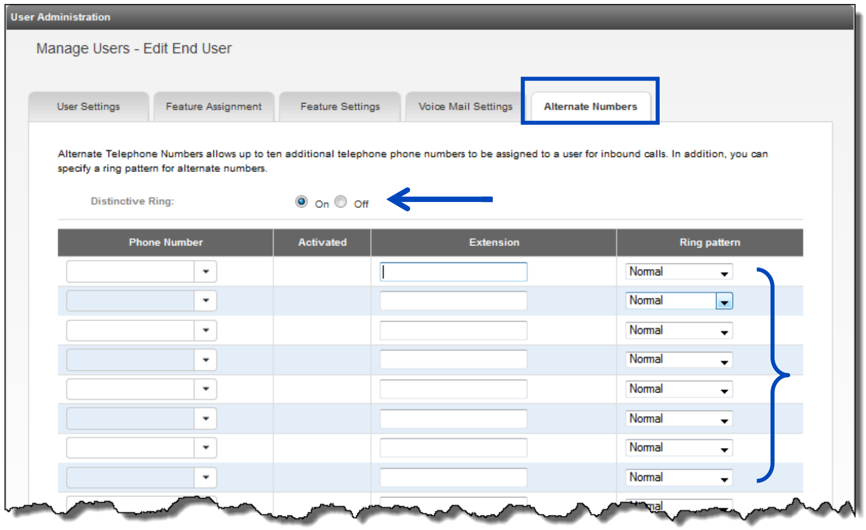
110. In the **Forward to Email Addresses** field, enter the email addresses or distribution lists to receive voicemails to email; addresses or distribution lists are comma separated.
111. If **Voice Mail Transcription** licenses were purchased, they must be available within inventory to be assigned.
112. If inventory is available, click the **Yes** radio button for **Assign Voice Mail Transcription** to assign a license to the user.
113. Click the **Inventory On** radio button to enable transcription.
114. Remove voicemail transcription by clicking the **Assign Voice Mail Transcription No** radio button.
115. To turn voicemail transcription off, click the **Voice Mail Transcription Off** radio button.

   Note: Transcriptions are included at the bottom of an email the user receives when a message is left. This envelope also contains a .wav file of the message; email addresses receiving .wav files. The transcribed message is approximately a maximum length is 45-60 seconds, regardless of the entire message length.

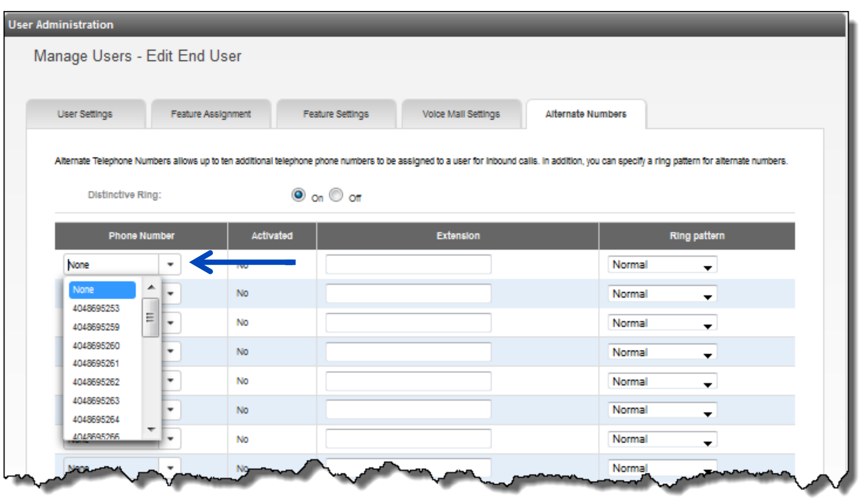
116. Click the **Save** button.



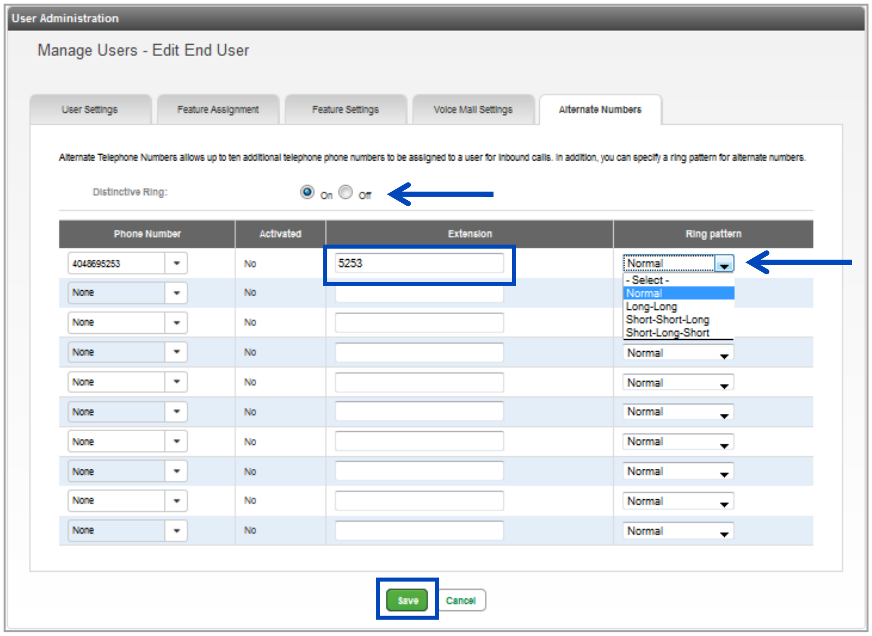
117. Click the **Alternate Numbers** tab.
118. This feature allows you to assign up to 10 available numbers to an existing user for inbound calls; unique ring patterns for each alternate number(s) can be assigned.
119. To define distinctive rings, click the **Yes** radio button.



120. Select the number you want to assign to this user from the **Phone Number** dropdown list.
121. To remove an alternate number from a user, click the **Phone Number** dropdown list and select **None**.



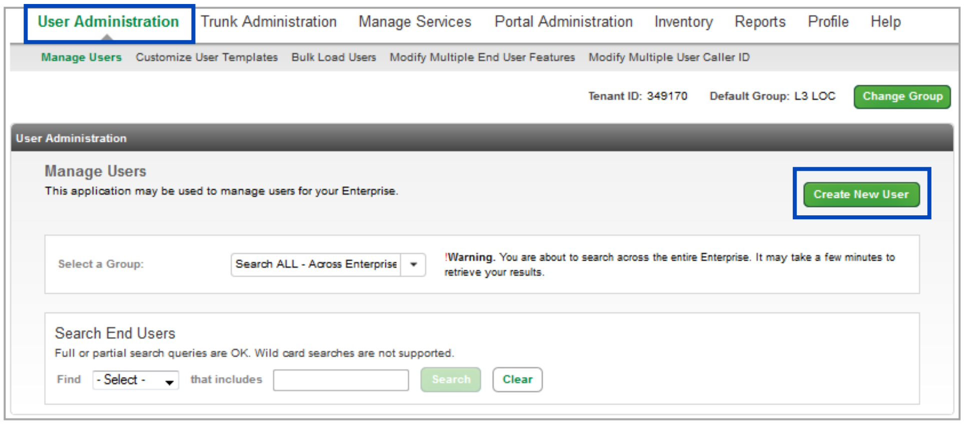
122. The extension automatically populates in the **Extension** field based on your extension dialing plan and can be edited if it wasn't populated correctly.
123. From the **Ring Pattern** dropdown list, select from silent or three unique ring pattern types for each alternate number.
124. Click the **Save** button.



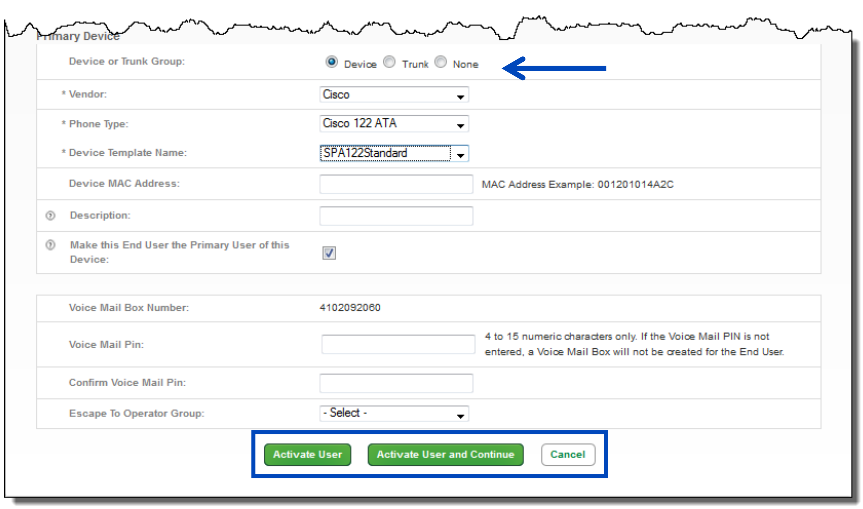
Creating an ATA Device

An **ATA** device provides dial tone from an IP platform, which can then be plugged into an analog device such as a phone, fax machine, postage machine, or paging system. Creating or editing an **ATA** is similar to creating or editing regular users.

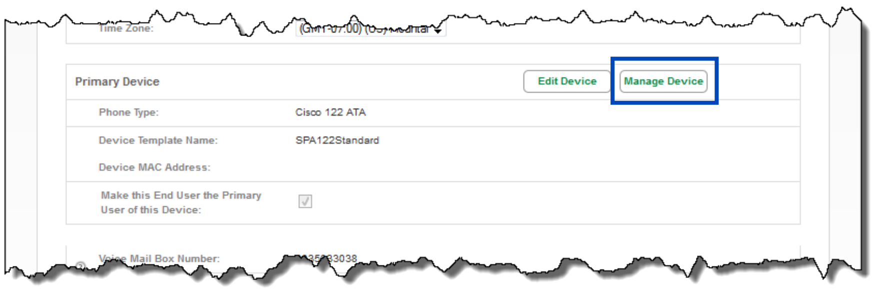
1. Click on **User Administration** from the main menu.
2. Click the **Create New User** button.



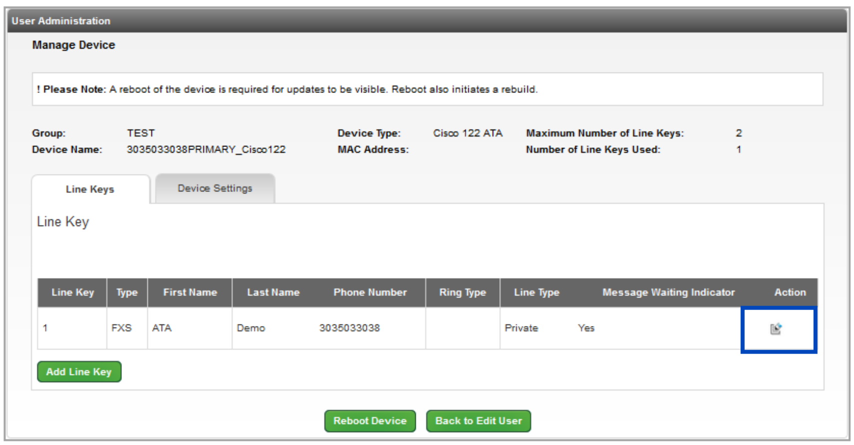
3. Complete the **Manage Users – Create New User** form, as described in the previous section.
4. For Device or Trunk Group, click on **Device**.
5. Choose the appropriate vendor from the **Vendor** dropdown list.
6. Select the appropriate device from the **Device Type** dropdown list
7. Select the appropriate ATA from the **Phone Type** dropdown list.
8. Select the correct template in the **Device Template Name** dropdown list based on the vendor and device type.
9. Enter the devices MAC address in the **Phone MAC Address** field.
10. Click the **Activate User** or **Activate User and Continue** button.



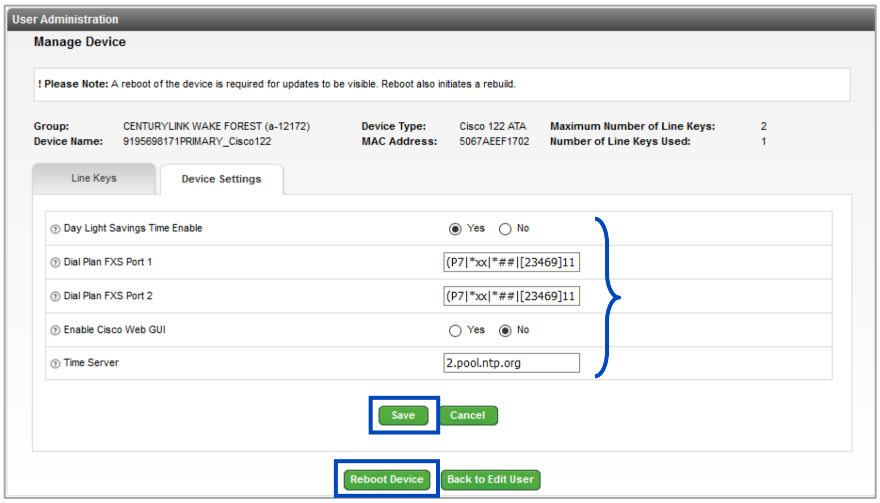
11. Once the device is successfully built, click the **Edit** icon for that device on the **User Administration --> Manage Users** menu.
12. Scroll down and click the **Manage Device** button.



13. Click the **Edit** icon to make changes to the primary line on the ATA; similar to editing a regular user.
14. If you make feature changes, you'll need to reboot the device by clicking the **Reboot Device** button.
15. Click the **Device Settings** tab.



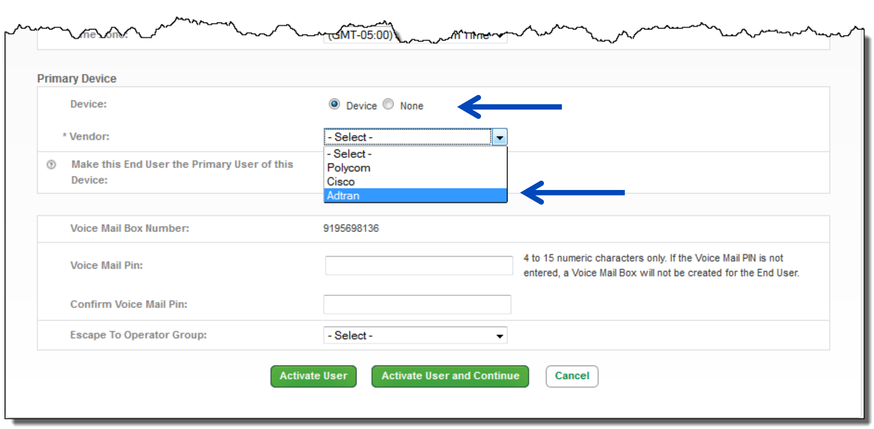
16. Click the **Day Light Savings Time Enable Yes** radio button to observe this feature; click the **No** radio button if your area does not observe.
17. Use the **Dial Plan FXS Port 1** and **2** fields to create hot lines or ring downs. Hover over the “**?**” for programming details.
18. **Enable Cisco Web GUI** allows you to access Cisco Web Browser settings from your computer’s web browser, however, should only be used if needed as it could pose a security risk.
19. The **Time Server** field is auto populated, if you wish to use your Internal SNTP Time server, enter the IP address in the **Timer Server** field.
20. Click the **Save** button to save your setting, then click the **Reboot Device** to enable those setting changes.



Adtran/ATA Router Devices

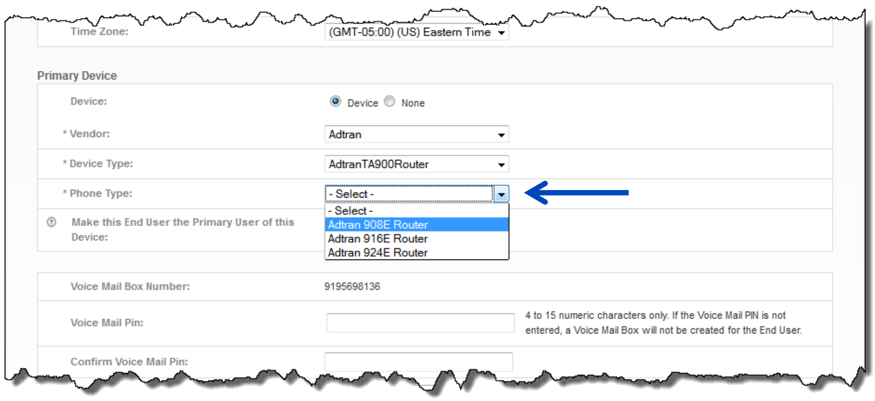
These devices are used with analog handset devices. Multiple handsets can be associated to one device.

1. To build an Adtran ATA or router device, begin creating an analog seat as you would any other seat and click on the **Device** radio button.
2. Select **Adtran** from the vendor dropdown list.

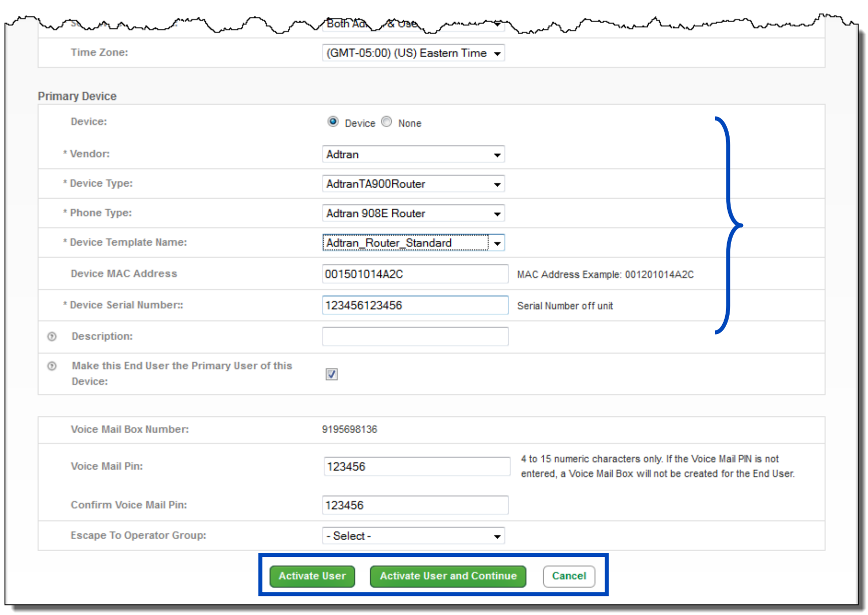


3. Select either Adtran ATA or Adtran Router from the **Device Type** dropdown list, based on the equipment you received.
4. Select the correct device from the **Phone Type** dropdown list, based on your equipment:

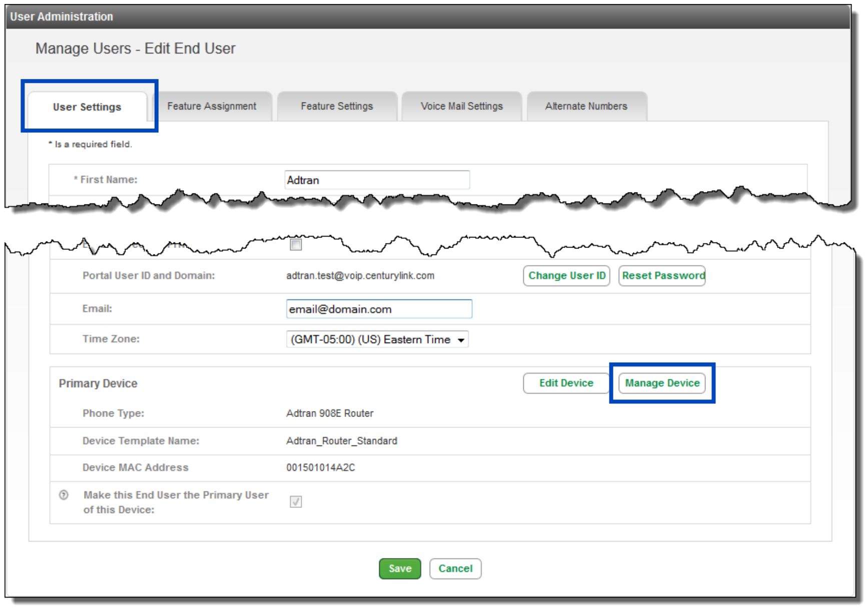
- **Adtran 908E** (ATA or Router) – 8 port device
- **Adtran 916E** (ATA or Router) – 16 port device
- **Adtran 924E** (ATA or Router) – 24 port device



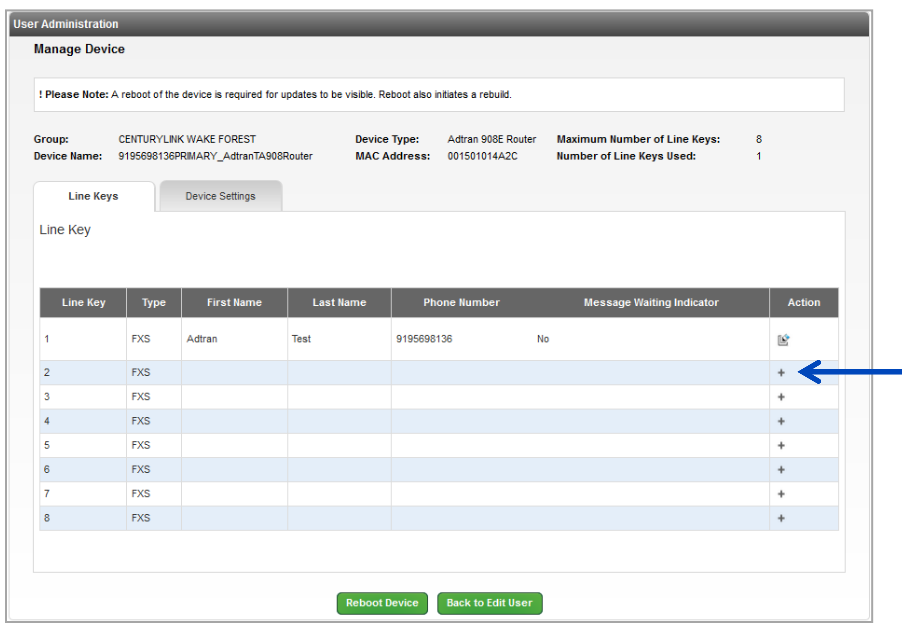
5. Select a template from the **Device Template Name** dropdown list.
6. Enter the MAC address of the device in the **Device MAC Address** field.
7. Enter the serial number of the device in the **Device Serial Number** field.
8. Select and confirm a voicemail PIN if required.
9. Click the **Active User** or **Activate User** and **Continue** button.



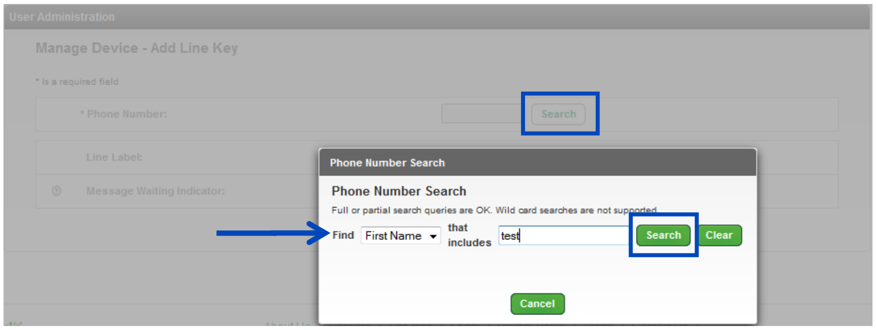
10. To assign additional users to the remaining lines of your device, click the **Manage Device** button from the User Settings tab.



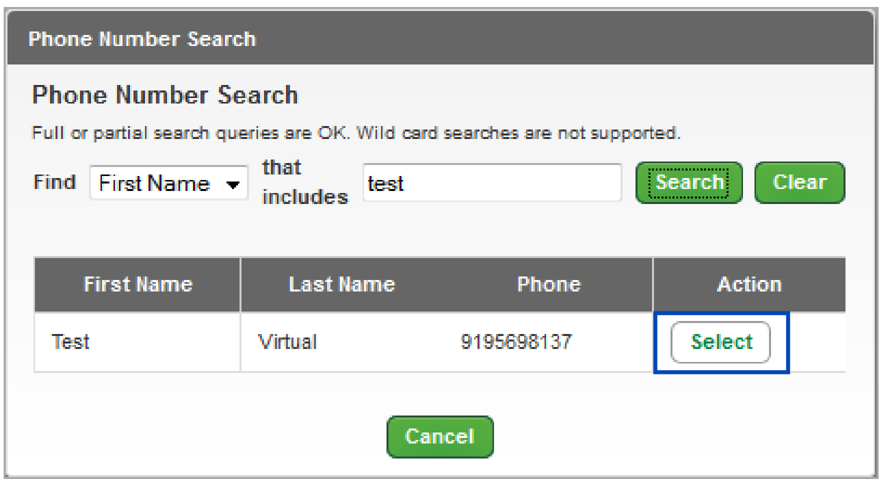
11. The number of ports will be based on the ATA or Router model chosen when you built the seat.
12. To add a line, click the "**+**" next to the port you want to program.



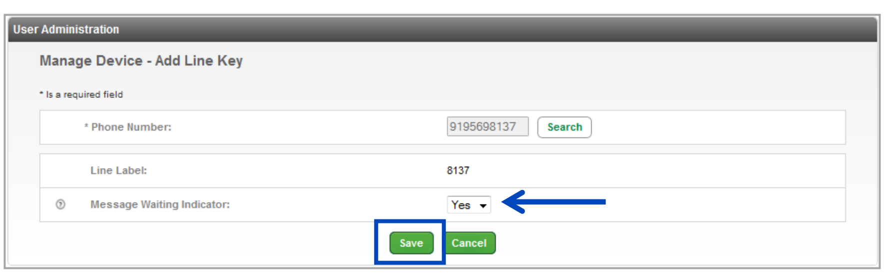
13. Click the **Search** button from the Manage Device – Add Line Key window.
14. From the **Find** dropdown list, choose to enter a search or partial search by First Name, Last Name or Phone Number.
15. Click the **Search** button.



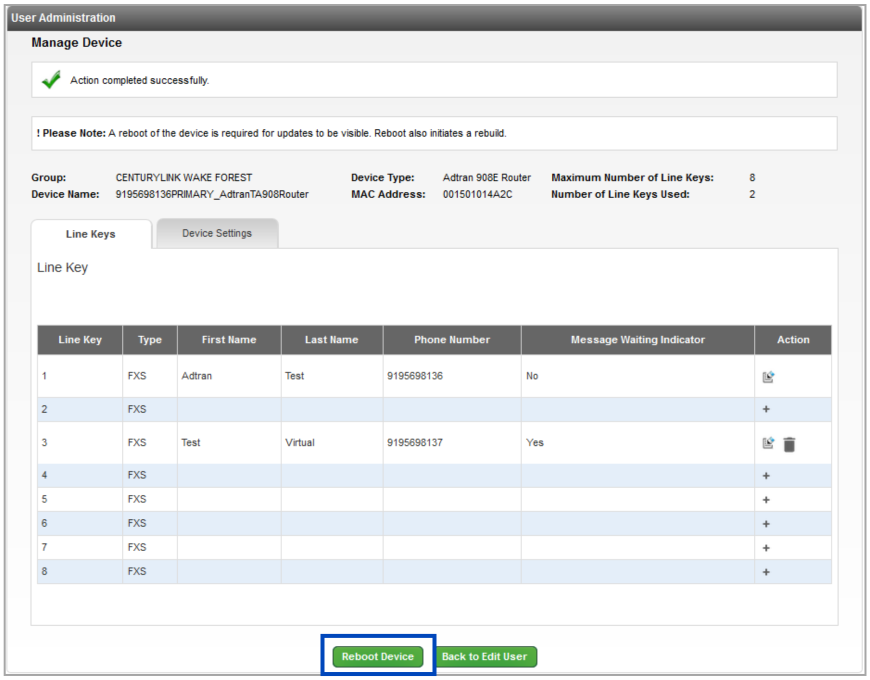
16. All seats matching your search criteria are displayed.
17. Click the **Select** button for the user you wish to add to your device.



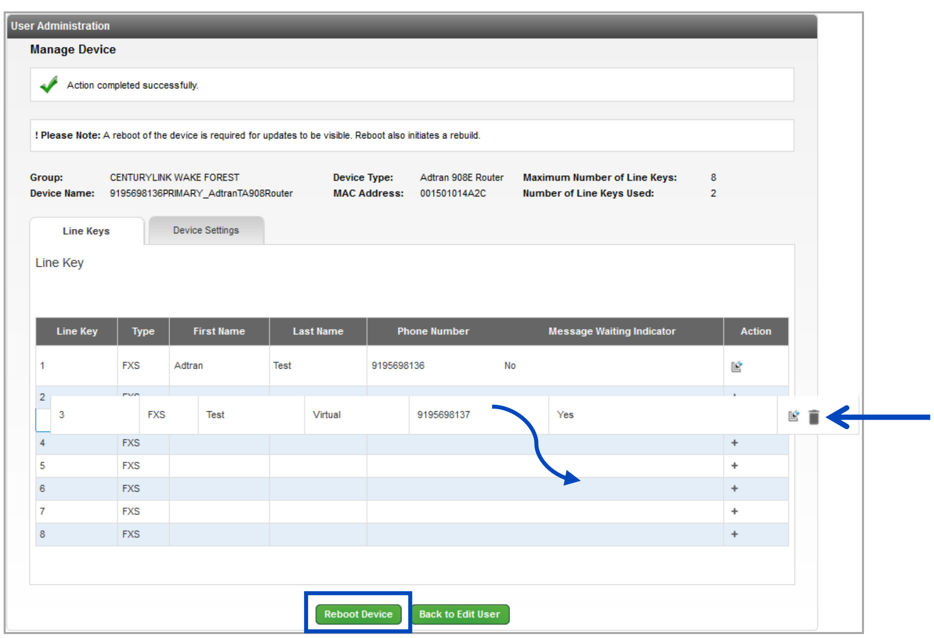
18. Choose your option from the **Message Waiting Indicator** dropdown list:
    - **Yes** – will light the message waiting indicator on the device
    - **No** – won't light the message waiting indicator the device
19. Click the **Save** button.



20. Your successful action is acknowledged, that user will now be programmed on that port.
21. A reboot of the device is required after every change.
22. Click the **Reboot Device** button.



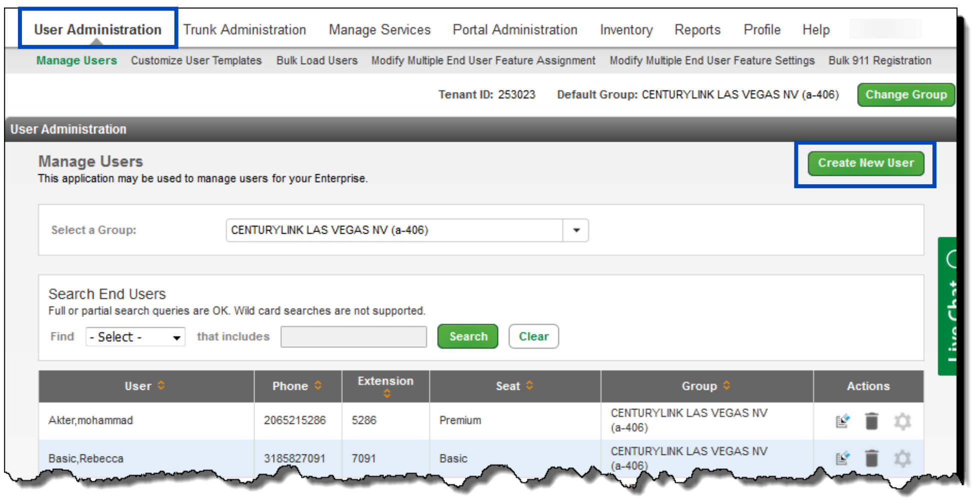
23. To move a user to another port, left click and drag the user to the new port location and release your mouse.
24. To delete a user from this device, click the **Trash** icon.
25. A reboot of the device will be required to activate the new port.



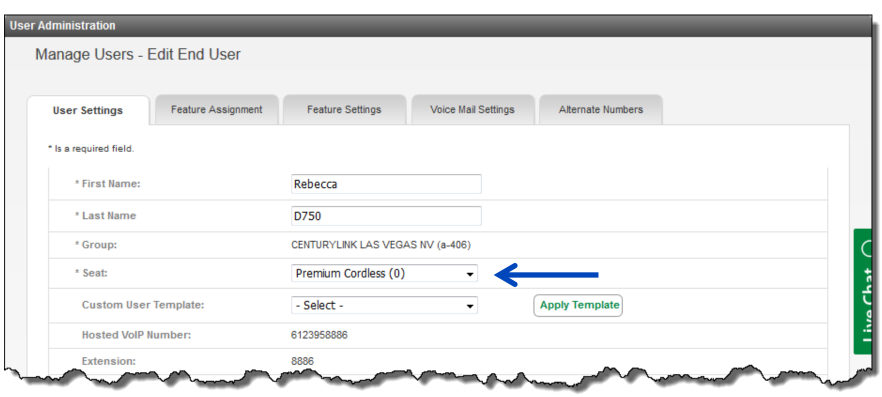
Grandstream DP750 Devices

The **Grandstream DP750** base device can support programming for up to 10 lines and can be paired with 5 individual **Grandstream DP720** handset devices. Each handset then can be customized to include one or all 10 lines programmed on the base unit, in any order on the handset device.

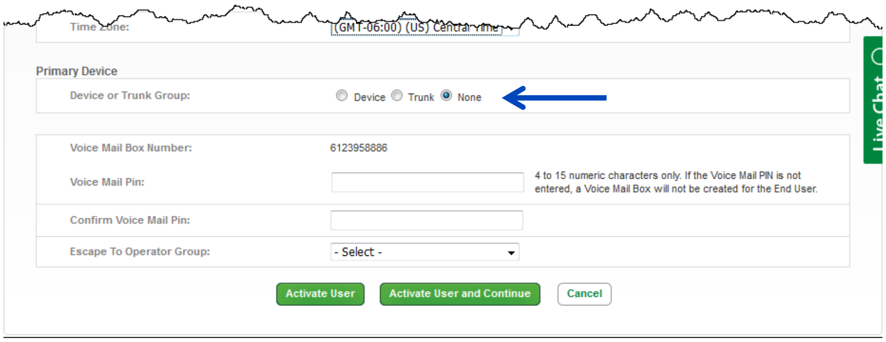
1. Click on **User Administration** from the main menu.
2. Click the **Create New User** button.



3. Enter a **First Name** and **Last name** in the appropriate fields.
4. Select a location from the group dropdown list.
5. Select a **Cordless** seat type from the **Seat** dropdown list; options will be Basic Cordless, Standard Cordless or Premium Cordless, licenses are controlled by available inventory.
6. Continue inputting data for the new user as you would for any other device such as **Telephone Number**, **Portal User ID**, **Email Address**, etc.

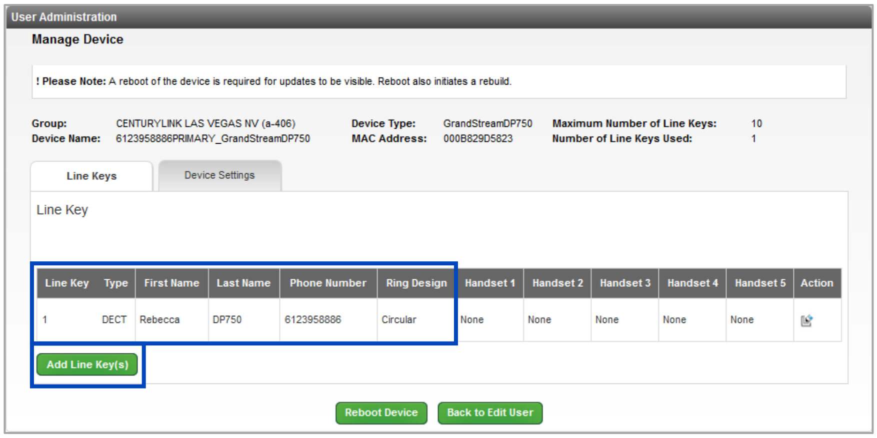


7. Click the **Device** radio button to expose additional fields, required to program the DP750 base unit.

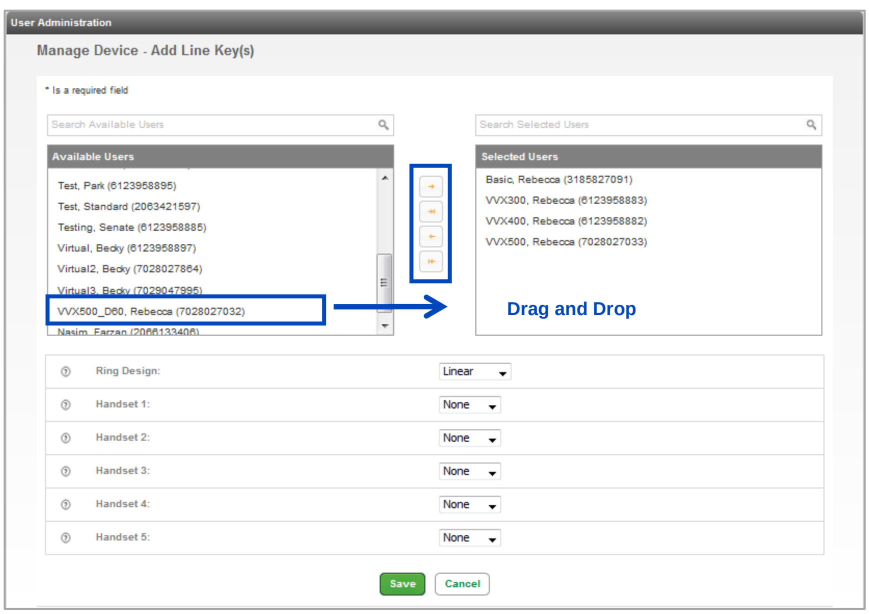


8. Select **Grandstream** from the **Vendor** dropdown list.
9. Select **GrandstreamDP750** from the **Phone Type** dropdown list.
10. Select **Grandstream_DECT_Standard** from the **Device Template** name dropdown list.
11. Locate the device's MAC address on the bottom of the device and enter it in the **Device MAC** Address field.
12. If the primary line should include voicemail, enter a PIN and confirm that PIN, in the **Voice Mail PIN** and **Confirm Voice Mail PIN** fields.
13. Click the **Activate User** or **Activate User and Continue** button complete programming.

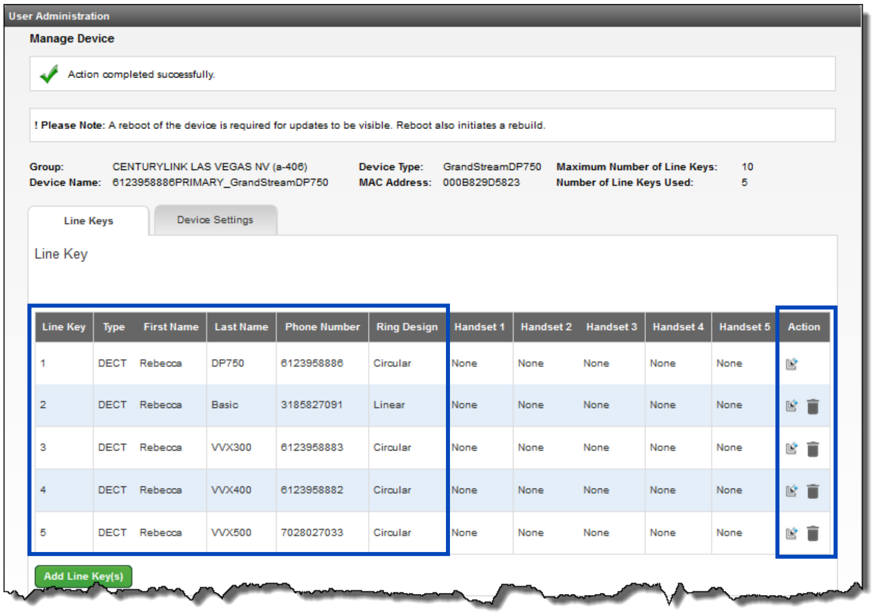
14. Initially a single line is programmed to the DP750 base device, based on the telephone number selected when the device was created.
15. To add additional lines, click the **Add Line Key(s)** button and click **Accept** to accept the disclaimer.



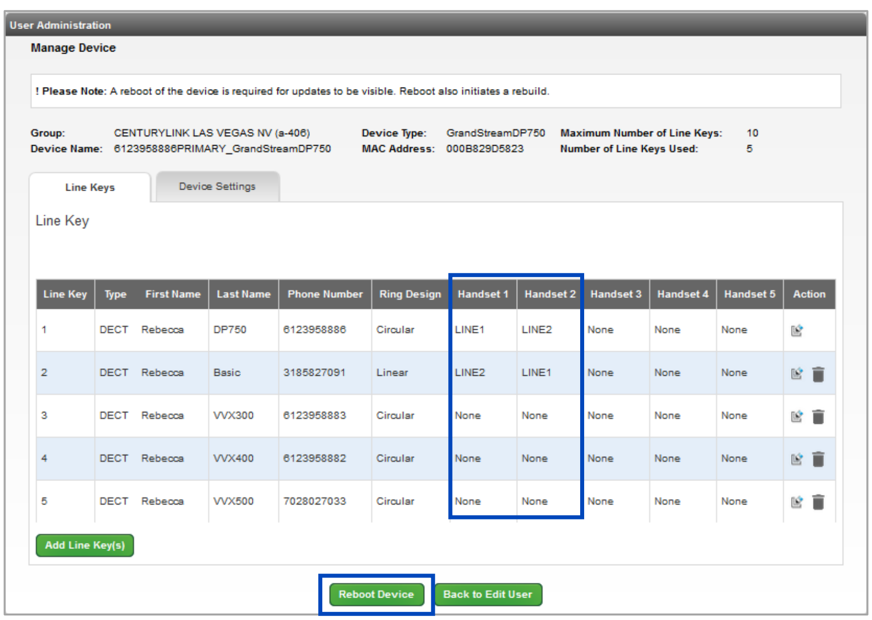
16. Locate the lines you want added to the DP750 base unit from within the **Available Users** field.
17. Drag and drop each user to the **Selected Users** field or use arrows to move users between fields.
18. Click the **Save** button.



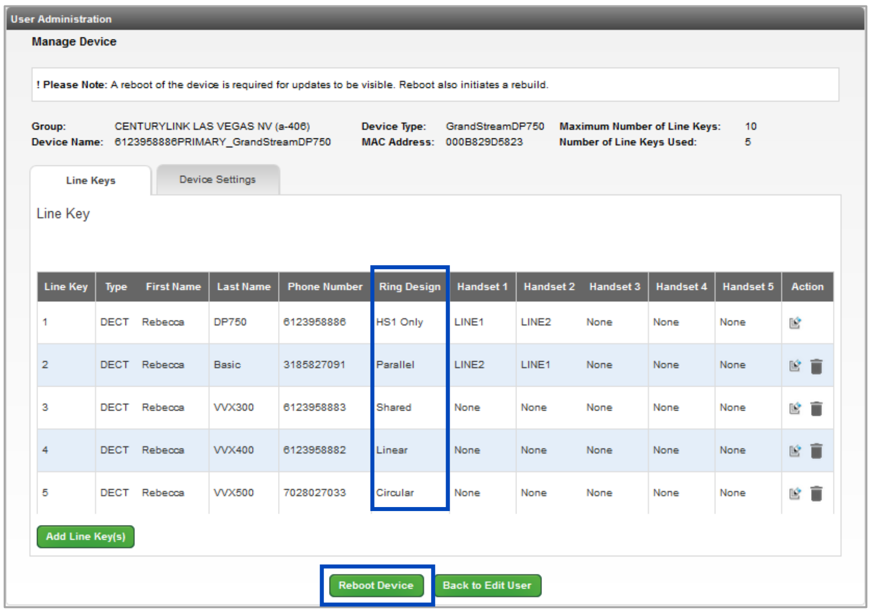
19. Five lines are now programmed on the DP750 base unit and can be programmed to appear on 1-5 cordless handset devices (DP720).
20. To add lines to individual handsets, click the **Edit** icon for each line programmed on the base unit.



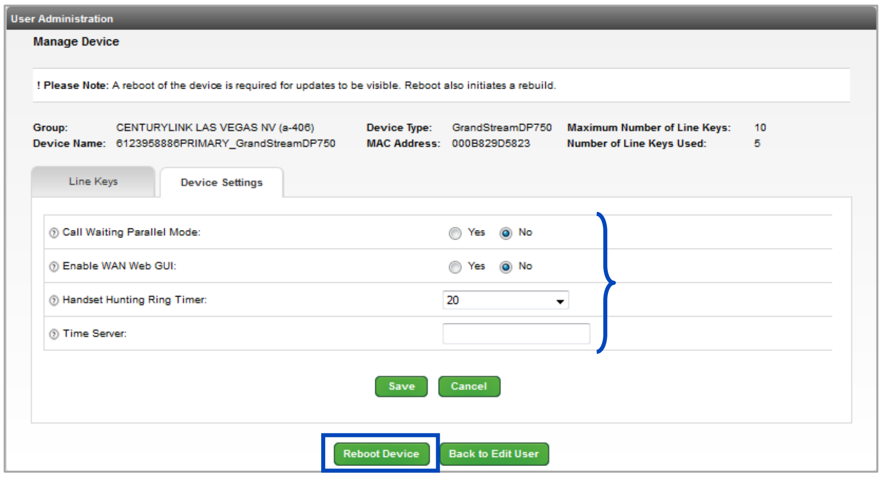
21. Based on the following programming, **Handset 1** appears with 6123958886 as line one, and 3815827091 as long 2; **Handset 2** appears with 3815827091 as line one, and 6123958886 as ling two.
22. Outbound caller ID is always based on the line that is programmed as line 1 on the device, unless the default outbound dialing setting is changed within the menu option on the handset.
23. When programming changes are done, click the **Reboot Device** button which syncs all changes to any handset paired to the base unit.



24. While editing lines, choose from **5 Ring Designs**:
    - **Specific Handset (HS1 Only, HS2Only) --** designates the inbound call to a specific handset
    - **Shared Handset --** allows all handsets assigned to the line to ring at the same time and all features to be shared from the line on all handsets
    - **Circular --** the base station notes which handset answered the last call, and the rings the next available handset in round-robin fashion
    - **Linear --** the base station distributes calls in predefined order from the lowest-numbered available handset, if no answer within ring timeout, the call is sent to next available handset in sequence; this mode is also called "serial hunting"
    - **Parallel --** all phones ring concurrently, if one phone answers, the remaining available phones can make outgoing calls
25. After any programming changes, always click the **Reboot Device** button to syncs changes to all paired handsets.



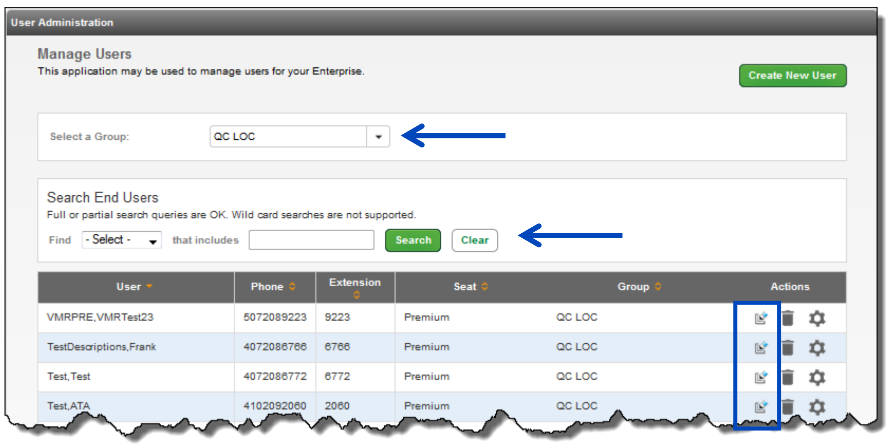
26. If using parallel as a ring design, click the **Yes** radio button for **Call Waiting Parallel Mode** to allow calling waiting.
27. For security purposes, **Enable WAN Web GUI** should remain disabled; the **Yes** radio button should only be selected for troubleshooting purposes.
28. If using a **Linear** or **Circular** ring design, click an option from the **Handset Hunting Ring Timer** dropdown list from 5-40 seconds; this determines how many times the first handset rings, before the call rolls to the next available handset, typical setting is 20 seconds.
29. Enter the internal SNTP time server IP address in the **Time Server** field, if necessary; this field typically remains blank.
30. Click the **Save** button.



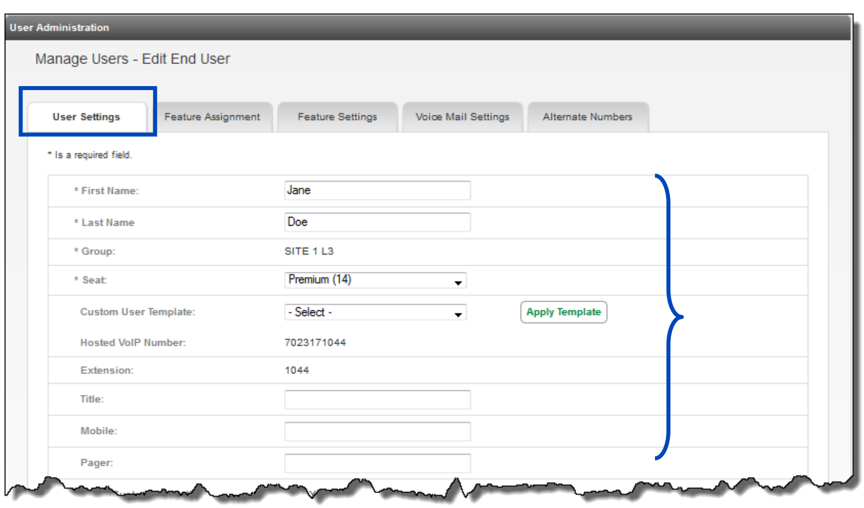
Editing a New or Existing User

After the user has been activated and **Features and Settings** and **Phone Setting** changes have been applied and saved, you can return to the user and **Edit** the seat to add/manage features such as **Busy Lamp Fields**, **Shared Call Appearances**, and **Soft Keys**.

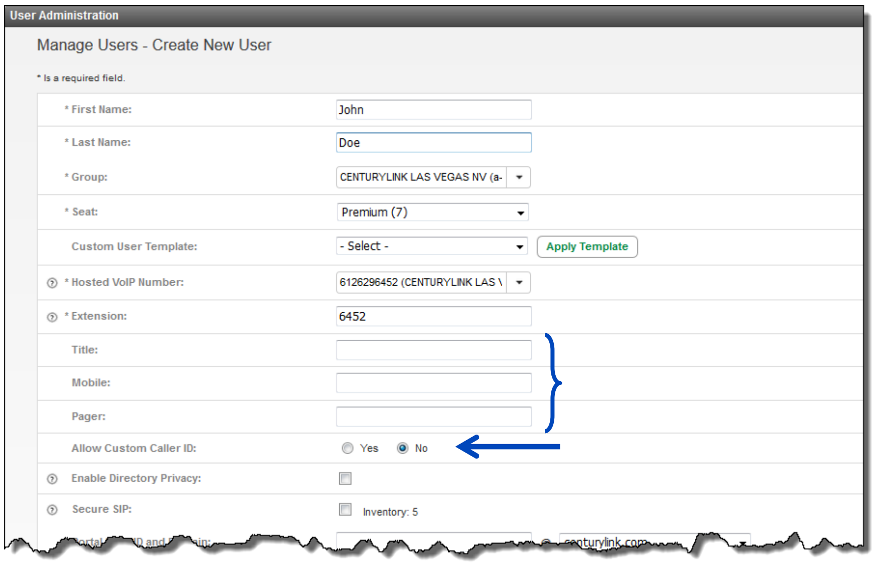
1. To **Edit** a user, go to **Manage Users** from the sub-menu.
2. Select your group from the **Select a Group** dropdown list if you have more than one location.
3. Use the **Search End Users** feature to refine your search criteria if your group is large.
4. Click on the **Edit** icon to access the features and setting for that user.



5. Most fields can be changed when editing a user. This allows you to change the name and user name if you have a change in staff, without having to delete and rebuild the seat.
6. Enter the new name in the **First Name/Last Name** fields.
7. If you need to change the seat type, click the dropdown list next to **Seat** to select the new seat type based on available inventory.
8. The **Hosted VoIP Number** and **Extension** cannot be changed without deleting and rebuilding the seat.



9. Enter a **Title**, **Mobile** and **Pager** number if desired, but these fields are not required.
10. To **Allow Custom Caller ID**, click the **Yes** radio button.

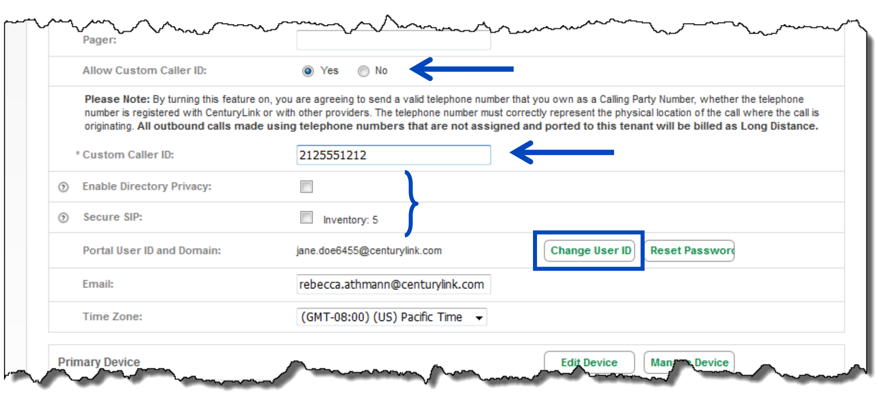


11. Enter the number you wish to display, in the **Custom Caller ID** field.

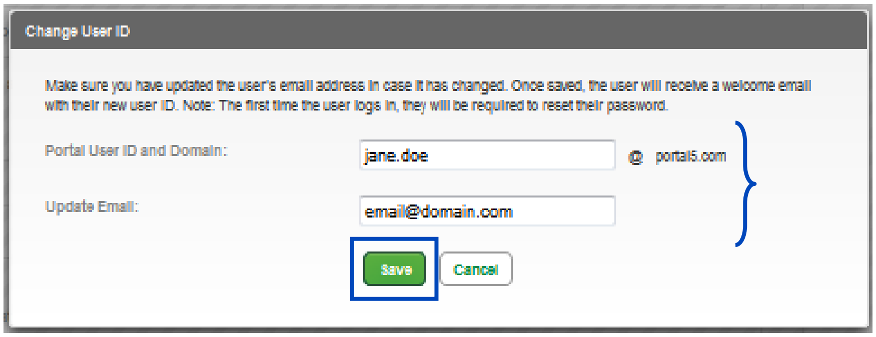
Note: You must agree that you're sending a valid telephone number that is owned by the Calling Party, whether the telephone number is owned by CenturyLink or another provider. The telephone number must correctly represent the physical location of the call where the call is originated.

Note: If you enter a number for Custom Caller ID that is not on you Hosted VoIP account or if you use a Toll Free number, all outbound calls will be billed as Long Distance.

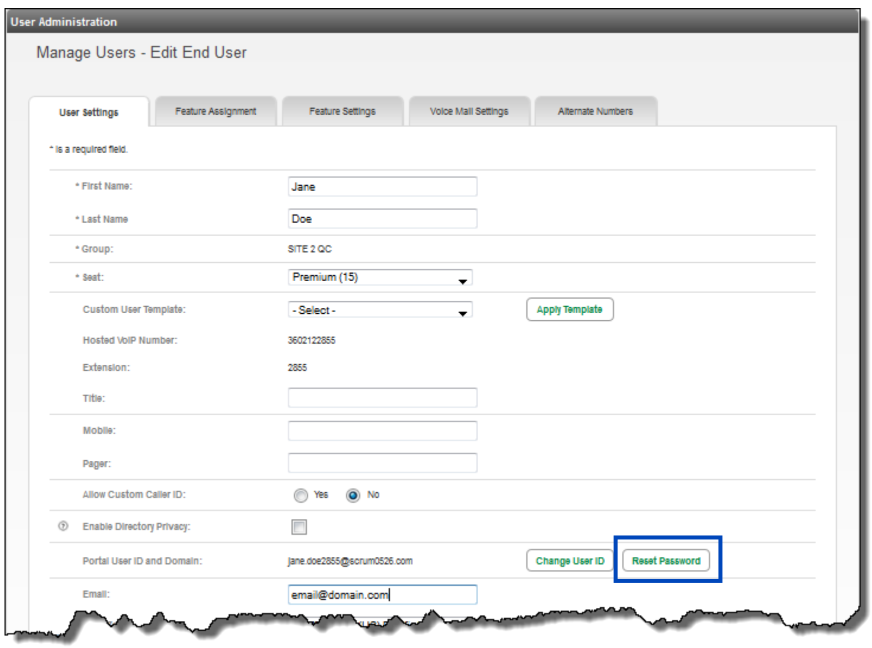
12. Click the **Enable Directory Privacy** checkbox to enable this feature.
13. To enable **Secure SIP** for this user, click the **Secure SIP** checkbox; if you don't see this option, it indicates the seat you're editing doesn't support this feature, or you don't have available licenses within your inventory; there is a cost associated to this feature.
14. To change the portal user ID, click the **Change User ID** button.



15. A **Change User ID** window appears.
16. Enter the new user ID in the **Portal User ID and Domain** field.
17. Enter the user's correct email address in the **Update Email** field.
18. Click the **Save** button.
19. An email is sent to that email providing them with their user ID and password, as well as a link to access their end user portal.

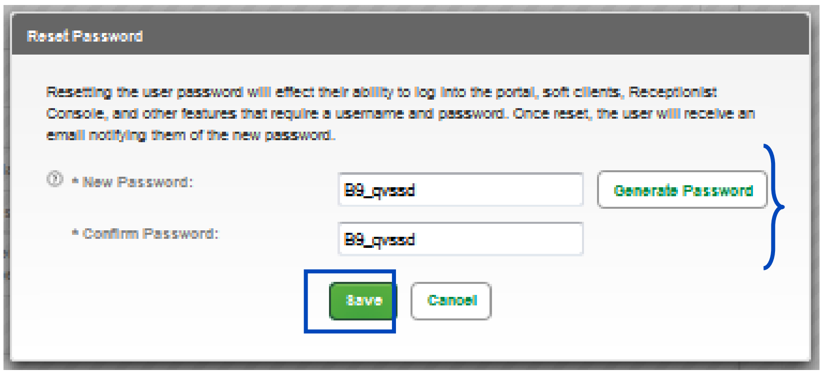


20. To reset an existing end user's portal password or to assign a new password, click the **Reset Password** button.



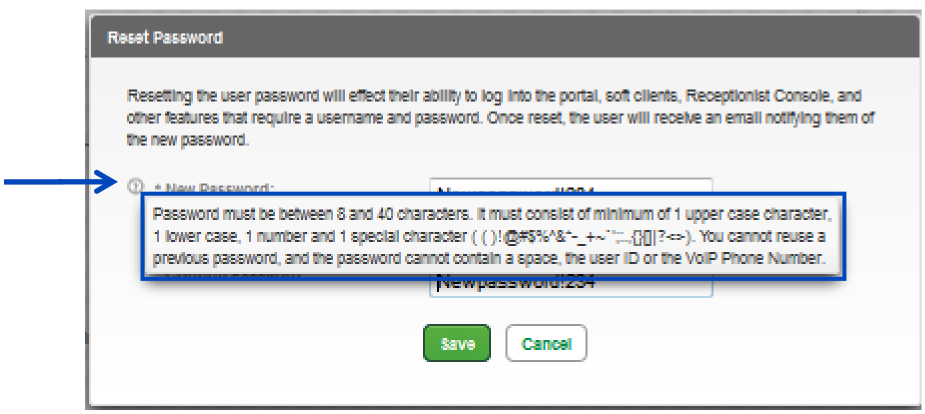
21. A **Reset Password** window appears.
22. Click the **Generate Password** button for a system generated password or enter and confirm a new password in the **New Password** and **Confirm Password** fields.
23. Click the **Save** button.
24. Once reset, the user receives an email with their new temporary password. When they log into their portal the first time, they'll be required to change their password for security purposes.

Note: Resetting the password effects their ability to log into the portal, soft clients, receptionist console and other features that require a user ID and password.

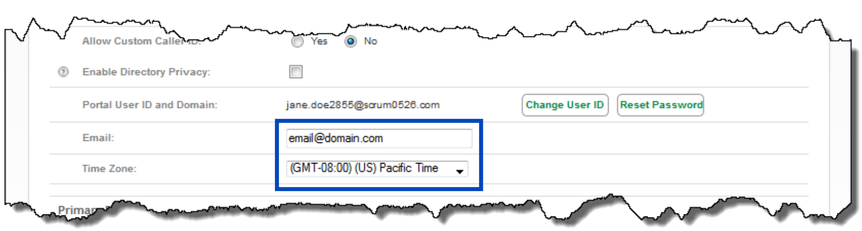


25. For password rules, hover over the "**?**" next to **New Password**.

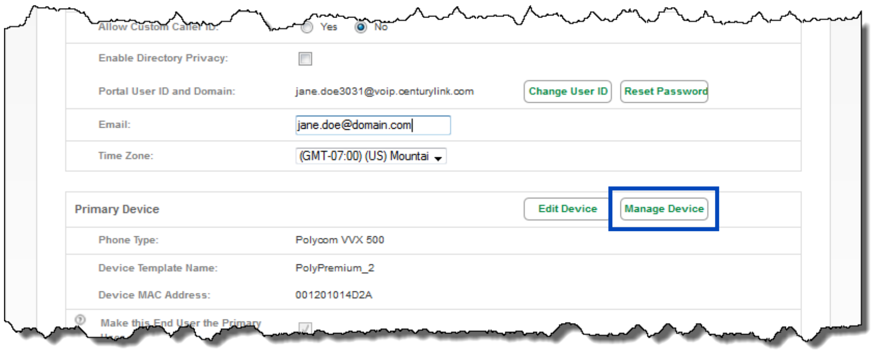
Note: The password must be between 8 and 40 characters and include 1 upper case letter, 1 lower case letter, 1 number and 1 special character. The password cannot contain white space.



26. To edit or change the email address, enter the new email address in the **Email** field.
27. If the time zone needs to be changed, click the **Time Zone** dropdown list and select the correct time zone; remember, Arizona has its own unique option, so watch for that.



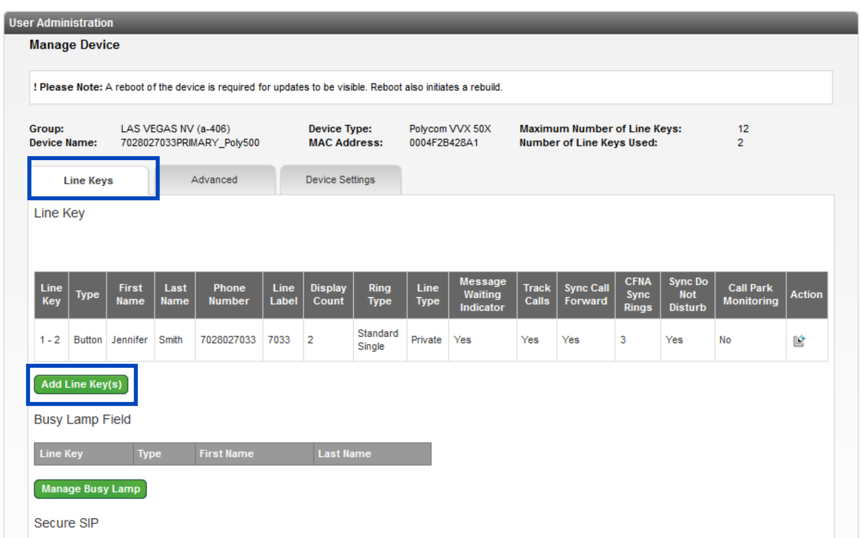
28. From the **Manage Users – Edit End Users** screen, click on the **Manage Device** button.



29. The **Line Keys** tab allows you to add/remove Shared Call Appearances and Busy Lamp Fields.
    - **Shared Call Appearance (SCA) –** allows this user the ability to answer and monitor another individual's line.
    - **Busy Lamp Field (BLF) –** allows this user the ability to answer and monitor another individual's line, in addition to using this key to dial that individual's extension. A BLF can also be used in the transfer process, instead of having to manually enter that individual's extension on the keypad in the transfer process.

Note: You can only add **Shared Call Appearances (SCA)** for individuals within your group, you can add **Busy Lamp Fields (BLF)** for individuals in other groups across your tenant.

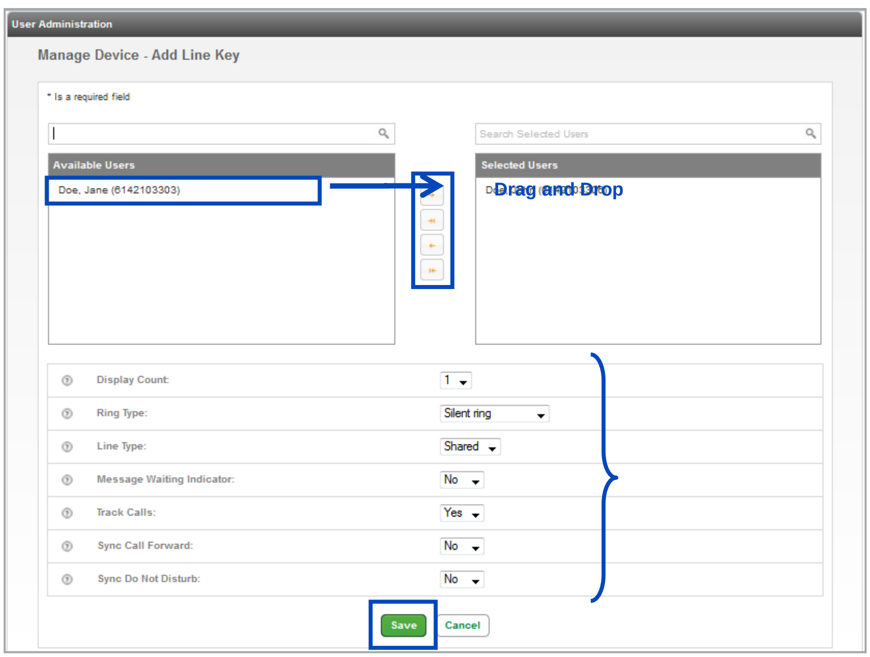
30. The **Soft Keys** tab allows you to delete and add soft keys to a user's device.
31. The **Device Settings** tab allows you to change additional feature settings at the user level.
32. Click the **Add Line Key** button.
33. To continue, click the **Accept** button on the 911 Limitations screen.



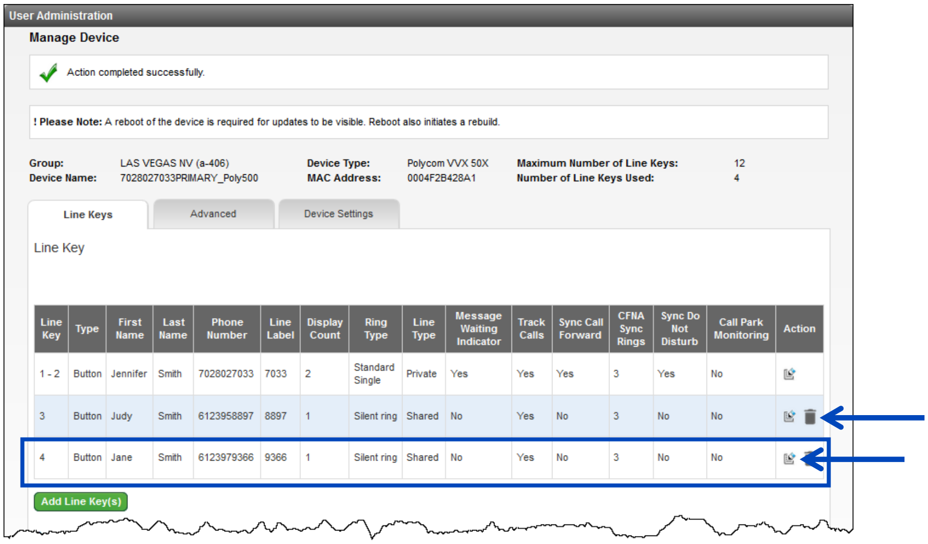
34. Search for users by entering a search or partial search in either search field.
35. Drag and drop users to and from the **Available Users** field and **Selected Users** field.
36. You can also use arrow buttons between both fields to move individuals two and from each field.
37. **Display Count** is the number of lines you want appearing on that device for that individual; select the appropriate number of lines from the dropdown list.
38. Choose a **Ring Type** from the dropdown list; each SCA on any device can have a unique ring, which can also be unique from the primary line of that device.
39. Select if the SCA should be **Private** or **Shared** from the dropdown list.

    IMPORTANT:

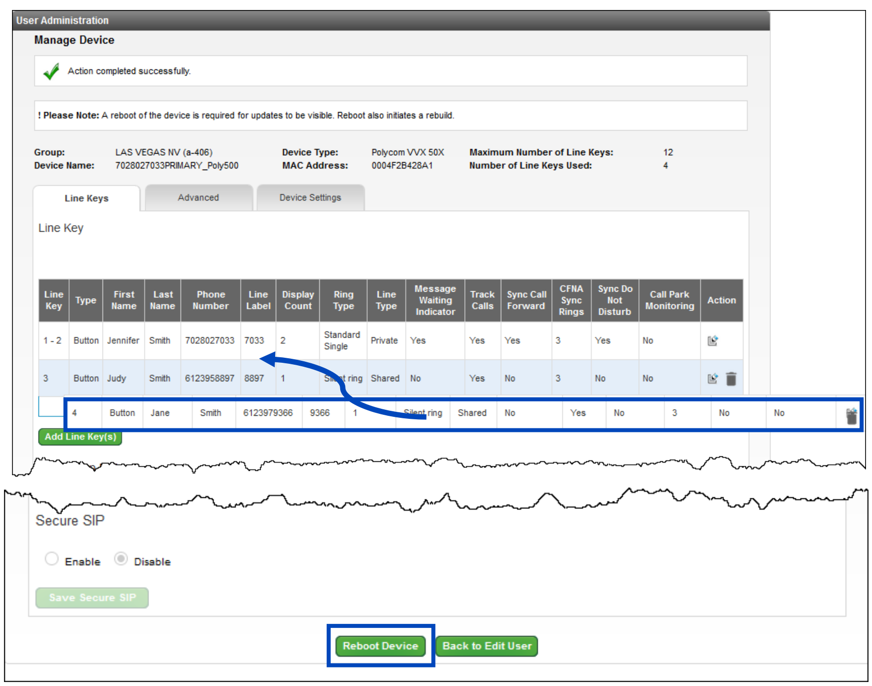
    - **Private –** won't show availability and you won't be able to barge or place a call on hold from one phone and pick it up on the other
    - **Shared –** you'll be allowed to see the line's status and place a call on hold to be picked up on the other device
40. If **Yes** is selected for **Message Waiting Indicator**, this user's message waiting light will activate when the individual you're monitoring receives a new voicemail; the standard setting for this feature is **No**.
41. If **Yes** is selected for **Track Calls**, any missed calls for the monitored individual logs in this user's missed call log; the standard setting for this feature is **Yes**.
42. If **Yes** is selected for **Sync Call Forward**, this device visually displays if the owner of the line appearance enables call forwarding; the standard setting is **No**.
43. If **Yes** is selected for **Sync Do Not Disturb**, this device visually displays if the owner of the line appearance enables do not disturb; the standard setting for this feature is **No**.
44. Click the **Save** button.



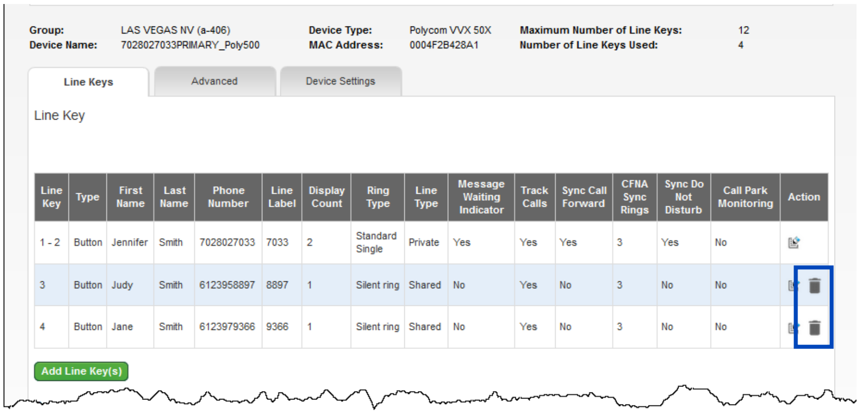
45. The SCA for the monitored user will be built on the next available line key.
46. At any time click the **Edit** icon to change any of the previously selected settings.
47. At any time click the **Trash Can** icon to delete an SCA from a user’s device.



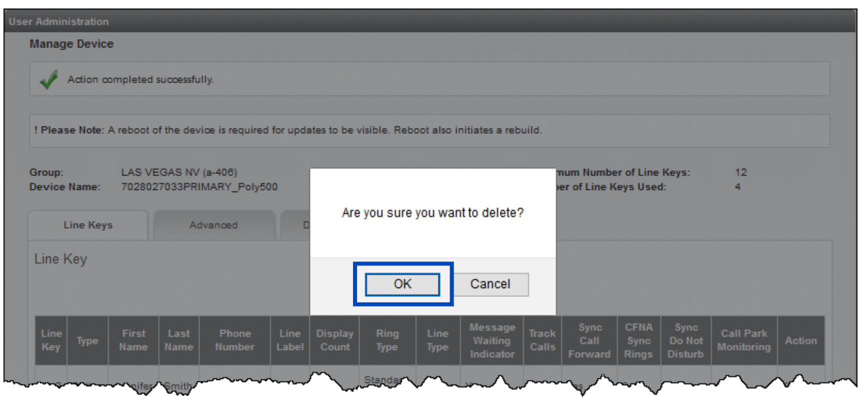
48. You can change the order in which your SCAs appear on a device.
49. **Left Click and Drag** the line you want to move and drop it into the new position.
50. When all line changes are made, you must click **Reboot Device** for your changes to take effect.



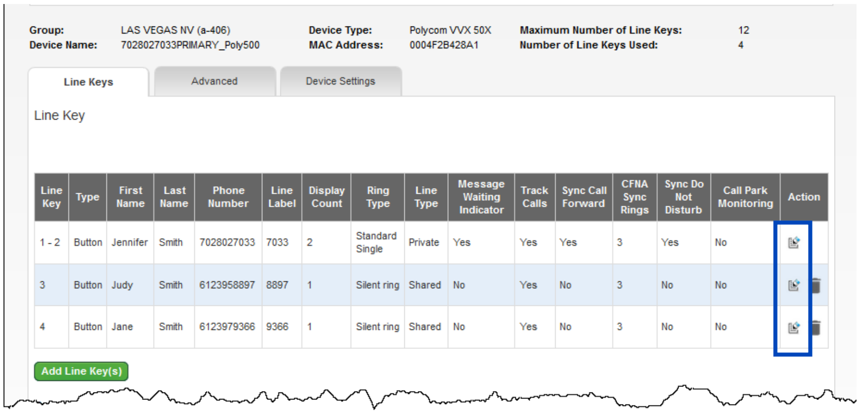
51. To delete an SCA, click on the **Trash Can** icon next to the line you wish to delete.



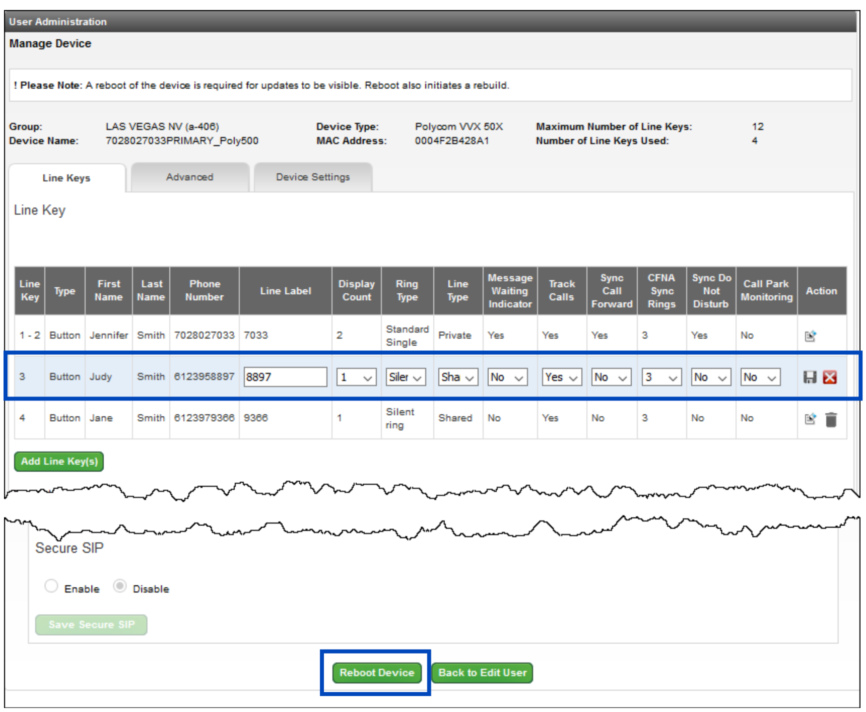
52. Click the **OK** button to confirm the deletion of that SCA.



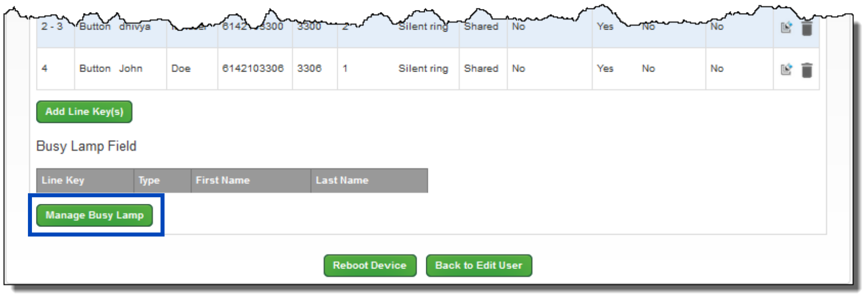
53. When all SCA's are deleted, you must click the **Reboot Device** button for your changes to take effect.
54. To edit settings for any of your SCA keys, click the **Edit** icon.



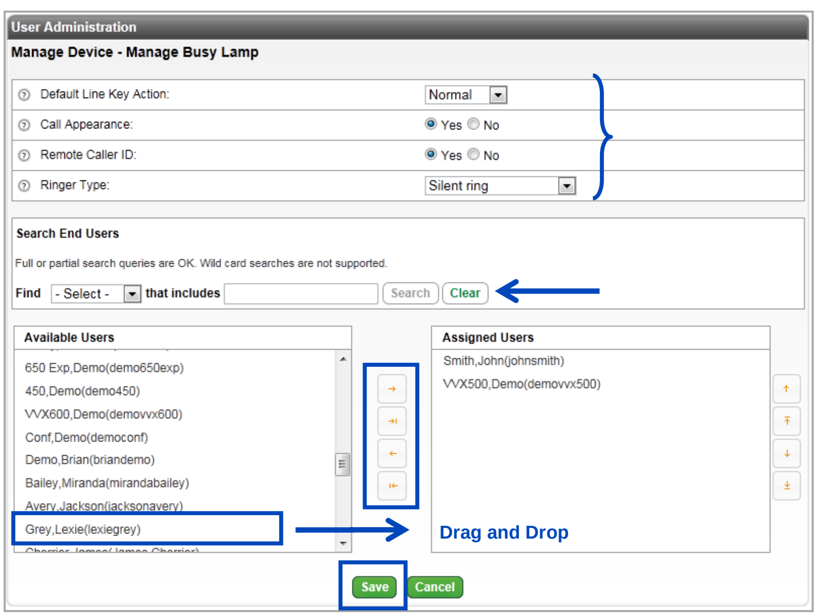
55. To change the default line label from the extension number, enter the preferred label name in the **Line Label** field.
56. Select your preferred feature settings from the dropdown list for Display Count, Ring Type, Line Type, Message Waiting Indicator, Track Calls, Sync Calls Forward and Sync Do Not Disturb.
57. Click the **Disc** icon to **Save** your settings.
58. Click the delete "**X**" icon to exit without saving.
59. When all SCA setting changes have been made, you must click the **Reboot Device** button for your changes to take effect.



60. To monitor a user with a **BLF** (Busy Lamp Field) key, click the **Manage Busy Lamp** button.



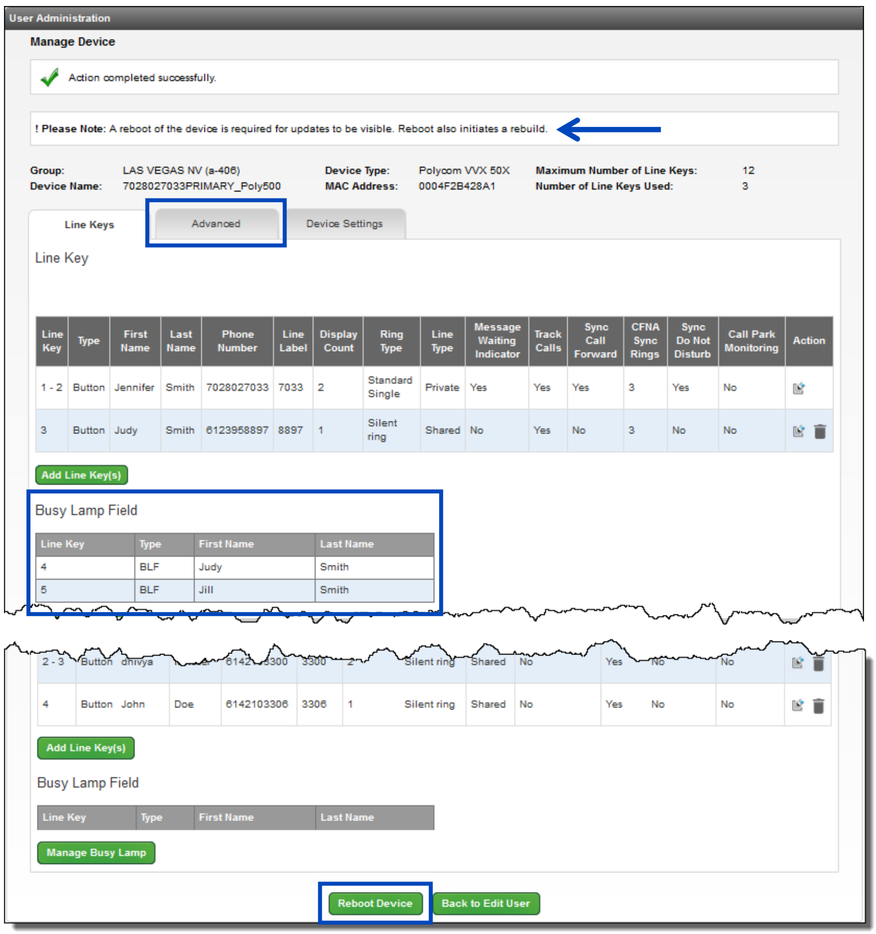
61. Select your **Default Line Key Action** from the dropdown list.
    - **Normal –** allows you to initiate a call to the user when set to Normal
    - **Automata –** allows you to park/transfer/pickup when set to Automata (this is the preferred setting for full use of the BLF function)
62. If **Call Appearance** is set to **Yes**, a splash screen appears when an inbound call is made to the BLF, if set to **No**, the splash screen won't appear.
63. If **Remote Caller ID** is set to **Yes**, the inbound caller ID will appear; if set to No, the caller ID will appear as "unknown".
64. **Ringer Type** allows you to customize the ring tone of your BLFs. Unlike customizing ring tones for SCA's, you can only select one ring tone for all BLFs assigned to a device. Select the preferred ring type from the dropdown list, silent ring is also an option.
65. Select individuals from the **Available Users** field who will be monitored on this device.
66. To narrow the list of users in that field, use the **Search End Users** field.
67. Select your search preference from the dropdown list, First Name, Last Name, or Phone Number.
68. In the "**that include**" field, enter your search criteria; you can enter a partial name or number.
69. From this list, drag and drop the user(s) who should appear on this device as a BLF to the **Assigned Users** field.
70. Click the **Save** button when all users have been added.



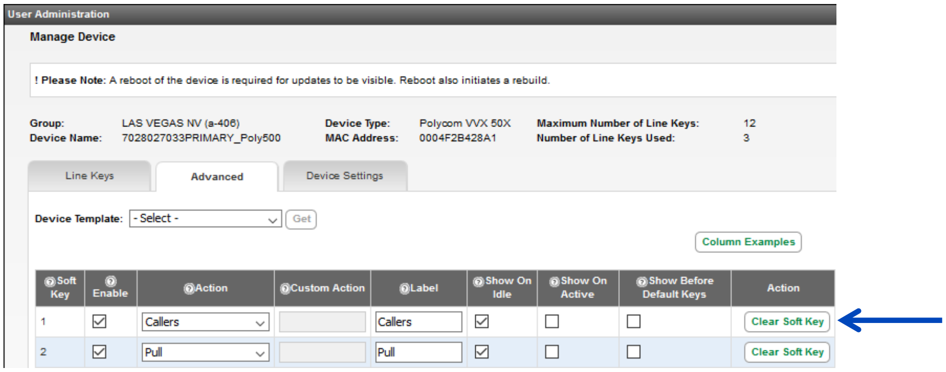
71. The BLF keys that were added will now appear and are built on the next available key in the order they were placed in the **Assigned Users** field.
72. Adding SCA or BLF keys requires a reboot of the phone for the changes to be visible on the device.
73. If you've finished making key changes, and don't need to make additional changes, click the **Reboot Device** button.

Note: If the user is on the phone when you reboot their device, the reboot won't take effect until the user disconnects from their call.

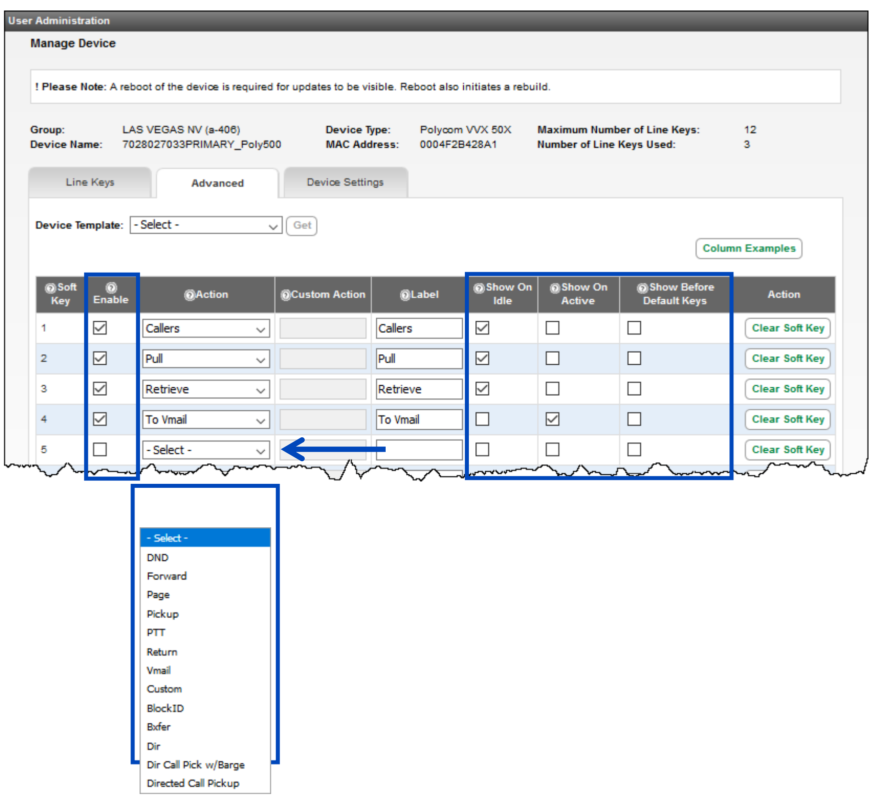
74. If you want to continue with soft key changes, click the **Advanced** tab, you can reboot the phone after those changes are made.
75. If you're not going to make soft key changes, click the **Reboot Device** button.



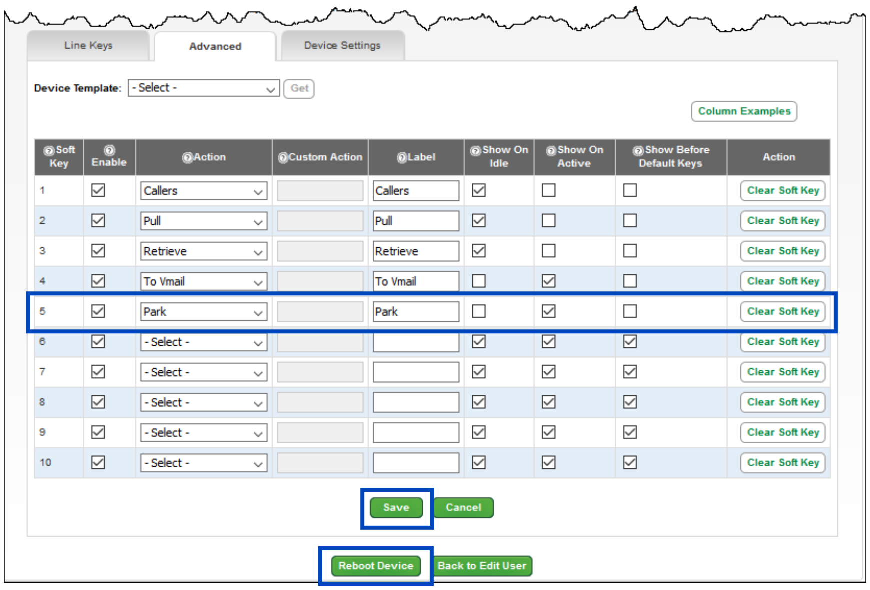
76. **Callers**, **Pull**, **Retrieve** and **To Vmail** soft keys are default keys on all devices.
77. Clear or remove any of the default soft keys by clicking the **Clear Soft Key** button next to the feature you want to delete.



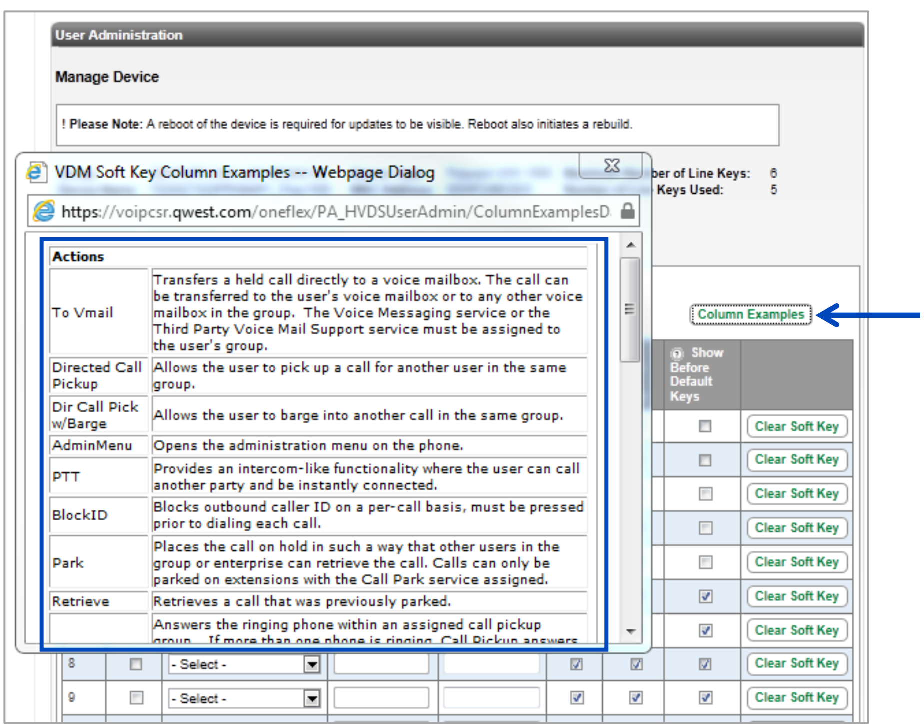
78. To add a new soft key, click the **Enable** check box to activate an option.
79. Click the dropdown list to display available options, select an option such as Park.
80. The default label name automatically populates in the **Label** field; this field is editable so you can relabel the key to reflect a different name that may be more familiar to your users.
81. Select when you want that key available to the user, i.e., when the phone is idle or while on an active call.
    - **Show On Idle –** the key will be available when the phone is on-hook, i.e., no dial tone
    - **Show On Active –** the key will be available while the phone is on an active call
    - **Show Before Default Keys –** the key will be positioned before default keys such as conference and transfer



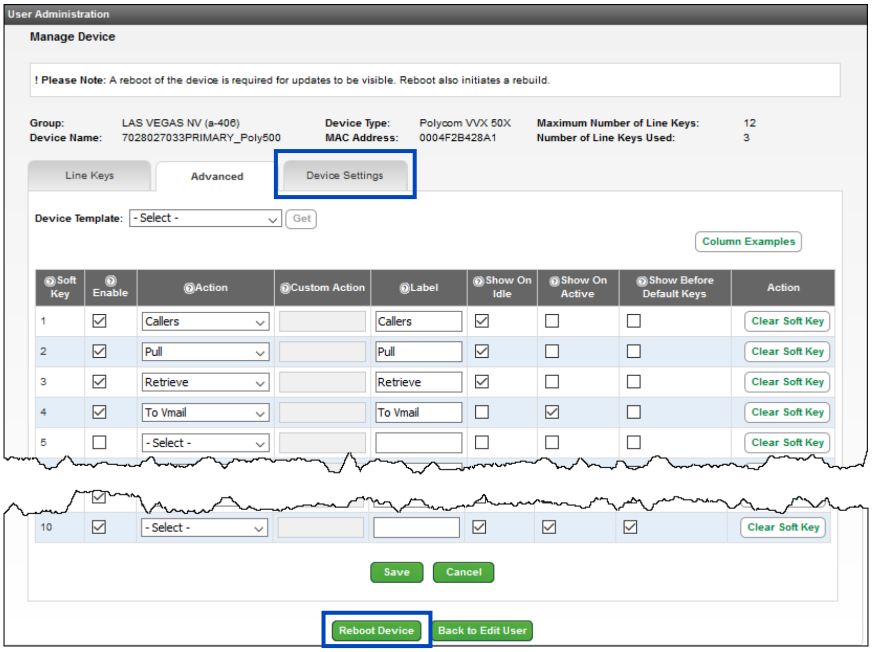
82. When all soft keys have been added, click the **Save** button.
83. Adding or modifying soft keys requires a reboot of the phone.
84. Click the **Reboot Device** button or click the **Device Settings** tab to continue making device changes.



85. If you're not familiar with a particular soft key feature, click the **Column Examples** button.
86. You'll be presented with a brief description about each feature that can be added as a soft key.



87. Click the **Reboot Device** button to reboot and apply key changes.
88. Or, click the **Device Settings** tab to make additional setting changes for this device.

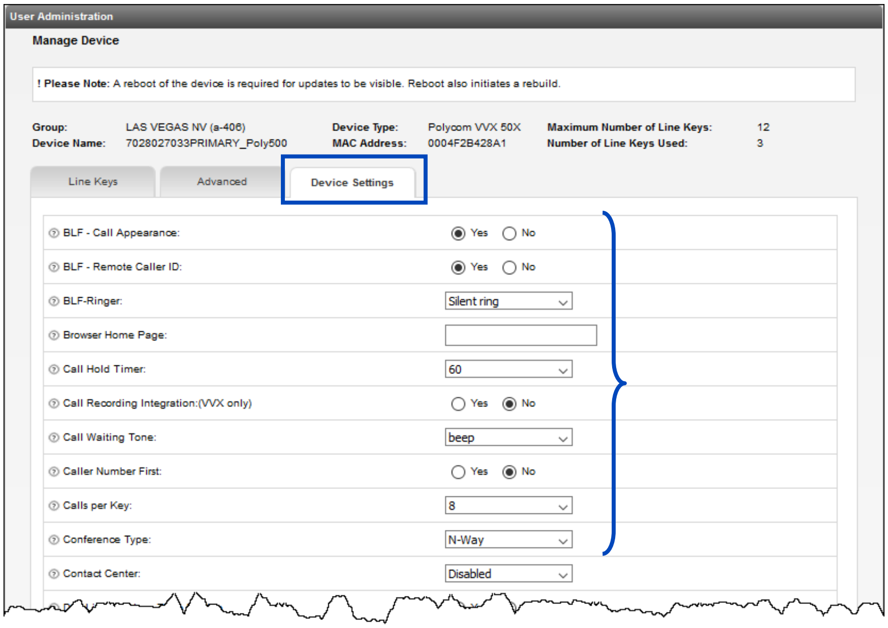


89. **BLF-Call Appearance** determines if the screen splash occurs on incoming calls.
90. Select Normal or Automata from the **BLF-Default Line Key Action** dropdown list
    - **Normal** -- used to initiate a call to that user when pressing the BLF key
    - **Automata** -- (preferred setting): used to Answer/Transfer/Park when pressing the BLF key
91. **BLFBLF-Remote Caller ID** provides caller ID of incoming call or ‘unknown’.
92. **BLF Ringer** allows you to select from a series of ring types or silent from the dropdown list.
93. When **Browser Home Page** is configured, it enables a built-in web browser on the phone.

Note: The address in the browser home page field should be structured in the following format http://xxx.xxx (http://goggle.com); when accessing Applications on your device, the website entered in this field will launch (supported on VVX models only).

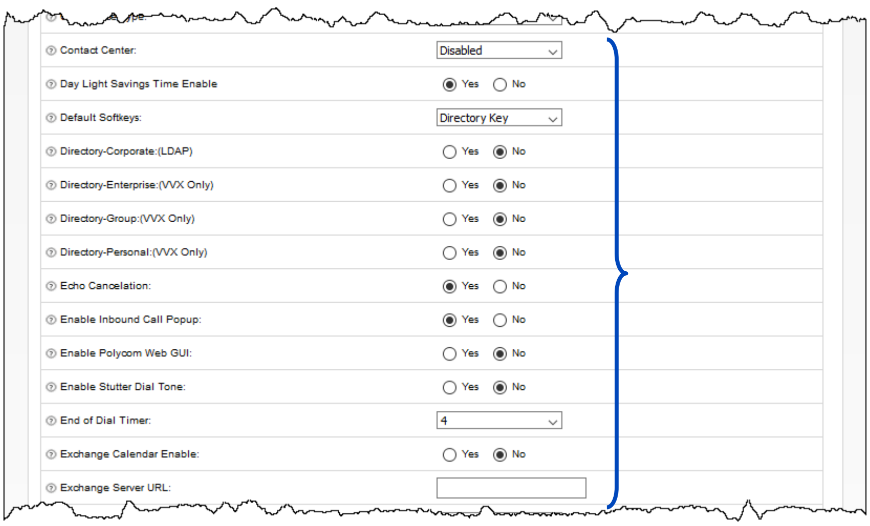
94. **Call Hold Timer** provides a tone as an audible reminder that a caller is on hold; the feature default setting is **Disabled**. Select **10-60 seconds** from the dropdown list. The phone provides an audible ring every XX seconds until the caller is removed from hold or hangs up.
95. Click the **Yes** radio button, to enable **Call Recording Integration** (VVX only); this provides soft keys for starting, pausing, and resuming recordings for users with call recording licenses.
96. **Call Waiting Tone** allows you to select the audible tone from the dropdown list.
97. **Caller Number First** displays caller ID name above or below the number.

98. **Calls Per Key** indicates the maximum number of calls that can be active or held on one line.
99. **Conference Type** allows you to set each user to 3-Way or N-Way conference calling.



100. **Contact Center** allows you to enable call center stats and agent login integration; agent login integration is only available on Contact Center Standard seats.
    - **Disabled –** won't provide a queue stats splash screen or an agent login button
    - **Enable All –** queue stats will splash on the screen and the device will have a login button
    - **Enable Login Keys –** will provide an agent login key only
    - **Enable Stats –** will provide queue stats splash screen only
101. **Day Light Savings Time Enable** enables the Day Light Savings Time setting on the phone.
102. Use the **Default Softkeys** feature to add Directory and DND soft keys to the bottom of the display. This feature is **Disabled** by default, so if you intend to provide soft keys for those features to your users, select Directory Key, DND or Enable All if you want both soft keys to appear.
103. **Directory-Corporate** (LDAP) – enables Corporate Directory search using LDAP, must configured LDAP settings for this option.
104. **Directory-Enterprise** (VVX only) – as new directory option that searches within the Enterprise Directory.
105. **Directory-Group** (VVX only) – enables new directory option, which searches entries in the Common Group Directory, this directory is managed by the primary or sub-administrator(s).
106. **Director-Personal** (VVX only) – enables new directory option, that searches entries added and modified by the user.
107. **Echo Cancelation** controls the built-in echo cancelation function.
108. Disable the **Enable Inbound Call Popup** feature, to turn off the popup that displays for incoming calls on VVX models; this provides the ability to transfer active calls, while new calls are ringing.
109. **Enable Polycom Web GUI** allows you to access phone settings from a browser. This should only be used when needed as it could pose security issues.

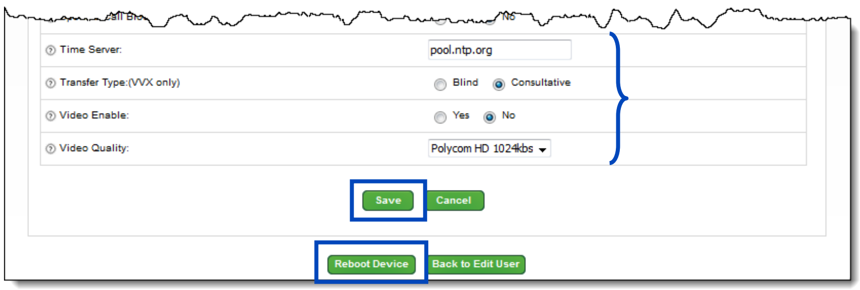
110. **Enable Stutter Dial Tone** turns on an audible alert when the user has a voicemail message.
111. From the **End of Dial Timer** dropdown list, select in seconds from **2-6**, the delay before a call is sent when extension dialing and transferring. This speeds up the dialing and transfer process, the user does not have to press the # key or the send call soft key to complete the dialing or transfer transaction.
112. **Exchange Calendar Enable** turns on the calendar on select models of phones (VVX models only).
113. **Exchange Server URL** input the Exchange calendar URL, must be OOF URL for Exchange (VVX models only).



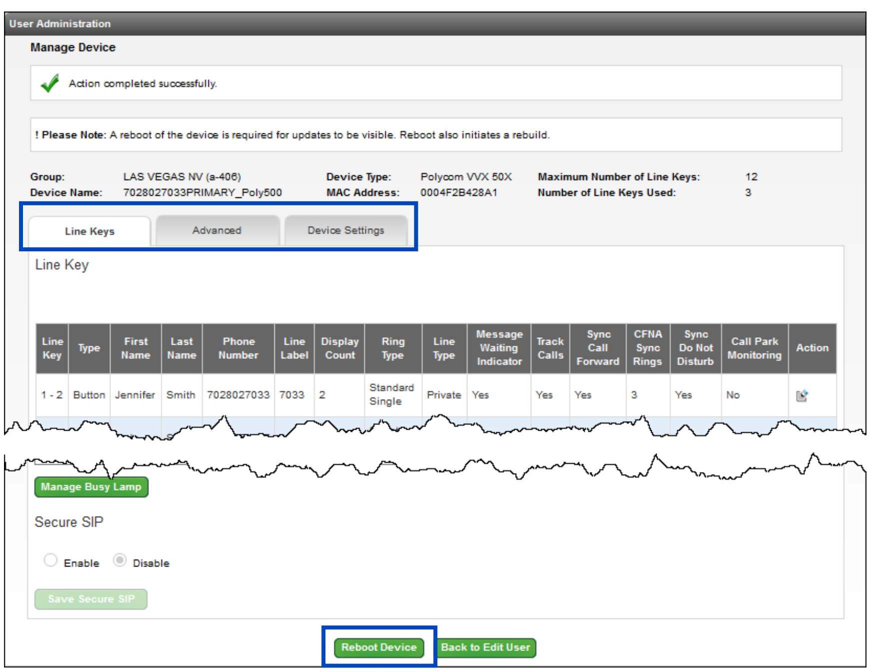
114. **Flexible Expansion Modules Keys** allows you to build the primary line of the phone on all of the keys on the phone itself, thereby moving shared call appearances and busy lamp fields to build on the expansion module.
115. The default setting for **Handset Background Noise** is **None**. Change that setting by selecting **01-10** from the dropdown list. As the filter increases, the far end caller may have more difficulty hearing the speaker due to the increase of noise suppression.
116. **Handset SideTone** is a feature that allows a user to hear their own voice in the receiver earpiece. The selected adjustment from the dropdown list, increases and decreases the volume for the handset. **0** is the default setting, select from **+3 to -12** from the dropdown list.
117. The default setting for **Headset Background Noise** is **None**. Change that setting by selecting **01-10** from the dropdown list. As the filter increases, the far end caller may have more difficulty hearing the speaker due to the increase of noise suppression.
118. **Headset SideTone** is a feature that allows a user to hear their own voice in the headset earpiece. The selected adjustment from the dropdown list, increases and decreases the volume for the headset. **0** is the default setting, select from **+3 to -12** from the dropdown list.
119. **Hot Dial Enable** must be turned on to use that feature.
120. **Hot Dial** automatically dials the predefined number when the phone goes off hook.

121. When this device is setup as a hoteling host and **Hoteling Integration** is enabled by clicking the **Yes** radio button, a guest login button appears when the user enables the **Hotel Host** feature in their end user portal; if the **No** radio button is selected, the guest login button won't appear and a guest would need to associate to that device through their end user portal, not via the phone.
122. Click the **Yes** radio button for the **Line Numbering (VVX only)** feature to add a line number indicator in front of the extension or line key name, i.e., **1_1234**, **2_1234**, **3_1234**, etc., or **1_Main**, **2_Main**, **3_Main**, etc.
123. Select **Yes** from the **Multicast Paging Initiate** dropdown list to designate this device as a multicast pager.
124. From the **Multicast Paging Zone** dropdown list, determine which zone this user should be a member of; choose from zones 1-5; the paging initiator must be assigned a zone, which then provides a paging soft key that is used to initiate the page.
125. **Screen Capture** requires the Polycom Web GUI to be enabled; if you click the **Yes** radio button, this allows the web to see the display and button layout on a device.
126. **Spoofed Call Blocking** (not used when on CenturyLink access) when phones are not connected to the CenturyLink network, users may receive calls from extensions that don't exit.
    - **CAUTION:** If you turn this feature on when using a CenturyLink connection, the phone won't work properly

127. Use internal SNTP time service for the **Timer Server** setting.
128. **Transfer Type** (for VVX handset models only):
    - **Blind** – the default transfer type will be blind or unsupervised, for that device
    - **Consultative** (default) – the default transfer type will be consultative or supervised, for that device
129. **Video Enable** turns on the Polycom Video Codec H264 for use with video enabled phones.
130. **Video Quality** is used to set the video quality on video enabled phones. Higher quality video utilizes more bandwidth.
131. Click the **Save** button**.**
132. Click the **Reboot Device** button; most setting changes made on this page do require a reboot.



133. After all configuration settings have been added or modified on the **Line Keys**, **Soft Keys** and **Device Settings** tab.
134. Click the **Reboot Device** button to reboot the phone and apply all setting changes.
135. A **Reboot Device** button is available on all three settings tabs and can be rebooted at any time.
    - **REMINDER:** If the device is rebooted while the user'ss on a call, the call won't be disconnected. When the user disconnects their call, the phone immediately reboots.



Copying an Existing User

The **Copy** feature allows you to copy an existing user that has the correct seat type, group, and make/model of phone for the new user. This prevents you from having to entirely build the new user.

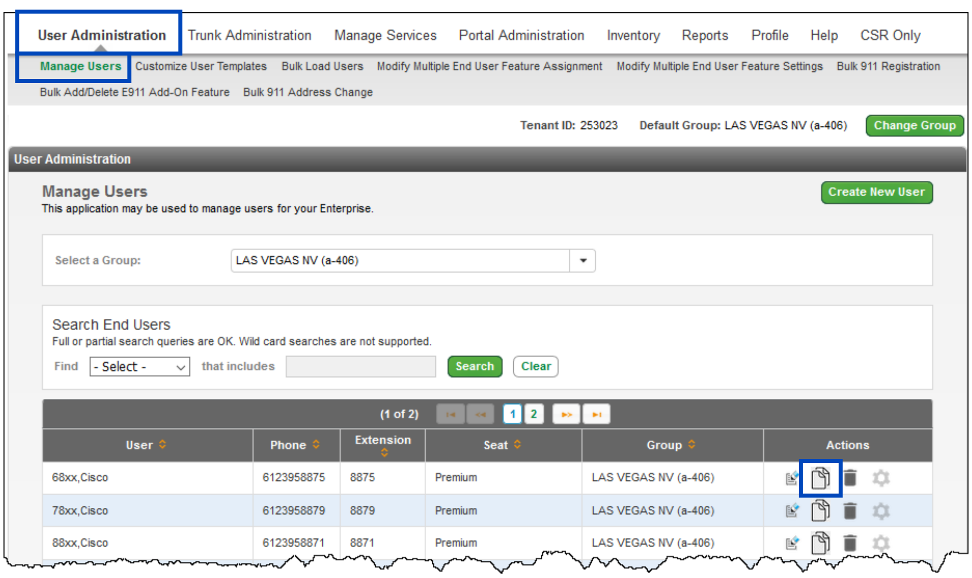
Example of fields that <u>can</u> be changed using the copy feature:

- First name/last name
- Phone number/extension
- Portal user ID and domain
- Email address
- MAC address

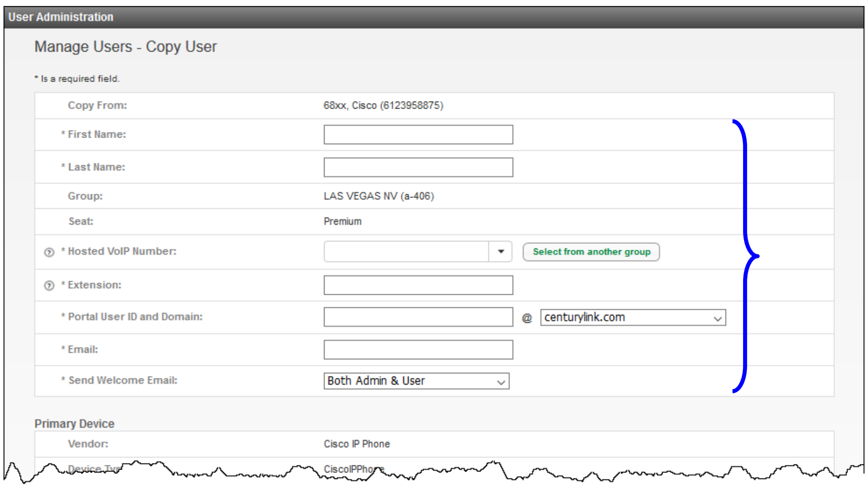
Example of fields that <u>cannot</u> be changed using the copy feature (be sure to copy a user that has the same group, seat type and phone make/model as the new user you're building):

- Group
- Seat type
- Phone vendor/make/model

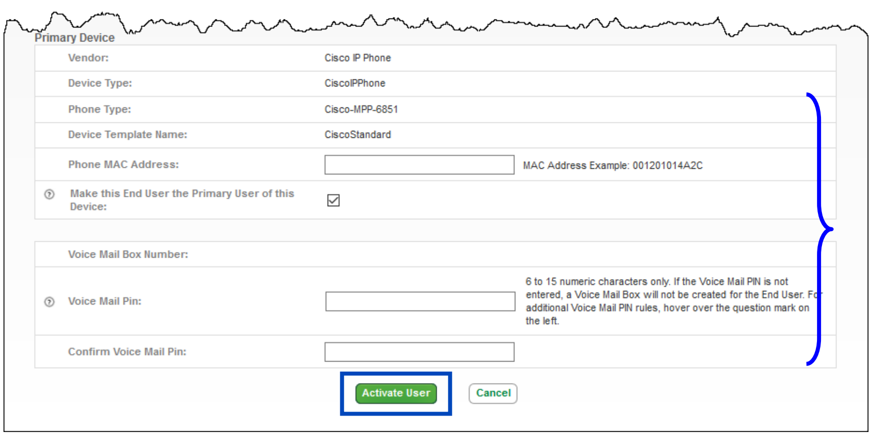
1. Click **User Administration** from the main menu.
2. Click **Manage Users** from the sub-menu.
3. Select your group from the **Select a Group** dropdown list if you have more than one location.
4. Use the **Search End Users** feature to refine your search criteria if your group is large.
5. Click on the **Copy** icon for the user's seat you're copying to build your new user's seat.



6. On the **Manage Users – Copy User** page, enter information for the new user.
7. Enter the user's first and last name in the **First Name** and **Last Name** fields.
8. Click the Hosted VoIP Number drop down list to select a number; if you want to select an available number from another group, click the **Select from another group** button.
9. The extension prefills based on the number you select and your dialing plan, but this field can be changed if necessary.
10. Enter the user's portal ID in the **Portal User ID and Domain** field; if more than one domain is assigned to your tenant, select the correct tenant from the **Domain** drop down list.
11. Enter the user's email in the **Email Address** field.
12. Select who should receive the welcome email from the **Send Welcome Email** drop down list.

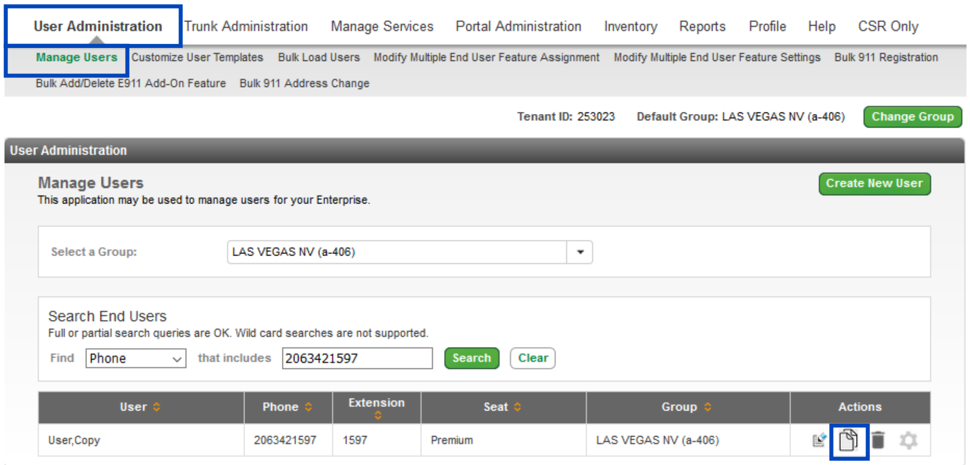


13. Enter the MAC address for the new phone in the **Phone MAC Address** field.
14. Enter a PIN for voicemail in the **Voice Mail PIN** field.
15. Confirm the PIN by re-entering the PIN in the **Confirm Voice Mail PIN** field.
16. Click the **Activate User** button.

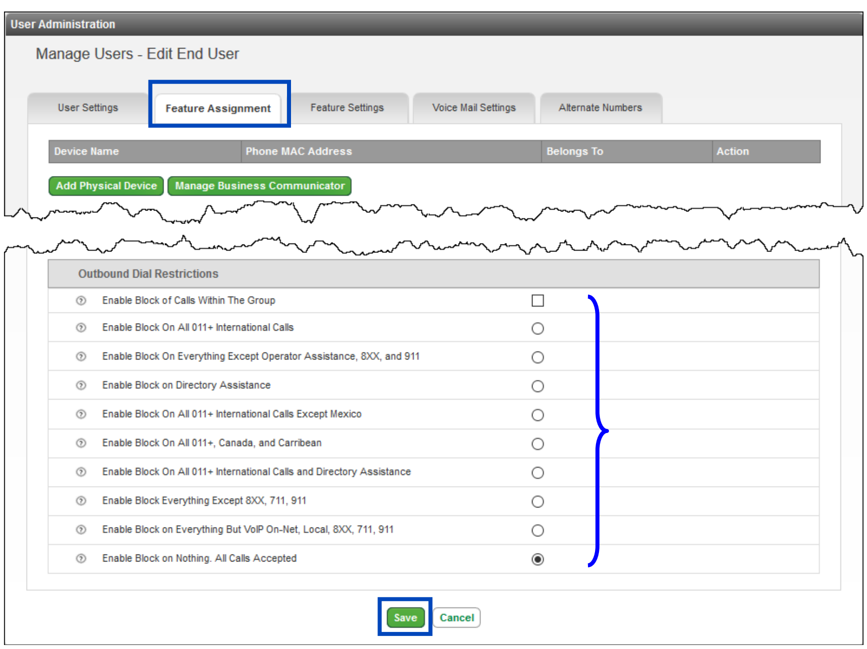


The copy feature doesn't copy every setting of the user being copied. For the new user, Edit the user and check the following settings:

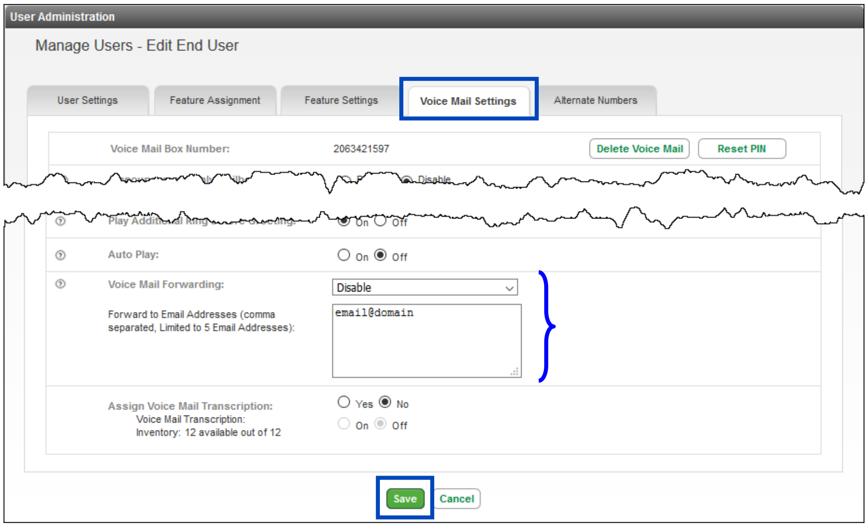
1. Click **User Administration** from the main menu.
2. Click **Manage Users** from the sub menu.
3. Click the **Edit** button for the new user.



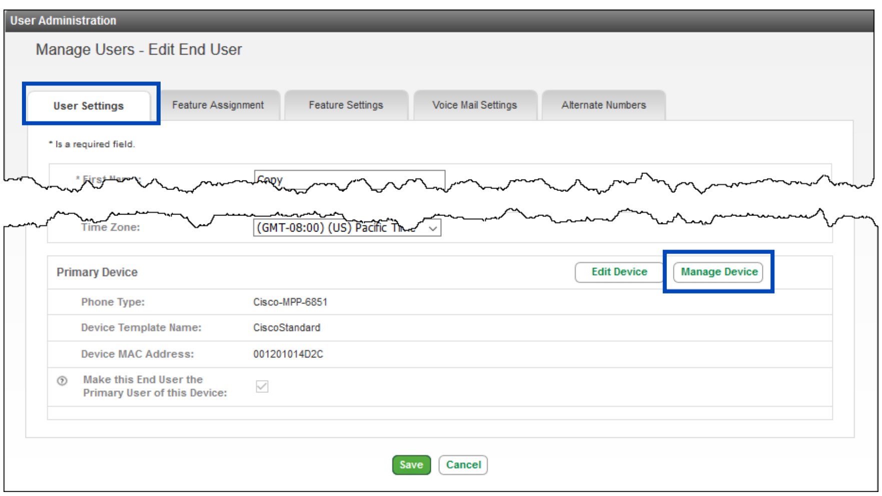
4. Click the **Feature Assignment** tab.
5. Scroll **Outbound Dial Restrictions** at the bottom of the page.
6. Review the assign dialing restriction from the user you copied from and change accordingly by clicking the correct radio button.
7. Click the **Save** button.



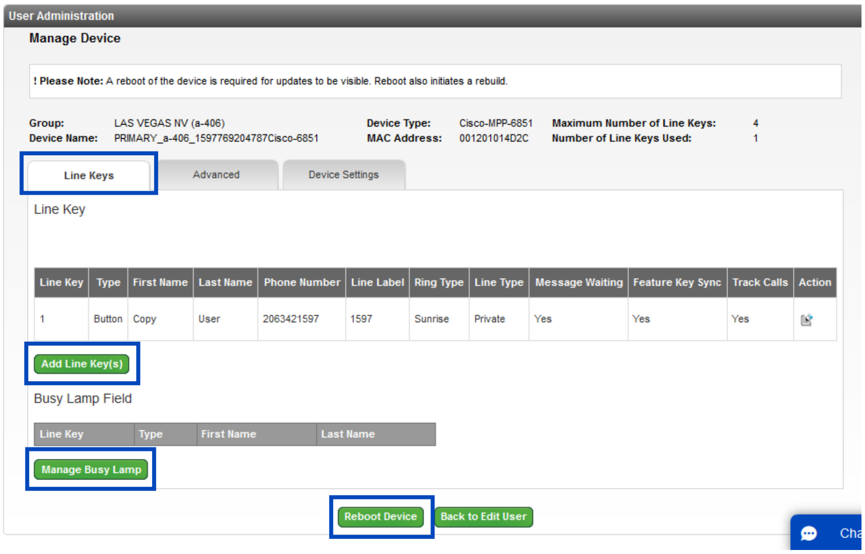
8. Click the **Voice Mail Settings** tab.
9. By default, when copying a user, the Voice Mail Forwarding setting will be set to Disable; to change this setting select an option from the **Voice Mail Forwarding** drop down list.
10. If enabling this feature, enter an email address(es) or distribution list(s) in the **Forward to Email Addresses** field.
11. Click the **Save** button.



12. From the **Manage Users – Edit End User** page, scroll to **Primary Device**.
13. Click the **Manage Device** button.



14. **Shared Call Appearances** and **Busy Lamp Fields** don't copy to the new user.
15. To add Shared Call Appearances, click the **Add Lines Key(s)**.
16. To add Busy Lamp Fields, click the **Manage Busy Lamp** button.
17. Click the **Reboot Device** button for changes to take place.

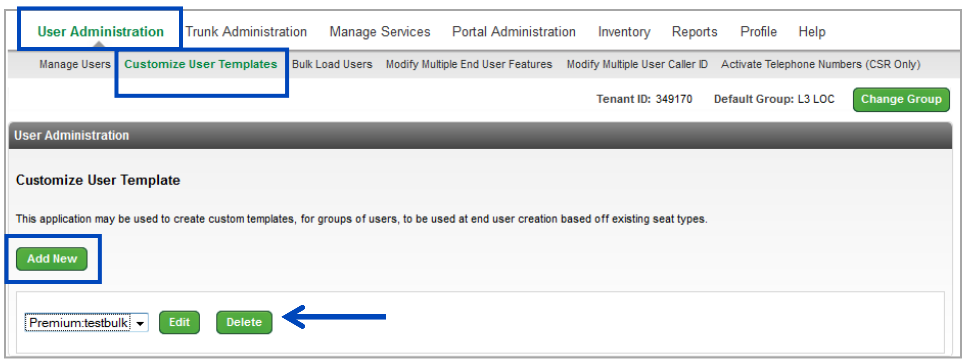


Custom User Templates

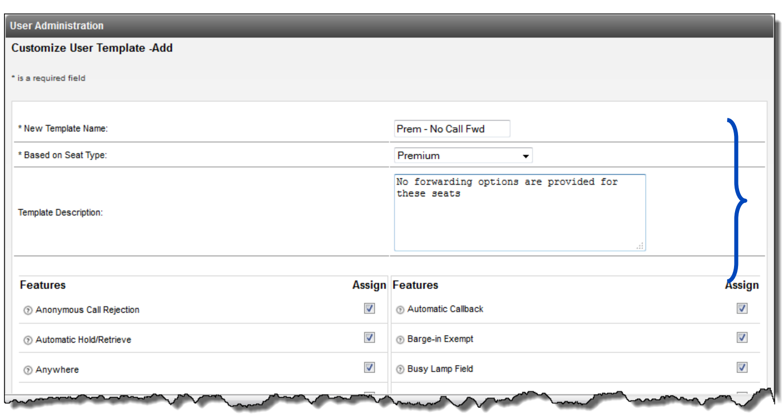
Custom User Templates are used to assign a specific set of features and class of service (COS) to users during user creation. Each **Custom User Template** is created for a specific seat type. If you have a group of Premium seats that do have a particular feature like Call Forward, or access to Directory Service (411), you can create a **Custom User Template** and assign to a group of users within the tenant.

Note: Editing a **Custom User Template** does not change the users that were assigned that template during user creation, it will only affect users that the template applied to when editing or creating a new user in the future.

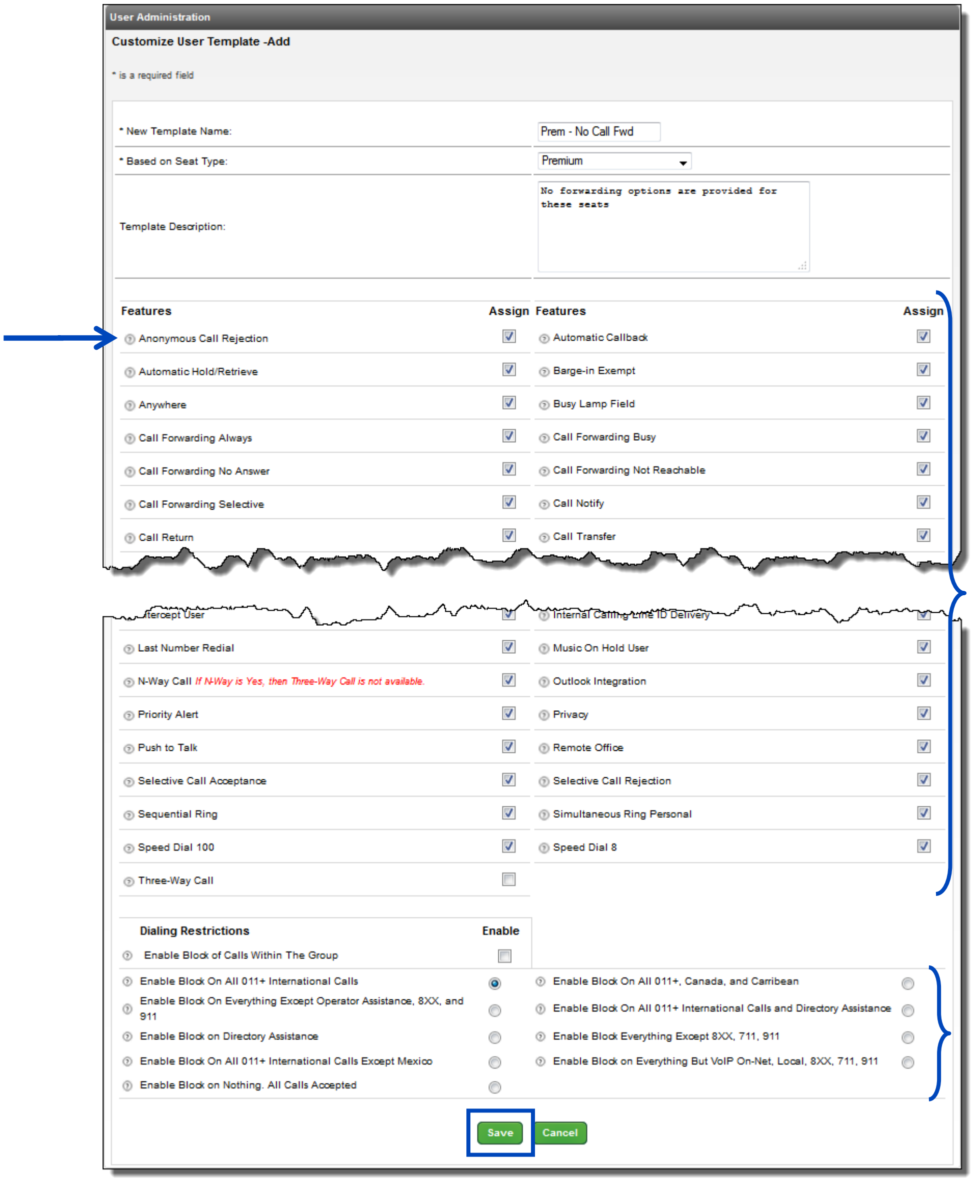
1. Click **User Administration** from the main menu.
2. Click **Customize User Templates** from the sub menu
3. If you have **Custom User Templates** built, you can click on the dropdown list to view all existing templates.
4. After selecting a template from the dropdown list, click the **Edit** or **Delete** button to manage that template.
5. To add a new template, click the **Add New** button.



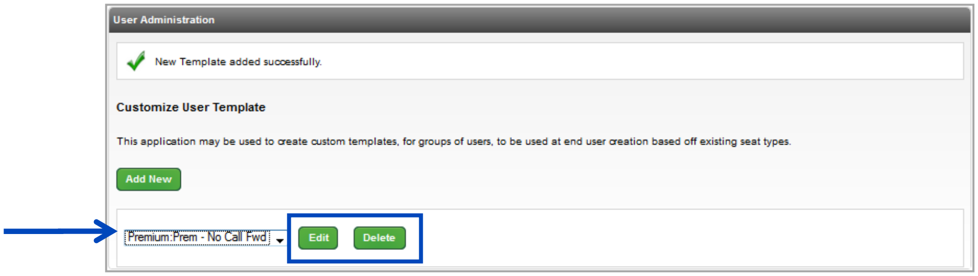
6. Provide a name for the template in the **New Template Name** field. The name should be something meaningful that you'll recognize later (e.g., Premium No Call Fwd, Premium John Pickup Group).
7. Select the **Seat Type** from the dropdown; the seat type will determine which features you're able to enable/disable.
8. Fill in the optional **Template Description** field by noting a feature specific description of your template.



9. By default, all available features for the selected seat type are **Enabled**. To **Disable** a feature, uncheck the corresponding box under the **Assign** column.
    - For a brief description of any feature, hover over the "**?**"
10. By default, **Enable Block On All 011+ International Calls** is set; to change dialing restrictions for this template, click the radio button for the corresponding setting.
11. When all options are selected, click on the **Save** button.



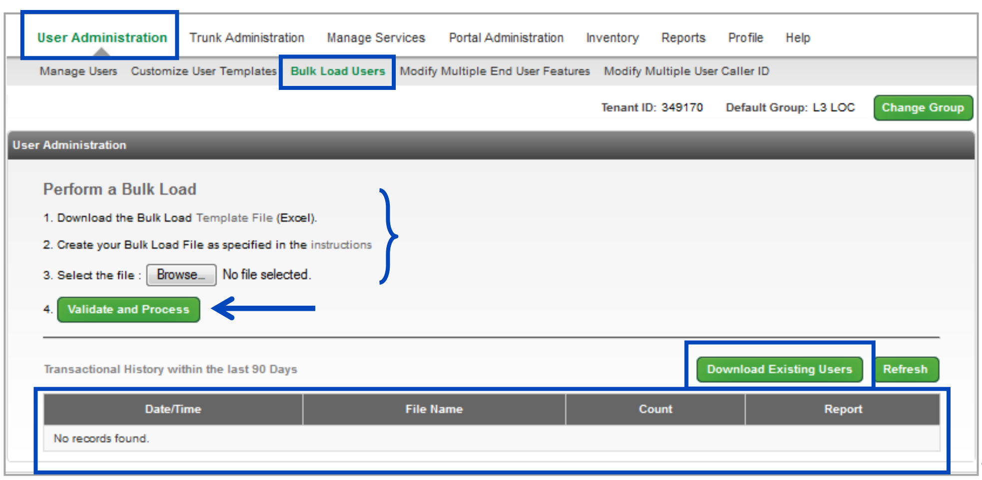
12. The new **Custom User Template** is now available from the dropdown list, and can be easily edited/modified
13. Click on the **Edit** button to edit the features of that template, click the **Delete** button to delete that custom template.



Bulk Load Users

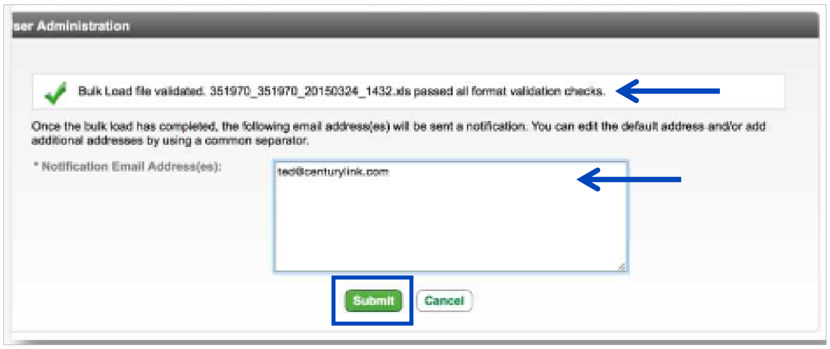
The **Bulk Load Users** tool allows you to fill out a spreadsheet with all users and import that spreadsheet into the portal. The tool will then process and activate all of the new users. If you have existing users listed in the spreadsheet, you can input an action for each user such as **Create**, **Delete**, or **Update**, and the tool will perform those actions as well. In addition, you can **Download Existing Users**, to make changes to multiple groups or Users.

1. Click on **User Administration** on the main menu.
2. Click on **Bulk Load Users** in the sub menu.
3. Download the **Bulk Load Template File** by clicking on the **Template File** link.
4. Fill out the file with all of the information for your users and settings.
5. For a guide on the information that is required within the **Template File**, click on **Instructions**.
6. Upload the file by clicking the **Browse** button to browse your computer and select the file.

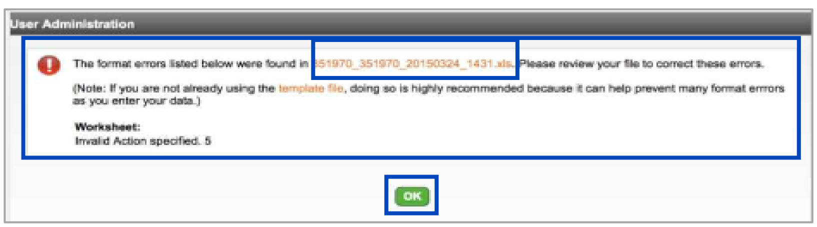


fs

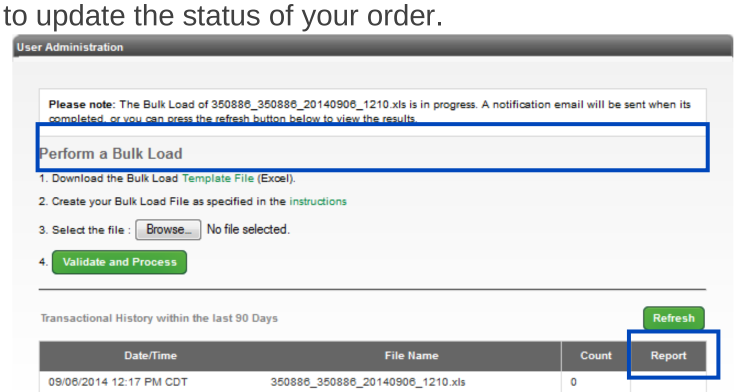
7. Once you browse to your document, click the **Validate and Process** button. The tool will then process the file.
8. You'll receive a confirmation window indicating that all format validations passed.
9. In the **Notification Email Address(es)** field, enter the email address(es) using comma separation, that you want to receive notification that the bulk upload has completed.
10. Click the **Submit** button.



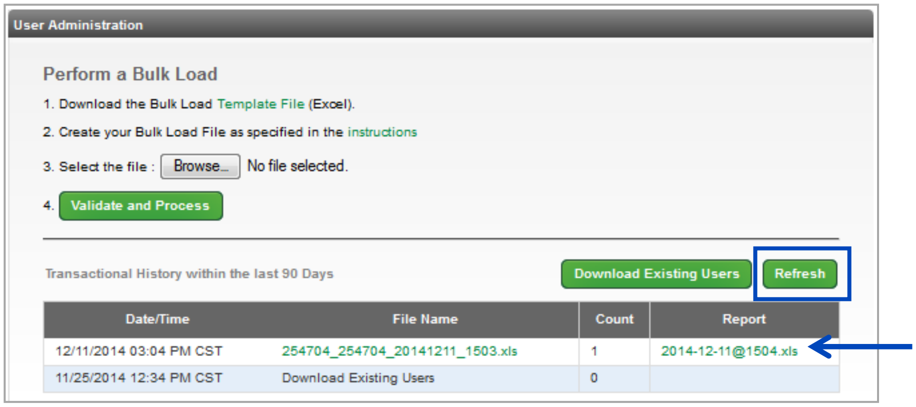
11. If your bulk upload spreadsheet does not pass validation, you'll receive an error.
12. Review your spreadsheet for errors, by clicking on the .xls file within this notification.
13. Correct all errors and upload the corrected spreadsheet.



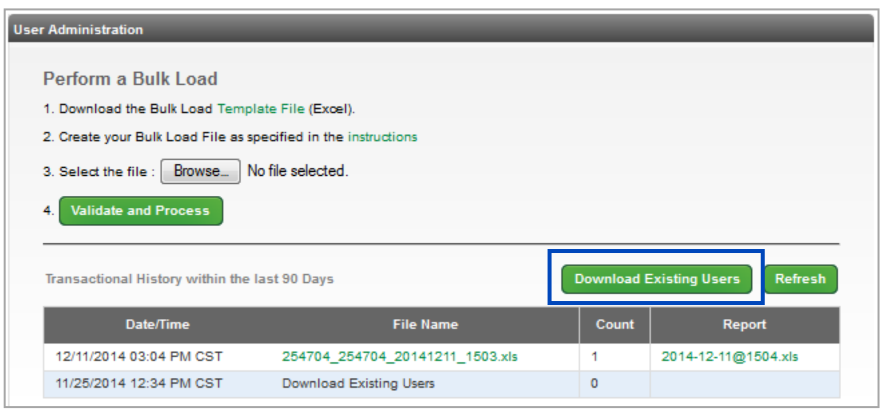
14. Another notification window will display indicating that your order is in process, and that an email notification will be sent when the order is complete.
15. The report in process will be listed under the **Transactional History** window for reference and status.
16. Once the email notification email has been received that your order is in process, click the **Refresh** button to update the status of your order.



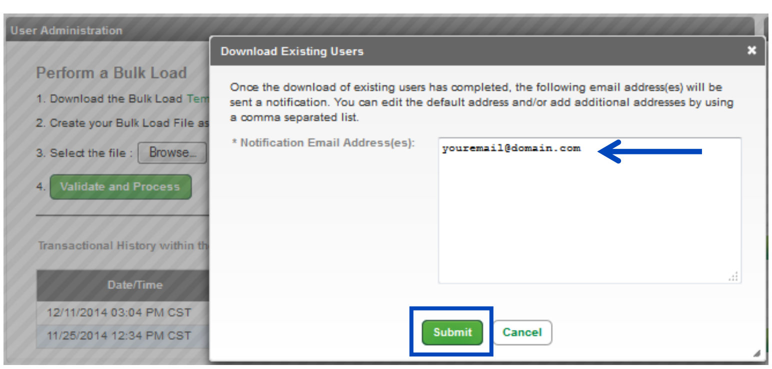
17. After clicking the **Refresh** button, your order status information is updated including a link to the spreadsheet under the **Report** column.
18. Click on the **Report Link** to open the spreadsheet – it may take a few minutes to download depending on the size of the spreadsheet.
19. **Transactional History Report** will provide reports for all of your bulk upload orders for the past 90 days. Click on a report link at any time to review the information contained within that report.



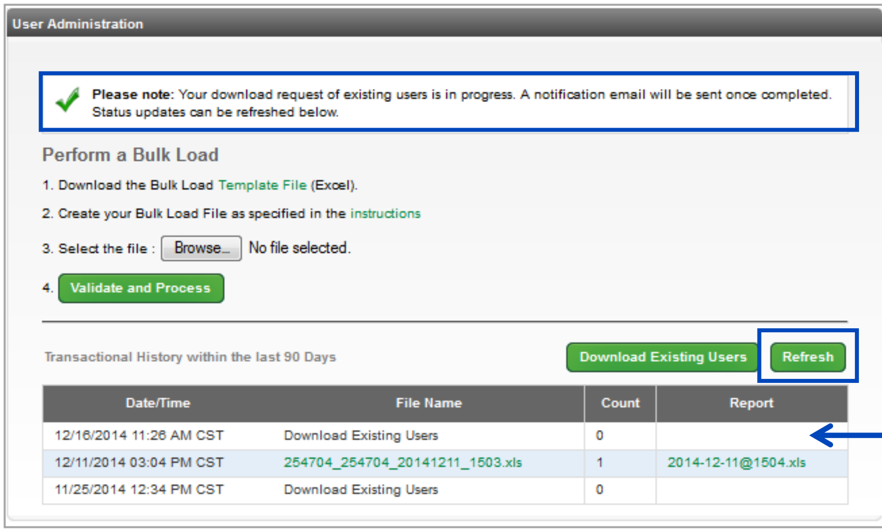
20. To download a report for all Existing Users, click the **Download Existing Users** button.



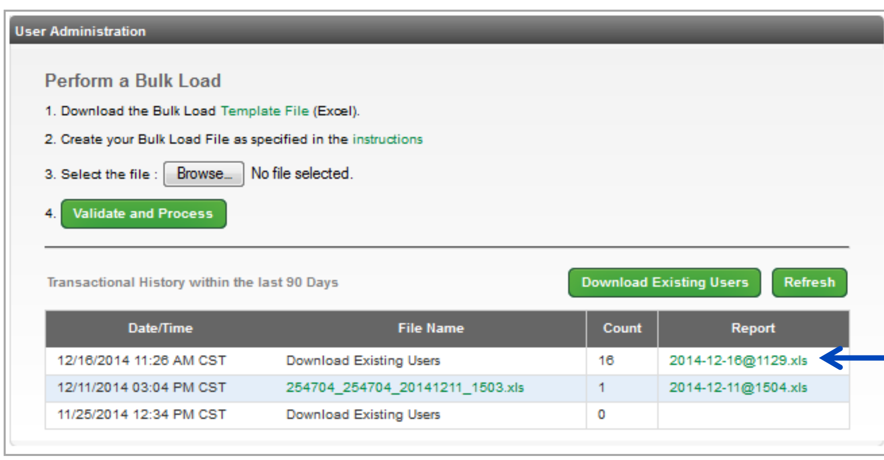
21. A window appears for email notification and contains the email address of the primary administrator.
22. Add/modify the email in the **Notification Email Address(es)** field.
23. Click the **Submit** button.



24. A notification will be sent to the email address(es) noted Email Notification field.
25. The time it takes to receive the report will vary based on the size of your company and the amount of information that needs to be downloaded.
26. Once that notification is received, click the **Refresh** button.

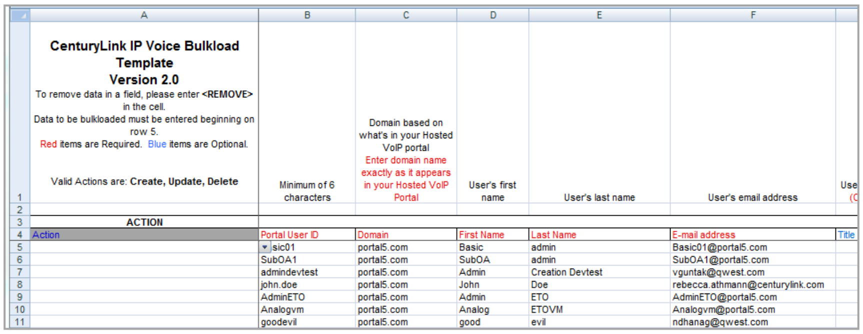


27. After clicking the **Refresh** button, there will be a link under the Report column.
28. Click on the link to download your report.



29. The report opens and can be saved or used as any other Excel document.
30. To make changes to multiple users, update the information in the appropriate fields, and follow the process to Upload the Bulk Load Spreadsheet.

    Note: Delete all users from this spreadsheet that you don't wish to change, before performing a new upload.

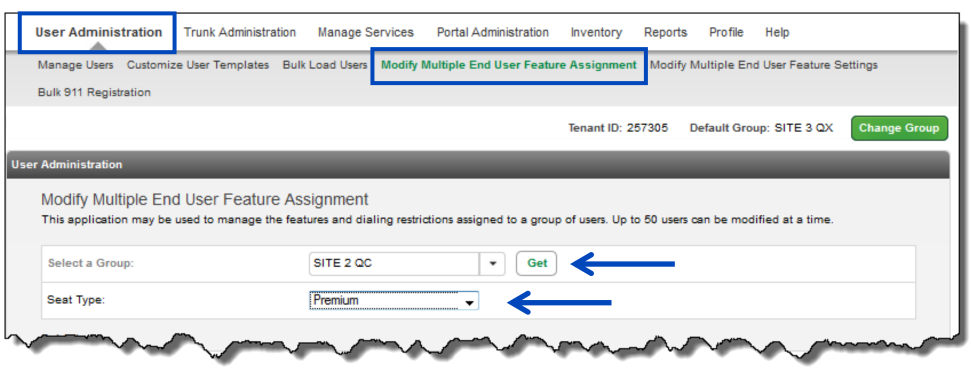


	A	B	C	D	E	F
1	CentuRyLink IP Voice Bulkload Template Version 2.0 To remove data in a field, please enter <REMOVE> in the cell. Data to be bulkloaded must be entered beginning on row 5. Red items are Required. Blue items are Optional. Valid Actions are: Create, Update, Delete	Minimum of 6 characters	Domain based on what's in your Hosted VoIP portal Enter domain name exactly as it appears in your Hosted VoIP Portal	User's first name	User's last name	User's email address
2						
3	ACTION					
4	Action	Portal User ID	Domain	First Name	Last Name	E-mail address
5		sic01	portal5.com	Basic	admin	Basic01@portal5.com
6		SubOA1	portal5.com	SubOA	admin	SubOA1@portal5.com
7		admindevtest	portal5.com	Admin	Creation Devtest	vguntak@qwest.com
8		john.doe	portal5.com	John	Doe	rebecca.athmann@centurylink.com
9		AdminETO	portal5.com	Admin	ETO	AdminETO@portal5.com
10		Analogvm	portal5.com	Analog	ETOVM	Analogvm@portal5.com
11		goodevil	portal5.com	good	evil	ndhanag@qwest.com

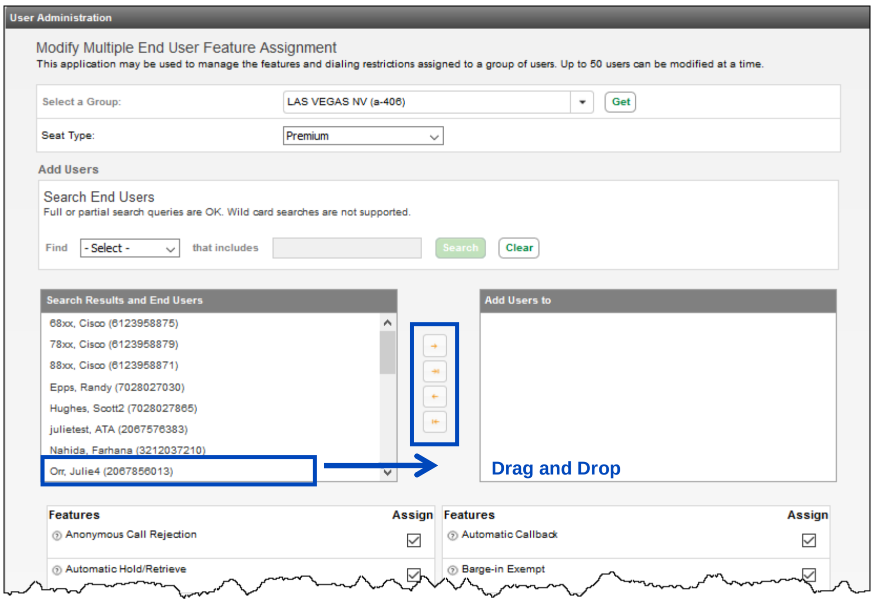
Modify Multiple Ender User Assignment Feature

The **Modify Multiple End User Feature Assignment** allows you to make features assignment changes to multiple users within a group. Features are defined as **Call Forward Always**, **Do Not Disturb**, **Calling Waiting**, etc.

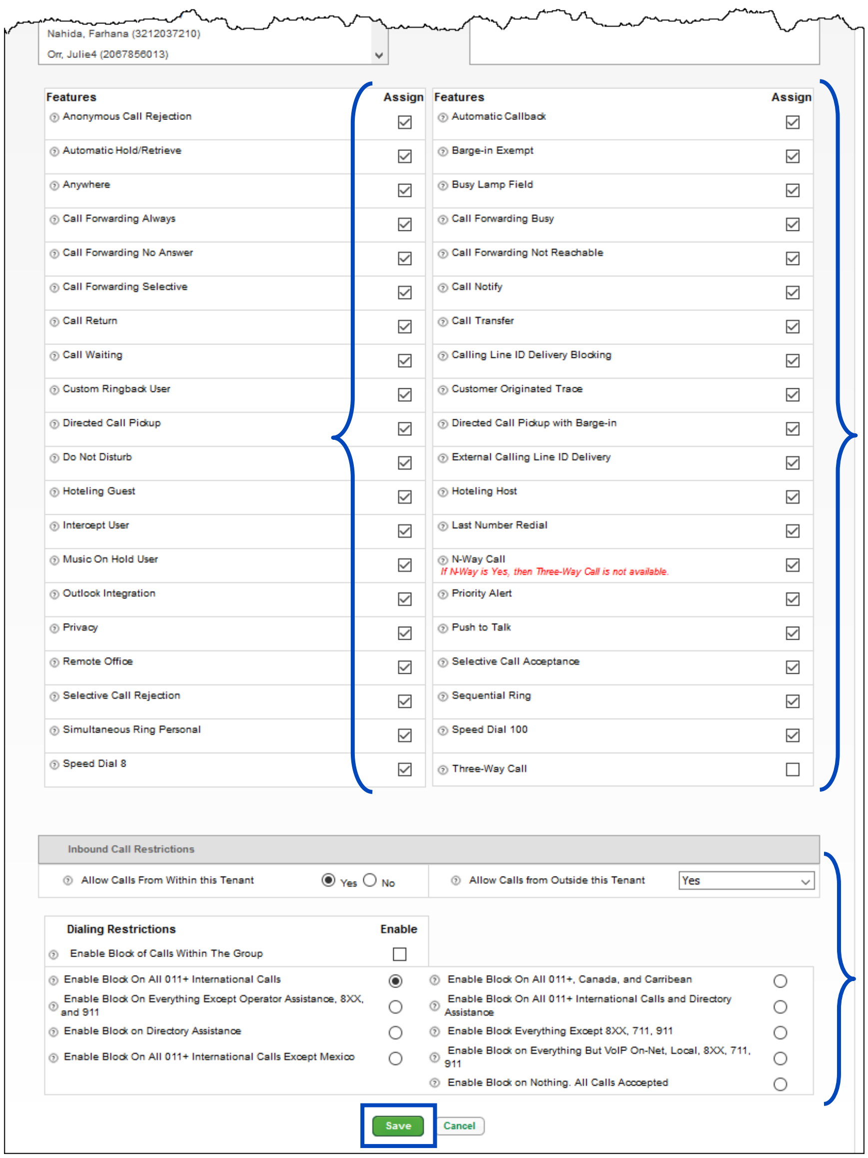
1. Click on **User Administration** from the main menu.
2. Click on **Modify Multiple End User Feature Assignment** in the sub menu.
3. Select the group, and **Seat Type** from the dropdown lists that you want to modify.



4. Once you select a group and **Seat Type**, you can refine the search for your user(s) by **First Name**, **Last Name** or **Phone Number**.
5. Enter a sequence of letters or numbers for the user(s) you're searching for, in the "**that includes**" field, and click the **Search** button. If you choose not to refine the search by user name or number, all users within that group, assigned to that **Seat Type**, will be displayed in the **Search Results and End Users** field.
6. The **Search Results and End Users** field will list all users in that group, which fit the search criteria.
7. From this list, drag and drop the user(s) for which you wish to modify feature (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
8. If you add a user in error, highlight the user in the **Add Users To** field, and drag and drop them back to the **Search Results and End Users** field.



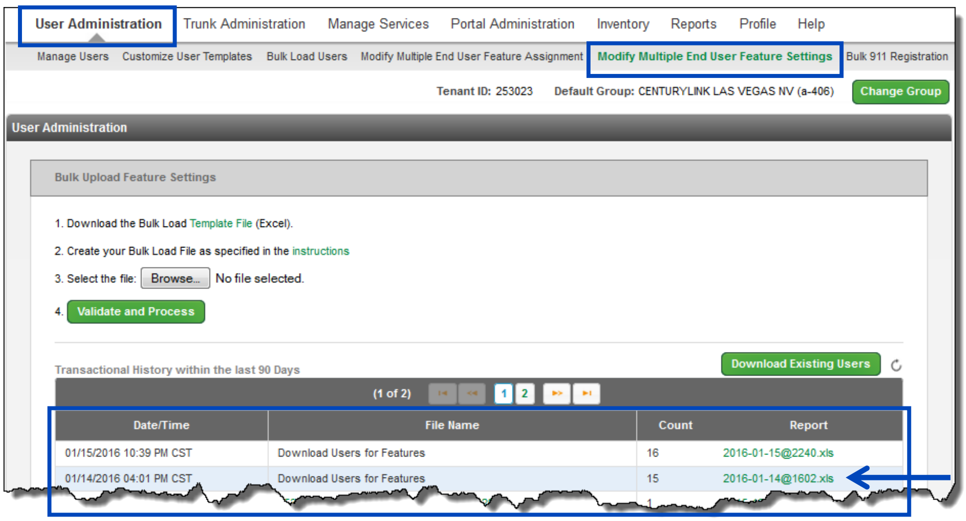
9. Once user(s) are identified in the **Add Users To** field, you can decide which **Features** to activate or deactivate.
10. Click the check box to activate or deactivate a **Feature**; you can make changes to multiple features. This is just a sample of the features you can make changes to, and you'll have access to all **Features** and **Dial Restrictions** from this screen within the portal.
11. Once you have selected/deselected each **Feature** or **Dialing Restriction** you want to modify, click the **Save** button. This modifies the selected changes for every user that was moved to the **Add User To** field.



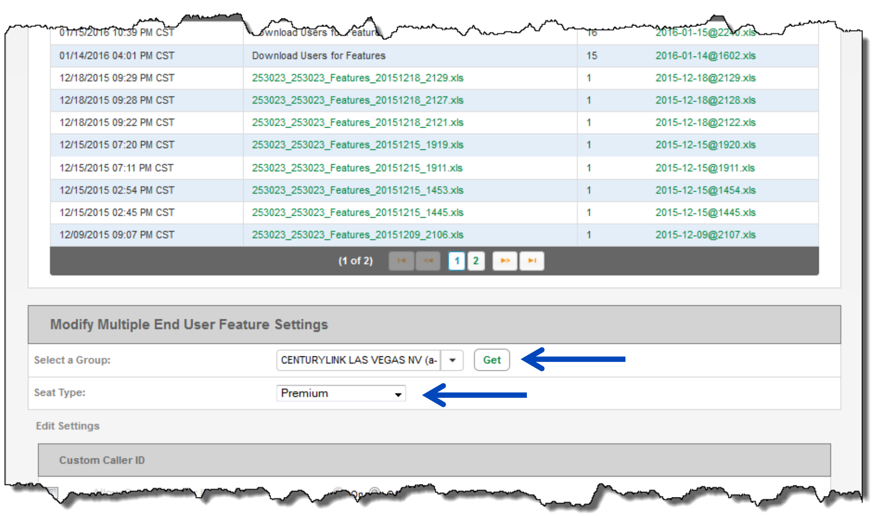
Modify Multiple Ender User Feature Settings

The **Modify Multiple End User Feature Settings** allows you to make feature settings changes to multiple users within a group at one time, or via Bulk Upload. Features are defined as **Call Forward Always**, **Do Not Disturb**, **Calling Waiting**, etc.

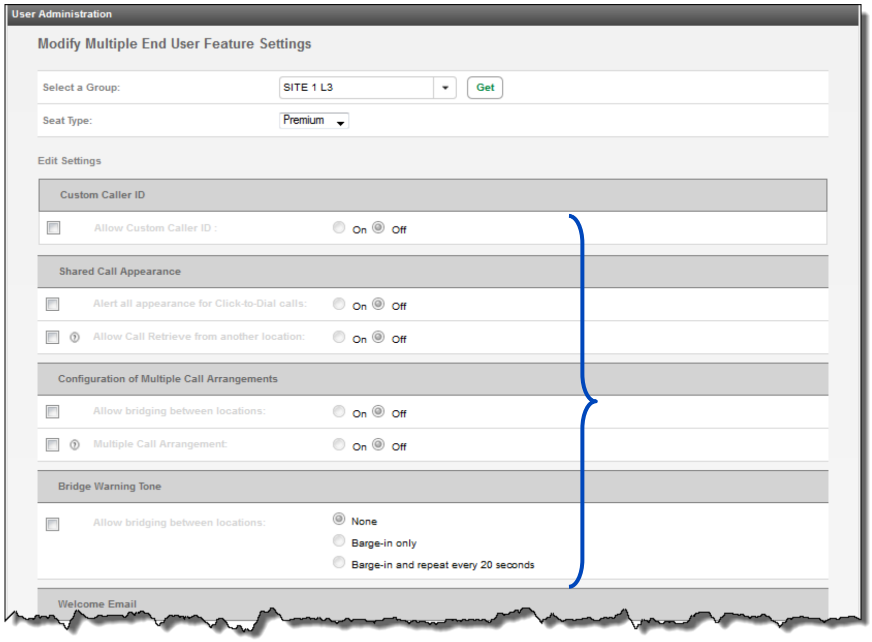
1. Click on **User Administration** from the main menu.
2. Click on **Modify Multiple End User Feature Settings** in the sub menu.
3. Previously uploaded spreadsheets will be displayed in the **Transactional History** field and can be reviewed by clicking on the link.



4. To modify features settings, locate and select the **Group**, and **Seat Type** from the dropdown lists that you wish to modify.
5. After options are selected, click the **Get** button.

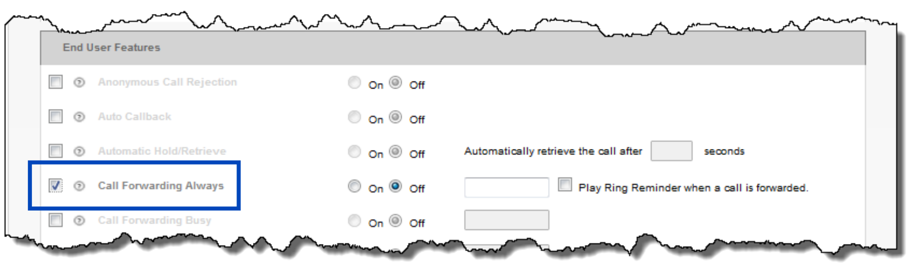


6. All feature options for the seat type you selected are provided for editing.

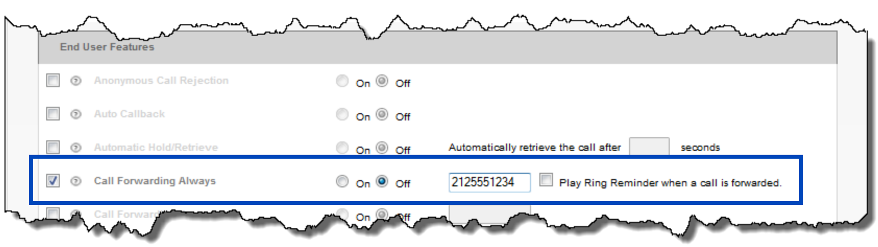


7. If you chose to not send the welcome letter to the primary admin or the end user, or if the user misplaced their welcome email, you can selecting choose individuals within the group that should receive the email.
8. Click the **Send Welcome Email** check box.
9. From the dropdown list, choose **Admin Only**, **User Only** or **Both Admin & User**.

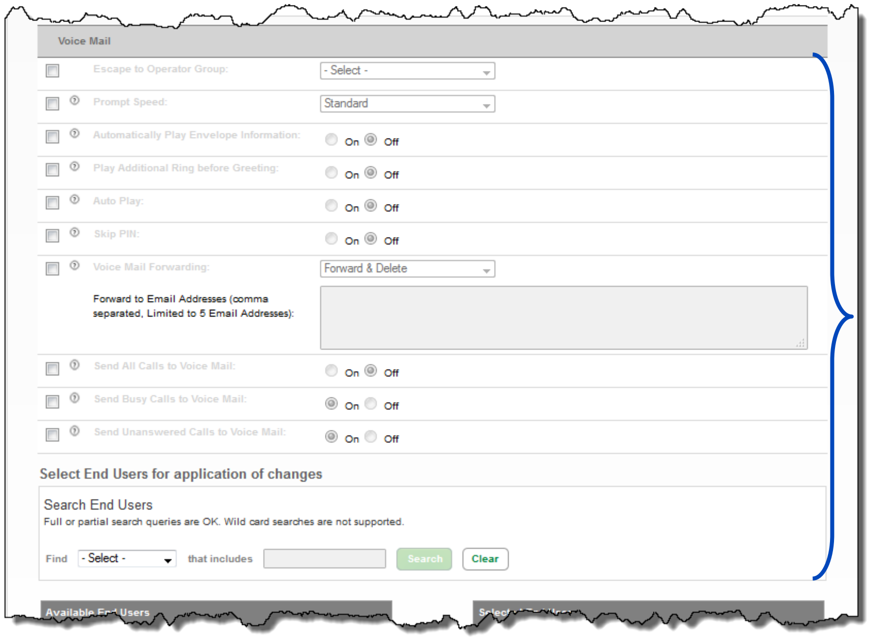
10. Click the **Check Box** next to the feature that you wish to edit for selected users in that group, such as Call Forward Always.



11. The field for the selected feature will now be editable. Select or input the information based on the feature setting you're changing.

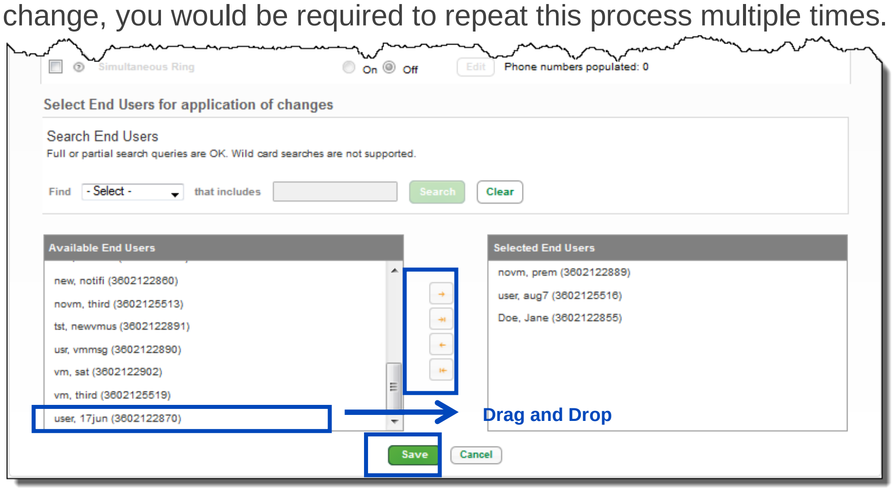


12. Manage or change settings for **Voicemail**.

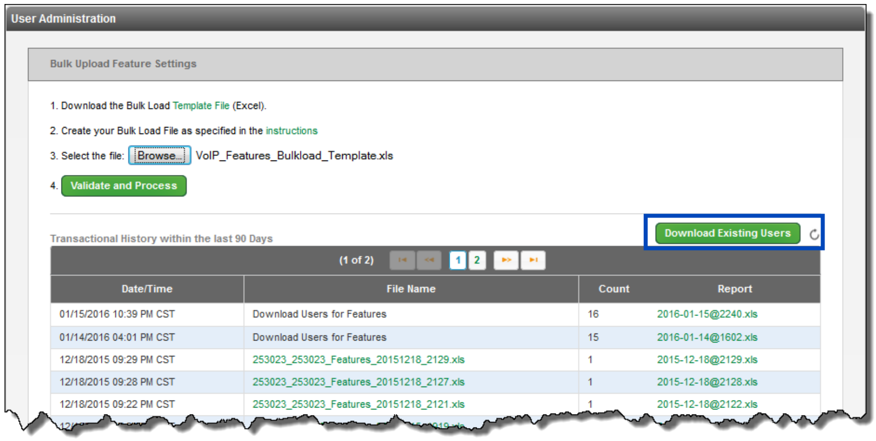


13. Scroll to the bottom of the screen to select the users within your group.
14. Use the **Search** option to narrow your search criteria.
15. From the **Available End Users** field, drag and drop the user(s) for which you wish to modify this feature (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns), to the **Selected End Users** field.
16. Click the **Save** button.
17. All users identified in the **Selected End User** field, will be immediately impacted by the feature setting change.

Note: At present, a maximum of 50 users can be moved to the Selected End Users field for each bulk modification; if you have more than 50 users that need the same feature setting change, you would be required to repeat this process multiple times.



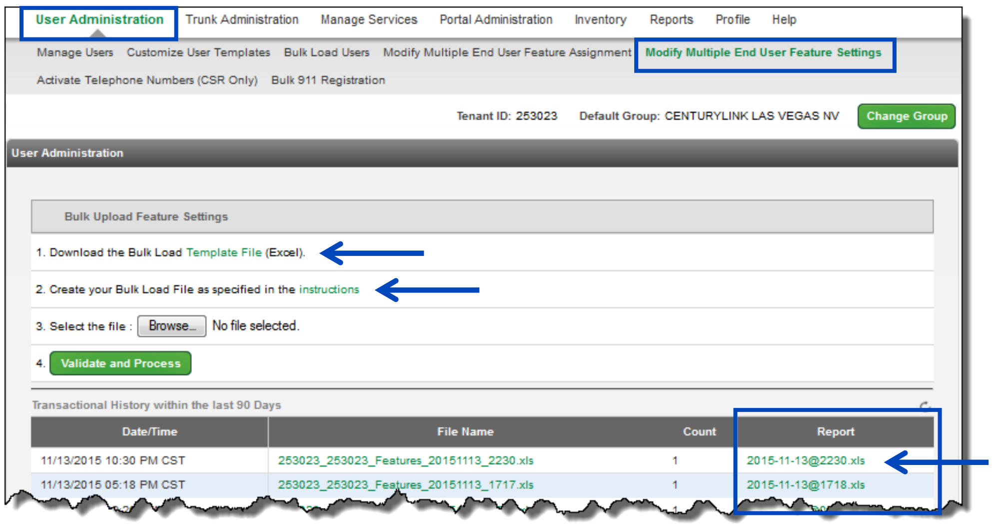
18. Click the **Download Existing Users** button, to export a spreadsheet that will indicate feature settings for all of your users.
19. This spreadsheet is an easy way to ensure that features are set appropriately for each user.



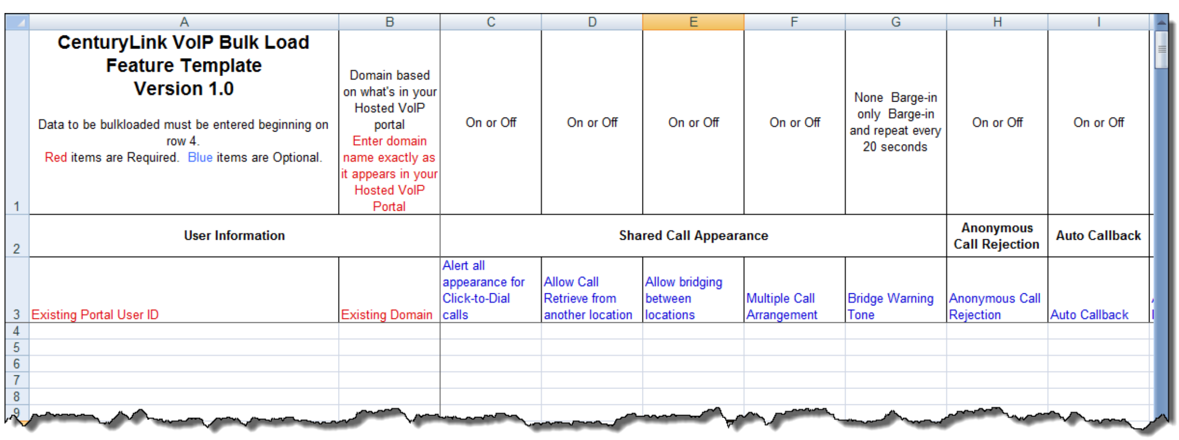
Modify Multiple Ender User Feature Settings – Bulk Upload

In addition to manually making changes to multiple users, you can manage multiple end user changes by performing a bulk upload, similar to the bulk upload process used to build new users.

1. Click on **User Administration** from the main menu.
2. Click on **Modify Multiple End User Feature Settings** from the sub menu.
3. Click the **Template File** link to download your upload template.
4. Click on the **Instructions** link to review and print important parameters needed to perform bulk feature changes.
5. **Bulk Load Transactions** will be displayed for 90 days in the **Transactional History** list. Click on the appropriate link to review previously processed uploads.

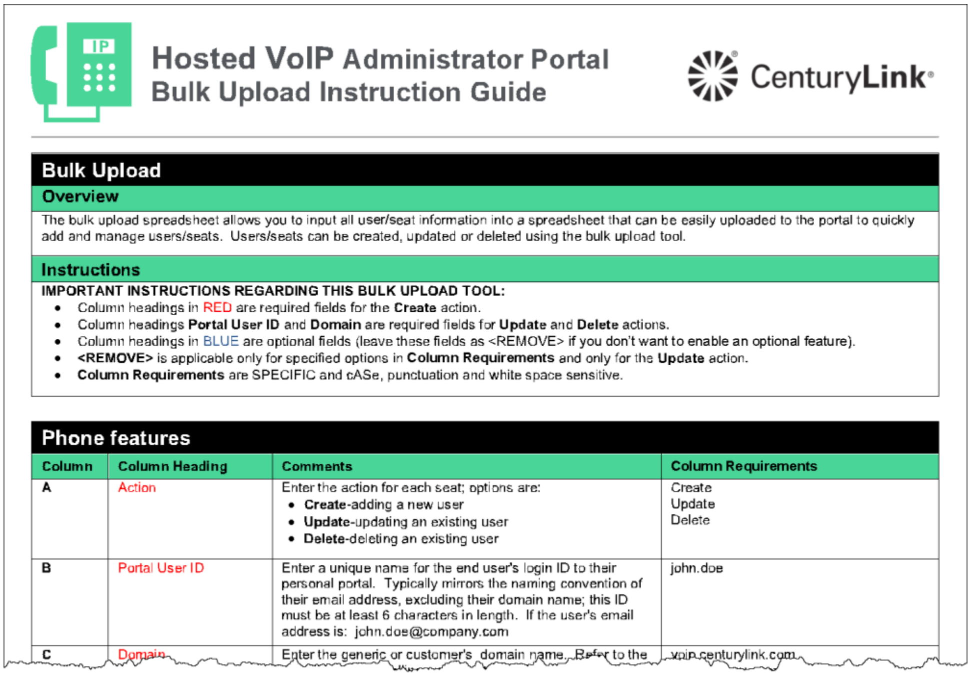


6. Example of **Bulk Load Feature Template**, save to your preferred drive and populate with the appropriate features before performing the upload.



	A	B	C	D	E	F	G	H	I
1	**CenturyLink VoIP Bulk Load Feature Template Version 1.0** Data to be bulkloaded must be entered beginning on row 4. Red items are Required. Blue items are Optional.	Domain based on what's in your Hosted VoIP portal Enter domain name exactly as it appears in your Hosted VoIP Portal	On or Off	On or Off	On or Off	On or Off	None Barge-in only Barge-in and repeat every 20 seconds	On or Off	On or Off
2	**User Information**		**Shared Call Appearance**					**Anonymous Call Rejection**	**Auto Callback**
3	Existing Portal User ID	Existing Domain	Alert all appearance for Click-to-Dial calls	Allow Call Retrieve from another location	Allow bridging between locations	Multiple Call Arrangement	Bridge Warning Tone	Anonymous Call Rejection	Auto Callback
4									
5									
6									
7									
8									

7. Refer to the **Bulk Upload Instructions** for required fields, and instructions on completing the bulk upload spreadsheet.
8. **Columns A** and **B** are the only two required columns, the remaining are optional based on each user requirements.



Hosted VoIP Administrator Portal
Bulk Upload Instruction Guide

CenturyLink

Bulk Upload

Overview

The bulk upload spreadsheet allows you to input all user/seat information into a spreadsheet that can be easily uploaded to the portal to quickly add and manage users/seats. Users/seats can be created, updated or deleted using the bulk upload tool.

Instructions

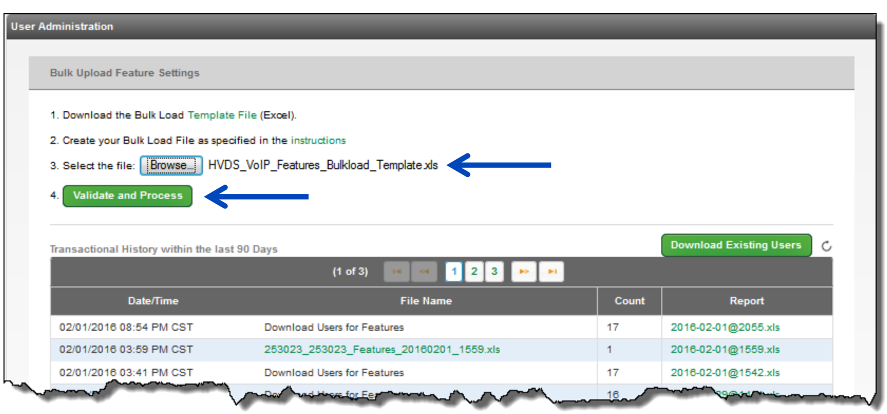
IMPORTANT INSTRUCTIONS REGARDING THIS BULK UPLOAD TOOL:

- Column headings in RED are required fields for the **Create** action.
- Column headings **Portal User ID** and **Domain** are required fields for **Update** and **Delete** actions.
- Column headings in BLUE are optional fields (leave these fields as <REMOVE> if you don't want to enable an optional feature).
- **<REMOVE>** is applicable only for specified options in **Column Requirements** and only for the **Update** action.
- **Column Requirements** are SPECIFIC and cASe, punctuation and white space sensitive.

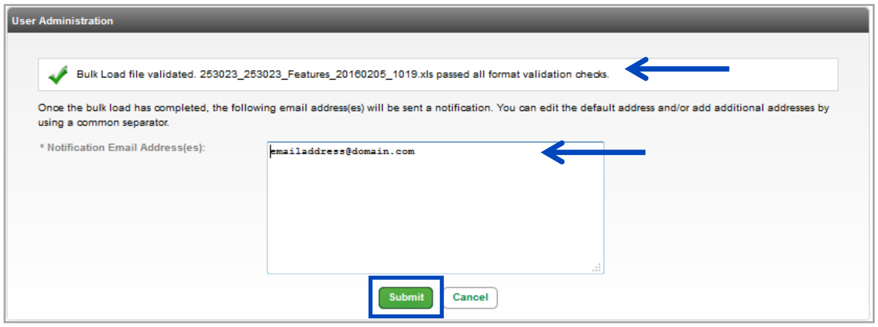
Phone features

Column	Column Heading	Comments	Column Requirements
A	Action	Enter the action for each seat; options are: • **Create**-adding a new user • **Update**-updating an existing user • **Delete**-deleting an existing user	Create Update Delete
B	Portal User ID	Enter a unique name for the end user's login ID to their personal portal. Typically mirrors the naming convention of their email address, excluding their domain name; this ID must be at least 6 characters in length. If the user's email address is: john.doe@company.com	john.doe
C	Domain	Enter the generic or customer's domain name. Refer to the	voip.centurylink.com

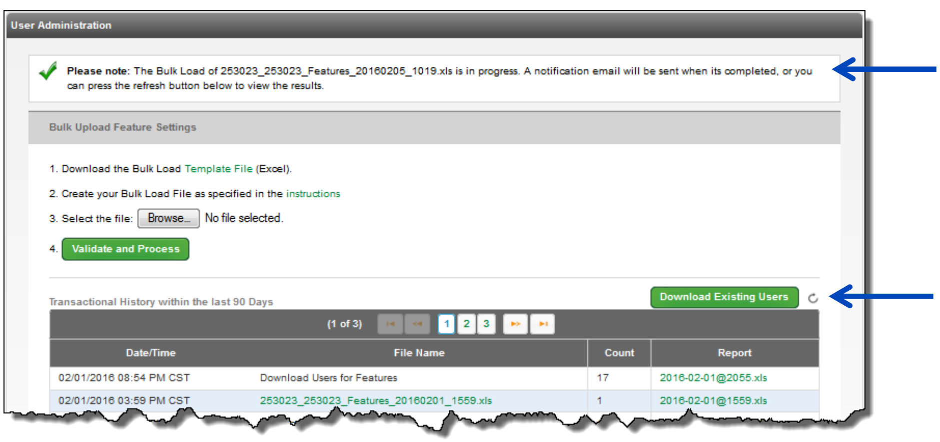
9. Once the bulk upload spreadsheet is populated and saved, click the **Browse** button to locate and select your saved spreadsheet.
10. After the file is selected, it will be displayed next to the **Browse** button.
11. Click the **Validate and Process** button to run your bulk upload.



12. A successful notification will be displayed if your spreadsheet was successfully validated; if there were errors with your spreadsheet, an error message will appear.
13. In the **Notification Email Address(es)** field, enter the email address, or addresses, for any individuals that should receive email notification upon completion of the upload.
14. Click the **Submit** button.



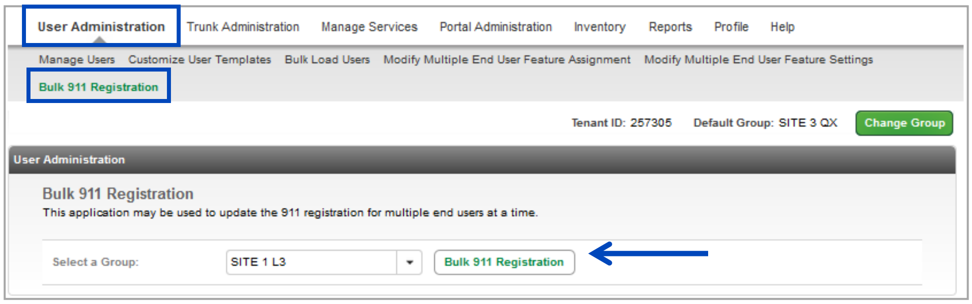
15. You'll receive another notification, this one indicating that your upload is in progress, and an email will be received upon completion.
16. At any time, click the **Refresh** icon, to update the status of your upload in the Transactional History list.



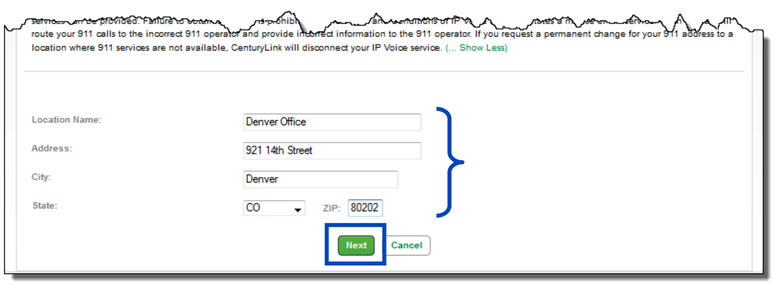
Bulk 911 Registration

In addition to manually making changes to multiple users, you can manage multiple end user changes by performing a bulk upload, similar to the bulk upload process used to build new users.
Use **Bulk 911 Registration** to change the registered 911 address for multiple users within a group.

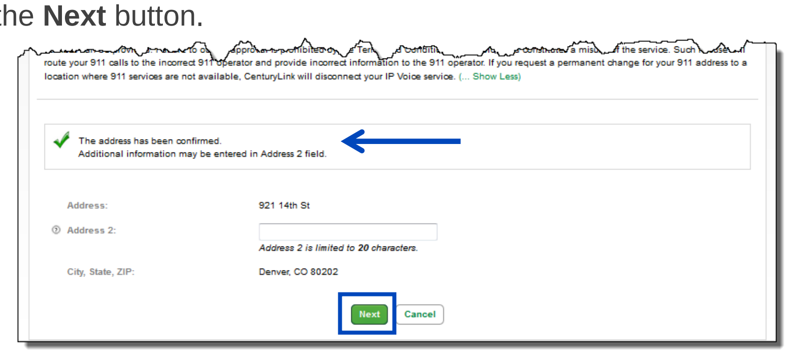
1. Click on **User Administration** from the main menu.
2. Click on **Bulk 911 Registration** from the sub menu.
3. If you have multiple groups in your organization, click the Group you want to modify from the dropdown list and click the **Bulk 911 Registration** button.



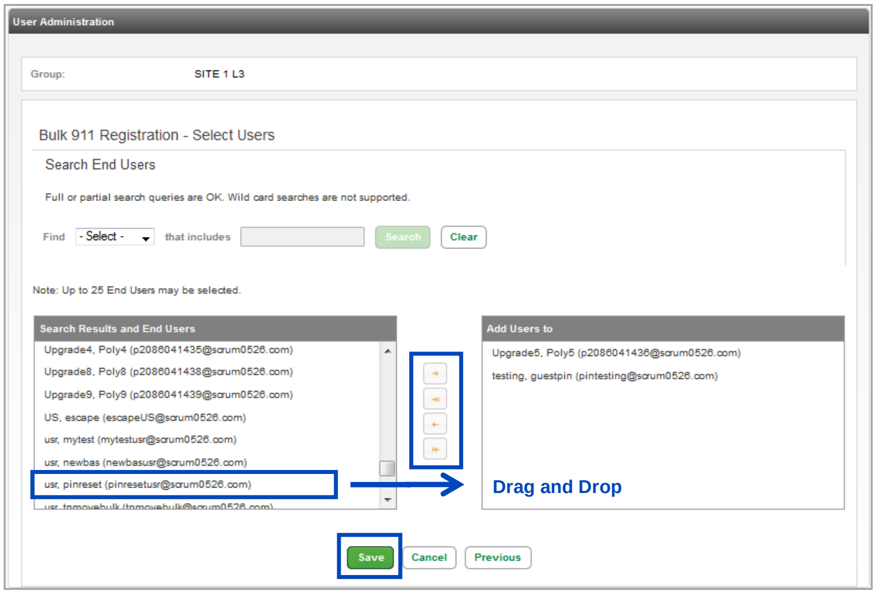
4. At the bottom of the Bulk 911 – Add Location Screen, enter the **Location Name**, **Address**, **City**, **State** and **Zip Code** for your change.
5. Click the **Next** button.



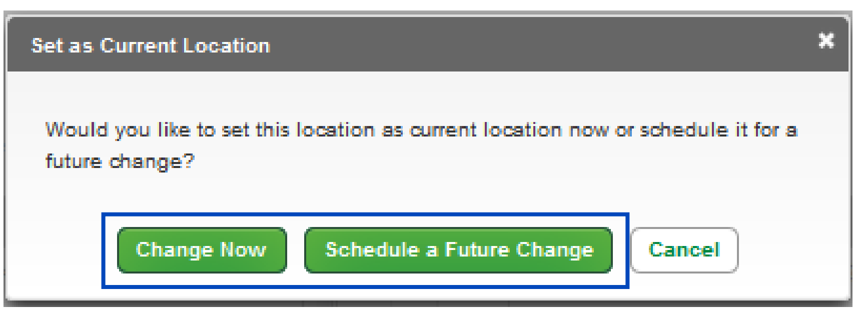
6. Your address will be validated, and if successful, you'll receive an address confirmation success notification.
7. Enter an **Address 2** option such as floor, cube, etc., if required.
8. Click the **Next** button.



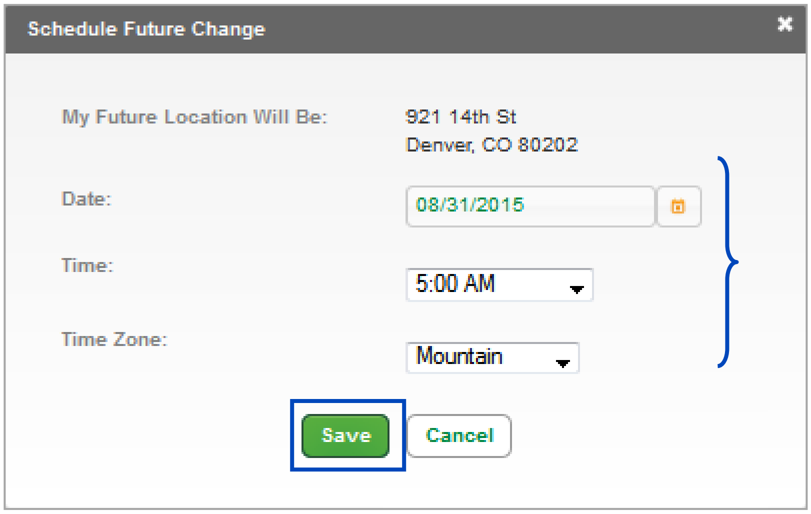
9. Use the **Search** option to narrow your search criteria.
10. From the **Search Results and End Users** field, drag and drop the user(s) for which you wish to modify this feature (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns), to the **Add Users To** field.
11. Click the **Save** button.



12. To process your 911 Registration changes immediately, click the **Change Now** button.
13. 911 Registration changes will happen in approximately 15 minutes to all users identified, and all users identified will receive an email notification of the change.
14. To schedule your registration change, click the **Schedule a Future Change** button.



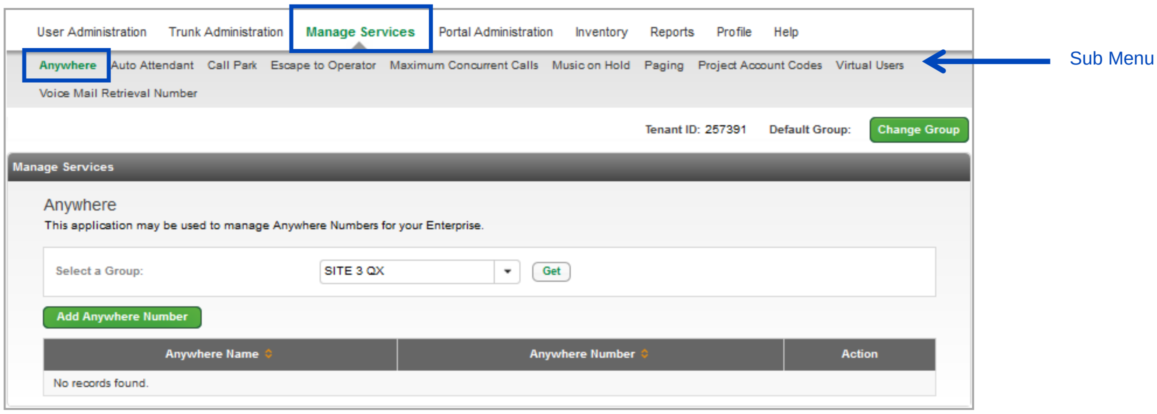
15. The **Future Location** address will be indicated.
16. Click on the **Calendar** icon to select the date you want your address registration to change.
17. From the **Time** dropdown list, select the time you want your address registration to change.
18. From the **Time Zone** dropdown list, select the appropriate time zone for the change.
19. Click the **Save** button.
20. The registered 911 address for the users identified, will occur on that date and time, and all users identified will receive an email notification of the change.



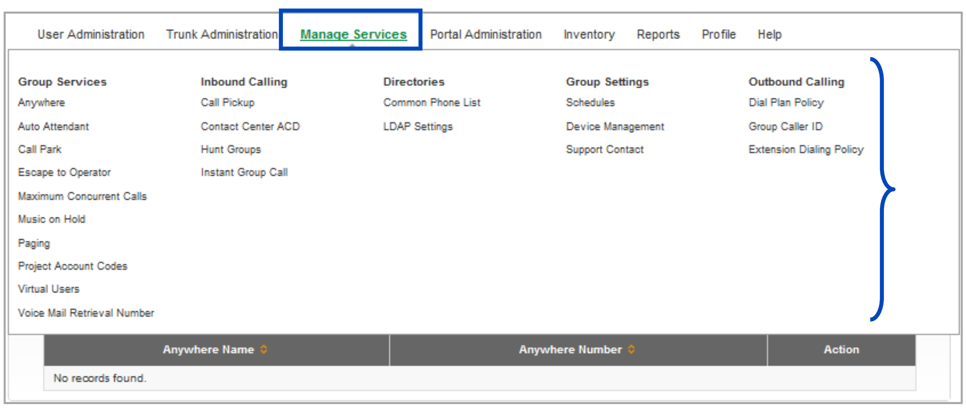
Manage Services

The **Manage Services** tool gives you access to **Edit** or **Modify Group Services**, **Inbound Calling** features, **Directories**, and **Group Settings**.

1. Click on **Manage Services** from the main menu.
2. This displays the first level of sub menu items under the main menu.



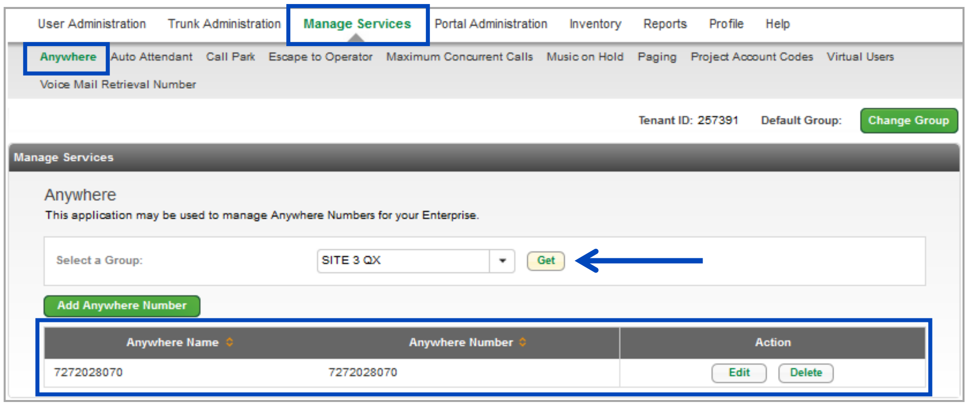
3. Hover over **Manage Services** from the main menu to display and access the remaining sub menu items such as **Outbound Calling Features**, **Inbound Calling Features**, **Directories** and **Group Settings**.



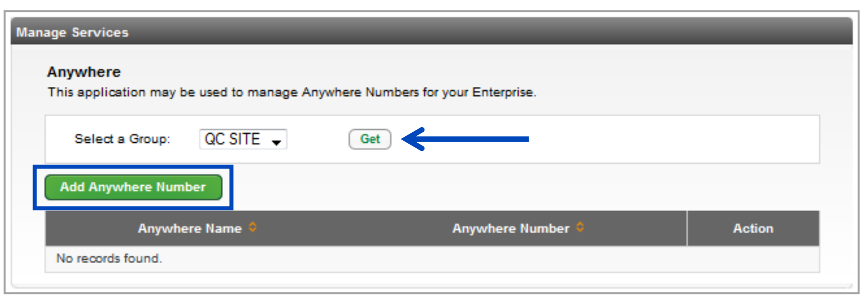
Anywhere

An **Anywhere** pilot number can be assigned to each tenant or group within a tenant. This allows users to utilize their **Anywhere** feature to move active calls seamlessly from their IP handset to another designated device, such as a mobile phone, or from their designated Anywhere device to their IP handset.

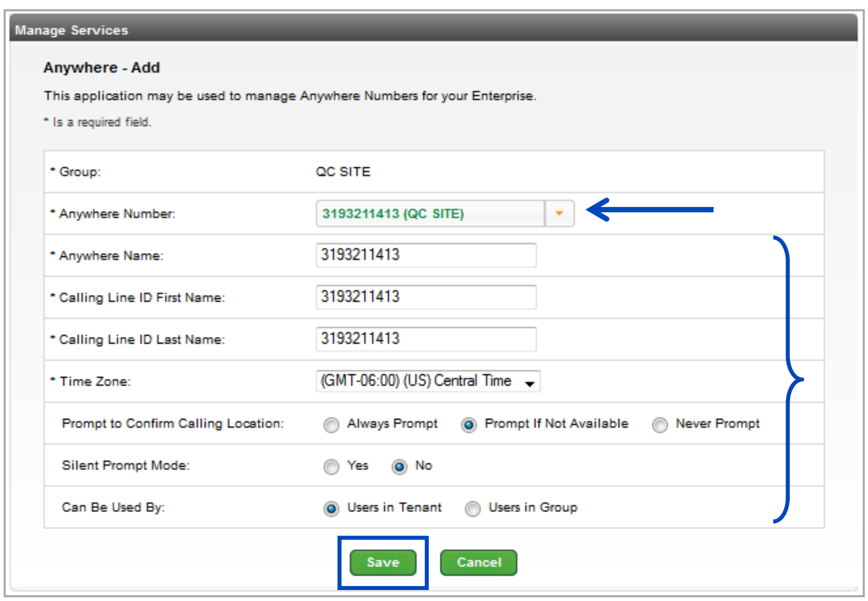
1. Click on **Manage Services** from the main menu.
2. Click on **Anywhere** from the sub menu.
3. If you have an **Anywhere** number programmed, it will be displayed including the **Name** and **Number**.
4. If you have more than one group, click the dropdown list to select the group (location) that you want to add/review/modify.
5. Once your group is selected, click the **Get** button.



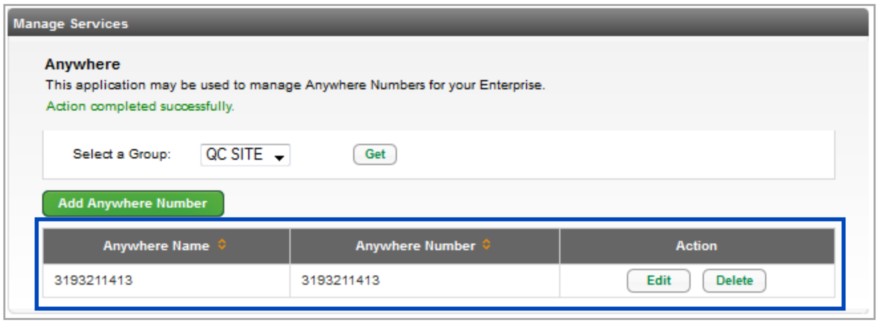
6. To **Add** an **Anywhere** pilot number to a specific group, select the correct group from the dropdown list, and click the **Get** button.
7. Click on the **Add Anywhere Number** button.



8. To assign a number from your available inventory, click the dropdown list next to **Anywhere Number**. You can select any available telephone number from any group.
9. The **Anywhere Name**, **Calling Line ID First Name** and **Calling Line ID Last Name** are prefilled with the telephone number you assign.
10. All of these fields are editable, so you can change the information based on what your needs are.
11. The **Time Zone** will preselect based on the time zone for that group, this can be changed if needed.
12. Choose the appropriate settings for **Prompt to Confirm Calling Location.** and **Silent Prompt Mode**.
    - **Always Prompt** – when you dial the Anywhere pilot to make or move a call, you'll always be prompted to enter your Anywhere device's 10-digit phone number
    - **Prompt if Not Available** *(recommended setting)* – if enabled, Anywhere identifies the 10-digit number of your Anywhere device and does not require you to enter your 10-digit phone number
    - **Never Prompt** – if enabled, you'll never be prompted to enter your 10-digit Anywhere device number
13. Choose the appropriate setting for **Silent Prompt Mode**.
    - **Yes** – if set to Yes, you'll NOT be prompted to enter your destination digits, the line will remain silent
    - **No** *(recommended setting)* – if set to No, you'll be prompted to enter your destination digits
14. The **Anywhere Number** can now be used across the tenant, instead of having to assign a unique **Anywhere** number to each group. If you wish to use one number for your entire tenant, leave the **Users in Tenant** radio button selected. If you want a unique **Anywhere Number** for each group, click the **Users in Group** radio button as you define a number for each group.
15. Click the **Save** button.

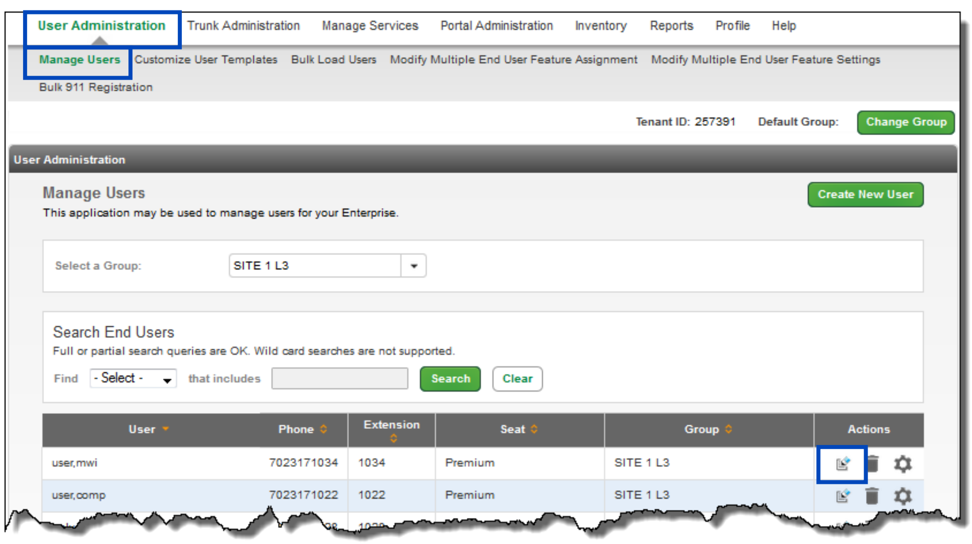


16. Once an **Anywhere** pilot number has been added, or if it already exists within a group, it will be displayed as seen below.
17. Click the **Delete** button if you wish to delete an **Anywhere** pilot for that group.
18. Click the **Edit** button to change any settings for a specific **Anywhere** pilot number.
19. Always remember to click **Save** after making setting changes.

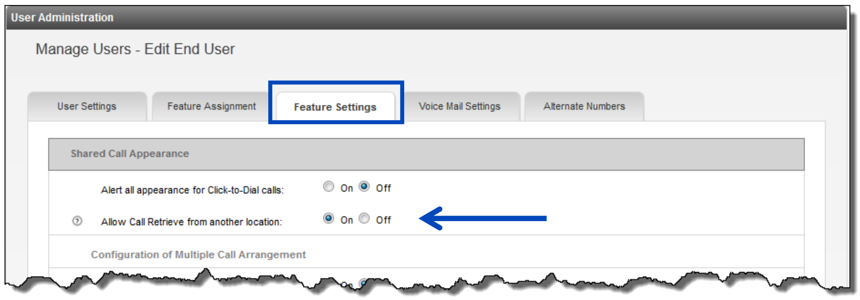


Note: To move a call from an Anywhere mobile device to the user's IP handset, a specific setting at the end user level needs to be confirmed as enabled for each user intending to move calls between devices.

20. Click on **User Administration** from the main menu.
21. Click on **Manage Users** from the sub menu.
22. Click the **Edit** icon next to the user you wish to edit.



23. Click the **Features Settings** tab.
24. Confirm or select the **Allow Call Retrieve from another location** radio button.
25. Click the **Save** button.
26. This user is now be able to move a call from their mobile Anywhere device, back to the IP handset upon return to the office.

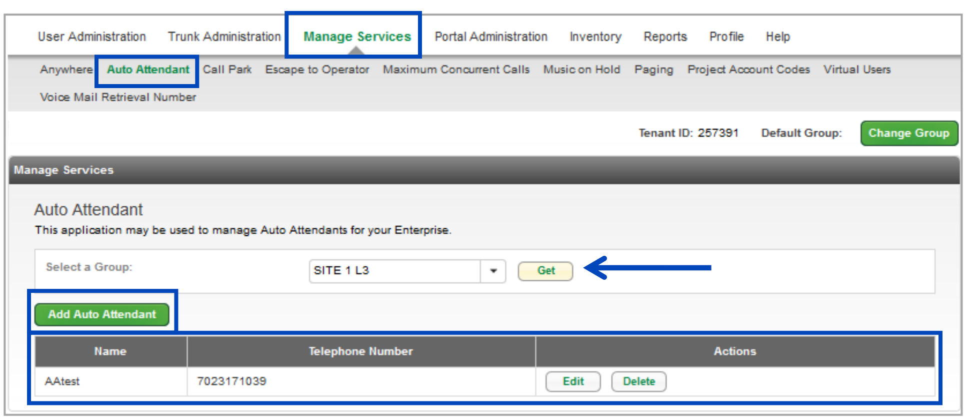


Auto Attendant

The **Auto Attendant** feature provides customizable answering and call routing options, giving you full control over managing incoming calls. **Auto Attendant** answers incoming calls using a personalized greeting that you record, provides incoming callers with a menu of options, and routes the caller to a defined extension, mailbox or off-site phone number.

Note: The maximum greeting length for an Auto Attendant is 240 seconds (4 minutes).

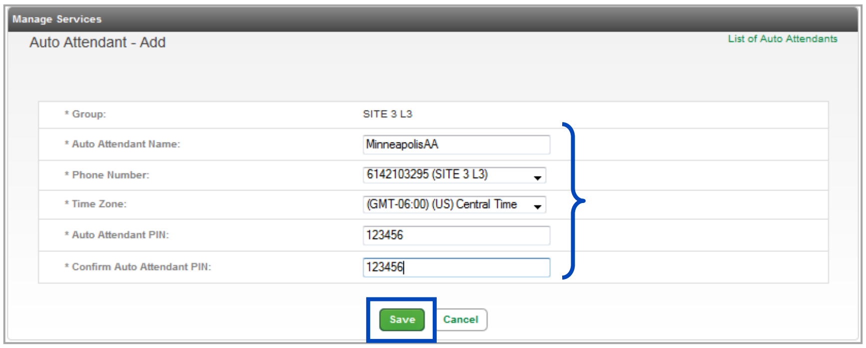
1. Click **Manage Services** from the main menu.
2. Click **Auto Attendant** from the sub menu.
3. Click the **Add Auto Attendant** button to program your Auto Attendant.
4. Any existing **Auto Attendants** for your chosen group will be displayed and can be **Edited** or **Deleted**.
5. Select the group from the dropdown list that you'll be adding or editing an **Auto Attendant** for.
6. Click the **Add Auto Attendant** button.



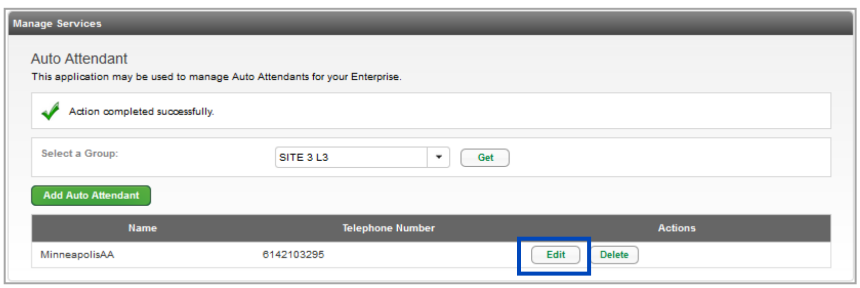
7. Enter the **Auto Attendant Name**, letters or numbers only, no spaces or special characters.
8. From the dropdown list, select a **Phone Number** from your inventory that you would like to assign to this **Auto Attendant**.

   Note: If there are no phone numbers available in your inventory, you'll need to contact your Account Manager to have one added.

9. From the dropdown list, select the **Time Zone** this **Auto Attendant** will use.
10. Enter a PIN in the **Auto Attendant PIN** and **Confirm Auto Attendant PIN** fields, they must match.
11. Click the **Save** button.



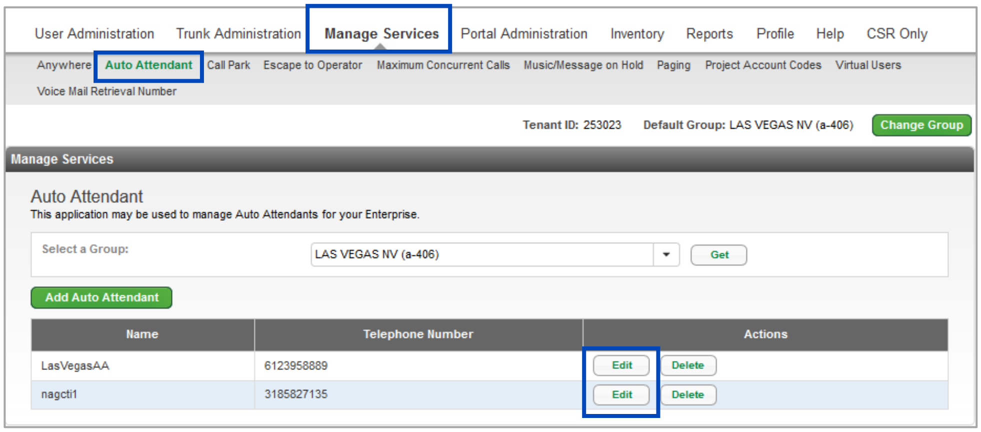
12. You receive notification that your action was successful.
13. Click the **Edit** button to continue with the Auto Attendant configuration.



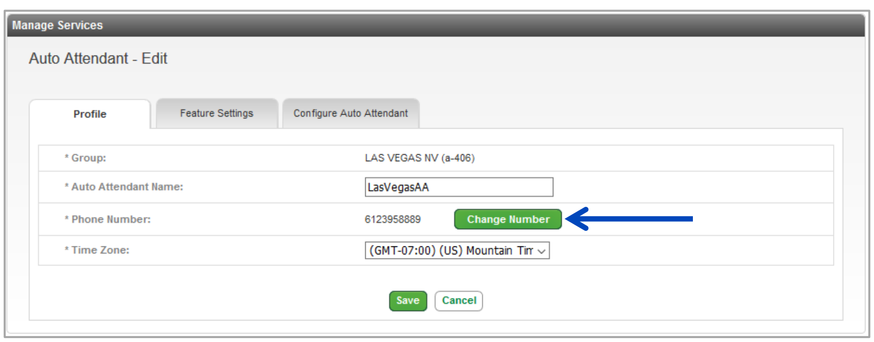
Change Auto Attendant Number

This feature allows you to change the lead Auto Attendant number, without having to delete and reconfigure existing settings.

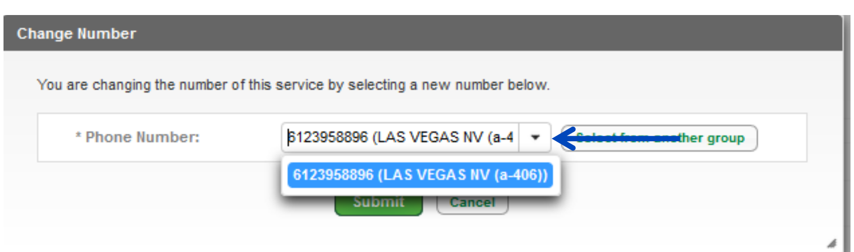
1. Click **Manage Services** from the main menu.
2. Click **Auto Attendant** from the sub menu.
3. Click the **Edit** button for the **Auto Attendant** you want to manage.



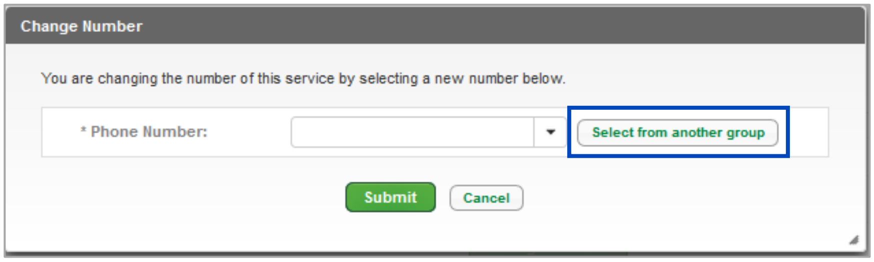
4. The number currently assigned to that **Auto Attendant** is displayed.
5. Click the **Change Number** button.



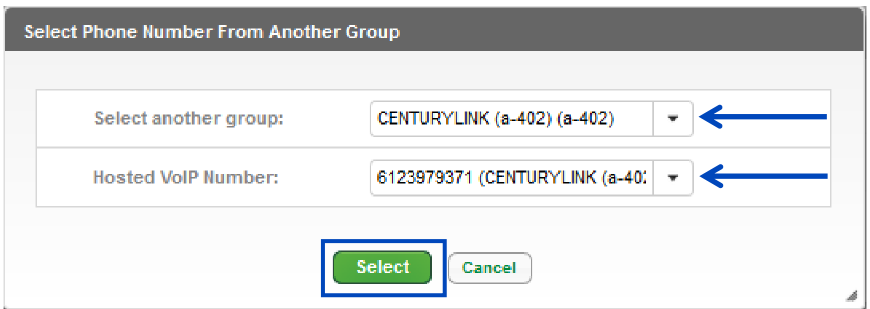
6. To assign a new number from the existing group, click the **Phone Number** dropdown list and select an available number.
7. Click the **Submit** button.



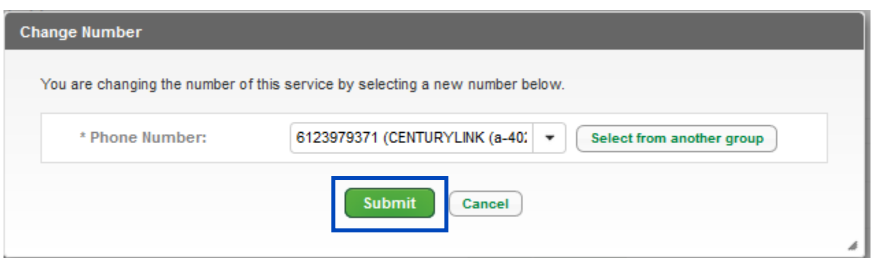
8. If the new number you want to assign is in another group (site), click the **Select from another group** button.



9. Select the group from the **Select another group** dropdown list where the number is currently assigned.
10. Select the new number from the **Hosted VoIP Number** dropdown list.
11. Click the **Select** button.



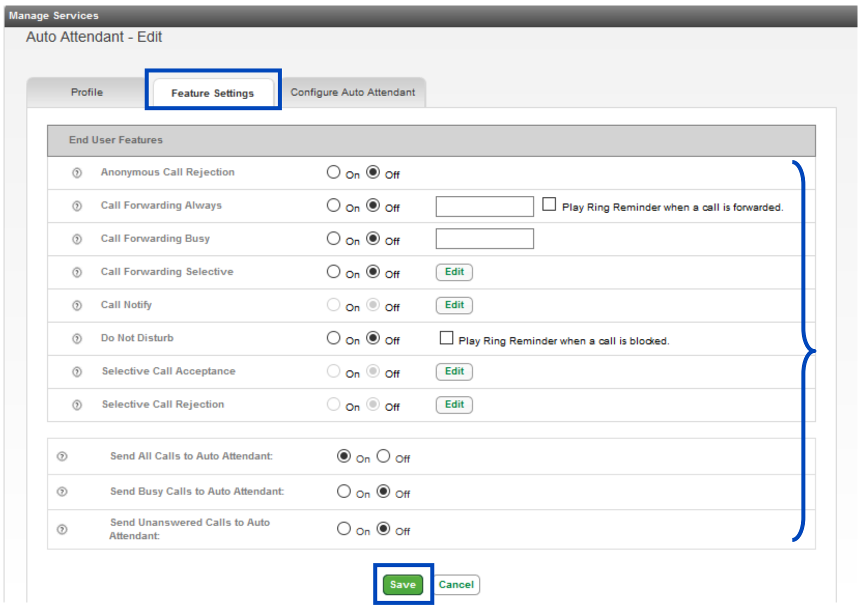
12. Click the **Submit** button.
13. The new number is now the lead number for that **Auto Attendant**.



Features Settings

From **Features Settings** within the Auto Attendant feature, customize each Auto Attendant individually based on requirements for each.

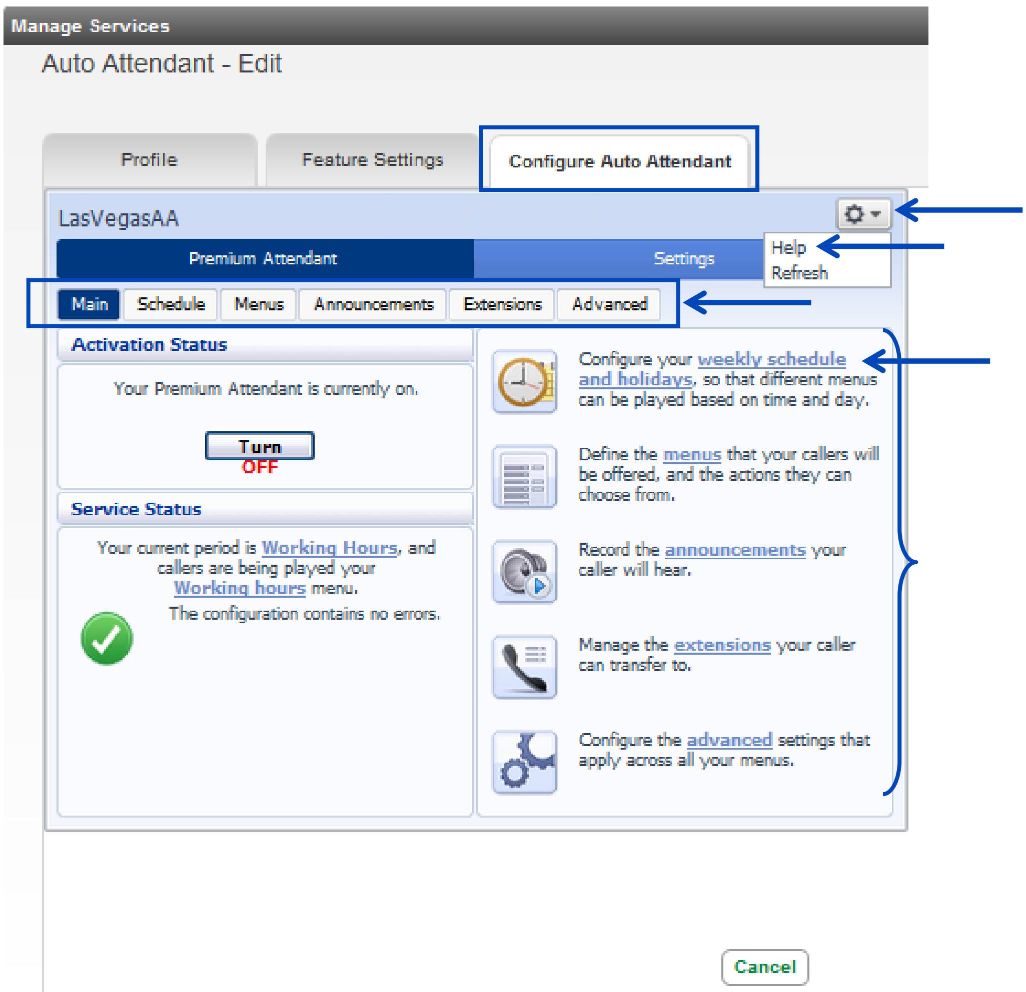
1. Click the **Features Settings Tab**.
2. Make various settings changes to your **Auto Attendant** as you're able to on an individual user level.
3. After settings are made, click the **Save** button.



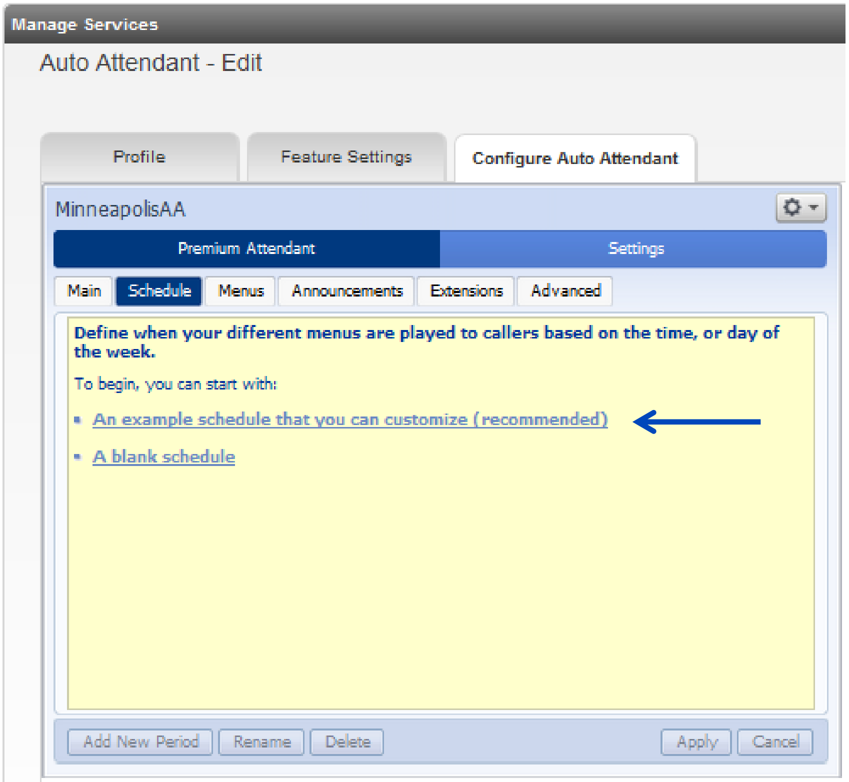
Configure Auto Attendant

Within configuration, is where you'll determine press offs and where they go, hours for daytime and nighttime options, etc.

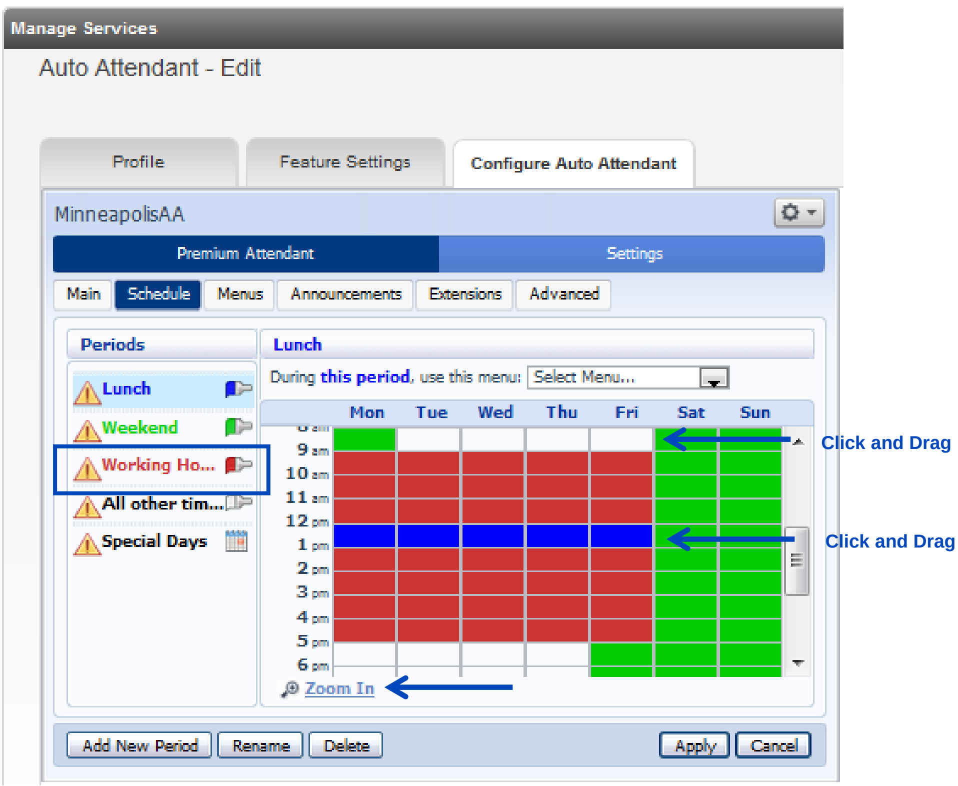
1. Click on the **Configure Auto Attendant** tab.
2. Click on **Tabs** or **Links** to access scheduling options, menu options, announcements, extensions and advanced features.
3. **Help** is always available throughout the entire **Auto Attendant** programming sequence.
4. To access Help, click the **Gear** dropdown list, and select **Help** from the list.
5. This provides a link you can review for assistance and descriptions of the features within the **Auto Attendant** configuration pages.
6. Click the **Schedule** or **Menus** tab to start your Auto Attendant configuration.



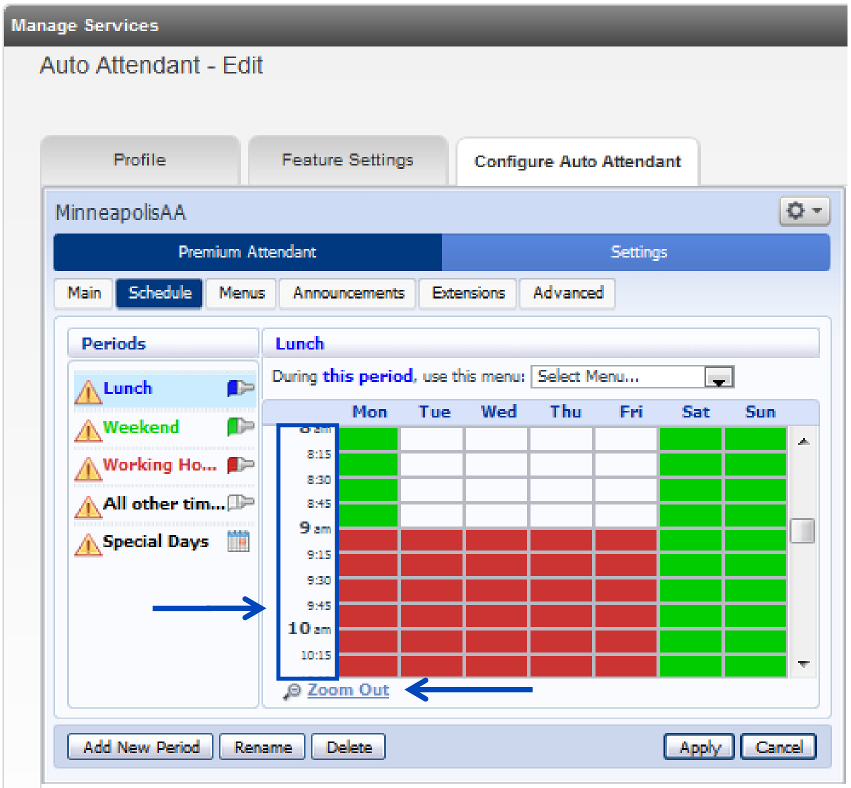
7. To set your **Schedule**, click on the **"An example schedule that you can customize"** link, this is the recommended option.
8. By setting Business and Non-Business hour **Schedules**, you can provide your customers with different greetings and options for Business hours and Non-Business hours.



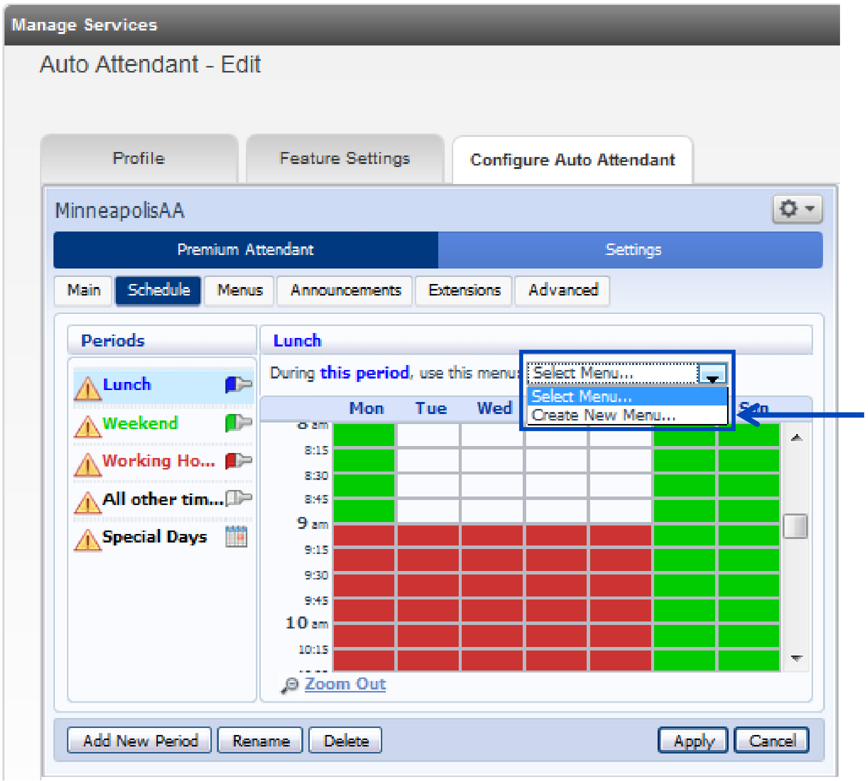
9. By using the recommended **Schedule**, standard business hours are set to 9:00 a.m. to 5:00 p.m., with lunch from 12:00 p.m. to 1:00 p.m.
10. To modify this **Schedule**, click on the **Paint Brush** under the **Periods** section, and click/drag the correct color based on the change you wish to make, **Lunch**, **Weekend**, **Working Hours**, **All Other Times** and **Special Days**.
11. To change your business hours to 8:00 a.m. to 5:00 p.m., click the **Red Paint Brush**, and drag it from the Monday 8:00 a.m. cell to the Friday 8:00 a.m. cell. Those cells with turn Red to indicate **Working Hours**.
12. To remove the lunch hour from 12:00 p.m. to 1:00 p.m. and make those working hours, repeat the same steps as above. Once you apply Working Hours from 12:00 p.m. to 1:00 p.m., those cells with also be Red.
13. To make additional changes to the schedule, click on the corresponding paint brush based on the type of hours you need to change and click **Apply**.
14. The default time increment is 1 hour, to change to 15 minute increments, click the **Zoom In** link or the magnifying glass.



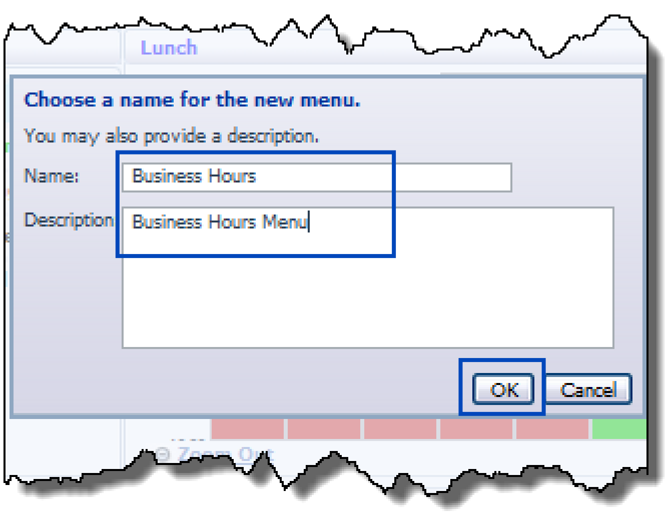
15. You can now adjust your schedules by **15 minute** increments.
16. Click the **Zoom Out** link or the magnifying glass to return to 1 hour increment formatting.



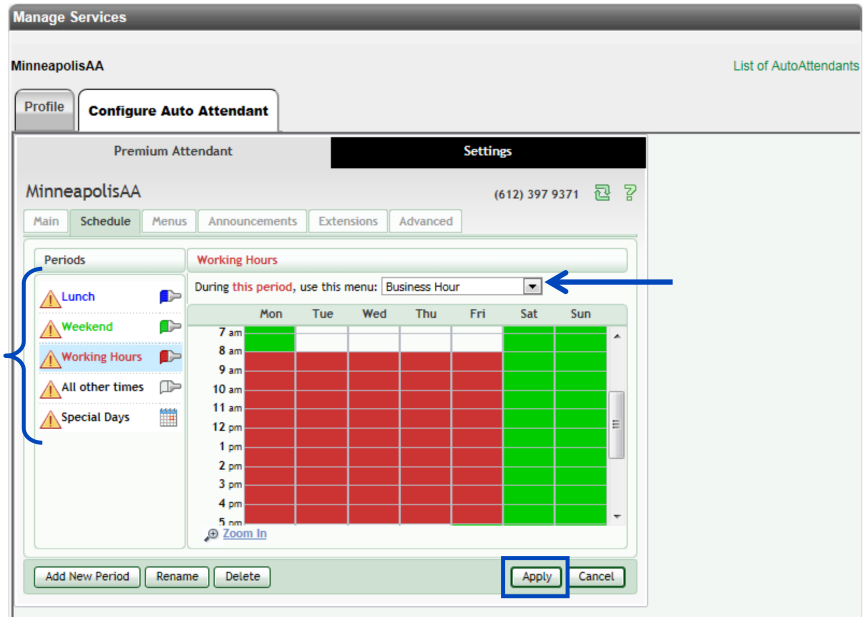
17. Name your **Menu** by clicking the dropdown list associated to "**During this period, use this menu:**"
18. From the dropdown list, select **Create New Menu**.



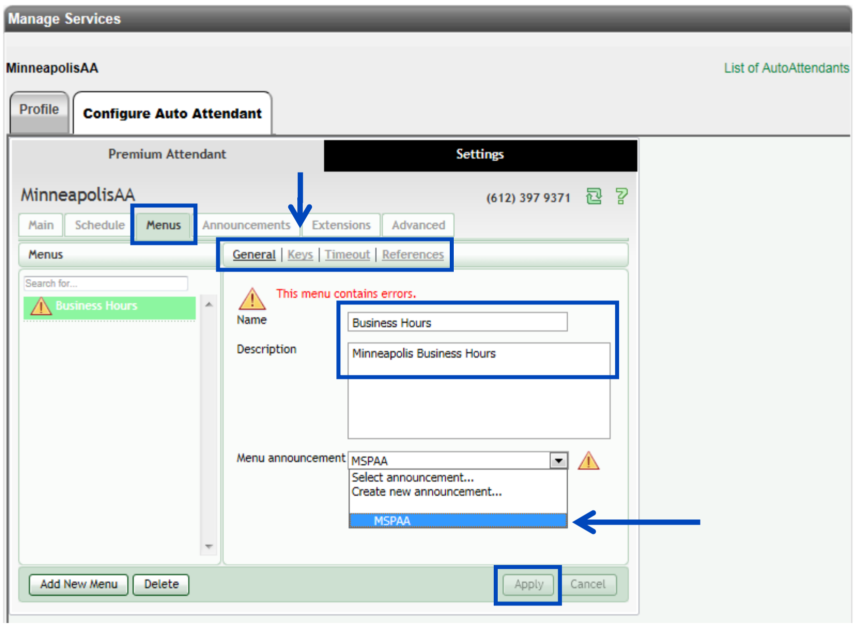
19. Enter the **Name** and **Description** of your **Menu**, a description is optional
20. Click the **OK** button.



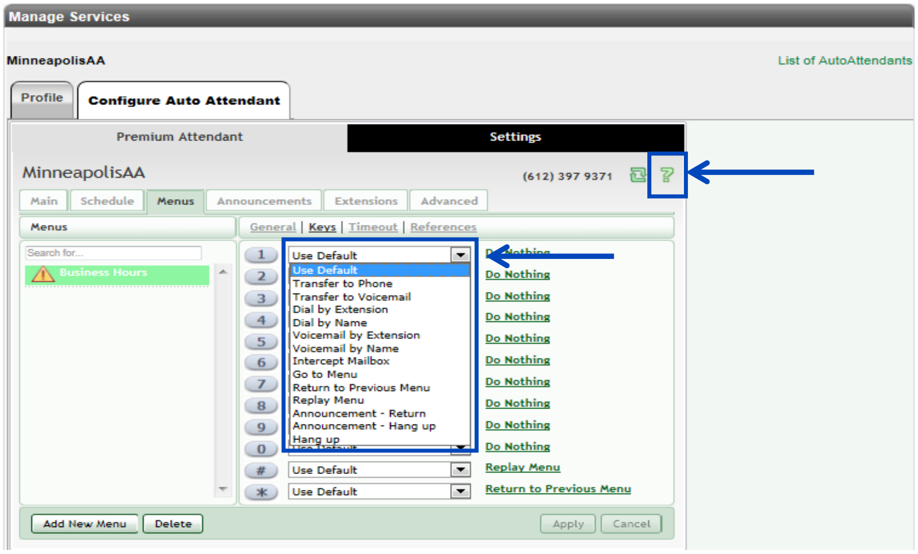
21. Click the **Apply** button to apply your **Menu Name** and **Description** to that schedule.
22. Go through all of the **Periods** by clicking on each one and apply a **Menu Name**. They can all have the same **Menu** or have unique **Menu** options for different times of the day, week and holidays.
23. Once all **Periods** have a **Menu** assigned, click the **Apply** button.



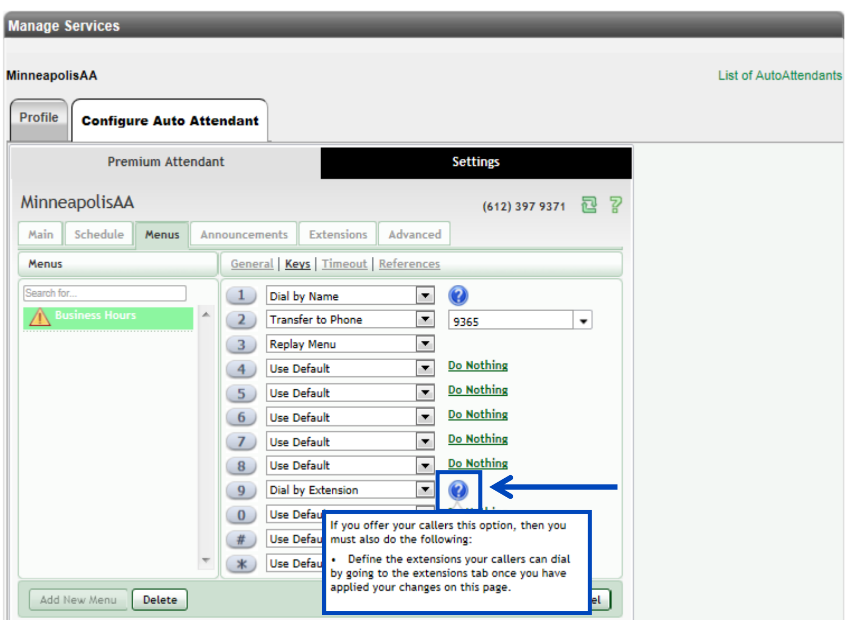
24. Click on the **Menus** tab.
25. You'll then go through the **General**, **Keys**, **Timeout** and **Reference** tabs to assign the **Menu** options.
26. Enter a Name for your Menu, such as Business Hours.
27. You can also enter a brief Description of the Menu.
28. From the dropdown list, select a **Menu Announcement**. You can **Create a New Announcement** or select from an existing **Menu Announcement**.
29. If you choose to **Create a New Announcement**, you'll need to name the announcement, and will then record the announcement later in the setup process.
30. Click the **Apply** button.
31. Click on the **Keys** tab to continue.



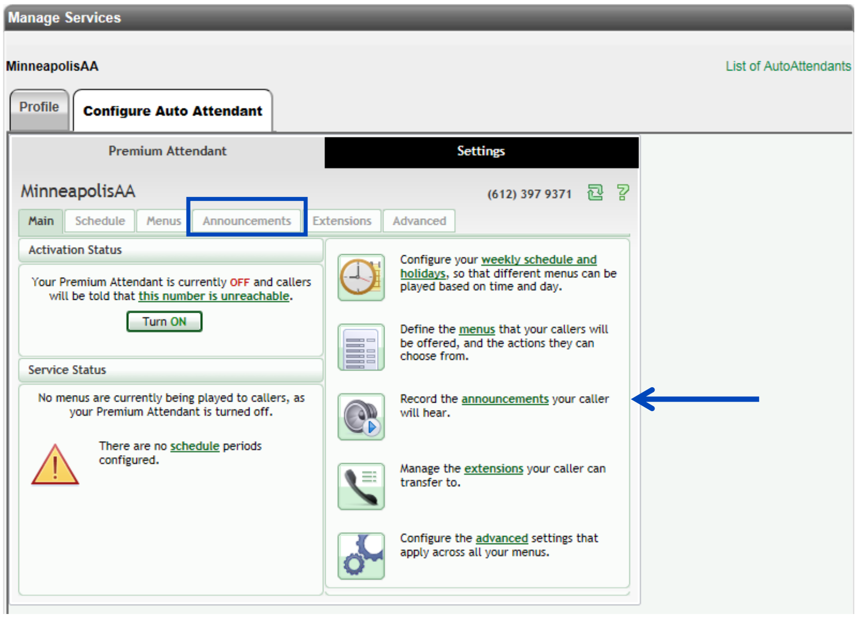
32. From this screen you'll determine the options that your callers will be presented with based on the key they press on their keypad.
33. Click on the dropdown list next to each keypad option. Examples of menu options are:
    a. Transfer to phone
    b. Dial by Extension
    c. Dial by Name
    d. Replay Menu
    e. Etc.



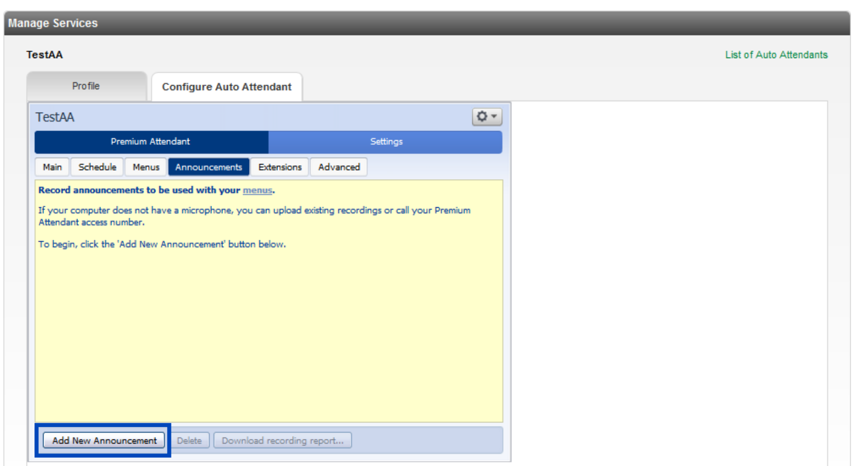
34. For each option you want to program, click the dropdown list and select the action you want to assign to that key.
35. If a "**?**" appears for any of your selections, click on the "**?**" for additional information.
36. The instructions will provide you with the additional information necessary to complete that action.
37. This **Menu** will provide callers with the following options. The announcement played for the caller should audibly reflect these options:
    a. To dial by name, press
    b. To speak to John Doe, press 2
    c. To replay this menu, press 3
    d. To dial by extension, press 9
38. Click the **Apply** button. Clicking the **Apply** button throughout the **Auto Attendant** programming process, saves any settings you've selected to that point.
39. Click on the "**?**" next to options 1 and option 9 to further process this menu.



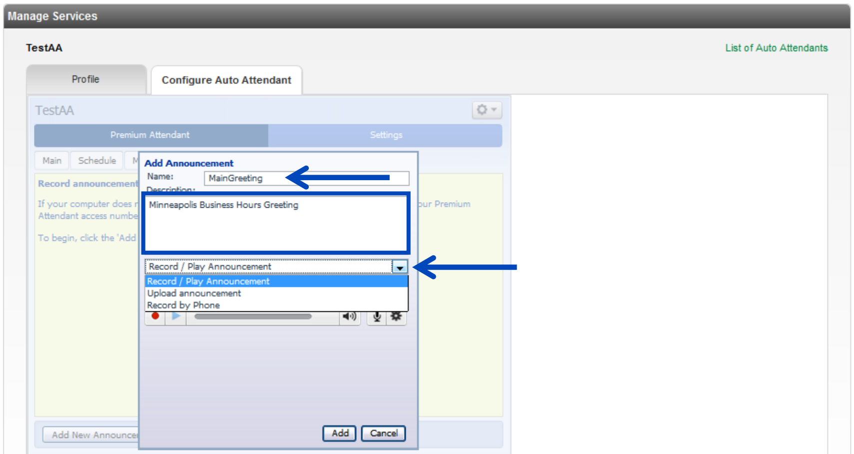
40. Click on the **Announcement** tab or the **Announcements** link to upload or record the **Announcement** for your **Menu**.



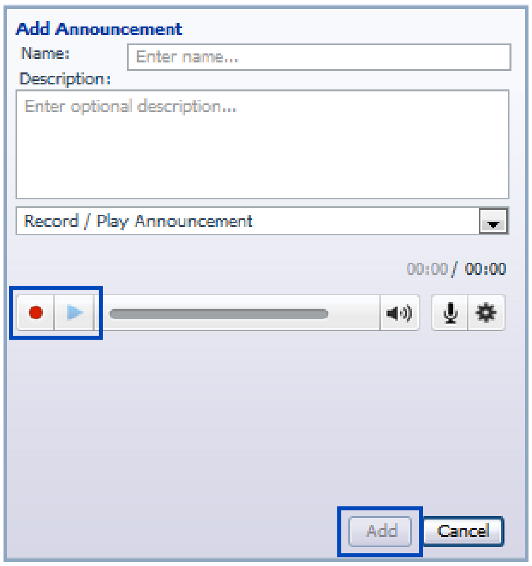
41. Click on the **Add New Announcement** button to upload an existing announcement file or record a new file via phone.



42. Enter a **Name** for your Announcement greeting.
43. Enter a **Description** of the Announcement, this is optional.
44. From the **Record/Play Announcement** dropdown list, choose how you want to record or upload your Announcement:
    - **Record/Play Announcement** – allows you to play/review existing announcements or record announcements from your computer
    - **Upload Announcement** – allows you to upload your announcements
    - **Record By Phone** – allows you to record your announcements by phone



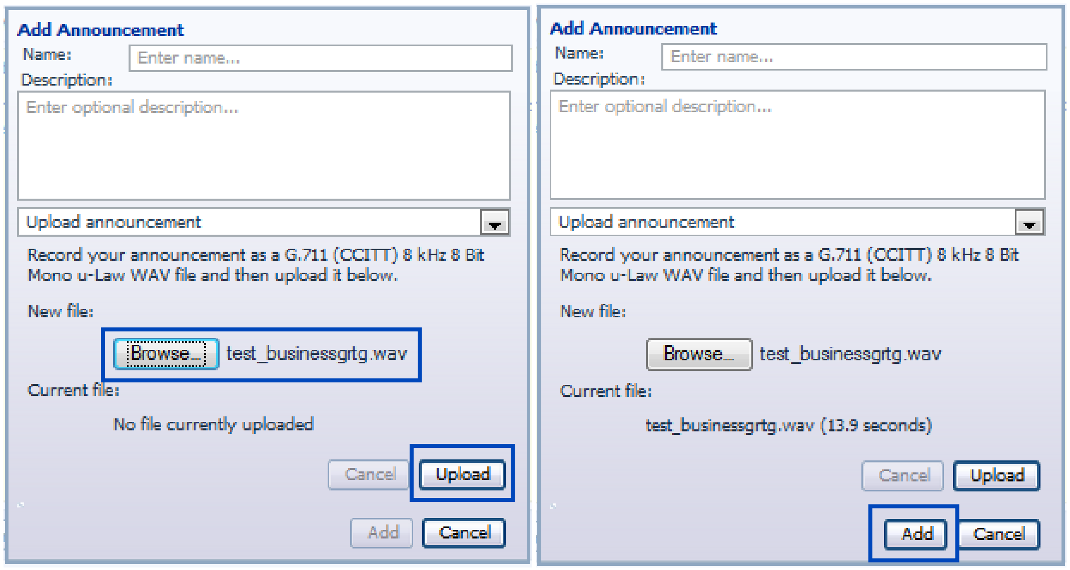
45. To Record or Play an announcement, select **Record/Play Announcement** from the dropdown list.
46. Click the **Red Record** button to record your announcement; you must have adequate flash settings and microphone on your computer to utilize this method.
47. Click the **Blue Play** button to play/review your announcement.
48. When the announcement is recorded, click the **Add** button.



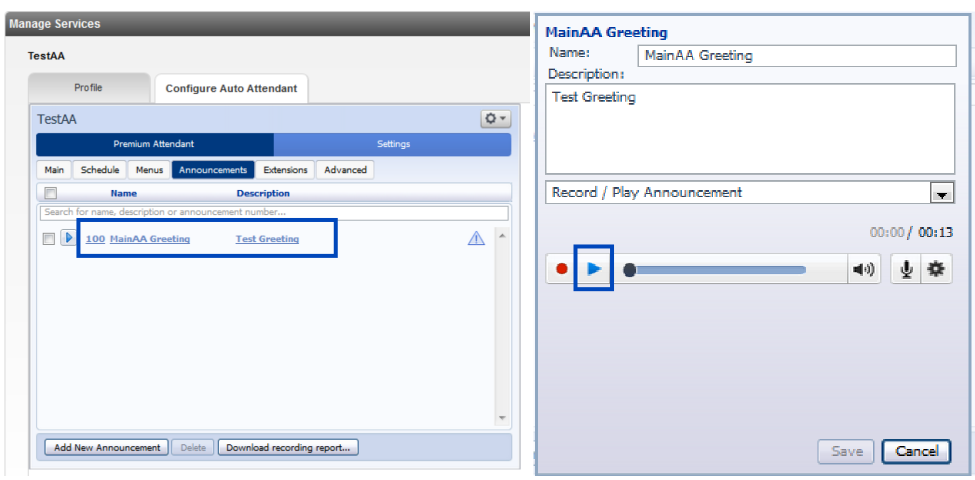
49. To upload an Announcement, select **Upload Announcement** from the dropdown list.
50. Click the **Browse** button to find the announcement file within your system.

Note: Your recorded announcement must be G.711 (CCITT) 8 kHz 8 Bit Mono u-Law WAV file.

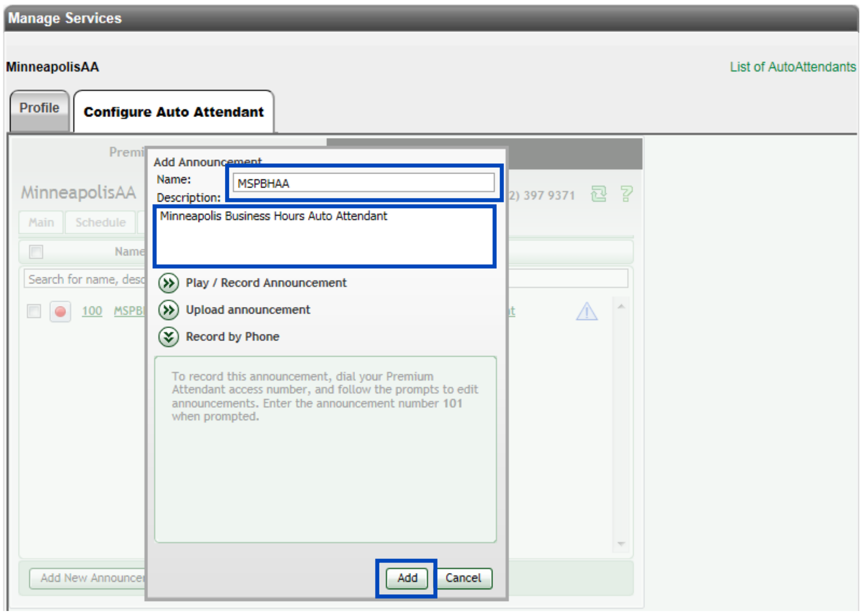
51. Once your file is applied, click the **Upload** button.
52. After the upload, click the **Add** button.



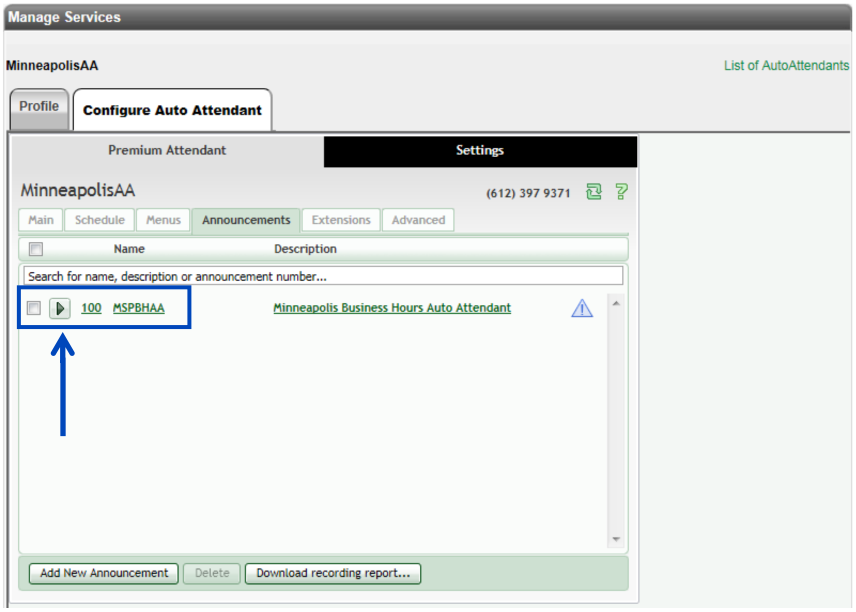
53. All Announcements are noted with an **Announcement ID** as well as a **Name** and your **Description**.
54. To play/review an Announcement, the **Blue Play** button next to the Announcement you wish to play.



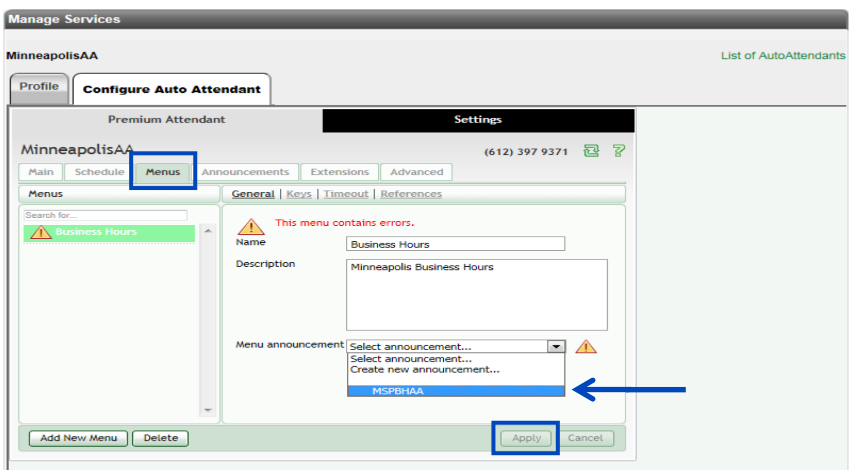
55. Click on the **Record by Phone** button.
56. Enter a **Name** for the announcement and a description (optional).
57. Click the **Add** button.



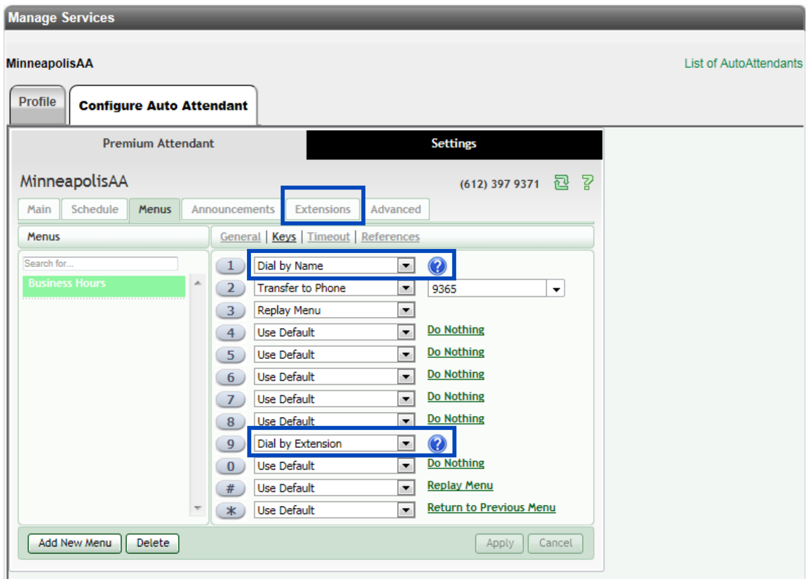
58. Your Announcement will be assigned a 3-digit Announcement number. At this point, nothing has been recorded.
59. To **Record by Phone** (greetings):
    - **From Within the Office –** press the **Message** button you use to access voicemail. When the voicemail system answers, press the ***#** keys. Enter your **Premium Attendant** number, this is the number you assigned to your **Auto Attendant** and follow the prompts.
    - **From Outside of the Office –** dial your **Voicemail Retrieval Number**. When the system answers, enter your **Premium Attendant** number, this is the number you assigned to your **Auto Attendant**, and follow the prompts. ** Refer to your Welcome Email or hover over Help on the main menu of your Administrator Portal for your Retrieval number.
60. The first time you access your **Announcement**, you'll be prompted to set a passcode. Create a passcode that is a minimum of 4 characters.
61. To change your **Auto Attendant Configuration**, press 1.
62. To edit your **Announcements**, press 2.
63. Enter the number of the **Announcement** from the portal that you wish to record, followed by #.
64. Follow the prompts to record, review and save your **Announcement**.
65. You can review your **Announcement** by clicking on the **Play** button within the portal.



66. You can now assign this **Announcement** to your **Menu** by clicking the **Menu** tab.
67. Click the **Menu Announcement** dropdown list and select the **Announcement** you just recorded.
68. Click the **Apply** button to apply your **Announcement** to that **Menu**.



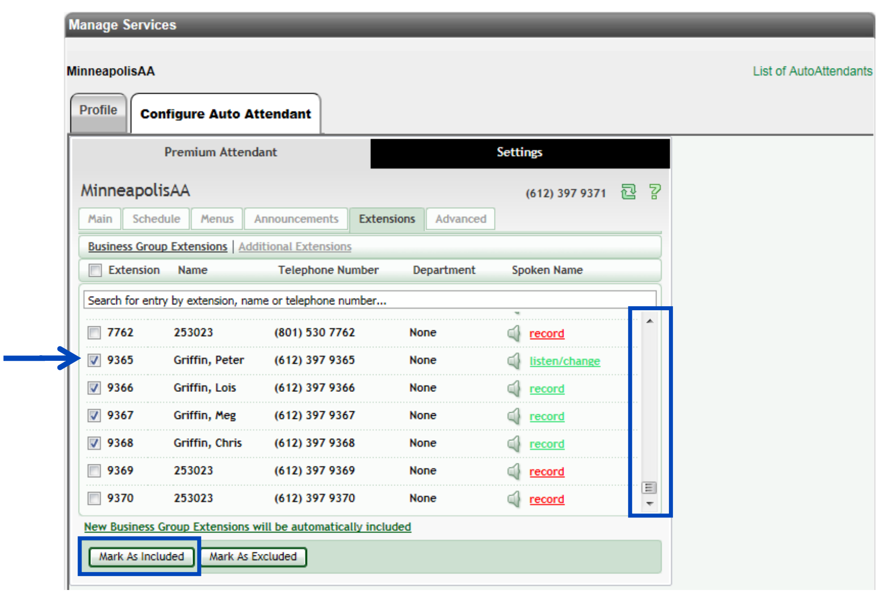
69. When prompt assignments were made for **Dial by Name** and **Dial by Extension**, you were provided with a "**?**" directing you to proceed to another area within the **Auto Attendant** to complete programming of those features.
70. To continue with those features, click on the **Extensions** tab.



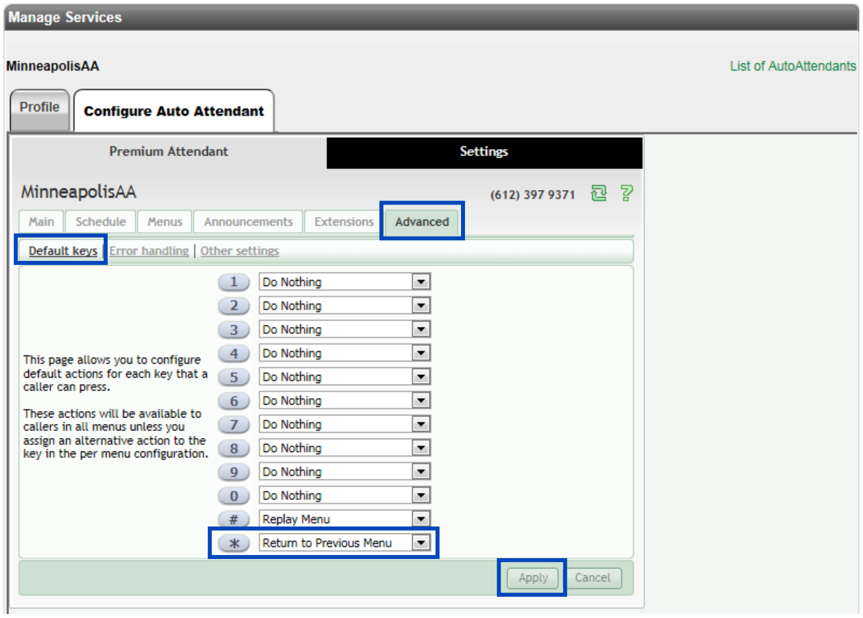
71. Use the **Scroll Bar** to find the employees you wish to add to the **Dial by Name** and **Dial by Extension** options.

Note: Each user must have recorded their name for the **Dial by Name** prompt. If this is not done, you can record the user's first/last name via the portal, if you have a sound card and microphone, or by phone by selecting the Auto Attendant configuration option. Even though it may indicate "record" next to a user's name, they may have recorded their first/last which then does not require you to rerecord it.

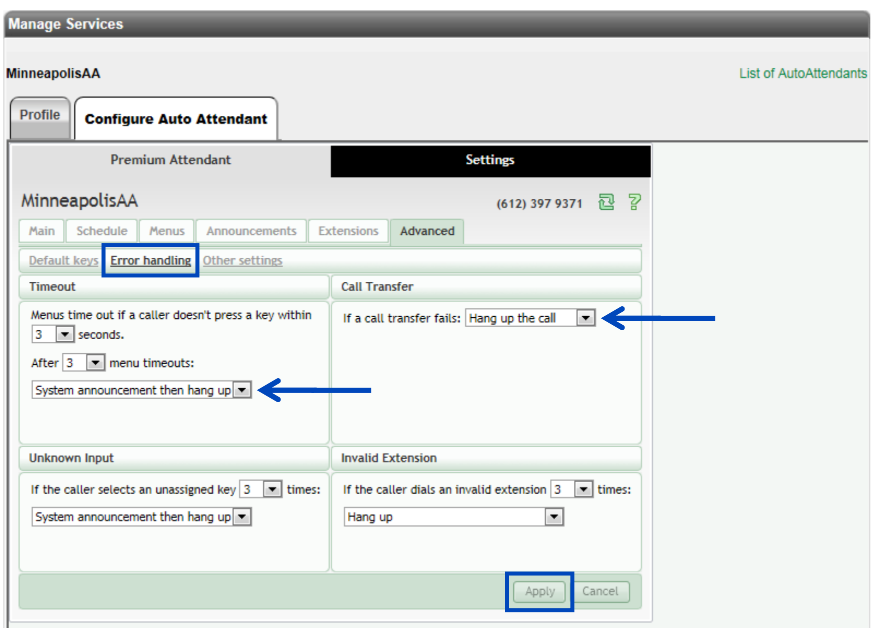
72. Click in the **Check Box** next to the users you want to add and click the **Mark As Included** button.



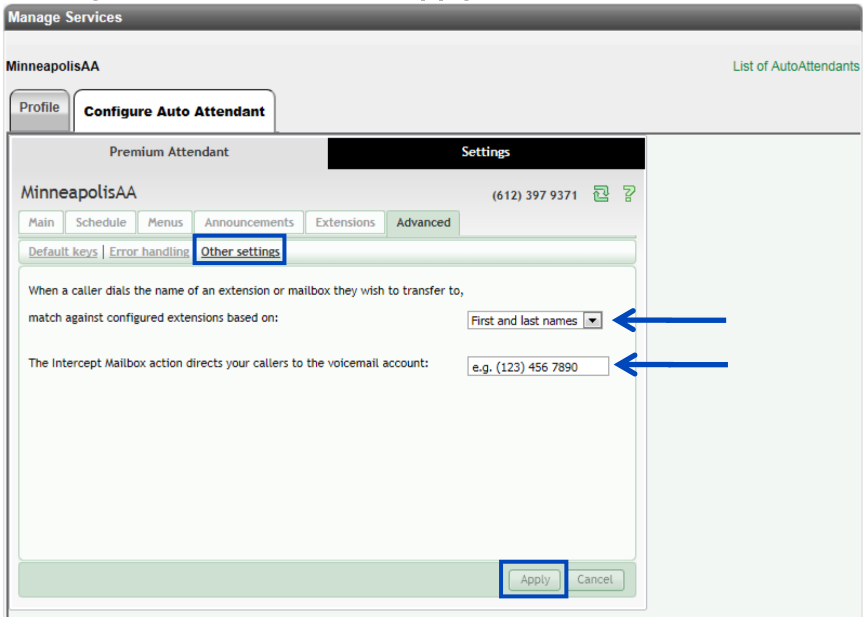
73. Click on the **Advanced** tab, **Default Keys**.
74. This allows you to configure default actions for specific keys that will be available in all menus, unless they are assigned alternate options. In this example, if "*" is not assigned another action, all **Menus** will allow the caller to **Return to the Previous Menu** by pressing the "*" key.
75. If any changes are made, click the **Apply** button.



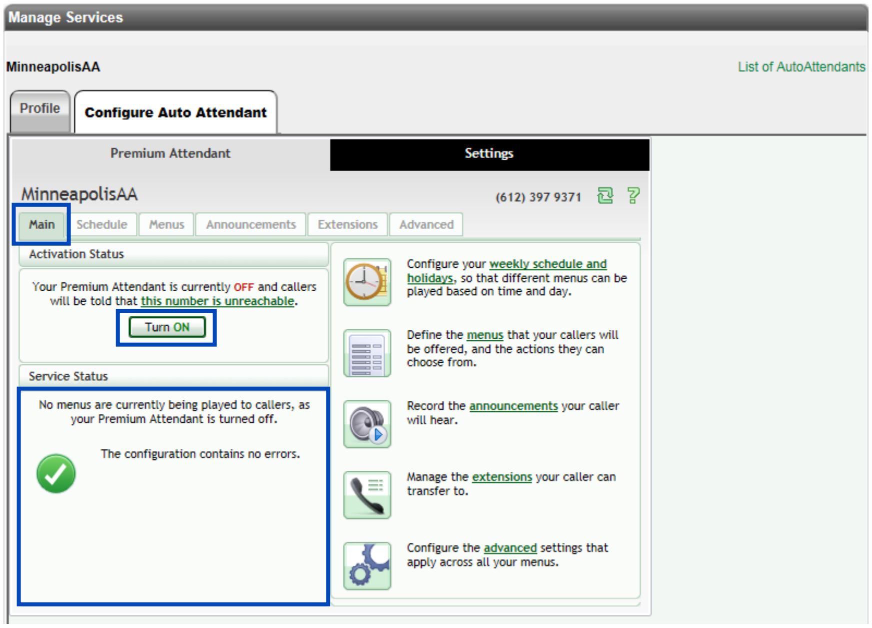
76. Click the **Error Handling** tab.
77. This allows you to change system parameters for **Timeout**, **Call Transfer**, **Unknown Input** and **Invalid Extension**.
78. Select options from the dropdown lists to modify the system parameters.
79. When all changes have been made, click the **Apply** button.



80. Click the **Other Settings** tab.
81. Select from the dropdown lists options to change configuration for dial by name and extension, and for sending callers to an Intercept Mailbox (this is a greeting only mailbox for information purposes).
82. When all changes are made, click the **Apply** button.



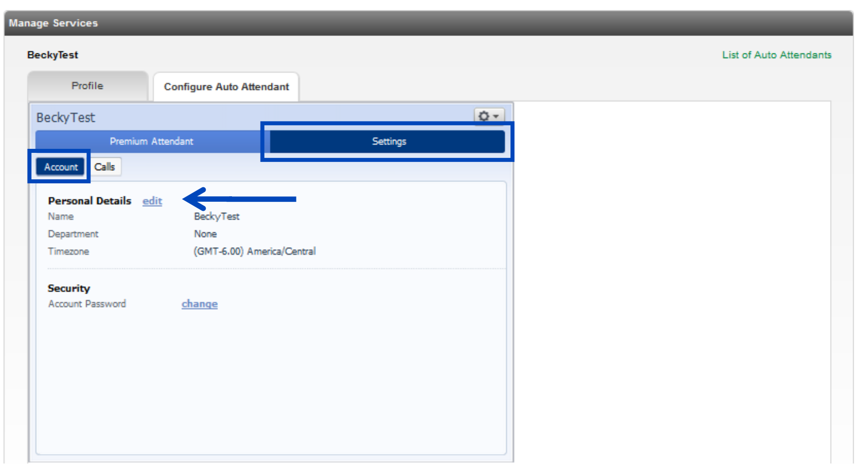
83. Once all Auto Attendant options have been made and applied, click on the **Main** tab from anywhere within the Auto Attendant feature.
84. Your Auto Attendant will be turned "Off" until all programming is completed and there are no errors in the configuration.
85. The **Service Status** area of the **Main** screen will update you if there are any errors. Errors will be indicated with Blue and Yellow warning triangles. Click on the warning sign for instructions to correct your error.
86. Click on the Warning Sign and you'll be informed of what the error is.
87. Once all errors are corrected, click the **Turn On** button to activate your **Auto Attendant**.
88. Your Auto Attendant will follow the Schedule you set up, provide the Announcement that you recorded, and provide the caller with the Prompts that you selected.
89. If you wish to turn off the **Auto Attendant**, click the Turn Off button that will be activated once the Auto Attendant is turned on.



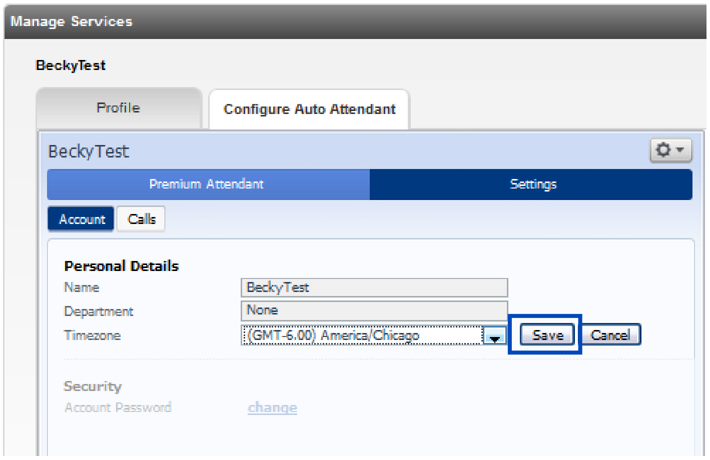
Settings

Settings allows you to change the Time Zone and Password for your Auto Attendant.

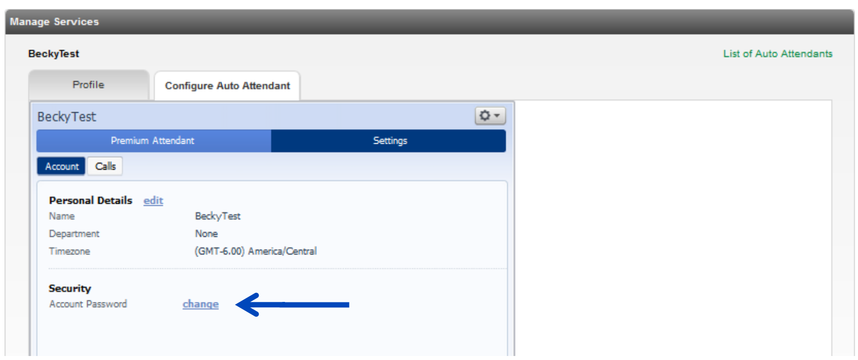
1. Click the **Settings** tab.
2. From the **Account** tab, click the Personal Details **Edit** link.



3. From the **Timezone** dropdown list, select the time zone you want to apply to your **Auto Attendant**.
4. Click the **Save** button.



5. To change the password for your Auto Attendant, click the **Change** link.

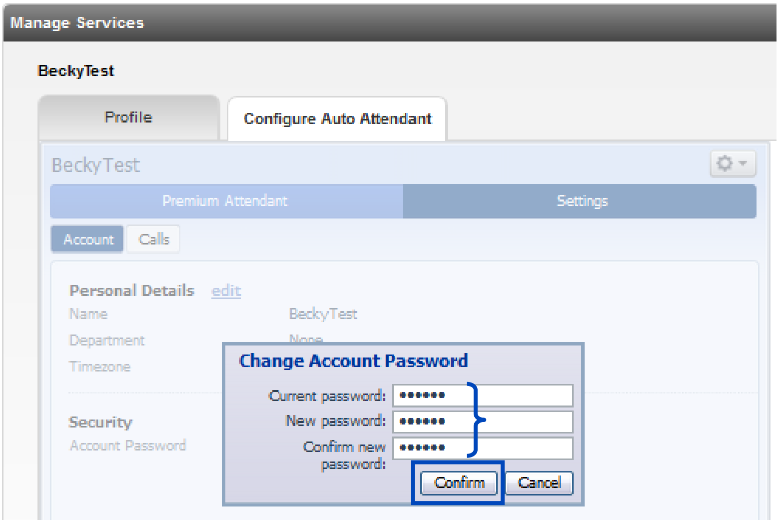


6. Enter the current password in the **Current Password** field.
7. Enter the new password in the **New Password** field.
8. Re-enter the new password in the **Confirm New** field.

Note: If you did not log into your Auto Attendant vial the Voicemail Retrieval number to define a current password, the default password is 000000.

Note: This password will be used to access your Auto Attendant via the phone, so it should be a numeric password.

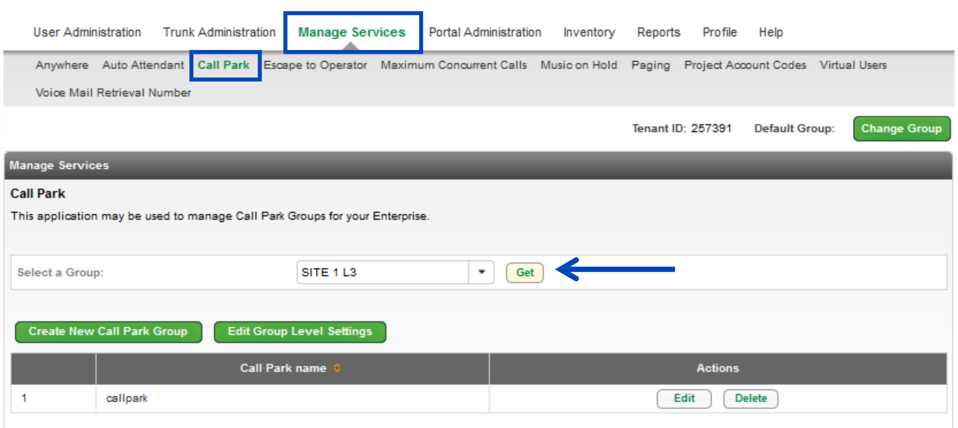
9. Click the **Confirm** button.



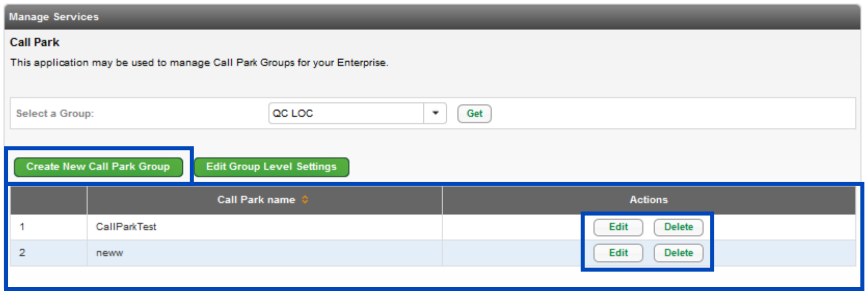
Call Park Group

Call Park Group lets you define **Call Park Groups** that allow users in those groups to park calls within their group. Calls are **Parked** and **Retrieved** using a softkey or predefined access code.

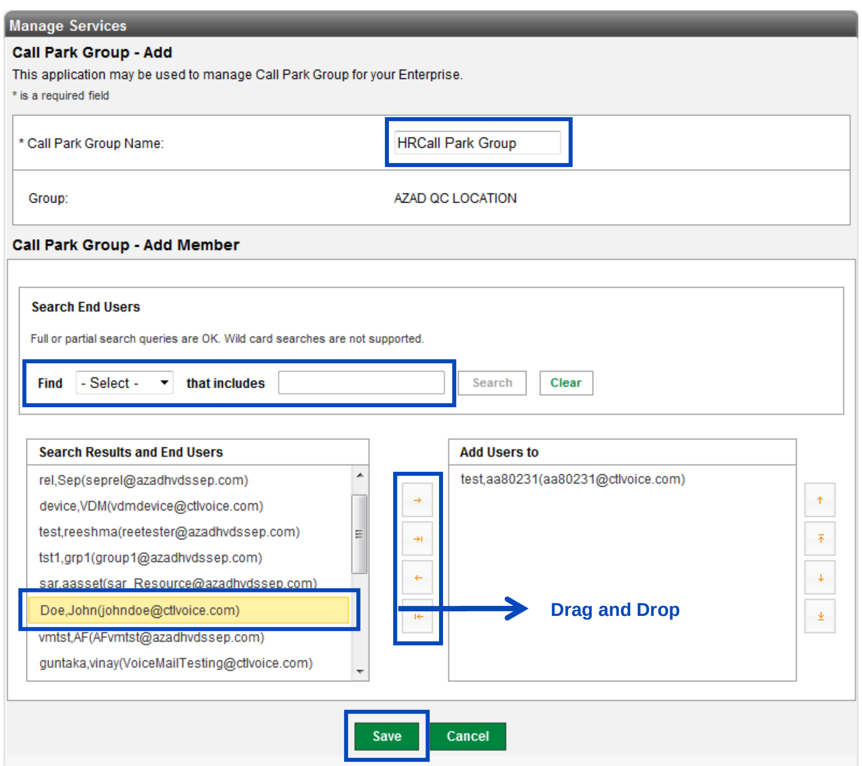
1. Click **Manage Services** from the main menu.
2. Click **Call Park** from the sub menu.
3. If you have multiple groups, select the group you want to add a **Call Park Group** to from the dropdown list.
4. Click the **Get** button.



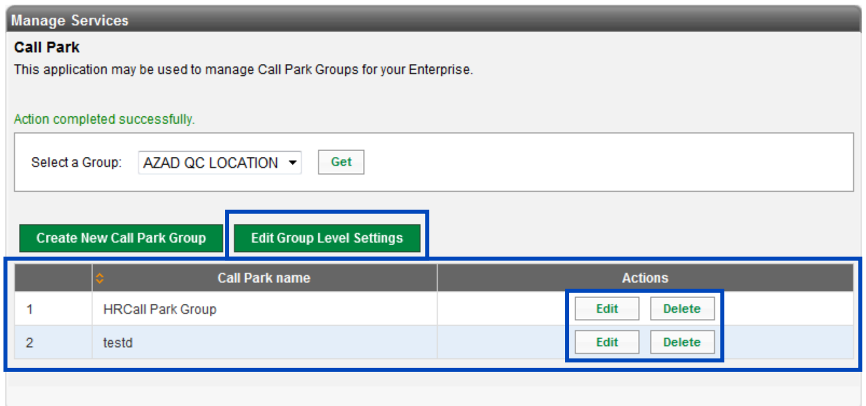
5. If any **Call Park Groups** currently exist for the selected group, they'll be displayed and can be **Edited** or **Deleted** by clicking the appropriate button.
6. Click the **Create New Call Park Group** button.



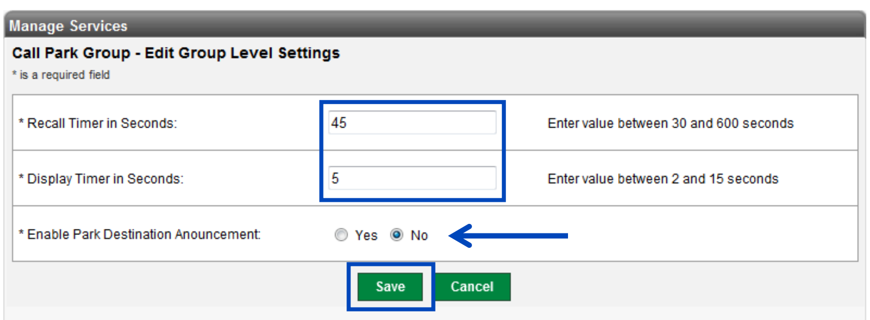
7. Enter a descriptive name in the **Call Park Group Name** field.
8. Enter search criteria for the users you would like to add to a **Call Park Group**.
9. If you have less than 1000 users, you're not required to **Search** for individual users. All users in the **Group** will be listed under **Search Results and End Users**.
10. Drag and drop the user(s) you would like to add to the **Call Park Group** from the left column to the right column (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
11. Click the **Save** button.



12. The new **Call Park Group** is displayed.
13. Click the **Edit Group Level Settings** to manage settings within a **Call Park Group**.
14. Locate the **Call Park Group** to manage and click the **Edit** button for that group.
15. Click the **Delete** button to delete a **Call Park Group**.



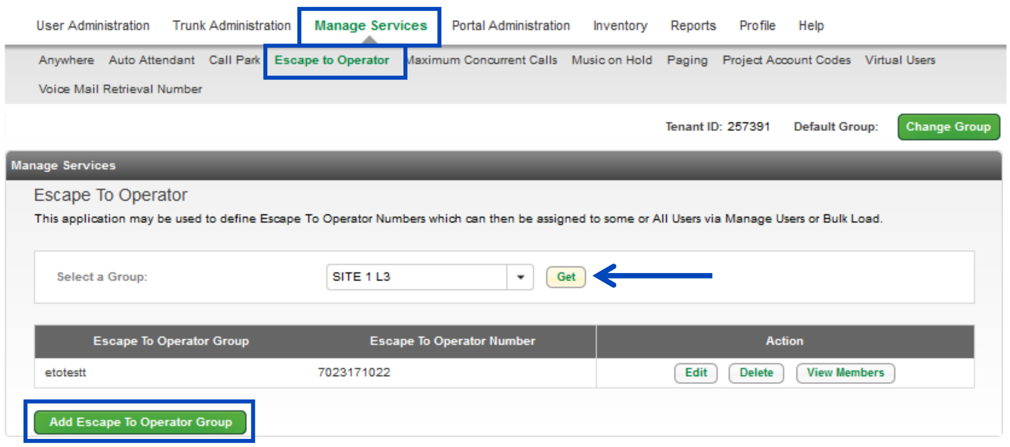
16. Please note that changing settings at this level will impact all **Call Park Groups** within this group as a whole, not just one **Call Park Group**.
    - **Recall Timer in Seconds –** number of seconds the call will be on Park until it recalls to the device it was parked in if it is not picked up elsewhere
    - **Display Timer in Seconds –** controls how long the server waits before releasing the parked call
17. Make any settings changes you want to for the entire group.
18. Click the **Save** button.



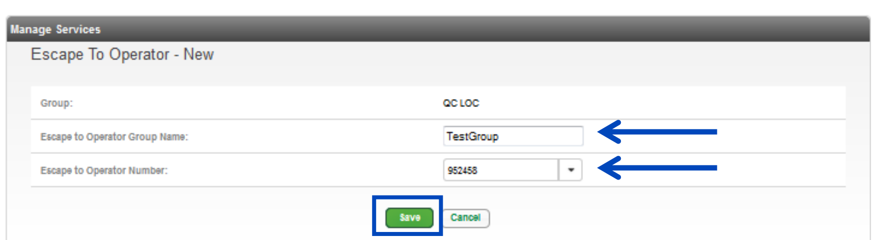
Escape to Operator

Escape to Operator allows you to setup phone numbers that calls can be transferred to when a caller presses 0 (zero) during the recipient's voicemail greeting. If you have multiple groups (locations), each location can **Escape** to a different operator. Within a group, you can have multiple groups that ring to different operators such as administrative assistants.

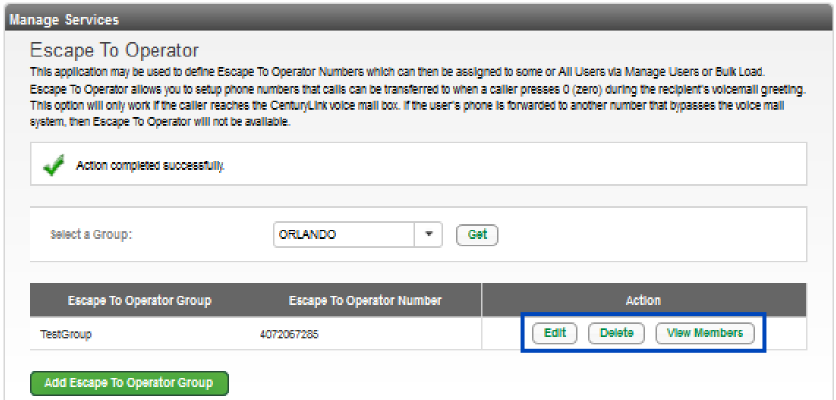
1. Click **Manage Services** from the main menu.
2. Click **Escape to Operator** from the sub menu.
3. If you have existing **Escape to Operator Groups** set up, they'll be displayed below.
4. Select the group you wish to manage from the **Escape To Operator** dropdown list and click the **Get** button.
5. To add a new group, click the **Add Escape to Operator Group** button.



6. Enter the **Escape to Operator Group Name**, this should describe the destination/person callers assigned to that group ring to.
7. Select the **Escape to Operator Number** you would like to assign to this group from the dropdown list or, enter any valid **10-digit number** in the **Escape to Operator Number** field.
8. Click the **Save** button.

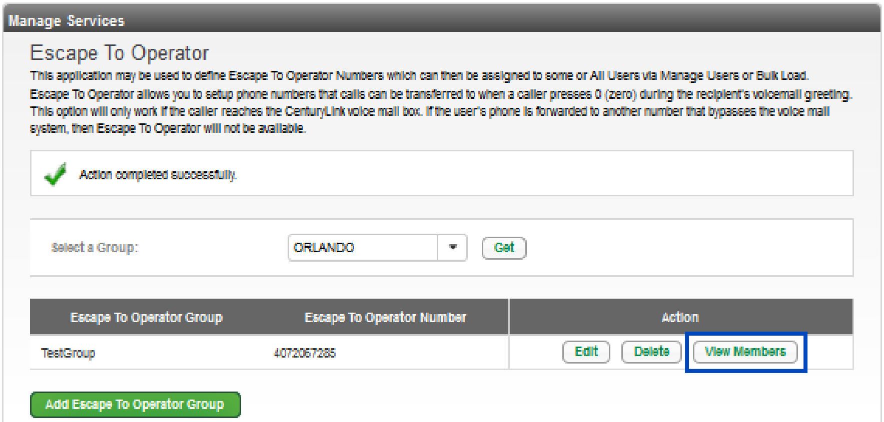


9. Users can be assigned to any **Escape to Operator Group** within their group.
10. To **Edit**, **Delete** or **View Members** of any **Escape to Operator Group**, click the appropriate button associated for the specific **Escape to Operator Group** you wish to manage.

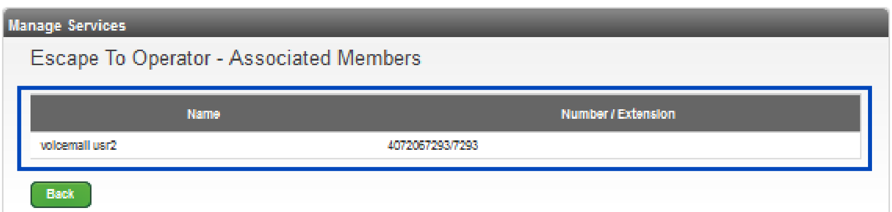


11. To add a user to an existing **Escape to Operator Group**, access that user's settings by clicking on **User Administration** from the main menu.
12. Click on **Manager Users** from the submenu.
13. Search for the **User** you wish to add to an existing **Escape to Operator Group**.
14. Click the **Voicemail Settings** tab, click the dropdown list next to **Escape to Operator Group**.
15. The dropdown list will include any existing **Escape to Operator Groups** that have been set up, as well as any new **Escape to Operator Groups** that have been added.
16. Select the appropriate **Escape to Operator Group** from the dropdown list; the name and phone number of the Escape to Operator Group will appear.
17. Click the **Save** button.
18. When a caller presses "**0**" from that user's voicemail, they'll roll to that destination for further assistance.

19. To view members of an Escape to Operator Group, click the **View Members** button.
20. When a caller presses "0" from that user's voicemail, they'll ring to that destination for assistance.



21. All members of that **Escape to Operator Group** will be displayed.
22. To change an **Escape to Operator Group** for a particular user or to remove them from **an Escape to Operator Group** completely, return to **User Administration** to search for the user, and then modify this option.

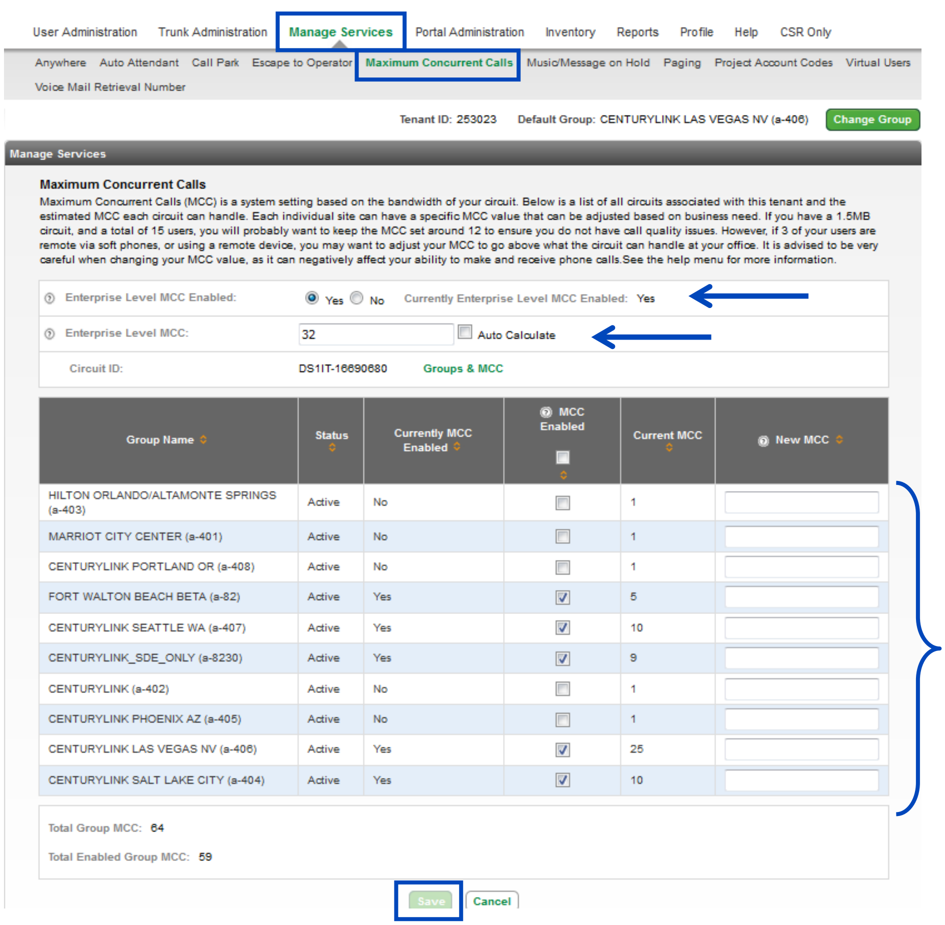


Maximum Concurrent Calls

Maximum Concurrent Calls (MCC) is a system setting based on the bandwidth of your circuit. The system setting is the suggested number of **MCC's** based on your circuit size. The number of **MCC's** can be changed but understand warning messages regarding best practices when determining the **MCC's**, and the cause and effect of increasing the number higher than your bandwidth can support.

1. Click on **Manage Services** from the Main Menu.
2. Click on **Maximum Concurrent Calls (MCC)** from the submenu, to display current circuits and **MCC** settings for each.
3. Click the **Yes** or **No** radio button to enable or display the **Enterprise Level MCC Enabled** feature:
   - **Enabled** – sets the MCC value for this enterprise/tenant
   - **Disabled** – enterprise/tenant level MCC is not utilized
4. Enter the number of MCCs for the enterprise/tenant in the **Enterprise Level MCC** field; click the **Auto Calculate** check box to calculate this setting for you.

   Note: This value is independent of the Group Level MCC setting; if the Enterprise/Tenant Level MCC and Group Level MCC are both enabled, the Enterprise Level MCC value must be greater than or equal to the highest Group Level setting.
5. To increase or decrease MCC settings for any group, enter the total final number of MCC's in the appropriate field in **New MCC** column; each group must have a minimum of 1 MCC.
6. Click the **Save** button.

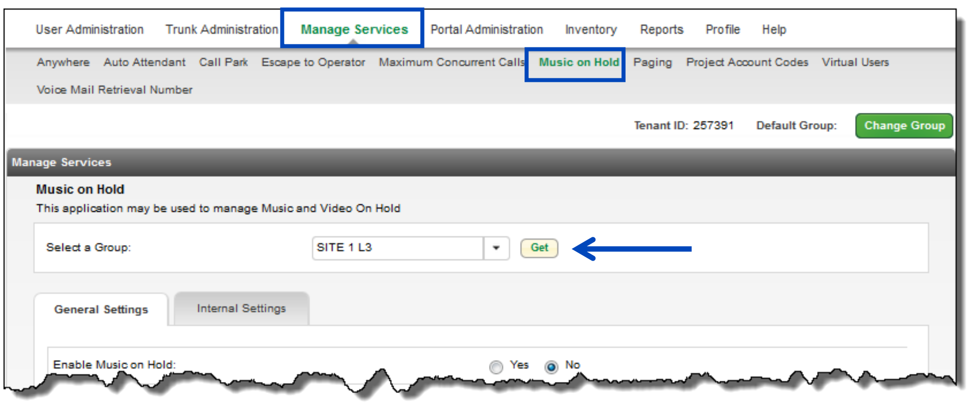


Music/Message On Hold

Music/Message On Hold is what your callers will hear when they are placed on Hold, Parked, or placed on Busy Camp status. The Music can be a default file, or you can upload a custom file with music or speech.

1. Click on **Manage Services** from the Main Menu.
2. Click on **Music/Message on Hold** from the submenu.
3. If you have multiple groups, select the appropriate group from the dropdown list. **Music/Message on Hold** options can be the same for each group, or they can be unique.
4. If you have multiple groups and need to select the group you wish to modify, click the **Get** button.

   Note: File limit size is 1mb.



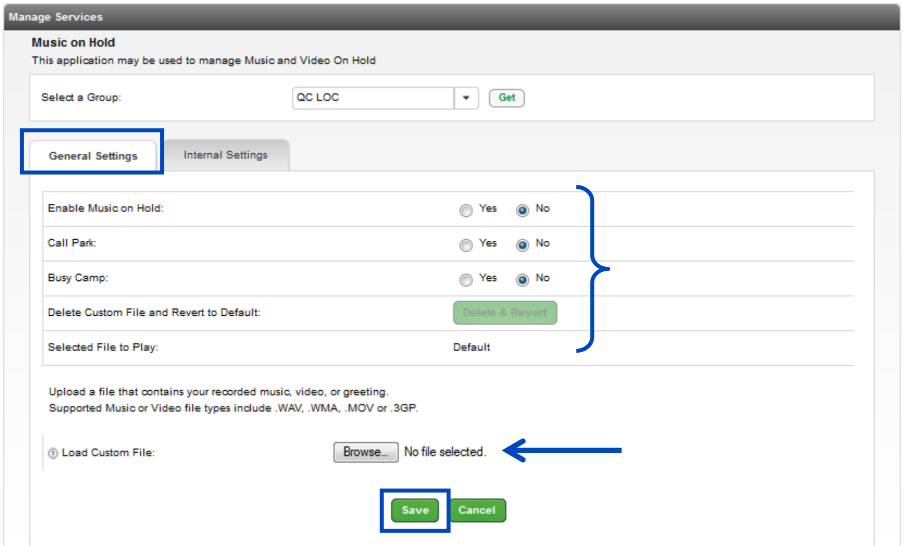
5. **Music/Message on Hold** options for that group will be displayed.
6. On the **General Settings** tab, click the radio buttons to turn on **Music on Hold** for **Hold**, **Call Park**, and **Busy Camp**. You can choose which features have **Music on Hold**, and which you prefer to not have **Music on Hold**.
7. **Music/Message on Hold** will be programmed with a default recording. If you wish to upload custom **Music on Hold**, click **Browse** to upload your file.

   Note: Files must be formatted as .WAV or .WMA. Files must be less than 10 minutes (9:59), and must meet the following requirements:

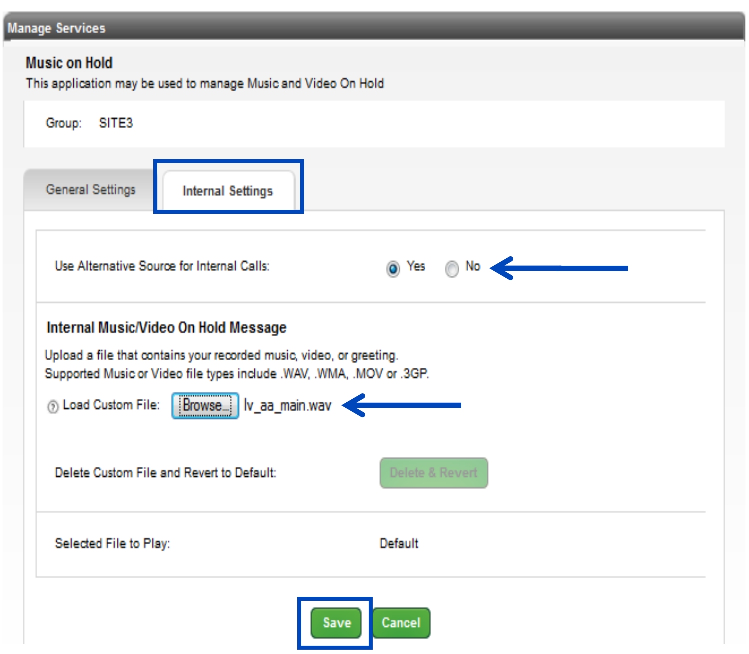
   - **For .WAV files:**
     8.000 or 16.000 kHz
     8 or 16 bit mono
     µ-law, A-law, or PCM
   - **For .WMA files:**
     8.000 or 16.000 kHz
     16 bit mono
     µ-law, A-law, or PCM
   - The maximum audio length is 10 minutes for the Music On Hold greeting or music.
8. Once changes are made to modify your **Music/Message on Hold** options, click the **Save** button.

9. The selected default or custom **Music/Message on Hold** will play when you place a caller on hold.

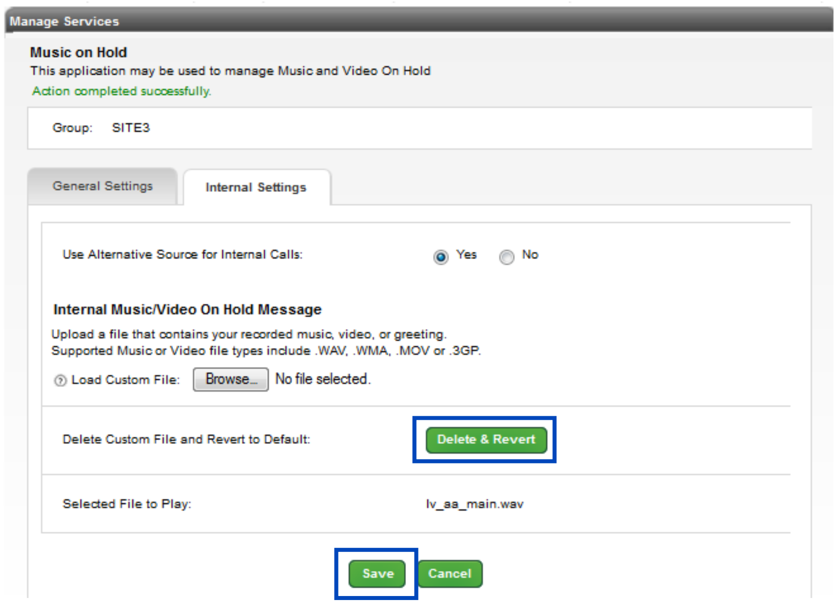
Note: If you only make setting changes to the General Settings tab, the selected options will impact both internal and external callers place on hold; if you define setting changes on the Internal Settings tab, internal callers will unique settings from external callers.



10. You can also choose different or customized **Music/Message on Hold** for internal callers.
11. Click on the **Internal Settings** tab.
12. If you choose to use the default **Music/Message on Hold**, you don't need to make any changes.
13. If you wish to have a unique recording for internal callers, click the **Yes** radio button.
14. Click on the **Browse** key to upload your internal recording.
15. The File name will be noted once the file has been uploaded.
16. When all changes are made, click the **Save** button.



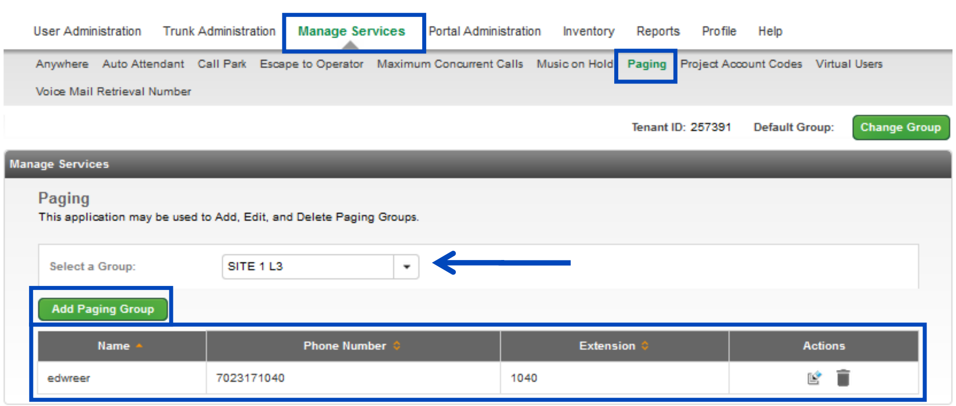
17. Once a custom file has been uploaded for either a **General** or **Internal Settings**, click the **Delete & Revert** button to remove the custom file and revert to the default.
18. Click the **Save** button.



Paging

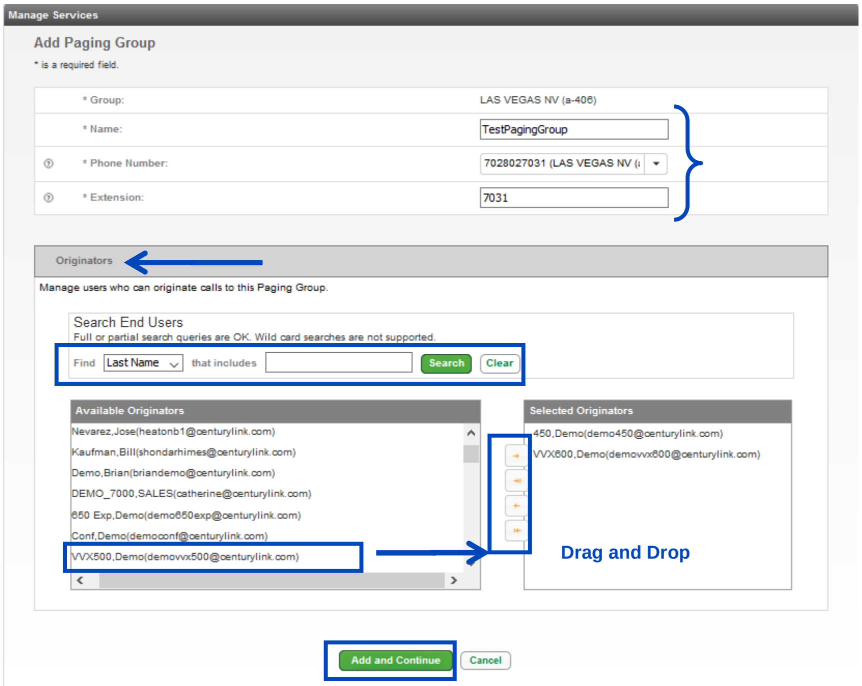
Paging allows you to define up to 50 devices that can receive over the phone paging. The **Page** will be a one-way announcement. You can also define which individuals are allowed to perform a **Page**.

1. Click on **Manage Services** from the Main Menu.
2. Click on **Paging** from the submenu.
3. Select the group you wish to manage from the **Select a Group** dropdown list.
4. All existing **Paging Groups** will appear to be Edited or Deleted.
5. To add a group, click the **Add Paging Group** button.



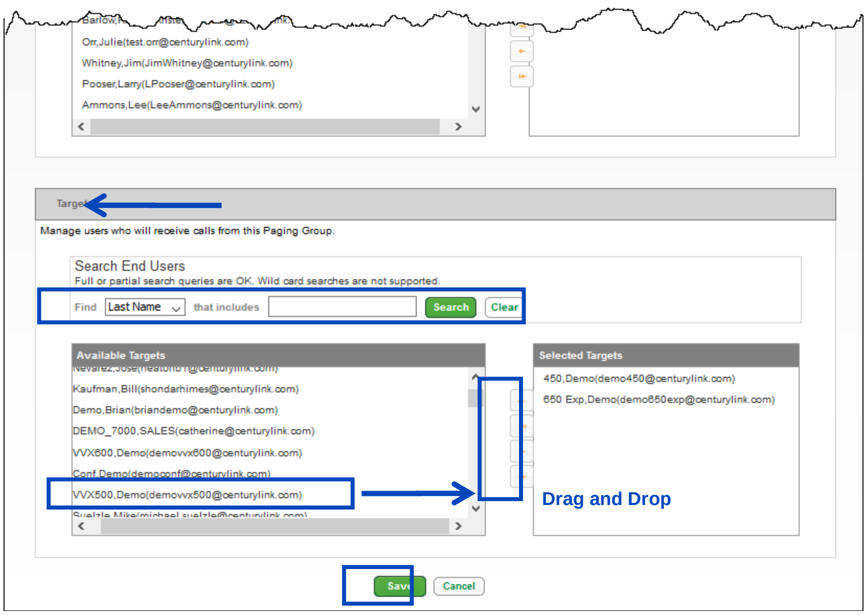
6. Enter the name of your Paging group in the **Name** field; no special characters or white spaces.
7. Select the telephone number you wish to assign to your Paging Group from the **Phone Number** dropdown list.
8. The **Extension** field auto populates based on your dialing plan, and it can be edited.
9. Scroll to search for the users you'll allow origination of a **Page**.
10. Enter search criteria for the users you would like assign as originators.
11. If you have less than 1000 users, you're not required to **Search** for individual users. All users in the tenant are listed in the **Available Originators** field.
12. Drag and drop the user(s) you would like to add to originate paging to the **Selected Originators** field (you can also select them while holding down the **Control** button on your keyboard and then click the right arrow in the middle of the columns).
13. Click the **Add and Continue** button.

Note: Originators are able to send a Page to target devices by dialing the extension assigned to the Paging Group.



14. Scroll to search for the users you'll allow as **Targets** for the Page (Target fields are exposed after clicking the **Add and Continue** button in the previous step).
15. Enter search criteria for the users you would like assign as originators.
16. If you have less than 1000 users, you're not required to **Search** for individual users. All users in the tenant will be listed under the **Available Target** field.
17. Drag and drop the user(s) you would like to add to originate paging to the **Selected Targets** field (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
18. Click the **Save** button.

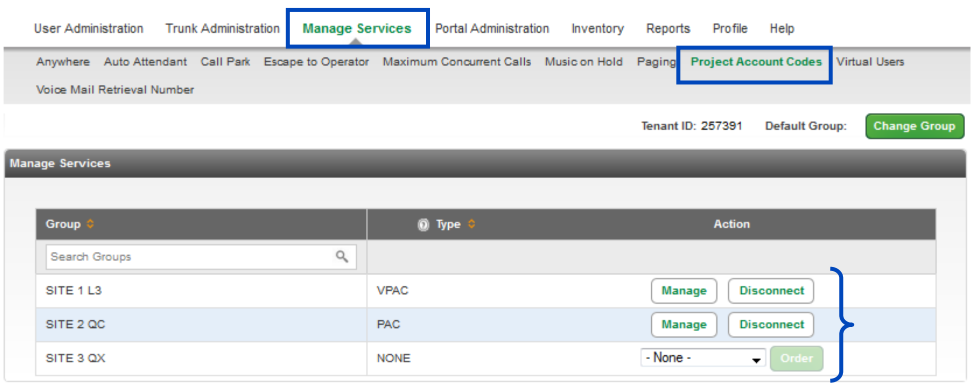
Note: Target devices added to the Select Targets field are the only devices to receive the one-way page from that Paging Group.



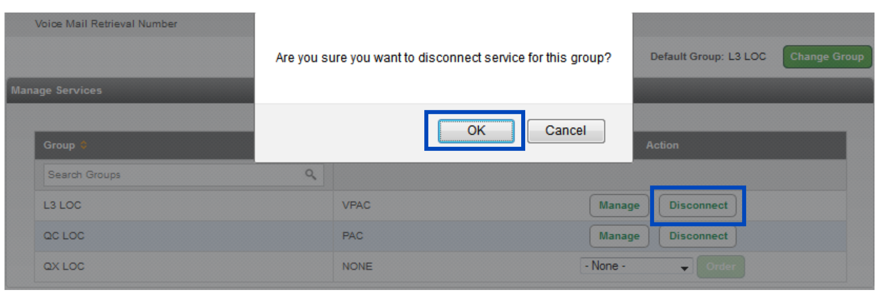
Project Account Codes

Project Account Codes are used by customers for internal call tracking and accounting and/or to control the ability of the customer's employees to make certain types of telephone calls. **Non-Verified Project Account Codes** (PAC) require a specific number of dialed digits. **Verified Project Account Codes** (VPAC) require a specific number of digits and specific codes that are defined by the Administrator.

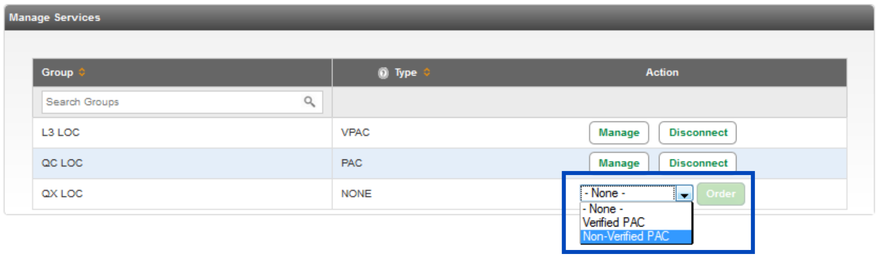
1. Click on **Manage Services** from the Main Menu.
2. Click on **Project Account Codes** from the submenu.
3. Any group that has an existing project code can be **Edited** or **Disconnect**.
4. Click on the **Order** button to order a Project Account Code for any groups that currently don't have that feature.
5. If you submit an **Order** for a Project Account Code, it will take approximately 30 minutes to become available for programming.



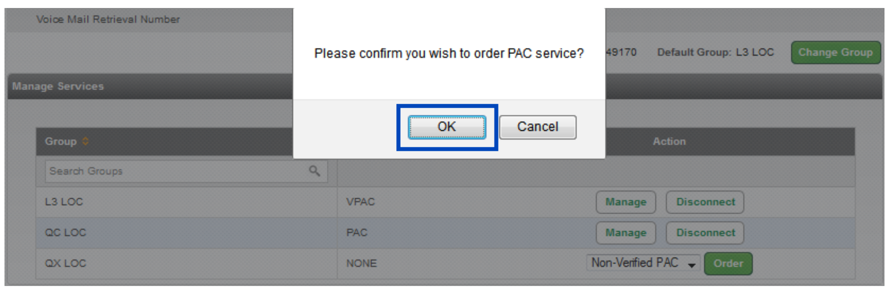
6. To disconnect a **Project Account Code** for any group, click the **Disconnect** button.
7. A message box will appear to confirm disconnection or removal of that **Project Account Code** product for that group.
8. To confirm disconnection, click the **OK** button.



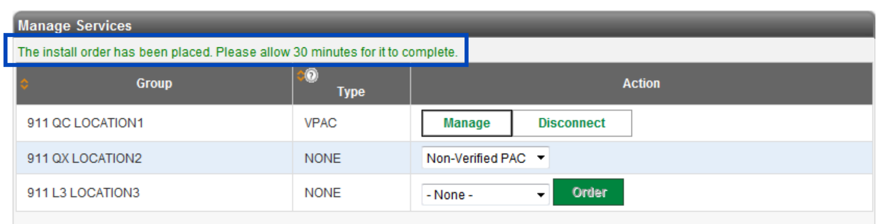
9. To order **Verified Project Account Codes** or **non-Verified Project Account Codes**, click on the dropdown list for the group you want to order codes for.
10. Select if those codes will be **Verified** or **non-Verified** from the dropdown list.
11. Click the **Order** button.



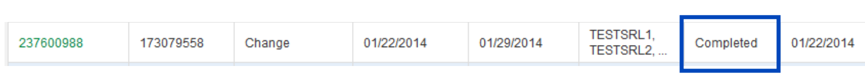
12. You'll receive a message asking you confirm the ordering of your PAC service.
13. Click the **OK** button to complete and submit your order.



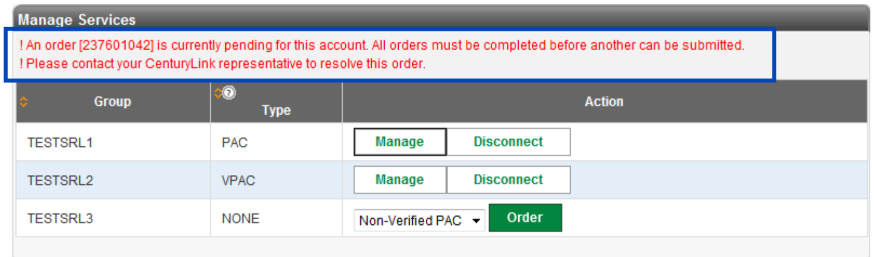
14. You'll receive confirmation of your order, and a reminder that it will take approximately 30 minutes for your order to complete.



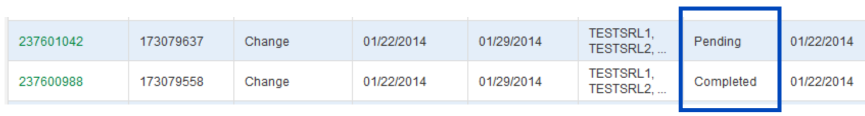
15. Follow the progress of your order under **Inventory → Order Status**.
16. Once your VPAC/PAC order has been processed and indicates **Completed** in the order status, you can proceed with building your indexes.



17. If you're **Ordering** a VPAC or PAC product, or **Disconnecting** a VPAC or PAC, product and have another order in progress, you'll receive an error message stating that you'll need to wait for that order to complete before you can submit your **VPAC/PAC** order.
18. The order number in progress is referenced in the error message



19. Follow the progress of that order under **Inventory → Order Status** from the main menu.
20. Once that order changes to **Completed** status, you can resubmit your VPAC/PAC order.

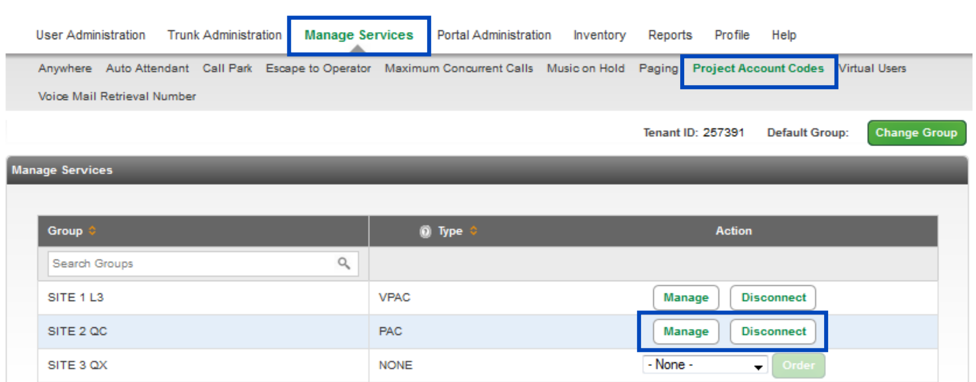


Programming Non-Verified Project Account Codes

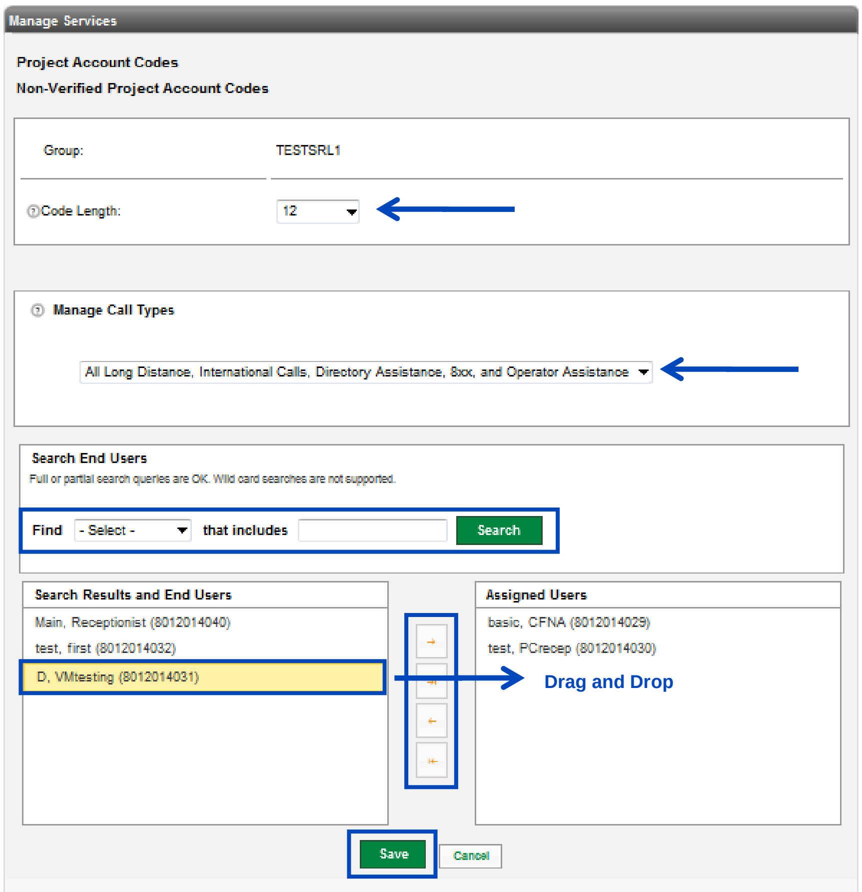
A **Non-Verified Project Code (PAC)** looks for the user to enter a specific number of digits when dialing outside numbers. This code requirement can be associated to various call types such as All Calls, Long Distance, International, Operator Assistance, etc.

Note: You can have one PAC setting per group. If a code length of 12 is selected, anyone in that group that is required to use a PAC for a specific call type, will need to enter a 12-digit code. You cannot have multiple code lengths in one group.

1. Click on **Manage Services** from the Main Menu.
2. Click on **Project Account Codes** from the submenu.
3. Click the **Manage** button to proceed with programming.



4. A **PAC** code length can be from 2-12 digits.
5. Select the required number of digits in the **Code Length** dropdown list.
6. Click the dropdown list under **Manage Call Types** to display the various types of calls a PAC would be required for.
7. Enter search criteria for the users you would like to add to require a **PAC**.
8. If you have less than 1000 users, you're not required to **Search** for individual users. All users in the group will be listed under **Search Results and End Users**.
9. Drag and drop the user(s) you would like to add to the **PAC** from the left column to the right column (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
10. Click the **Save** button.

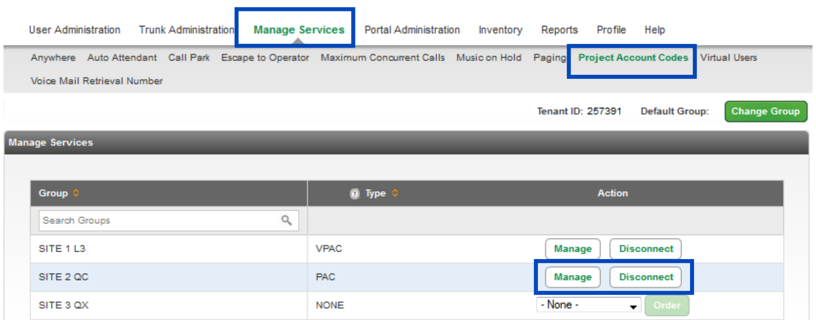


Programming Verified Project Account Codes

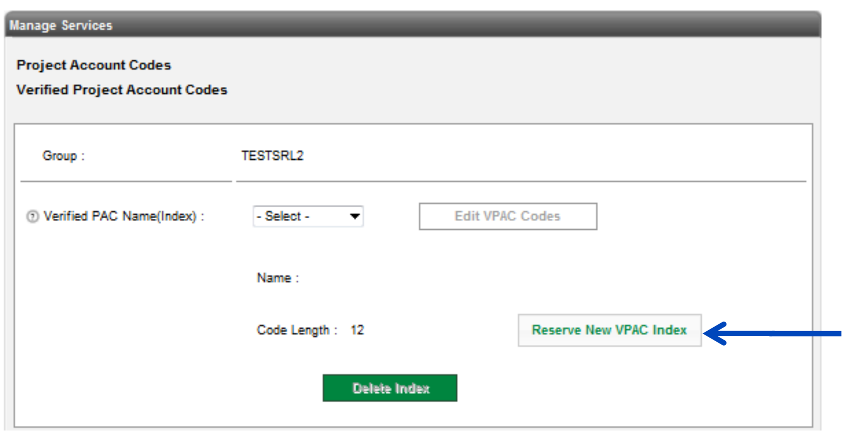
A **Verified Project Code (VPAC)** looks for the user to enter a specific number of digits *AND* specific codes when dialing outbound numbers. This code requirement can be associated to various call types such as All Calls, Long Distance, International, Operator Assistance, etc.

Note: You can have up to four (4) VPAC indexes per group. Each index can have its own unique parameters and codes. A user can only be assigned to one VPAC index.

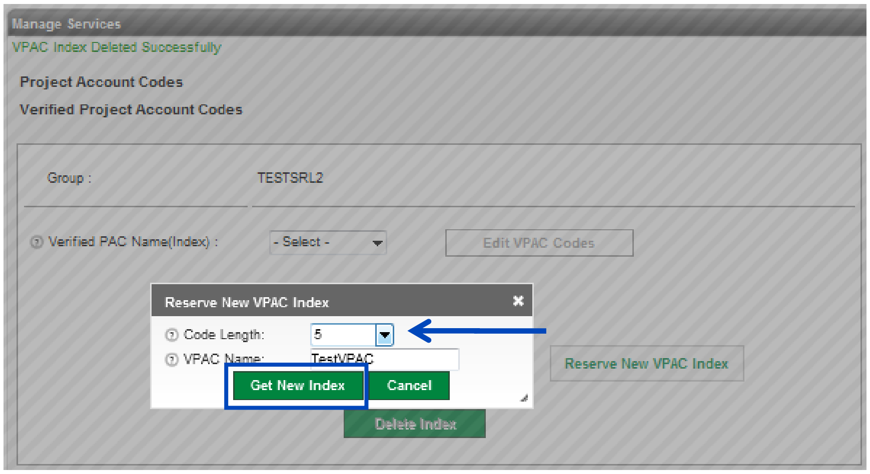
1. Click on **Manage Services** from the Main Menu.
2. Click on **Project Account Codes** from the submenu.
3. Click the **Manage** button.



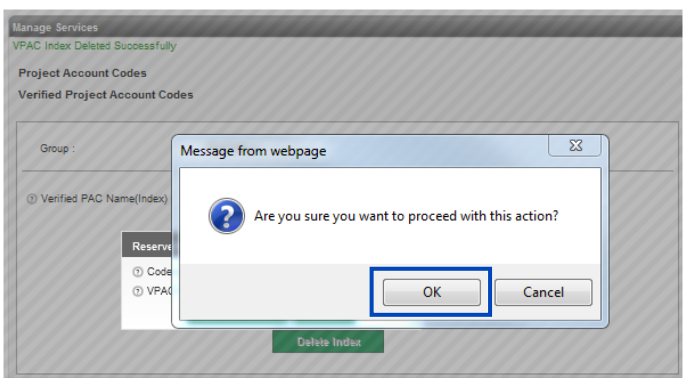
4. To set up a new index, click the **Reserve New VPAC Index** button.



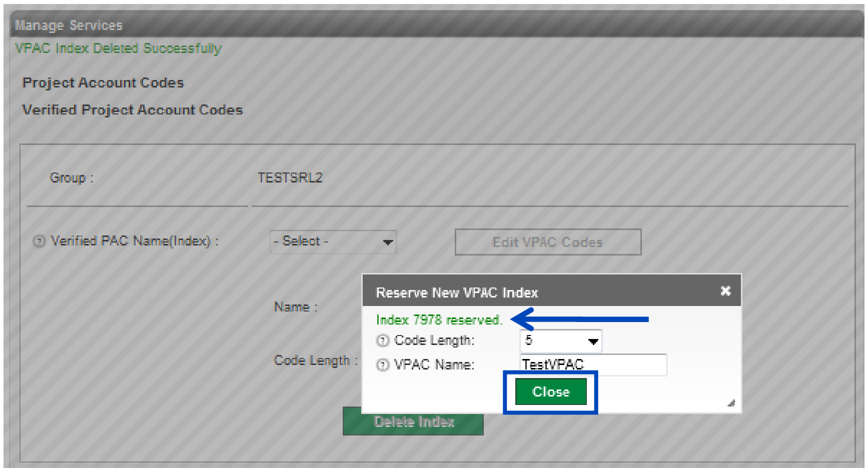
5. In the **Reserve New VPAC Index** box.
6. From the **Code Length** dropdown list, select the number of digits required for that VPAC index.
7. Enter a name for the VPAC index in the **VPAC Name** field.
8. Click the **Get New Index** button.



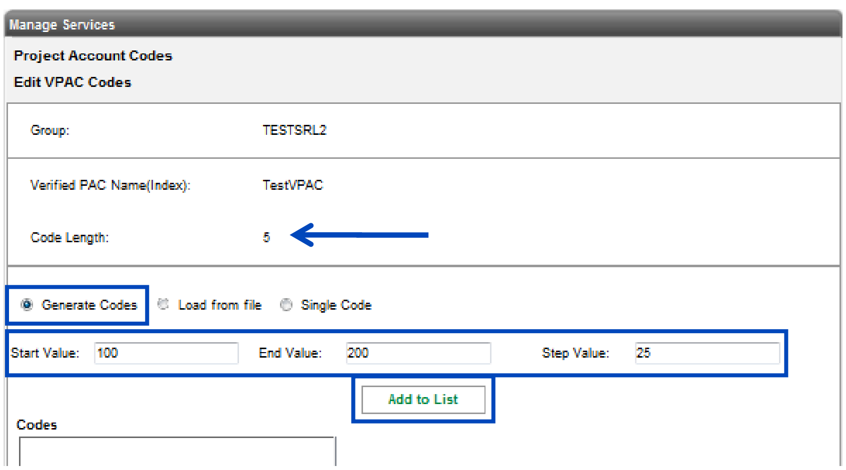
9. You'll receive a message asking you to confirm that you wish to proceed with this action.
10. Click the **OK** button to proceed.



11. A confirmation is received indicating a number has been returned for that VPAC index.
12. Click the **Close** button.

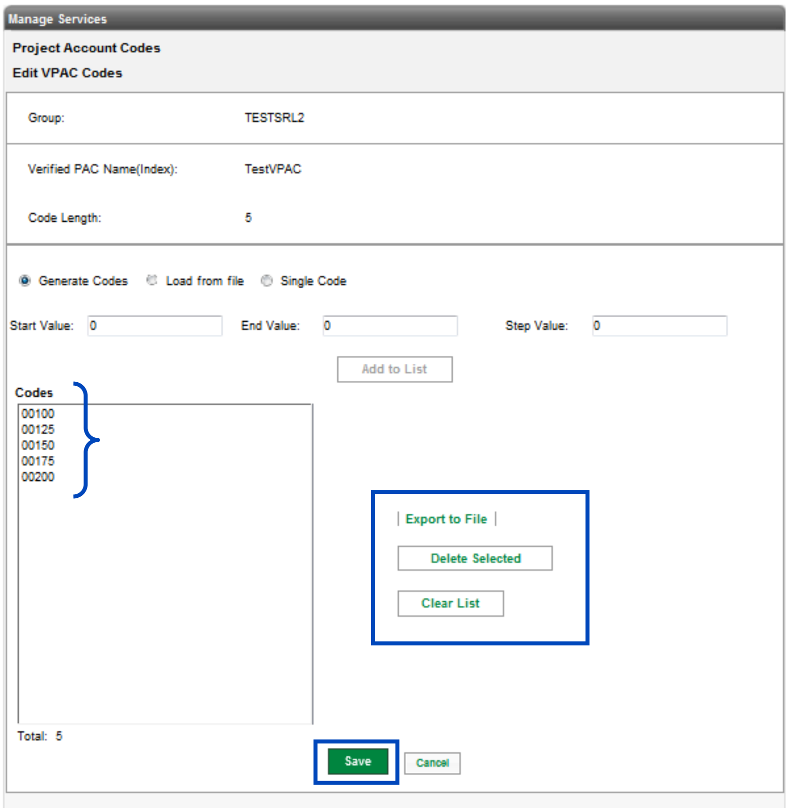


13. The **Start Value** is 100.
14. The **End Value** is 200.
15. The **Step Value** is 25.
16. When all values are entered, click the **Add to List** button.

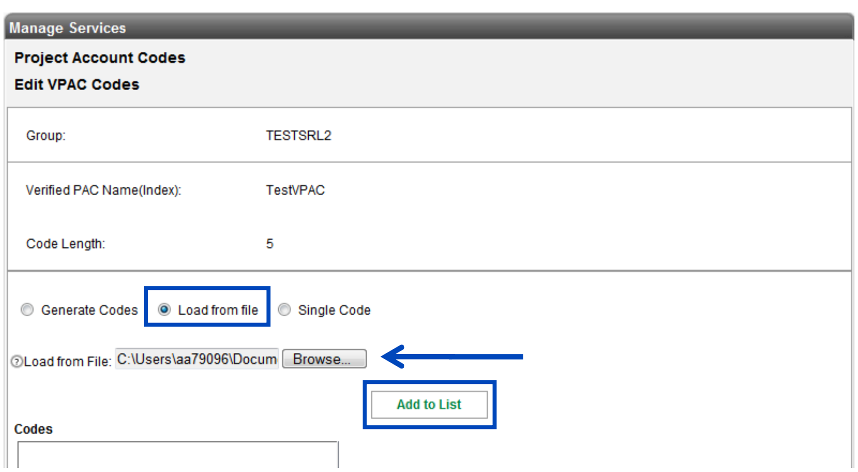


17. Based on the Start, End and Step Values, the system automatically generates your codes based on selected criteria.
18. Codes will be listed under the **Codes** section.
19. Click **Export to File** to export your VPAC code list.
20. Select a code, or codes, and click the **Delete Selected** button to delete codes.

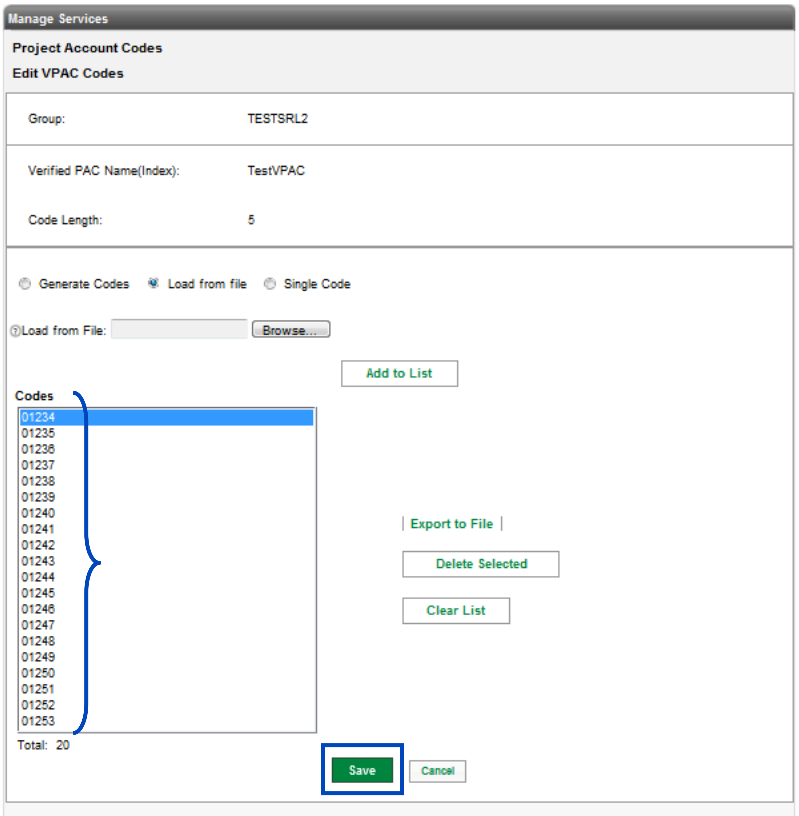
21. Click the **Clear List** button to clear the entire list of codes.
22. Click the **Save** button when all codes appear correctly.



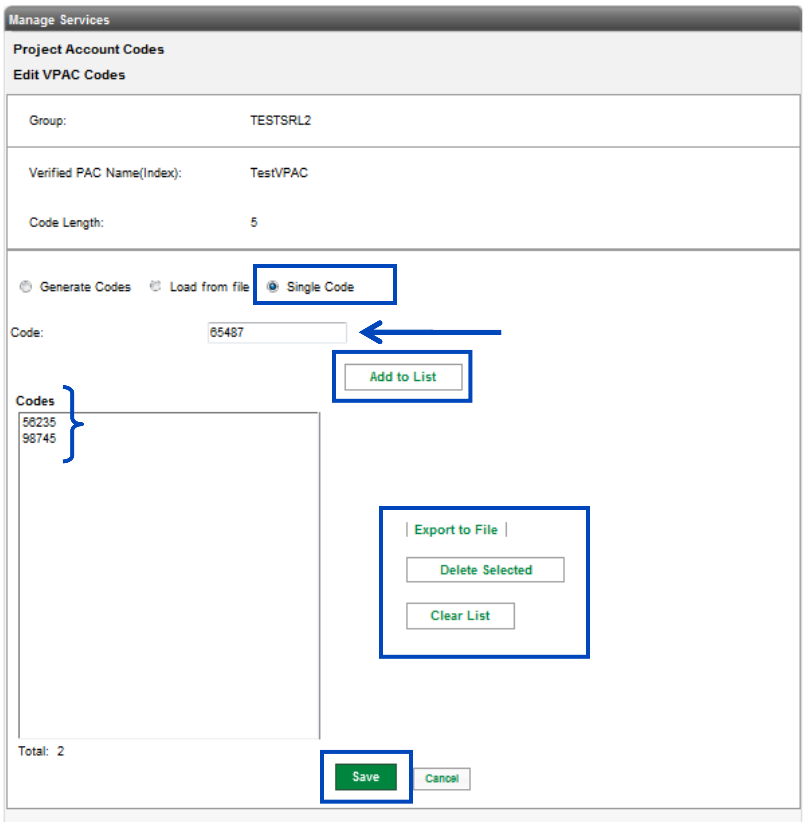
23. To load codes from a file, select the **Load from File** radio button.
24. Click the **Browse** button to search for your file
    - Text or Excel file that contains a single column of VPAC codes (.txt or .xls)
    - The codes must not exceed the code length
    - You can choose the option to pad with leading zeros
25. Click the **Add to List** button.



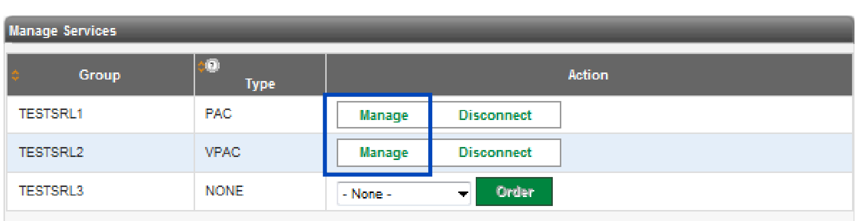
26. The codes will upload based on the source document.
27. In this example, the source document was code 1234 to 1253.
28. Since the Code Length is set to 5, the system automatically padded a lead “0” to each 4-digit code.
29. To **Export the File**, **Delete Selected** code or **Clear List**, click the appropriate button.
30. When all codes are accurate, click the **Save** button.



31. To add single codes, click the **Single Codes** radio button.
32. Enter the required code in the **Code** field.
33. If the code you enter exceeds the Code Length for your VPAC index, you'll receive an error.
34. Click the Add to List button to add your single code.
35. You code will appear in the **Codes** field in numeric order, regardless of how they are entered.
36. Continue with this process until all codes are added.
37. To **Export the File**, **Delete Selected** code or **Clear List**, click the appropriate button.
38. Click the **Save** button when all codes are entered.



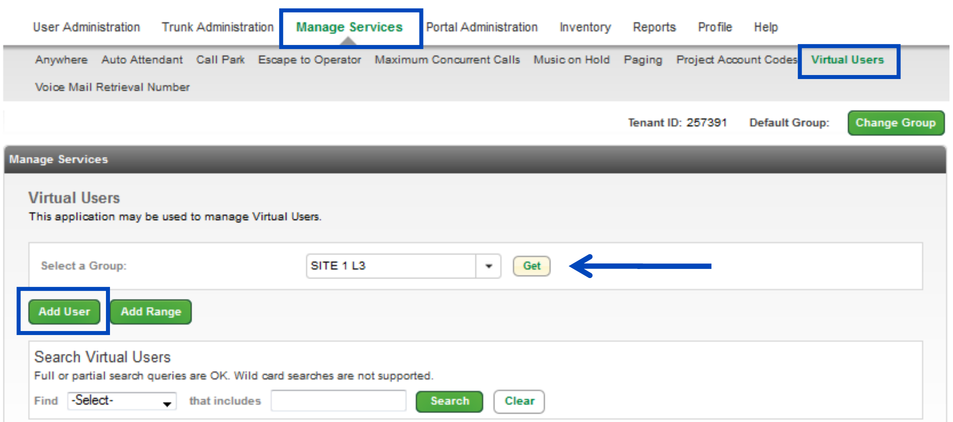
39. After your PAC and VPACs are programmed, return to **Managed Services → Project Account Codes** from the main menu.
40. Click the **Manage** button for the appropriate PAC or VPAC.
41. Edit the codes, code length, users, etc.
42. Click the **Save** button to save your changes.



Virtual Users

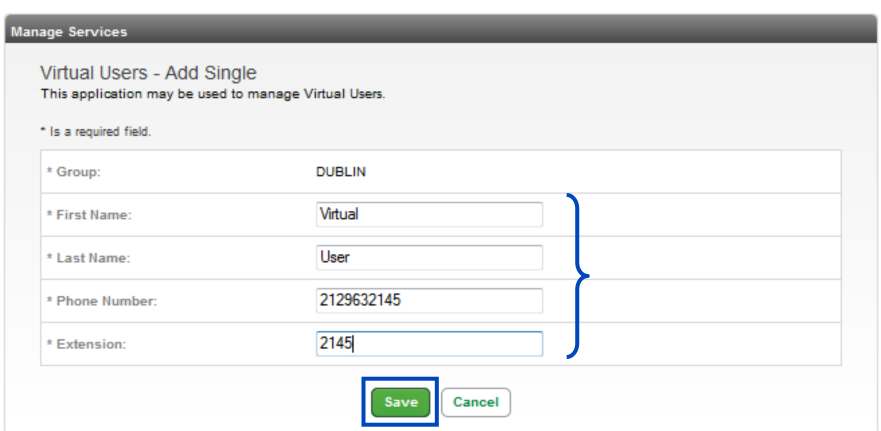
The **Virtual User** allows you to define numbers outside of your network, which can be extension dialed by you users. These numbers can be 10-digit numbers or toll free.

1. Click **Manage Services** from the Main Menu.
2. Click **Virtual Users** from the submenu.
3. If you have more than one location in your tenant, select your group from the dropdown list.
4. Click the **Get** button.
5. Virtual Users can be added individually or in bulk. To add an individual user, click the **Add User** button.

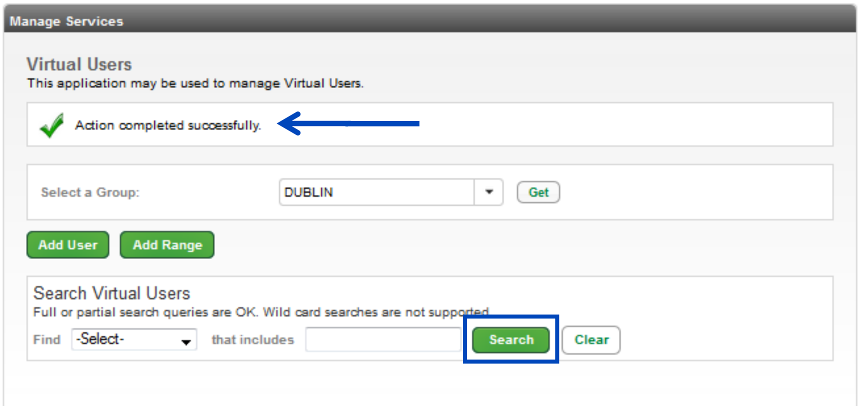


6. Enter a **First Name** and **Last Name** in the designated field that would best describe each Virtual User.
7. In the **Phone Number** field, enter the number your users will call when dialing the virtual extension.
8. In the **Extension** field, enter the extension your users will dial; extensions can be 2-7 digits in length.
   Note: N11 and 123 are restricted for 3-digit Virtual User extensions.

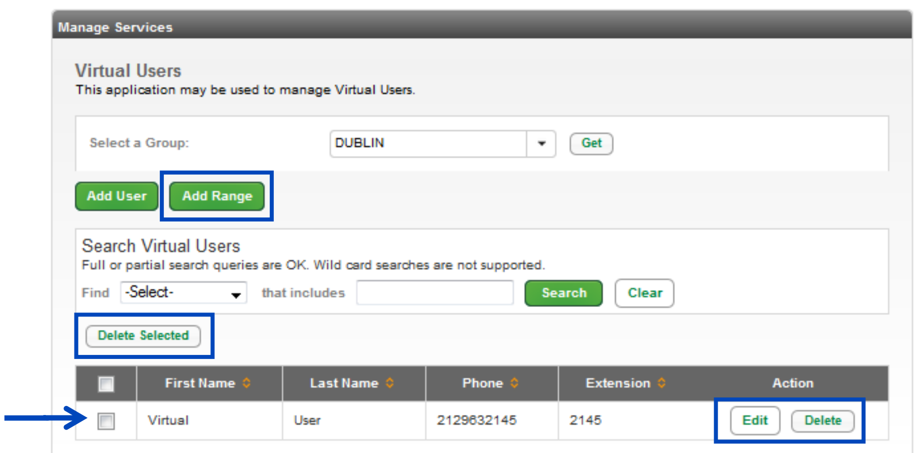
9. Click the **Save** button.



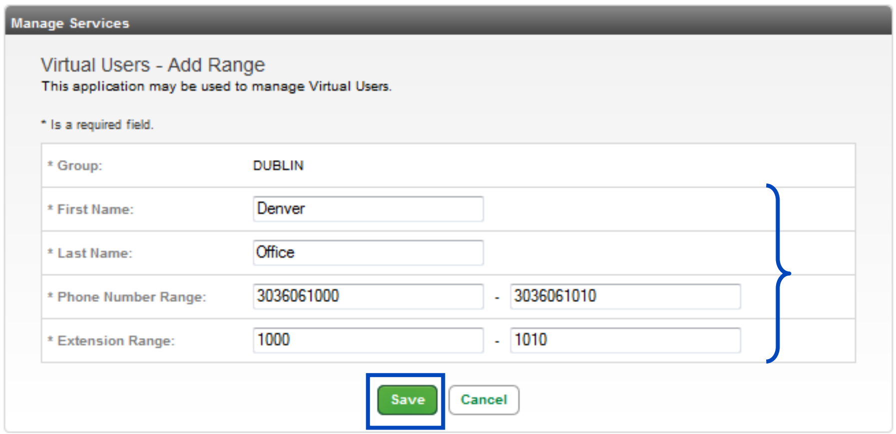
10. You'll receive a successful action notice that your **Virtual User** has been completed.
11. Click the **Search** button to view your Virtual Users.



12. You can edit or delete a virtual user by clicking the **Edit** or **Delete** buttons.
13. To delete multiple Virtual Users, check the check box for each entry you wish to delete, and click the **Delete Selected** button.
14. To add a range of Virtual Users, click the **Add Range** button.

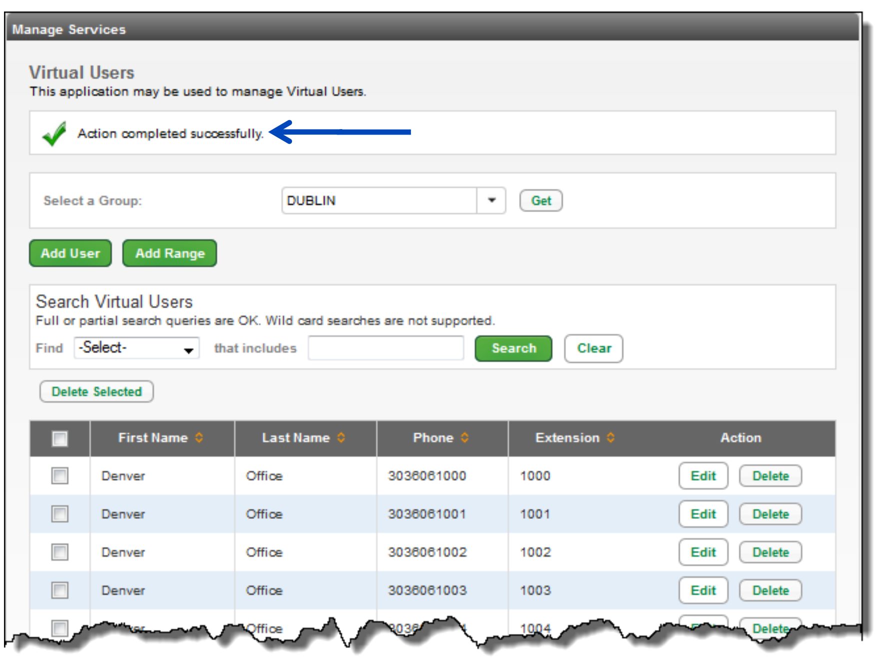


15. Define a name for your range by entering a **First Name** and **Last Name**.
16. Enter your range of numbers in the **Phone Number Range** fields; the range needs to be consecutive.
17. Enter the extensions for your range in the **Extension Range** fields; extensions can be 2-7 digits in length.
18. Click the **Save** button.



19. You'll receive a successful action notice that your **Virtual Users** have been completed.
20. Your Virtual Users will be displayed and can be **Deleted** or **Edited** as necessary.
21. End Users are now able to dial the defined 4-digit extensions to quickly reach off-net numbers.

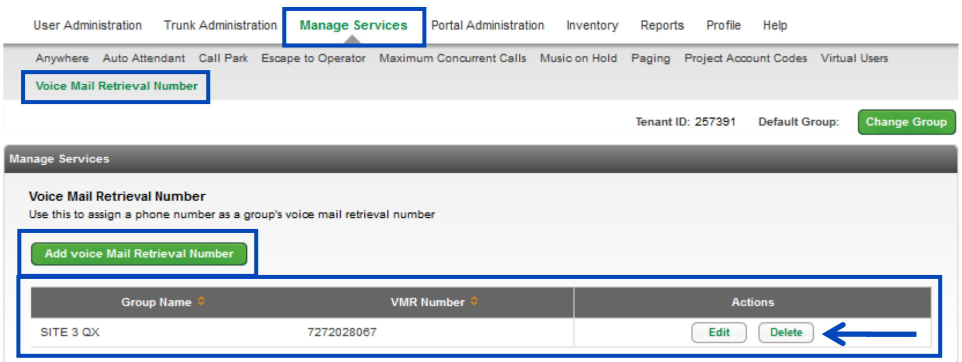
Note: N11 and 123 are restricted for 3-digit Virtual User extensions.



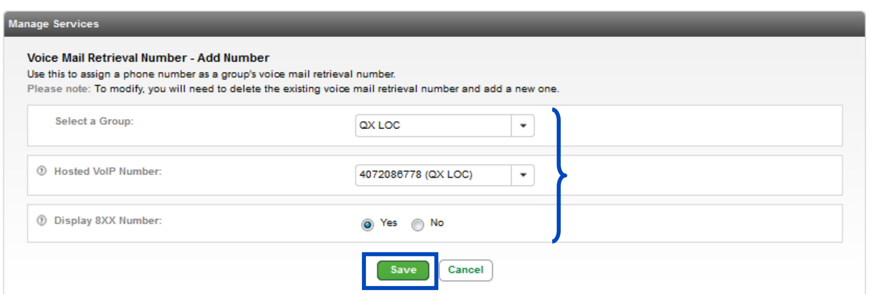
Voicemail Retrieval Numbers

Voicemail Retrieval Numbers are used to access voicemail from outside of the office. Users have always had the ability to dial a 10-digit or toll free number, but you also have the abillity to assign a number from your available number pool, which would be a more familiar number to your end users. This number, along with the Toll Free number, will then be referenced in the end user portal.

1. Click **Manage Services** from the Main Menu.
2. Click **Voice Mail Retrieval Number** from the submenu.
3. Any existing custom **Voice Mail Retrieval Numbers** already defined, will be displayed.
4. Click the **Edit** button to edit existing custom retrieval numbers, or the **Delete** button to delete a custom retrieval number.
5. Click the **Add Voice Mail Retrieval Number** button to add a custom retrieval number.



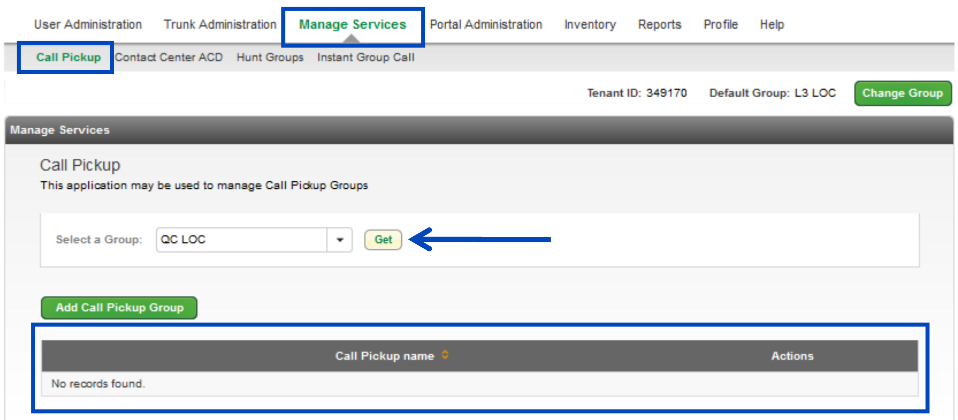
6. If you have more than one group within your tenant, select the group you want to add a custom retrieval number to from the **Select a Group** dropdown list.
7. Click the **Hosted VoIP Number** dropdown list to select the number you wish to assign as the custom retrieval number.
8. Click the **Yes** radio button if you want the Toll Free number to display along with the custom retrieval number in the End User portal; if you don't wish to display the Toll Free number, click the **No** radio button.
9. Click the **Save** button.



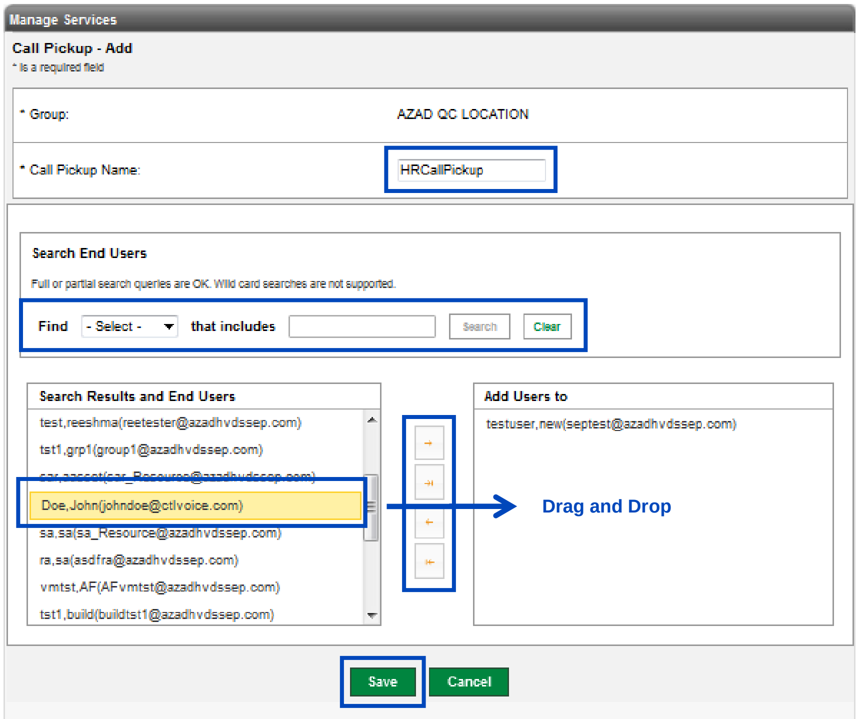
Call Pickup Group

Voicemail Retrieval Numbers are used to access voicemail from outside of the office. Users have always **Call Pickup Groups** allow a user to answer a call directed to another phone in their group by dialing the feature access code for **Call Pickup**.

1. Click on **Manage Services** from the Main Menu.
2. Click on **Call Pickup** from the submenu.
3. Select the group you want to add or edit from the dropdown list and click the **Get** button.
4. If there are existing **Call Pickup** groups your selected group, they'll be displayed.



5. Click the **Add Call Pickup Group** button.
6. Enter a descriptive name for the **Call Pickup Group Name**, such as HR Pickup Group, etc.
7. Enter search criteria for the users you would like to add to a **Call Pickup Group**.
8. If you have less than 1000 users, you're not required to **Search** for individual users. All users in the group will be listed under **Search Results and End Users**.
9. Drag and drop the user(s) you would like to add to the **Call Pickup Group** from the left column to the right column (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
10. Click the **Save** button.



Contact Center ACD (Call Queuing) – Basic and Standard

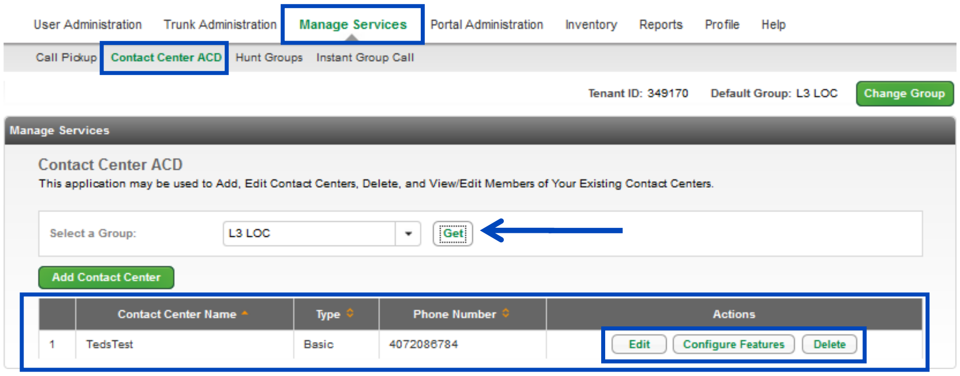
The **Contact Center ACD Basic and Standard** options allow you to **Add** and **Edit Contact Centers** and **Delete** and **View/Edit Members** and **Settings** for existing **Contact Centers**. **Contact Center** functionality is also referred to as ACD (Automated Call Distribution) or call queuing. Call queuing allows you distribute incoming calls to specific individuals assigned to a **Contact Center**. Your **Contact Center** can be programmed to provide Entrance Messages, Music on Hold, and Comfort Messages for your callers while they are waiting for the next available agent.

Note: Contact Center Standard will have additional options not available with Contact Center Basic. Please note in this section of the portal, when **Contact Center Standard** features are referenced specifically as available for use with **Contact Center Standard only** versus Contact Center Basic.

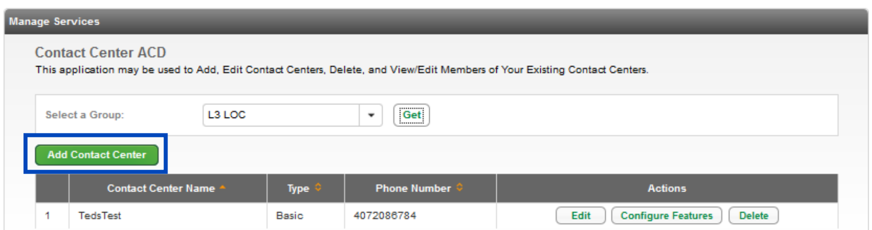
Note: You require at least one **Standard Supervisor** seat to run reports for **Contact Center Standard** statistic, reporting is not available with Contact Center Basic.

Note: You must ensure that the MCC (Maximum Concurrent Calls) setting for that site has an adequate setting to accommodate the Contact Center Group. Each concurrent call in queue and on a physical device associated with that site consumes a call path from the MCC setting. If the MCC is not set to an adequate amount, the maximum number of calls queued may not be realized.

1. Click on **Manage Services** from the main menu
2. Click on **Contact Centers ACD** from the sub menu.
3. Any **Contact Centers** that are already built for that group, will appear and can be **Edited**, **Deleted**, or features can be configured by clicking the **Configure Features** button.



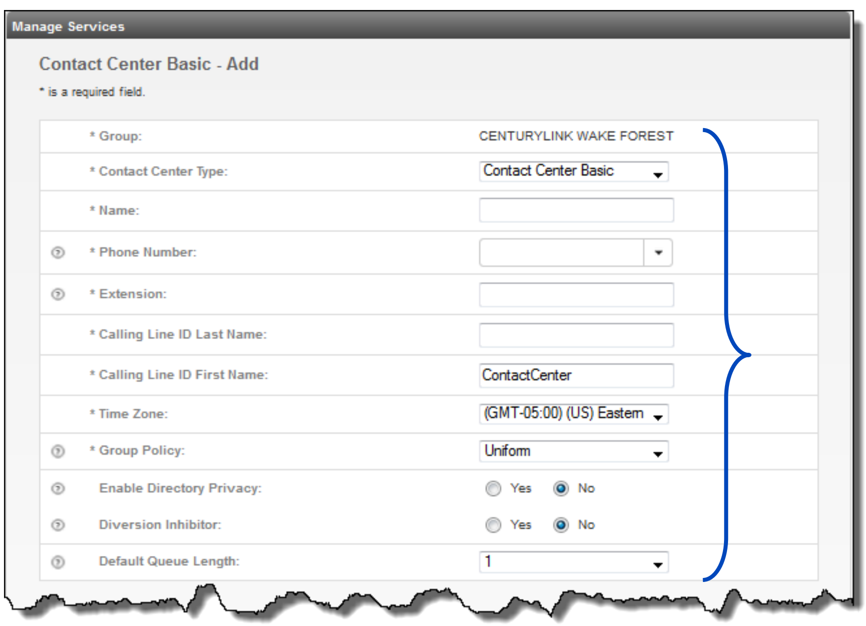
4. To add and configure a new Contact Center, click the **Add Contact Center Basic** button.



5. From the **Contact Center Type** dropdown list, select from Contact Center Basic, or Contact Center Standard.
6. Enter a description name for that Contact Center in the **Name** field.
7. From the **Phone Number** dropdown list, select the telephone number you wish to assign.
8. The extension will auto populate, but this can be edited if needed.
9. Enter the name as you want it to appear in the **Calling Line ID Last Name** and **Calling Line ID First Name** fields; this is what will display on each agents phone when a call is presented to them from the queue.
10. The **Time Zone** will be auto populated based on the time zone of the group your Contact Center is programmed in, but it can be changed by clicking the dropdown list.
11. From the **Group Policy** dropdown list, select the type of call routing policy you want to assign to your **Contact Center**:
    - "**Circular**": Incoming calls hunt through agents in the order they appear in the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all agents.
    - "**Regular**": Incoming calls hunt through agents in the order they appear in the list, starting from the top each time.

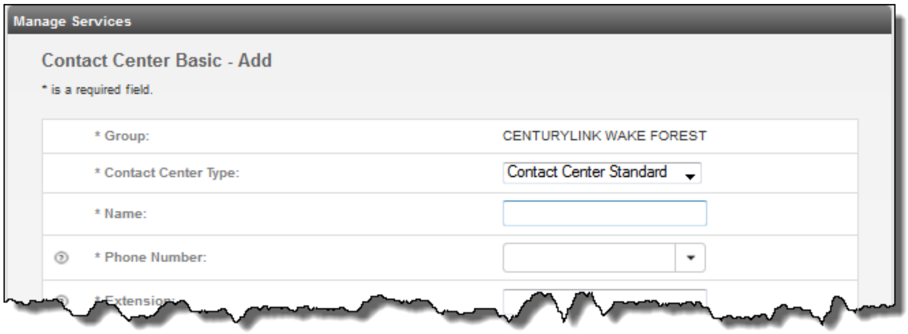
- "**Simultaneous**": Incoming calls alert all agents at the same time. The first agent to answer handles the call.
- "**Uniform**": Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
- "**Weighted**". Incoming calls are dispatched to the agents randomly according to the specified percentage weight of each agent.

12. Click the **Yes** or **No** radio button to enable or disable **Directory Privacy**.
    - **Yes –** enables Privacy, when another user does a directory listing, your name and information won't appear
    - **No –** disables Privacy, when another user does a directory listing, your name will appear as usual
13. Click the **Yes** or **No** radio button to enable or disable **Division Inhibitor**:
    - When enabled (**Yes**), prevents redirection services from being activated on the terminating side of an unanswered call
14. In the **Default Queue Length** dropdown list, pick the maximum number of queued calls you want to ring to your Contact Center:
    - **Contact Center Basic –** maximum of 25 calls queued
    - **Contact Center Standard –** maximum of 50 calls queued

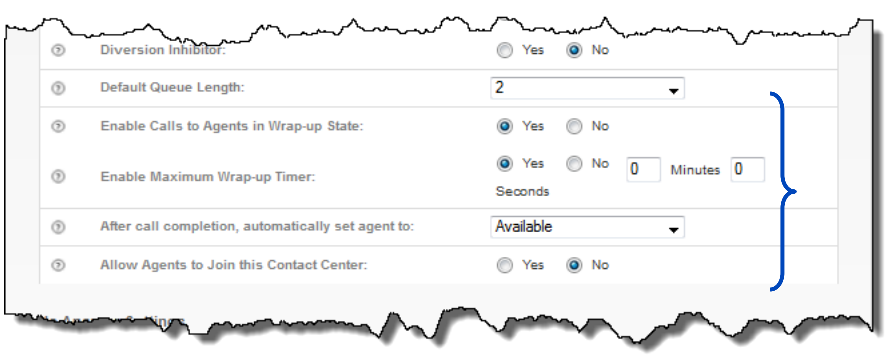


15. To program a Contact Center Standard queue, select Contact Center Standard from the **Control Center Type** dropdown list:

    Note: Continue selecting options that are similar to the Contact Center Basic queue; features unique to a Contact Center Standard queue, will be outlined in this section.



16. The following features are available for **Contact Center Standard only**, you won't see these options as you Add or Edit a Contact Center Basic queue.
17. **Enable Calls to Agents in Wrap-Up State** allows you to determine whether calls roll to agents that are in a wrap-up state:
    - **Yes –** agents will receive calls from the queue while they are in a wrap-up state
    - **No –** agents won't receive calls from the queue while they are in wrap-up state
18. The **Enable Maximum Wrap-Up Timer** allows you to set the maximum time an agent will be in wrap-up state:
    - **No –** won't allow you to set a maximum time
    - **Yes –** will allow you to set the maximum number of minutes and seconds the agents in this queue will be in wrap-up state before receiving the next call
19. Select from the following in the **After call completion, automatically set agent to** dropdown list:
    - **Available** – will take available queue calls immediately
    - **Unavailable –** won't take available calls until the agent logs back into the queue pressing or tapping the "Available" softkey on their phone
    - **Wrap-Up** – will place the agent in Wrap-Up State and won't receive calls until they meet the Wrap-Up Timer setting – white in Wrap-Up State, the agent can make themselves available sooner by pressing or tapping the "Available" softkey on their phone
20. The **Allow Agents to Join this Contact Center** setting defines whether agents in this queue can join or leave a queue from their desktop client:
    - **Yes –** will allow agents to join or leave a Contact Center queue from their desk top client
    - **No** – won't allow agents to join or leave a Contact Center queue from their desk top client

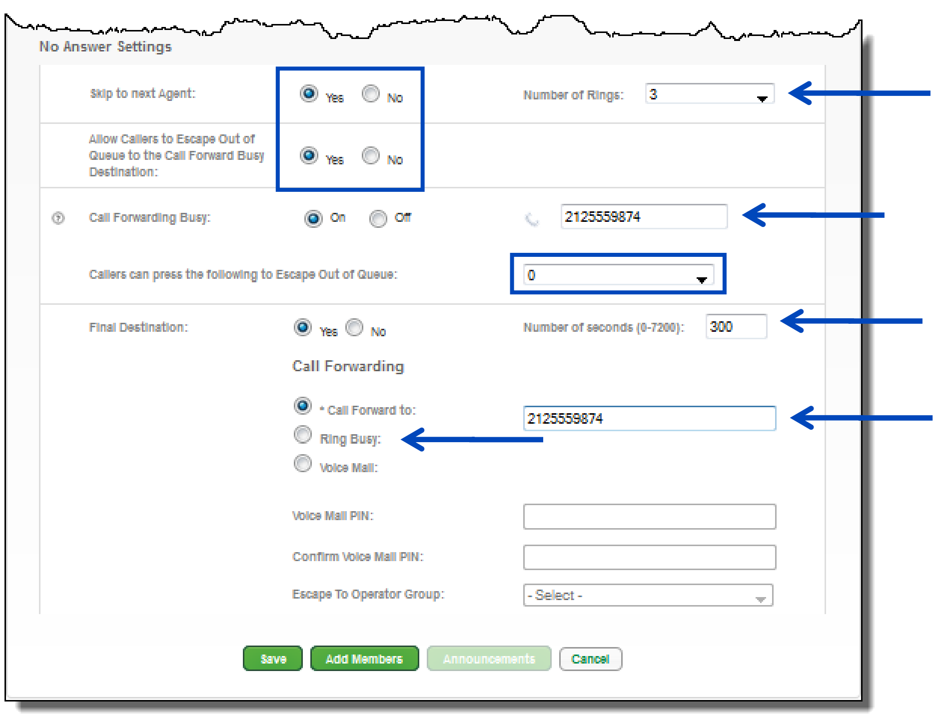


21. If the Group Policy type you choose is any option other than Simultaneous, you can choose the number of rings before the call will **Skip to Next Agent** if an agent does not answer. Click the **Yes** radio button and select from **1-20** rings.
22. If you want to provide your callers with an option to leave the queue before their call is answered, click the **Yes** radio button for **Allow Callers to Escape Out of Queue to the Final Destination**.
23. From the **Callers Can Press the Following to Escape Out of Queue** dropdown list, select the digit you want your callers to press on their key pad (0-9), to forward to the **Call Forward Busy** destination.

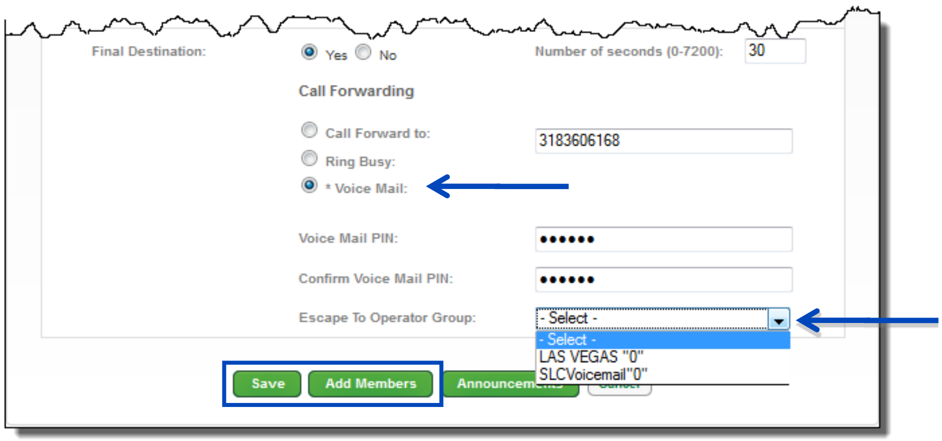
    Note: When your custom Entrance and Comfort Greetings are recorded, be sure it includes instructions for the caller to press "x" to leave the queue and be transferred to "y". "x" is based on the digit they are to press, and "y" is a description of where they'll be transferred to, i.e., an Answering Service, another department, a voicemail box, etc.
24. To enable a transfer to a **Call Forward Busy** location, click the **On** radio button and enter a 10-digit phone number in the **Call Forward Busy** field.
25. From the **Number of Seconds** box, select the number of seconds you want your callers to remain in queue before following that final destination path. You can select from **0-7200** seconds.
26. In the **Call Forward To** field, enter the **10-digit number** you wish your callers to be transferred to if they hit the Final Destination timer threshold.

    Note: The Final Destination phone number can be any 10-digit number - internal, external, toll free, etc., this is also the destination the caller will follow if the queue has the maximum number of callers in the queue.

27. If the caller should hear a busy signal when the Final Destination timer is met, click the **Ring Busy** radio button.



28. If the callers should roll to Voicemail for their Final Destination, click the **Voice Mail** radio button.
29. In the **Voice Mail PIN** field, enter a numeric passcode, 6-15 characters.
30. Reenter the numeric passcode in the **Confirm Voice Mail PIN** field.
31. If you have an Escape To Operator Group already created, choose a group from the **Escape To Operator Group** dropdown list; this is where callers will go if they press “0” while listening to the voicemail greeting.
32. Click the **Save** button or, click the **Add Members** button to continue and assign members to your queue.

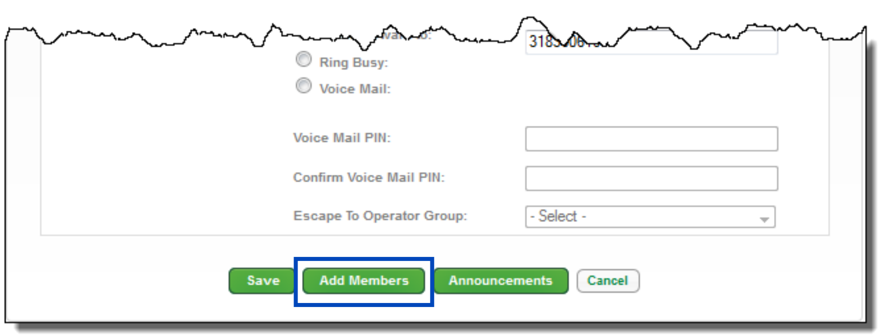


Add/Edit Members

The **Add/Edit Members** feature allows you to manage and control individuals that will be members of your queue.

Note: The button displayed on this screen will be **Add Members** if members have not been added to the queue; it will display as **Edit Members** once members have been added.

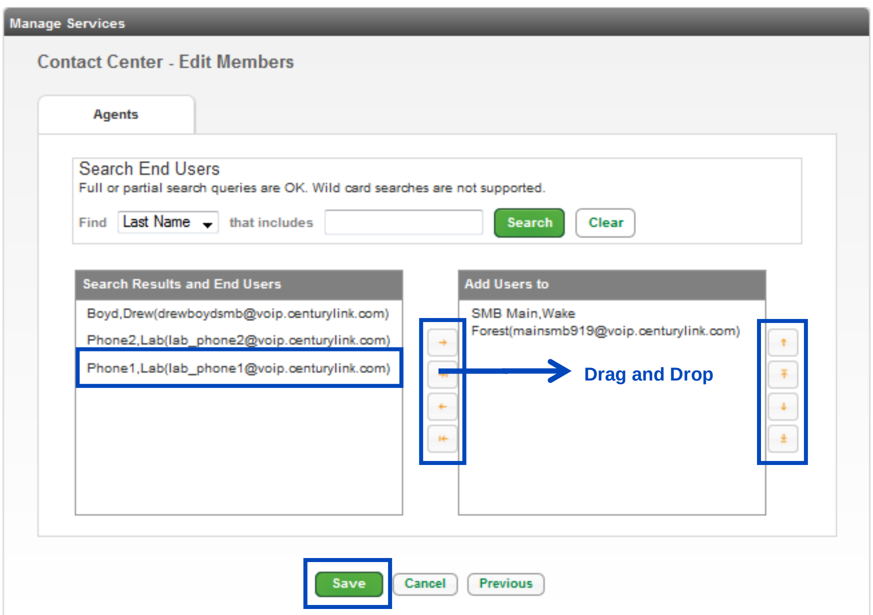
1. After setting up basic parameters for your Contact Center within the **Contact Center Basic - Add** screen, click the **Add Members** button at the bottom of the page (click the **Edit Members** button if you’re editing/managing your Contact Center queue).



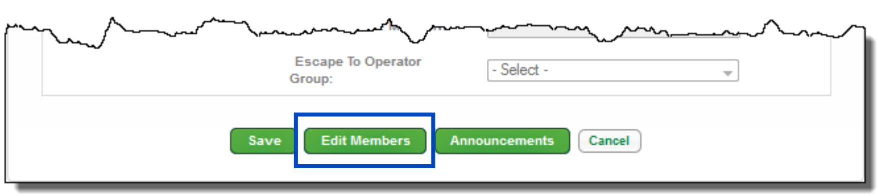
2. Enter search criteria for the users you would like to add to your **Contact Center**.
3. **Drag and drop** the users you would like to add to your **Contact Center** from the **Search Results and End Users** field to the **Add Users to** field (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
4. In the **Add Users to** field, place the users in the order you would like them to receive calls by using the up and down arrows to the right to sort them appropriately, the order of your Users is only necessary when using the "Regular" Group Policy.
5. The only users that will be available in the **Search Results and End User** field, will be individuals with **Contact Center Basic or Standard** seats.
6. When all members have been added and are placed in the appropriate order, click the **Save** button.

Note: To manage users in your queue, access the **Edit Members** option to move Contact Center Basic seat users to/from the queue; i.e., if an individual is on vacation, you can move them out of the queue by returning them to the **Search Results and End Users** field; upon return, they can be moved back to the **Add Users to** field to become a member of the queue again.

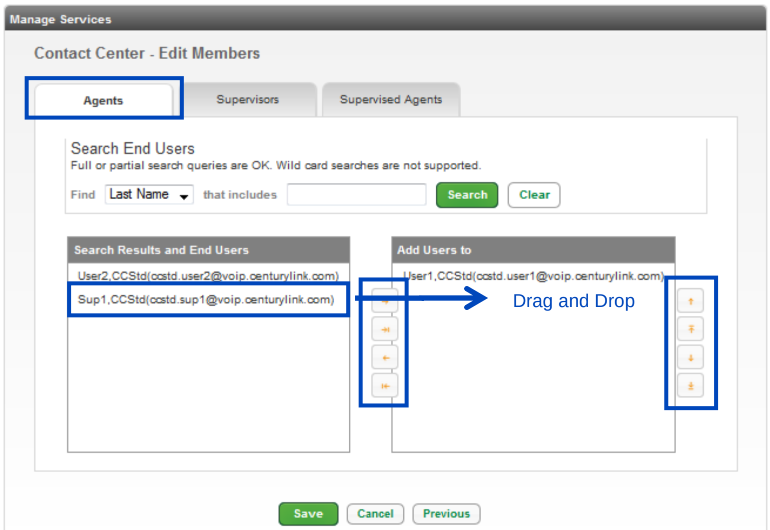
Note: Contact Center Basic and Contact Center Standard seats can be added to Contact Center Basic queues; only Contact Center Standard seats can be added to Contact Center Standard queues.



7. **Add/Edit** members for **Contact Center Standard only**, this section does not apply to Contact Center Basic queues.
8. Click the **Edit Members** button to edit members or click **Add Members** button if Contact Center members have not previously been added.

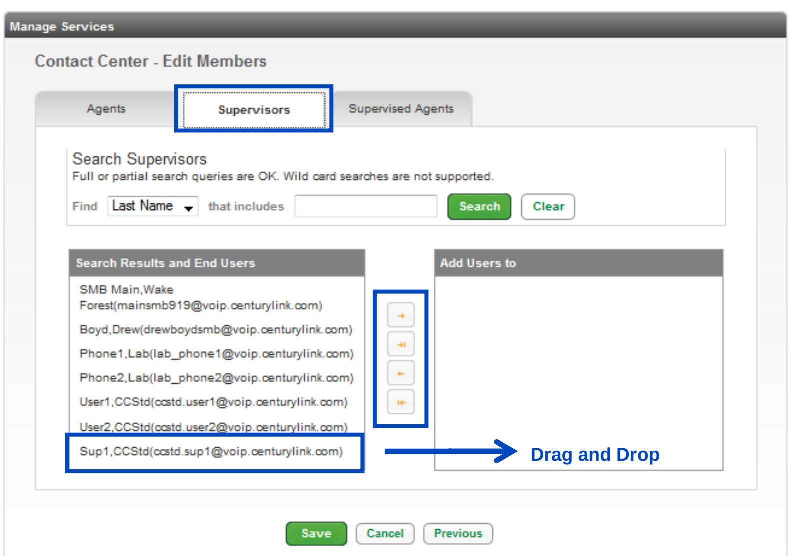


9. Click the **Agents** tab.
10. Any users that are built with a **Contact Center Standard** seat will appear in the **Search Results and End Users** field.
11. **Drag and Drop** users into the **Add Users to** field that should be included in your Contact Center queue or use the arrows between the fields to move members to/from the **Add Users to** field.
12. Use the **Up/Down** arrows next to the **Add Users to** field to sort your users; this will only be necessary if using the “**Regular” Group Policy** type.

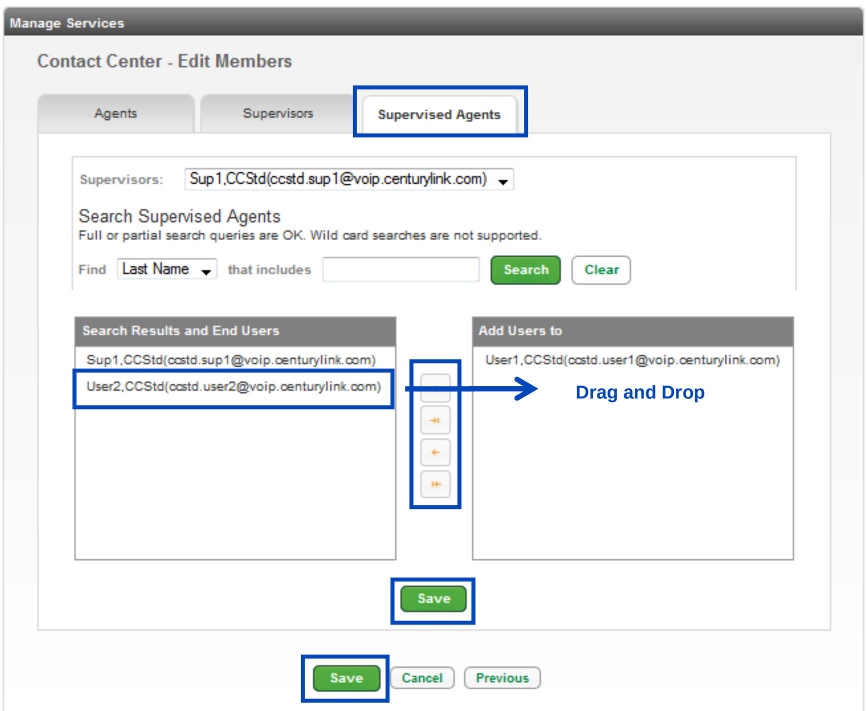


13. Click the **Supervisors** tab.
14. From the **Search Results and End Users** field, find the Supervisor you wish to add to your Contact Center queue.
15. **Drag and Drop** that Supervisor to the **Add User to** field, you can have more than one Supervisor/queue.

Note: Adding an individual that is not a Supervisor Seat, won’t provide them access to the Supervisor Client or reporting capabilities.



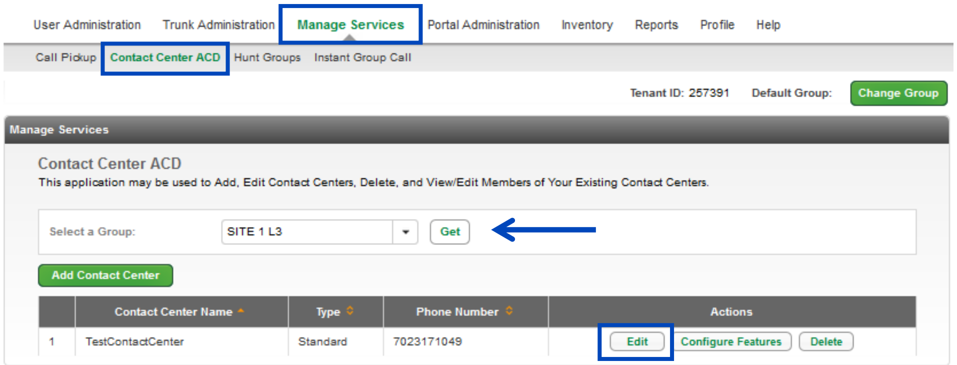
16. Click the **Supervised Agents** tab.
17. From the **Supervisor** dropdown list, select the Supervisor you wish to assign agents to; Supervisors will only have the ability to monitor agents assigned to them.
18. **Drag and Drop** those agents to the **Add Users to** field or use the arrow keys to move agents to/from a Supervisor.
19. If you have more than one Supervisor, select another Supervisor from the **Supervisors** dropdown list and assign the correct agents to that individual; a Supervisors can monitor the same agents as another Supervisor.
20. Click the **Save** button and click the second **Save** button to save settings on all tabs.



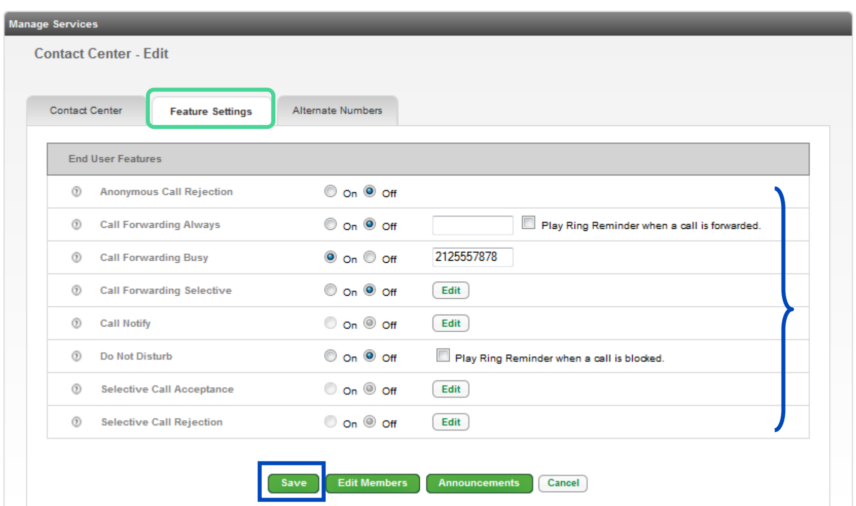
Contact Center Feature Settings and Alternate Numbers

You can easily modify and manage **Feature Settings** for you contact center or assign **Alternate Numbers** to ring to your Contact Center number, after your Contact Center has been built.

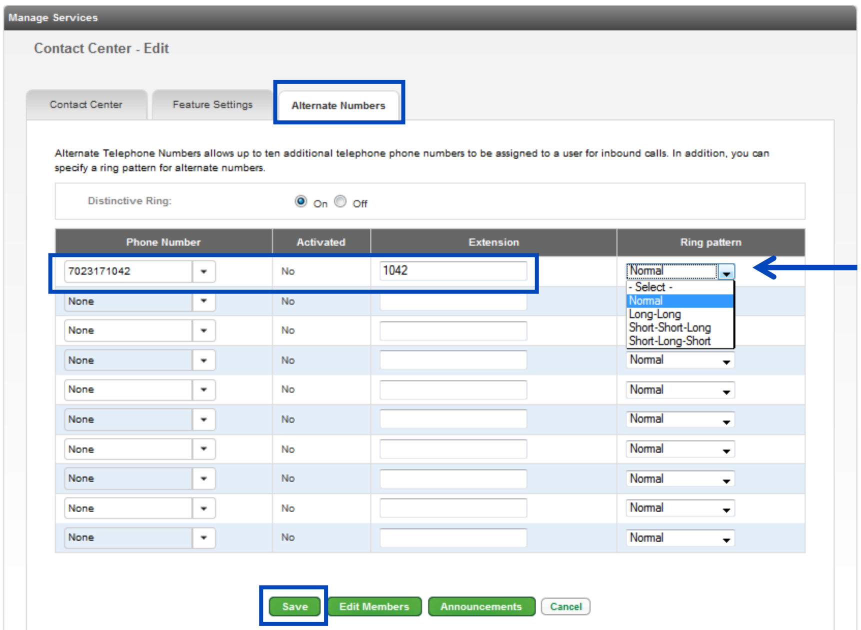
1. Click on **Manage Services** from the Main Menu.
2. Click on **Contact Center ACD** from the submenu.



3. Click the **Features Settings** tab.
4. Choose to enable or disable various settings for your Hunt Group, such as **Call Forward Always** or **Do Not Disturb**.
5. To enable a feature, click the **On** radio button.
6. At any time to disable a feature, click the **Off** radio button.
7. Click the **Edit** button for features to assign schedules or advanced features to those feature settings.
8. Click the **Save** button.



9. Click the **Alternate Numbers** tab.
10. From the **Phone Number** dropdown list, select the Alternate Number that you want to ring to the primary Hunt Group number.
11. The extension will auto populate in the **Extension** field, but this can be modified.
12. From the **Ring Pattern** dropdown list, select the type of ring tone you want to be presented to the Hunt Group members when this number is called.
13. Click the **Save** button.



Contact Center Announcements

The **Contact Center Announcements** feature allows you to manage **Entrance Messages**, **Estimated Wait Times**, **Comfort Messages**, and **Music on Hold** that your customer will experience while they are in queue waiting for the next available agent.

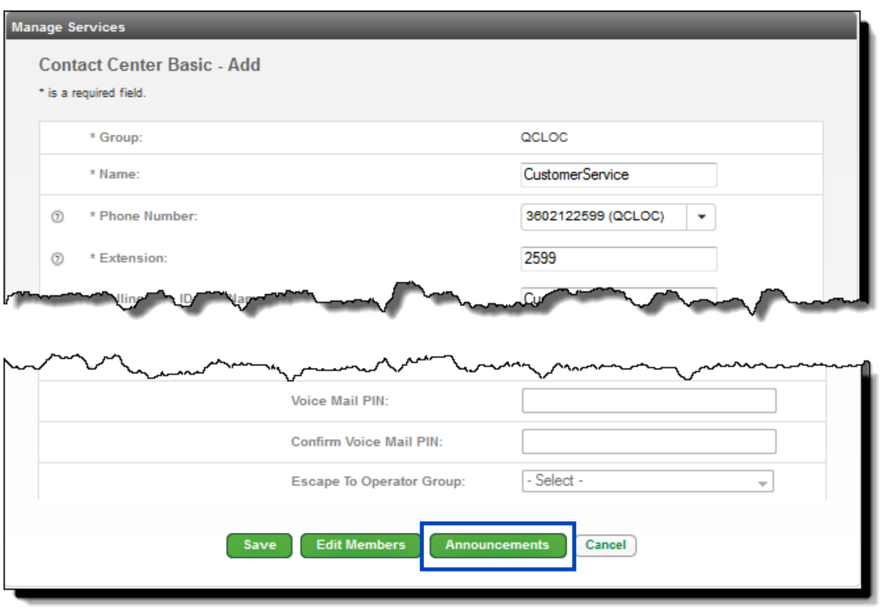
Note: All custom files, music or messages, need to abide by the following file definitions:

- **For .WAV files:**
  8.000 or 16.000 kHz
  8 or 16 bit mono
  µ-law, A-law, or PCM

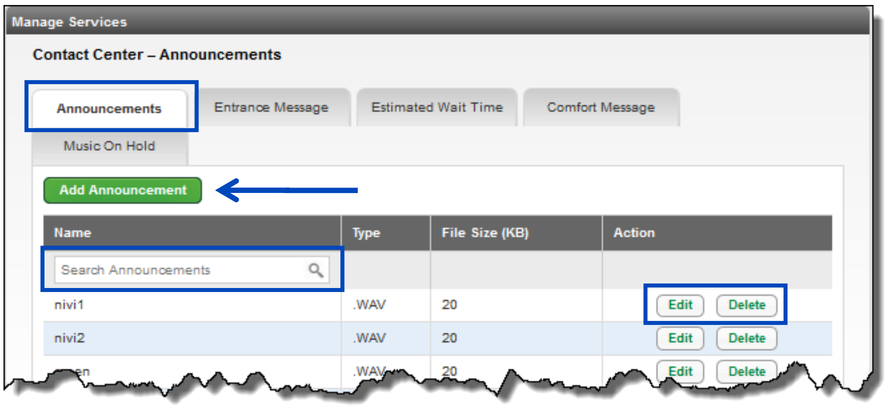
- **For .WMA files:**
  8.000 or 16.000 kHz
  16 bit mono
  µ-law, A-law, or PCM

- **For both .WAV and .WMA files:**
  The maximum audio length is 2 minutes for a Voice Messaging Greeting and Custom Ringback User/Group.
  The maximum audio length is 10 seconds for user's Voice Portal Personalized Name.
  The maximum audio length is 10 minutes for the Music On Hold greeting.
  For all other services, the maximum audio length is 5 minutes.

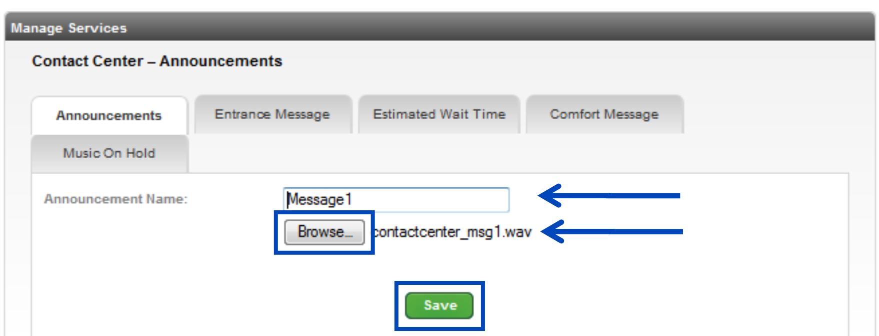
1. After setting up basic parameters for your Contact Center within the **Contact Center Basic - Add** screen, click the **Announcements** button at the bottom of the page.



2. With the **Announcements** tab highlighted, you can review all announcements that are available within your tenant.
3. In the **Search Announcements** field, enter a search, or partial search to filter the **Announcement** you wish to **Edit** or **Delete**.
4. Click the **Add Announcement** button to add a new announcement.



5. Enter a descriptive name for your announcement in the **Announcement Name** field.
6. Click the **Browse** button to find your announcement.
7. Click the **Save** button.
8. This announcement will now be available for use as you continue to build your **Contact Center**.

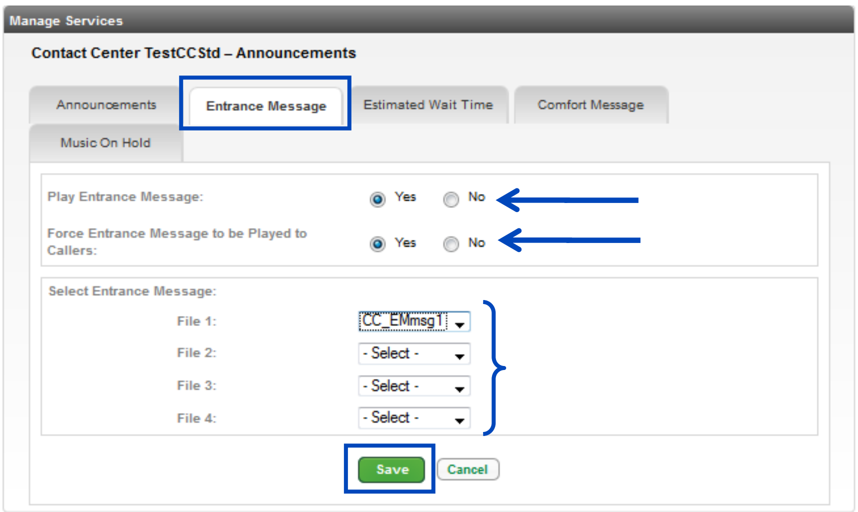


9. Click the **Entrance Message** tab.
10. Click the **Play Entrance Message Yes** or **No** radio button to play an Entrance Message:
    - **Yes –** will play an Entrance Message if no agents are available
    - **No –** will never play an Entrance Message
11. Click the **Force Entrance Message to be Played to Callers Yes** or **No** radio:
    - **Yes –** will always play your Entrance Message even if agents are available
    - **No** -- will only play your Entrance Message if agents are not available

12. If you click the **No** radio button for **Entrance Messages**, callers won't be presented with an Entrance Message.
13. If you choose to **Enable** the **Entrance Message** option, but choose to not upload a custom greeting, callers will hear a default message.
14. From the **File 1** (**File 2, File 3 or File 4**) dropdown list, select from any files you have previously uploaded.

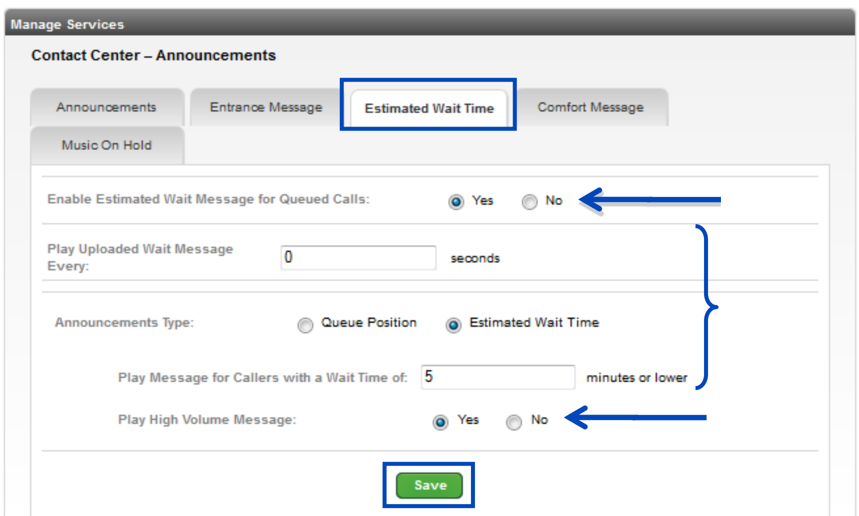
Note: If you choose to add multiple files, they'll be heard consecutively; a reason to add multiple files would be as follows: File 1 is your standard Entrance Message greeting which never changes, File 2 is a greeting added to include a unique announcement for a special time of year, sale, etc. Once the 'special' greeting from File 2, or subsequent files, are no longer needed, they can be removed.

15. Click the **Save** button.



16. Click the **Estimated Wait Time** tab.
17. Click the **Yes** radio button for **Enable Estimated Wait Message for Queued Calls**, to enable this feature.
18. If you click the **No** radio button, you'll be unable to change any parameter settings on this page.
19. With the **Enable Estimated Wait Message for Queued Calls** radio button clicked as **Yes**, you can make the following setting changes.
20. In the **Play Uploaded Wait Messages Every** field, enter in seconds, how often you want the Wait Time message to be played to callers waiting in the queue; your entry must be **10 to 700 seconds,** suggested setting should be no less than 90 seconds, so callers don't hear their wait time or position in queue too frequently.
21. You can choose the type of message your callers hear, between **Queue Position** or **Estimated Wait Time**.
    - **Queue Position** – you're the "x" person waiting in the queue
    - **Estimated Wait Time** – your call will be answered in "x" minutes

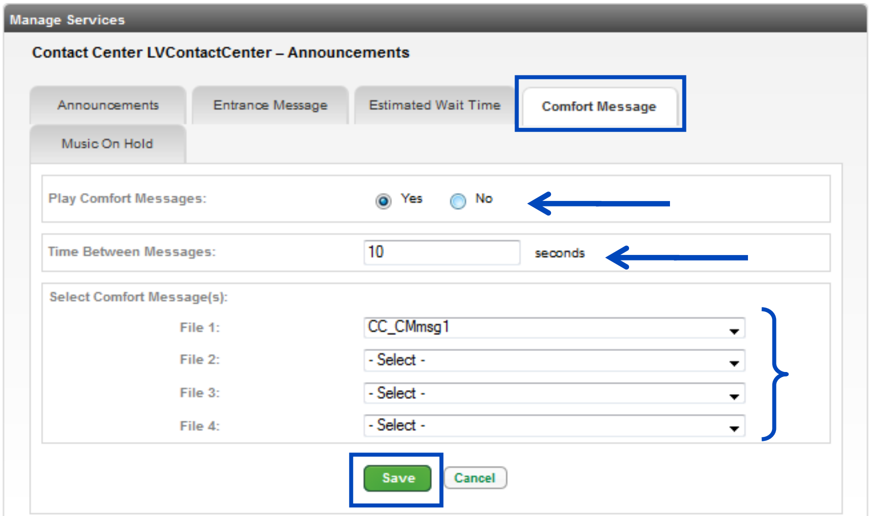
22. In the **Play Message for Callers in Queue Position** or **Play Message for Callers with a Wait Time** field, enter information based on the Announcement Type setting for Queue Position or Estimated Wait Time.
    - **Queue Position –** the number defined in this field indicates which callers in the queue hear the wait message based on their queue position; if you want all of your callers to hear this messages, it should be set to 26 or higher
    - **Estimated Wait Time –** the number defined in this field indicates which callers in the queue hear the wait message based on how long they have been waiting in the queue; if you want all of your callers to hear this messages, it should be set to 100 or higher, but at least higher than your Final Destination setting
23. If you want your callers to hear a message stating that there is a high level of calls, click the **Yes** radio button; if you don't want your callers to hear this message, click the **No** radio button.
24. Click the **Save** button.



25. Click the **Comfort Message** tab.
26. Click the **Yes** radio button for **Play Comfort Messages**, to enable this feature.
27. If you click the **No** radio button, you'll be unable to change any parameter settings on this page.
28. In the **Time between Messages** field, enter in seconds, how often you want the Comfort Message to be played to callers waiting in the queue; your entry must be **10 to 600 seconds**.
29. If you choose to **Enable** the **Comfort Message** option, but choose to not upload a custom greeting, callers will hear a default message.
30. From the **File 1** (**File 2, File 3 or File 4**) dropdown list, select from any files you have previously uploaded.

Note: If you choose to add multiple files, they'll be heard consecutively; a reason to add multiple files would be as follows: File 1 is your standard Entrance Message greeting which never changes, File 2 is a greeting added to include a unique announcement for a special time of year, sale, etc. Once the 'special' greeting from File 2, or sequent files, is no longer needed, they can be removed.

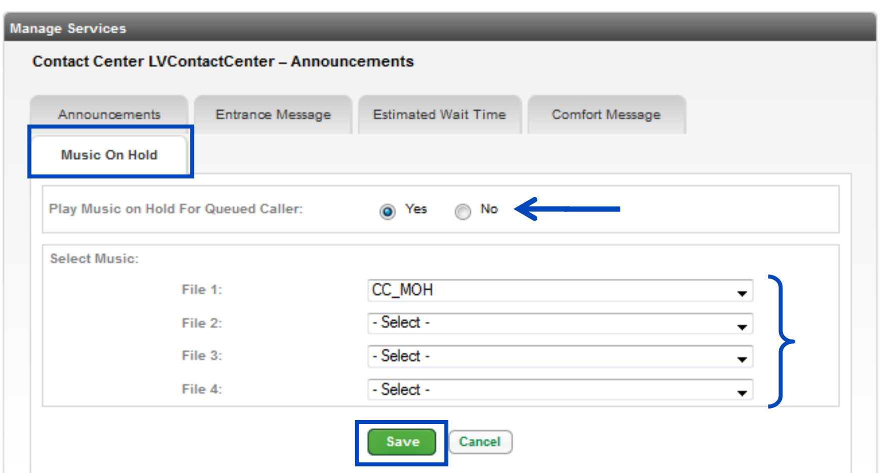
31. Click the **Save** button.



32. Click the **Music On Hold** tab.
33. Click the **Yes** radio button for **Play Music on Hold For Queued Caller**, to enable this feature.
34. If you click the **No** radio button, you'll be unable to change any parameter settings on this page.
35. If you choose to **Enable** the **Music On Hold** option, but choose to not upload a custom recording, callers will hear a default recording.
36. From the **File 1** (**File 2, File 3 or File 4**) dropdown list, select from any files you have previously uploaded.

Note: If you choose to add multiple recordings, they'll be played consecutively.

37. Click the **Save** button.

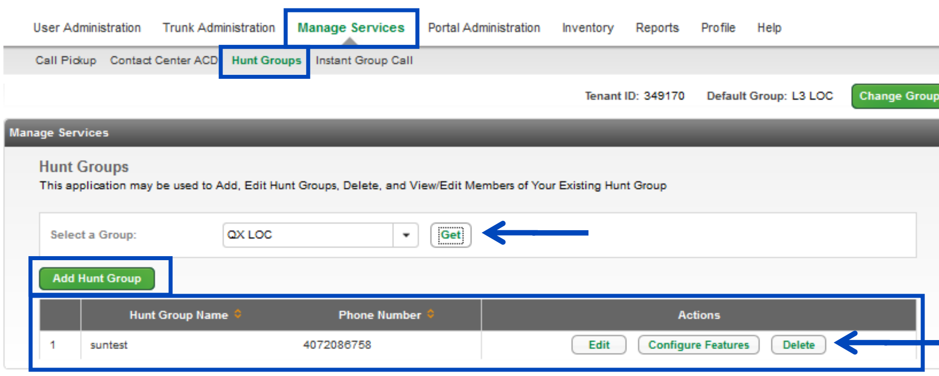


Hunt Groups

Hunt Groups allow you to automatically process incoming calls received by a single phone number, by distributing them among a group of **Hunt Group** members. Members from any group within your tenant can be added to any **Hunt Group**, regardless of which group the **Hunt Group** is built in.

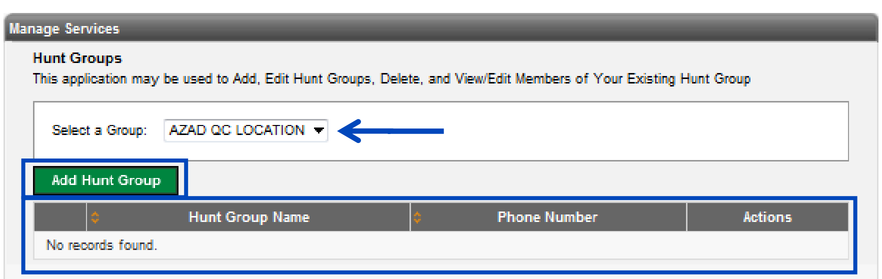
If a member(s) of a **Hunt Group** utilizes advanced features such as **Remote Office** and/or **Anywhere**, calls from the **Hunt Group** will ring to the devices assigned for that user(s). If they don't answer the call on their **Remote Office** or **Anywhere** device, the call will follow the **Final Destination** path that is programmed for the **Hunt Group**. **Final Destination** details will be discussed later in this section.

1. Click on **Manage Services** from the main menu
2. Click on **Hunt Groups** from the sub menu.
3. Any existing Hunt Groups for your selected group will be displayed; you can **Edit**, **Configure Features** or **Delete** a Hunt Group by clicking on the appropriate button.
4. Click the **Add Hunt Group** button.



5. If you have multiple groups, from the dropdown list, select the group you would like to create a **Hunt Group** for.
6. Once you select a group, any existing **Hunt Groups** already created, will display below. You can edit or delete existing **Hunt Groups** at any time.
7. Click the **Add Hunt Group** button.

Note: You'll receive an error if there are no Hunt Groups available in your account inventory, you'll have to contact your Account Manager to have one added.



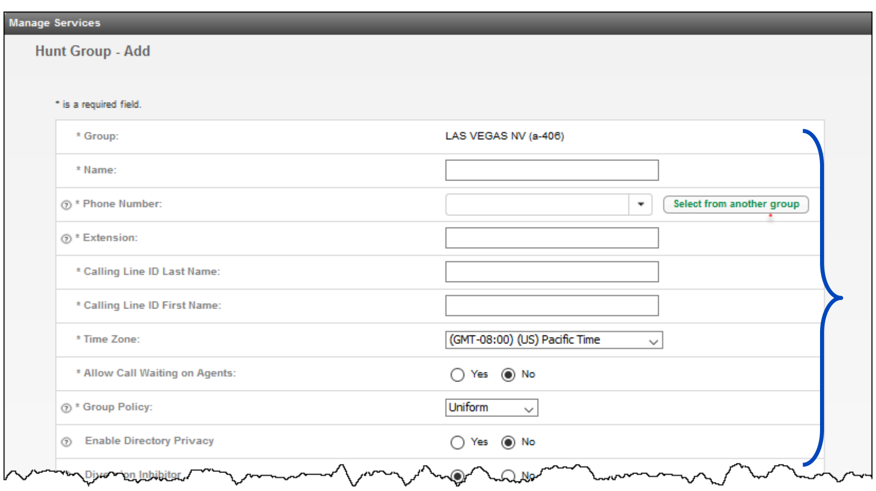
8. Enter a descriptive name for the **Hunt Group**.

Note: The Hunt Group name cannot contain white space, commas or semi-colons.

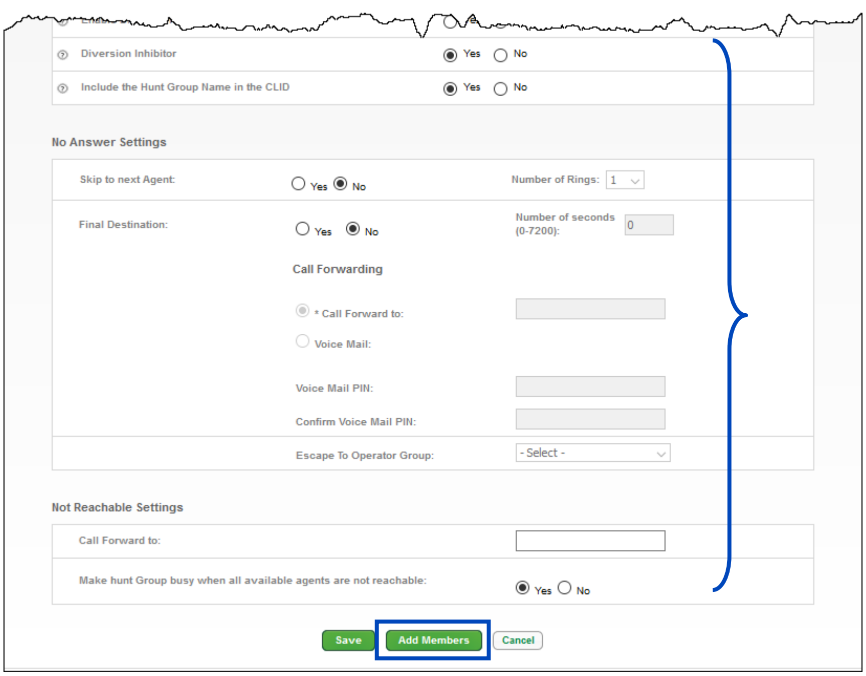
9. From the **Phone Number** dropdown list, select a number from your group to assign to the **Hunt Group**; or click **Select From Another Group** button to select a number currently assigned to another group.

Note: If there are no phone numbers available in your inventory, you'll need to contact your Account Manager to have one added.

10. An extension is automatically populated based on the assigned phone number, but this can be modified by highlighting the assigned extension in the **Extension** field, then typing in the new extension.
11. Enter the Hunt Group's **Calling Line ID Last Name** and **Calling Line ID First Name**. This is displays on the user's phone when they receive a call from the **Hunt Group** number.
12. From the dropdown list, select the **Time Zone** for this **Hunt Group**.
13. Select if you would like to **Allow Call Waiting on Agents**. This allows members to receive more than one call from the **Hunt Group** at a time.
14. From the dropdown list, select the **Group Policy** for the **Hunt Group**.
    - "**Circular**": Incoming calls hunt through agents in the order they appear in the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all agents.
    - "**Regular**": Incoming calls hunt through agents in the order they appear in the list, starting from the top each time.
    - "**Simultaneous**": Incoming calls alert all agents at the same time. The first agent to answer handles the call.
    - "**Uniform**": Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
    - "**Weighted**". Incoming calls are dispatched to the agents randomly according to the specified percentage weight of each agent.
15. Enable **Directory Privacy** is disabled by default; click the Yes radio button to enable. With this feature enabled your name won't appear in the directory.

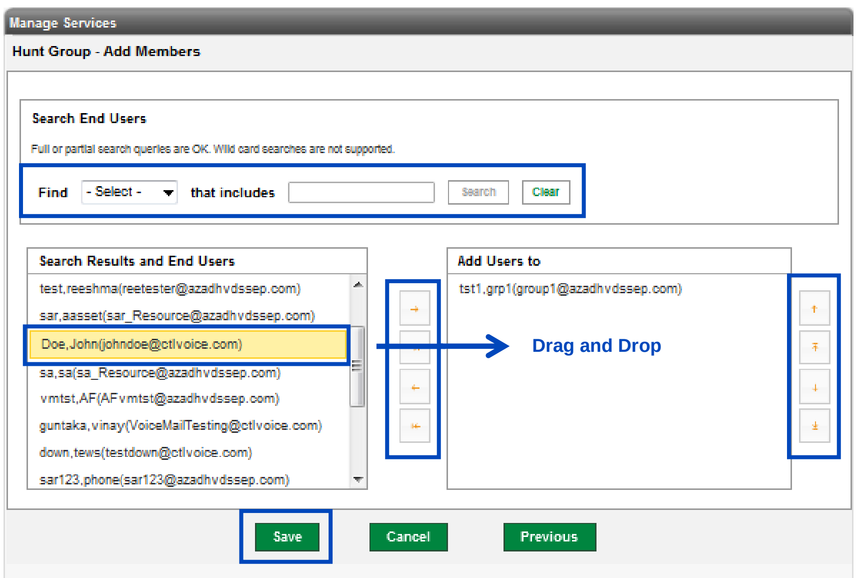


16. With **Diversion Inhibitor** enabled, it prevents redirection services from being activated on the terminating side of an unanswered call.
17. The First/Last Calling Line ID of the Hunt Group appears on the display for incoming Hunt Group calls; if you disable **Include the Hunt Group Name in the CLID** feature, it prevents calling line ID from appearing on the display.
18. If you have the group policy set to anything other than Simultaneous, enabling the **Skip to Next Agent** setting allows callers to move to the next agent if the first agent cannot answer the call.
19. In the **Number of Rings** dropdown list, select how many rings before the call moves to the next available agent.
20. The **Final Destination** is where you want the caller to go if no members are available to take a Hunt Group call. Click the **Yes** radio button to enable; in seconds from 0-7200 in the **Number of Seconds** field, enter how long a caller should wait for a member, before forwarding to the Final Destination.
21. If **Final Destination** is enabled, will choose between forwarding to a phone number or voicemail as the final destination.
22. When the **Call Forward To** radio button is enabled, enter any 10-digit internal or external number in the Call Forward To field.
23. If unanswered callers should roll to the Hunt Group's voicemail, click the **Voice Mail** radio button.
24. That activates the **Voice Mail PIN** and **Confirm Voice Mail PIN** fields, which should be populated accordingly.
25. If **Escape to Operator** groups have been defined, and you wish to enable this feature, select one of the groups from the dropdown list.
26. The **Not Reachable Setting** is where you want caller to go if your phones are not working. This number should be input in the **Call Forward To** field, with the **Yes** radio button for **Make Hunt Group Busy When All Available Agents Are Not Reachable** enabled. This is also known as disaster recovery.
27. When all features of the **Hunt Group** are selected, click the **Add Members** button.



28. Enter search criteria for the users you would like to add to a **Hunt Group** in the **Find** field.
    - Search for Hunt Group members by **Last Name**, **First Name**, **Telephone Number** or **Extension**.

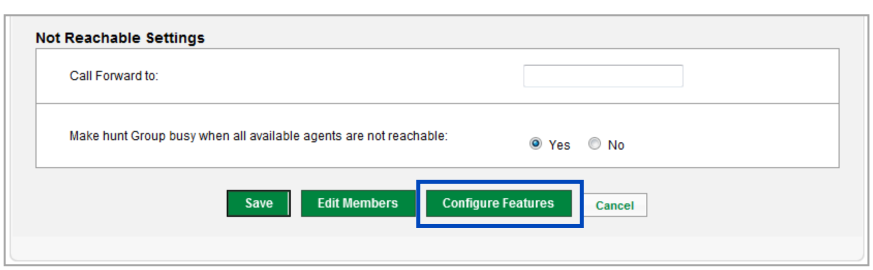
      Note: If your group has less than 1000 users in it, all members of that group will be listed under Search Results and End Users.
29. Drag and drop users you would like to add to the **Hunt Group** from the left column to the right column (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
30. Under **Add Users To**, place the users in the order you would like them to receive calls by using the up and down arrows to the right to sort them appropriately.
31. You can add members from locations outside of the **Hunt Group** location, so any individual within your tenant can be in any **Hunt Group**.
32. When all members have been added and are placed in the appropriate order, click the **Save** button.



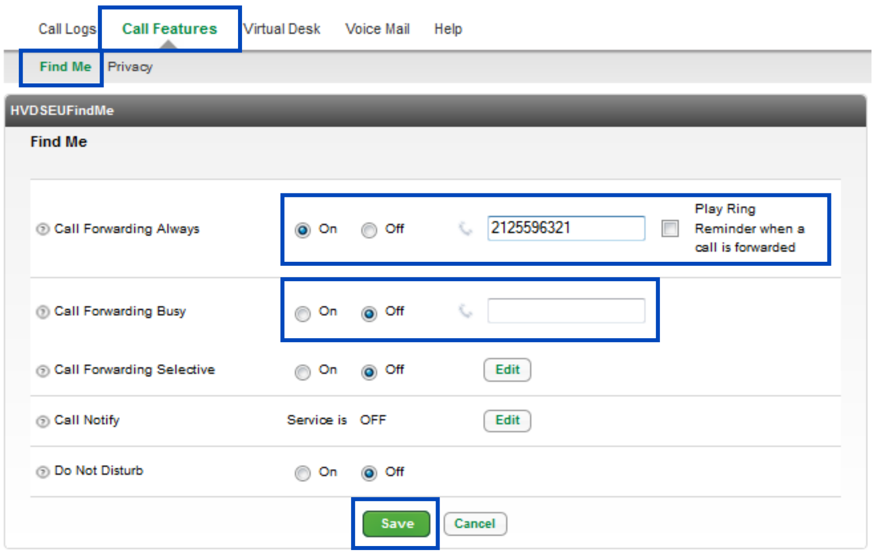
Configure Hunt Group Features

You can manage and monitor features within each **Hunt Group**, such as **Call Logs**, **Call Features**, and **Voicemail**, if the Hunt Group has a voicemail associated to it.

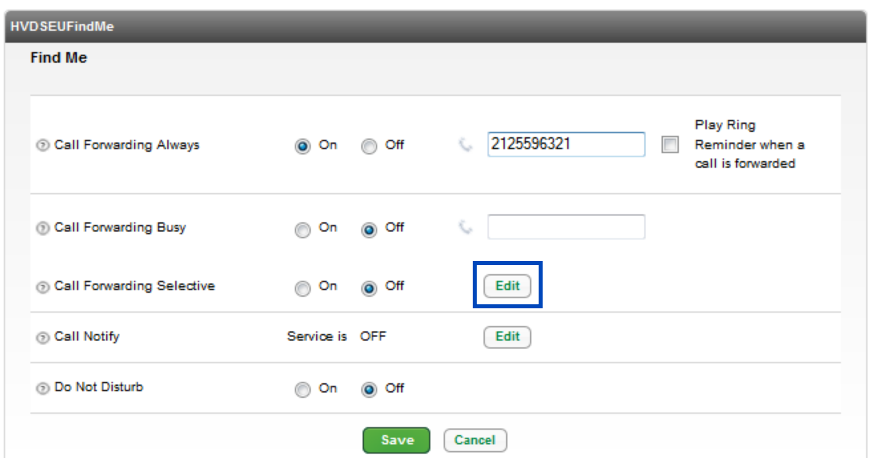
1. Once your Hunt Group has been defined and members have been added, scroll to the bottom of the Hunt Group screen and click the **Configure Features** button.



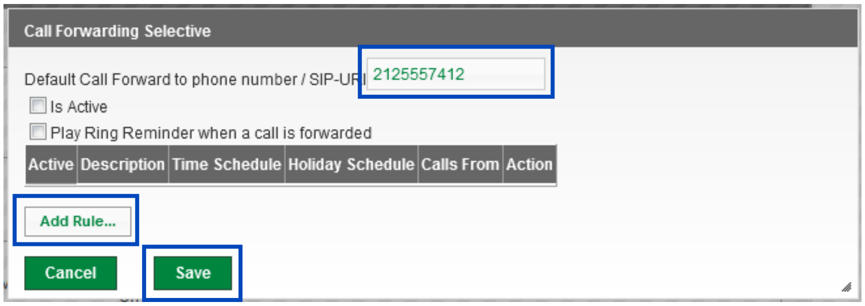
2. **Hunt Group Configure Features** has its own main menu and includes submenu options within each main menu item.
3. Click on **Call Features** from the main menu.
4. Click on **Find Me** from the sub menu.
5. Select from several Find Me options such as **Call Forward Always**, **Call Forward Busy** and **Call Forward Selective**.
6. To activate a feature, click the **On** radio button. Enter the number within the appropriate field that you wish to forward to.
7. Click the **Save** button to save any Find Me settings that you may have changed at this point.



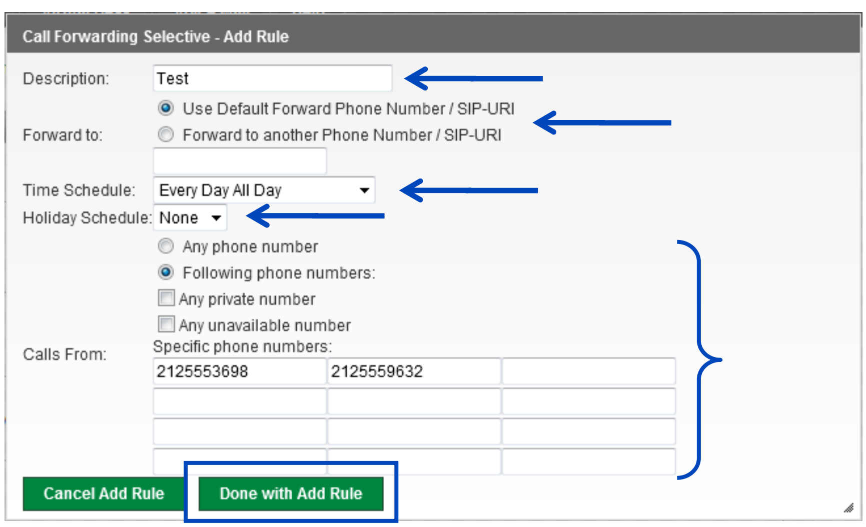
8. **Call Forwarding Selective** allows you to forward calls to a specific location based on various rules or criteria.
9. Click on **Edit** next to Call Forward Selective.



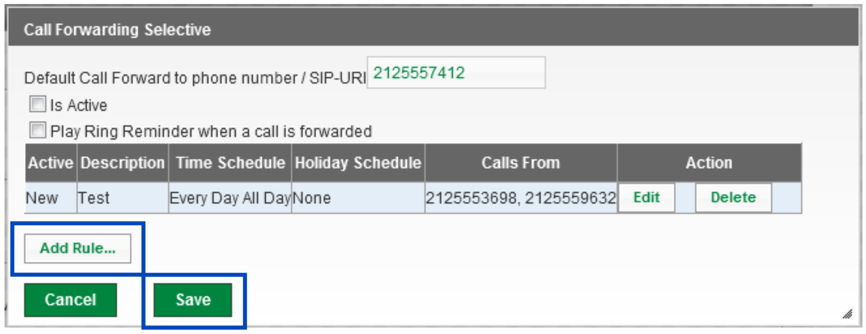
10. Define the number you want to forward to, by inputting the **10-digit number** in the appropriate field.
11. Click the **Save** button to forward all calls to that location or click the **Add Rule** button to set specific criteria.



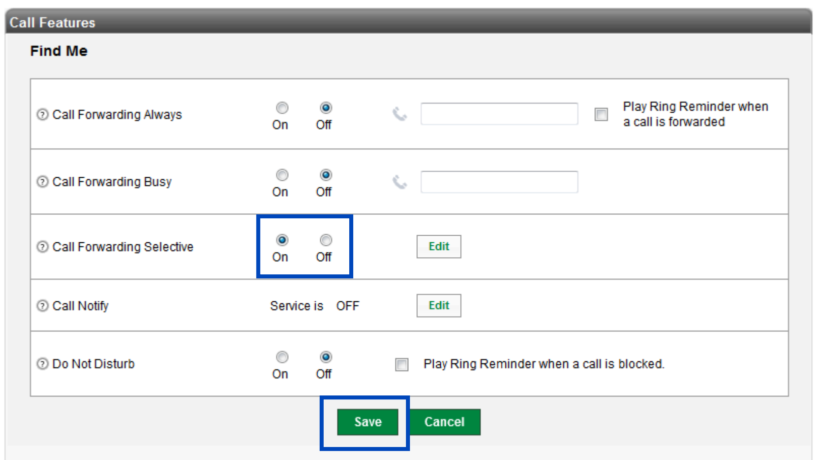
12. Enter a **Description** for your rule.
13. Choose to forward to the previously defined number or click the radio button for **Forward to another Phone Number/SIP-URI**. If you choose to override the number you just defined, enter the new number in the appropriate field.
14. If you wish to apply this rule to a **Time Schedule**, slick the dropdown list and select your schedule option.
15. If you wish to set a **Holiday Schedule**, click the dropdown list and select the appropriate schedule.
16. Choose which incoming call type you want to assign to this rule:
    - **Any Phone Number** – all incoming calls
    - **Following Phone Numbers –** allows you to define up to 12 incoming numbers that follow this rule
    - **Any Private Number –** any number that is listed as private with their caller ID
    - **Any Unavailable Number –** any number that does not provide caller ID
17. If choosing **Following Phone Number**, input up to 12 phone numbers in the appropriate fields that you wish to follow this rule.'
18. When all criteria is entered, click the **Done with Add Rule** button.



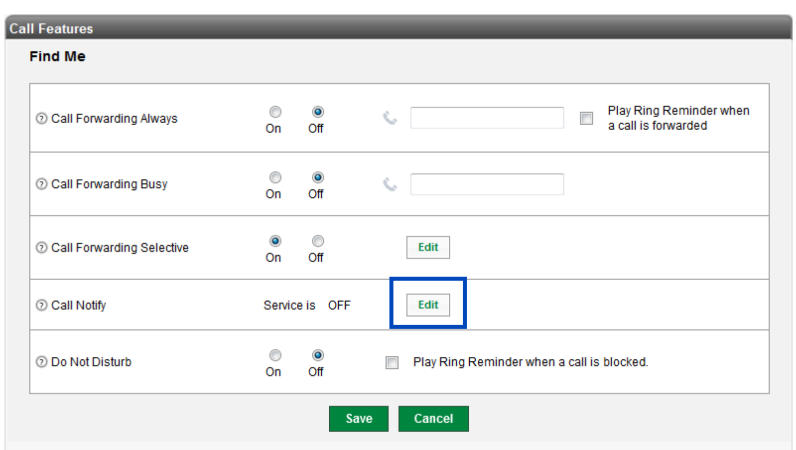
19. Click the **Add Rule** button, to define another rule, or click the **Save** button to save your Call Forwarding Selective options.



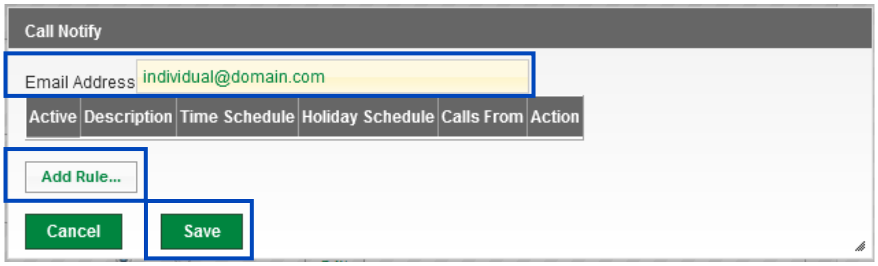
20. With **Call Forward Selective** settings defined and saved, be sure to click the **On** radio button.
21. Then click the **Save** button to enable that feature.



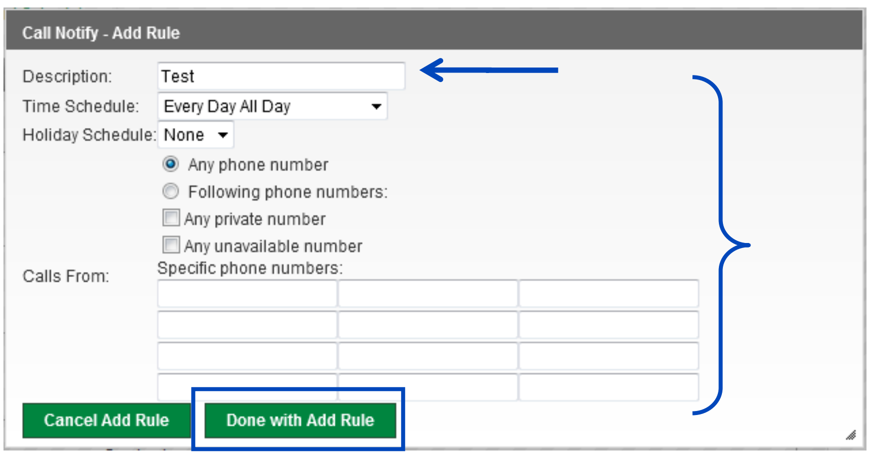
22. **Call Notify** allows you to define email addresses and distribution lists that receive an email whenever a call is make to your Hunt Group.
23. Click the **Edit** button next to **Call Notify**.



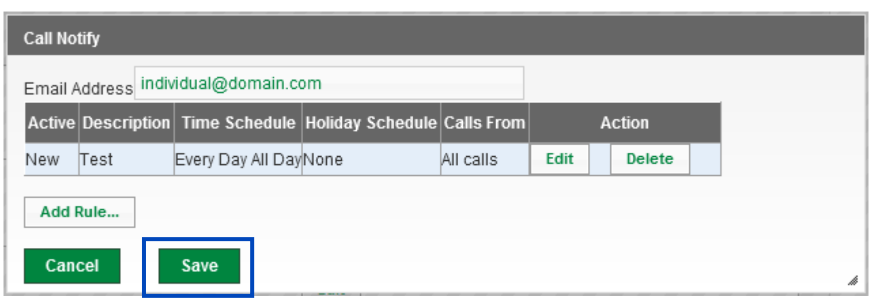
24. In the **Email Address** field, enter the email address, or common separated email addresses, or distributions lists that you want to be notified when calls are received by this Hunt Group.
25. Click the **Save** button, and all calls to this Hunt Group will active the Call Notify feature and send email to the email address(es) listed.
26. To set a rule for Call Notify, click the **Add Rule** button.



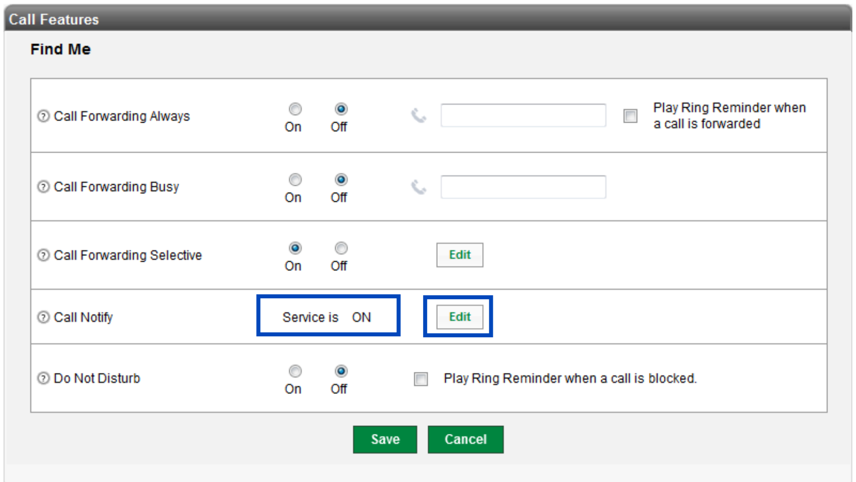
27. Enter a **Description** for your Call Notify rule.
28. The rest of the options are the same as for **Call Forward Selective Rules**.
29. Select the remaining options as outlined in steps 17-21 above for specifics on each option.



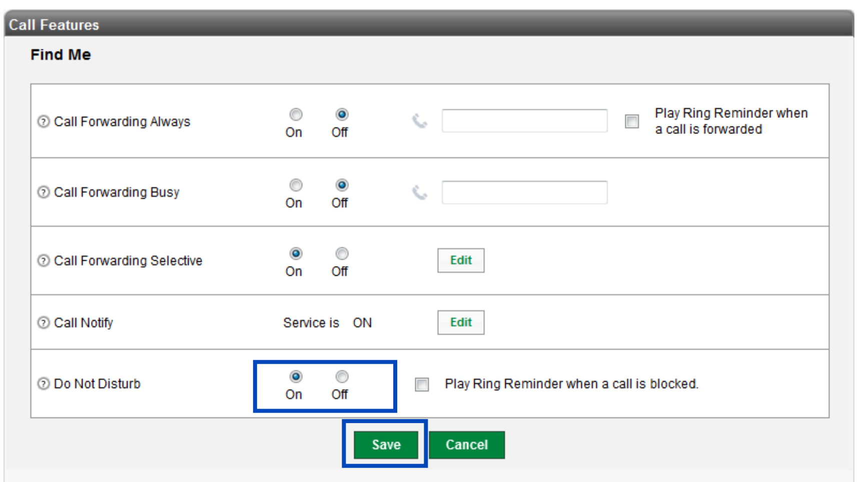
30. Click the **Save** button to save your rule.



31. Clicking **Save** automatically activates your Call Notify feature and any rule you've defined.
32. To remove Call Notify, click the **Edit** button to delete any rules you have saved.

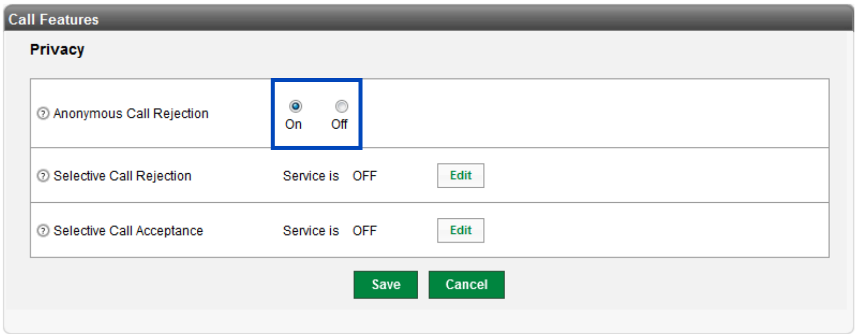


33. The **Do Not Disturb** feature, when activated, will send all callers to the Hunt Group's voicemail.
34. Click the **On** radio button.
35. Click the **Save** button.

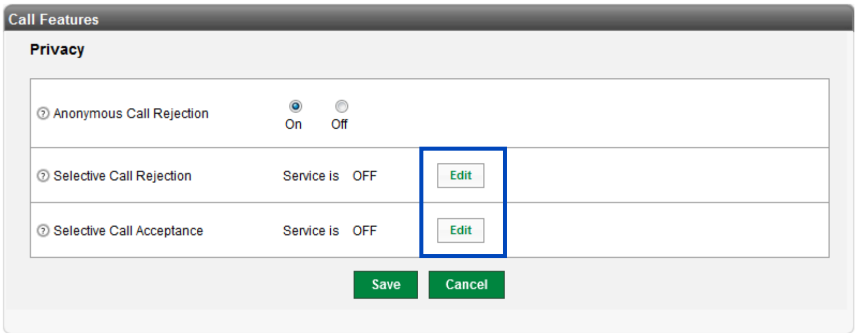


36. Click on **Privacy** from the Call Features submenu.
37. Click the **On** radio button to activate Anonymous Call Rejection.

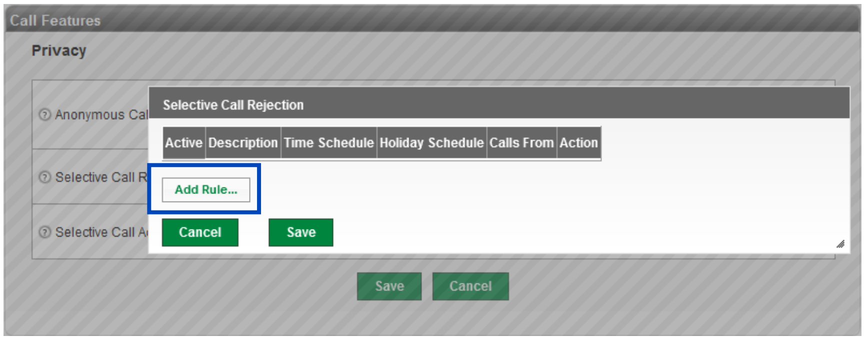
Note: By activating Anonymous Call Rejection, you'll restrict any call that does not provide caller ID from ringing into your Hunt Group. It is recommended that this feature be used sparingly.



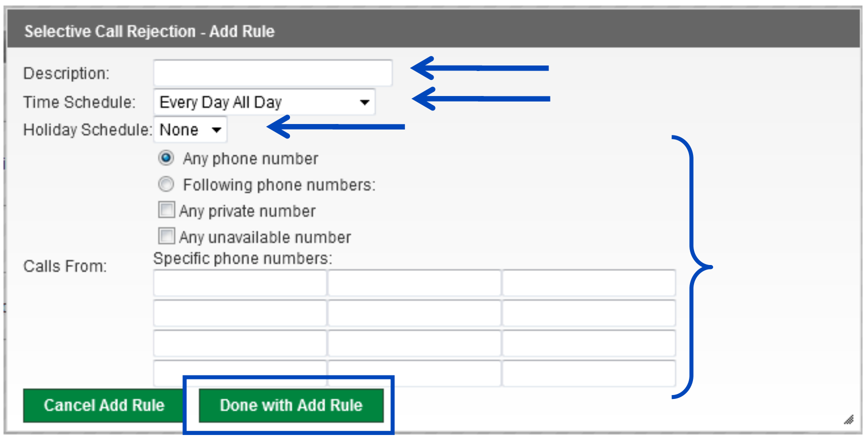
38. Selective **Call Rejection** and **Selective Call Acceptance** are similar features.
39. Activation and adding a rule is processed the same for both features.
    - **Selective Call Rejection** – reject calls to your Hunt Group when predefined criteria are met, phone number(s), time of day, etc.
    - **Selective Call Acceptance –** allows call to your Hunt group when predefined criteria are met; i.e., phone number(s), time of day, etc.
40. Click the **Edit** button next to the feature you wish to activate and create a rule for.



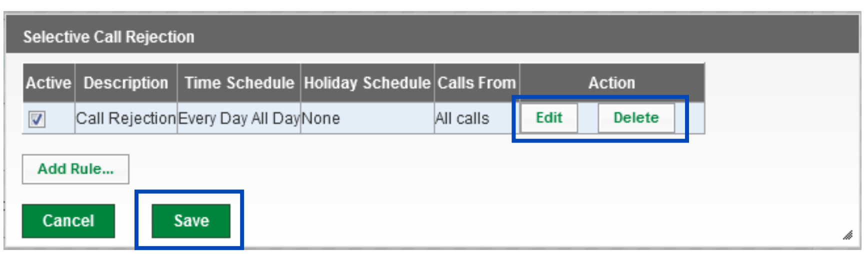
41. Click the **Add Rule** button.



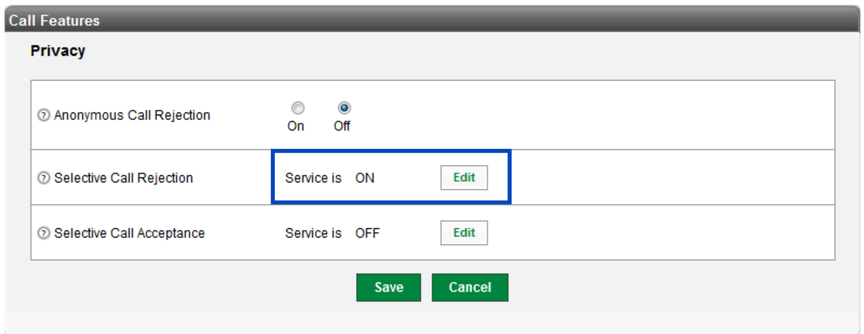
42. Enter a name for your rule in the **Description** field.
43. Choose a **Time Schedule** from the dropdown list if a schedule has been set and is required for this rule.
44. Choose a **Holiday Schedule** from the dropdown list if a holiday schedule has been set and is required for this rule.
45. Choose which phone numbers should follow this rule, **Any Phone Number**, the **Following Phone Numbers**, **Any Private Number** or **Any Unavailable Number**.
46. If you choose the **Following Phone Numbers**, enter up to 12 specific phone numbers that you want to follow this rule, in the fields provided.
47. One all options have been selected for your rule, click the **Done with Add Rule button**.



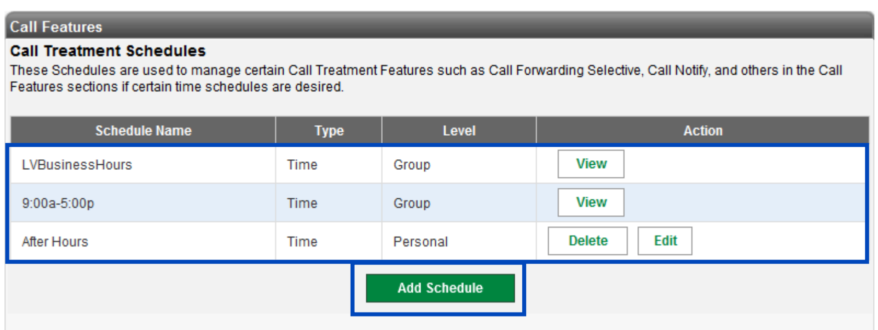
48. Your rule will be listed, and you can return to your rule to edit or delete it at any time.
49. Click the **Edit** button rule to modify your rule.
50. Click the **Delete** button to delete your rule.
51. Click the **Save** button to continue.



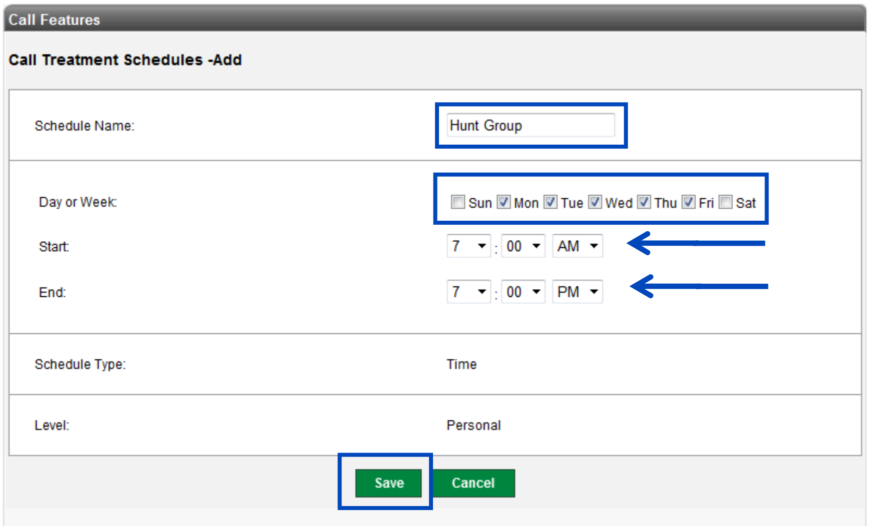
52. The rule you added and feature that you activated is now indicated by **Service is On**.
53. Calls ringing to your Hunt Group will be based on the criteria in defined in your rule.
54. To modify your rule at any time, click the **Edit** button.



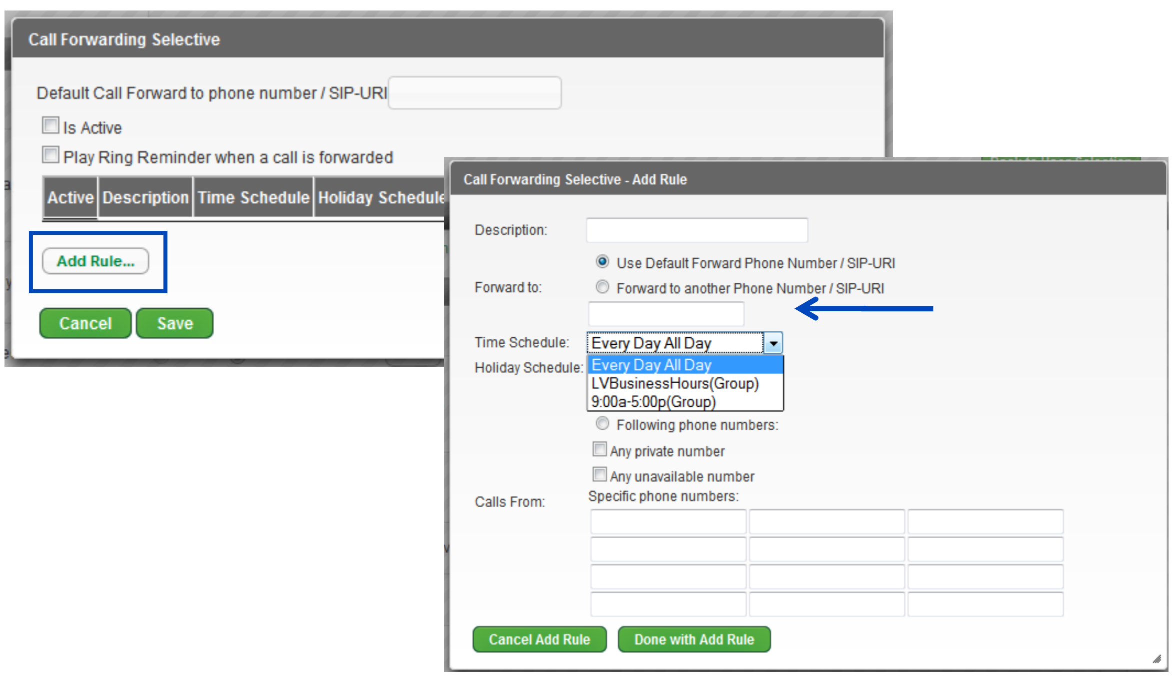
55. Click **Call Treatment Schedules** from the sub menu.
56. This allows you to define schedules that can be added to your Hunt Group based on time of day, after hours, weekends, holidays, etc.
57. If any schedules have been created either for this Hunt Group, or for the entire group, they'll be listed here.
58. A group schedule can only be added/deleted/modified by the administrator but can be used for any Hunt Group and can also be used for advanced features by any End User within that group.
59. Click the **Add Schedule** button to add a new Schedule if none of the existing personal or group schedules fit the criteria needed for your Hunt Group's schedule.



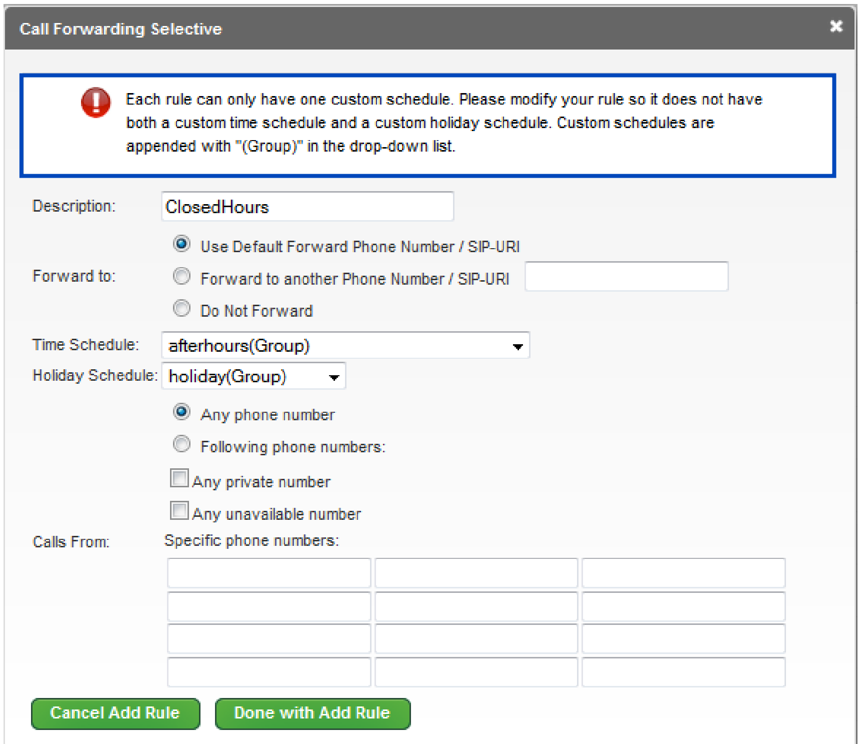
60. Enter a name for your schedule in the **Schedule Name** field.
61. Choose which **Days of Week** you want to apply this schedule to by clicking the check boxes.
62. Choose a **Start** and **End** time by selecting the options from the dropdown lists.
63. When all options for your schedule have been set, click the **Save** button.



64. Once **Schedules** are built at either the group level (by the Admin) or within an individual End Users' portal, schedules can be added to **Rules** within Advanced Features such as Selective Call Forwarding, Simultaneous Ring, Sequential Ring, Hunt Groups, etc.
65. This is an example within an advanced feature where you'll see the schedules built and which can be associated to a feature.
66. Click on **Add Rule**, a **Time Schedule** dropdown list is available, and populates with any Schedule that has been built at the group level by the Admin or schedules built at the user level.



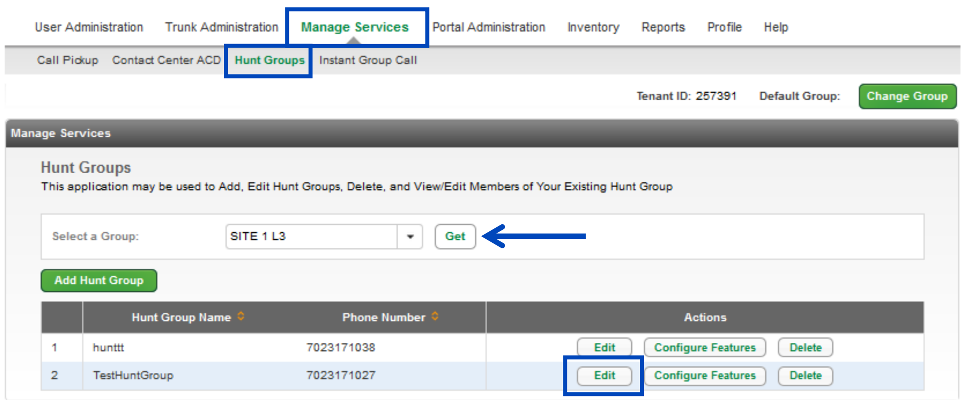
Note: A single Rule can only have a Time Schedule or Holiday Schedule assigned to it. If you want to use both, you need to set up individuals Rules - one for Time Schedule and one for Holiday Schedule. Attempting to add a Time and Holiday schedule to the same Rule, will result in the following error.



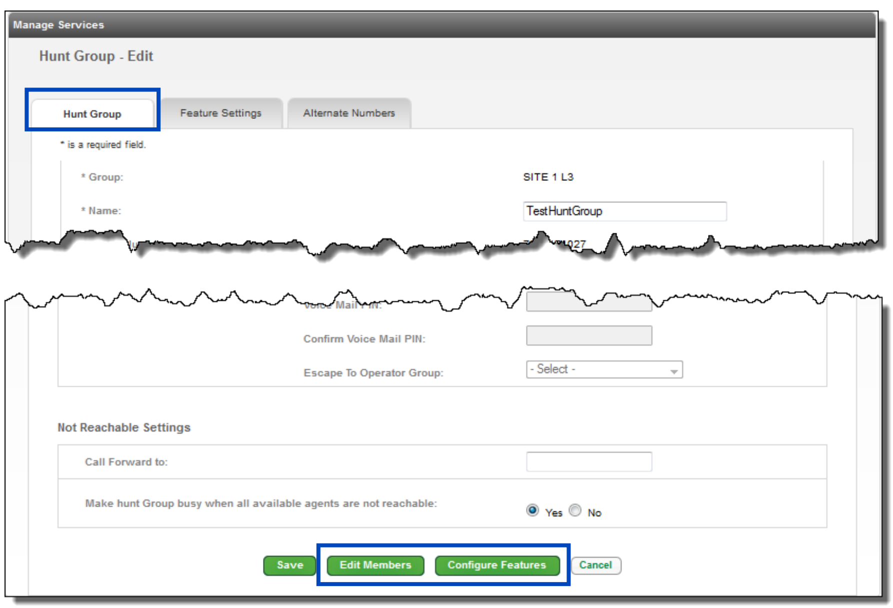
Editing Hunt Groups

Once your **Hunt Group** is built, you can return to edit that group, change members, select features settings, and assign alternate numbers.

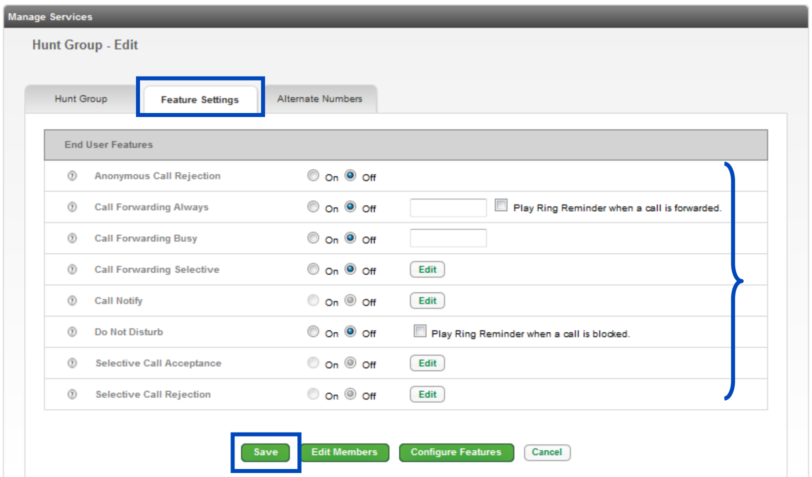
1. Click **Manage Services** from the main menu.
2. Click **Hunt Groups** from the sub menu.
3. Select the **Group** you wish to manage.
4. Click **Edit** for the Hunt Group you wish to manage.



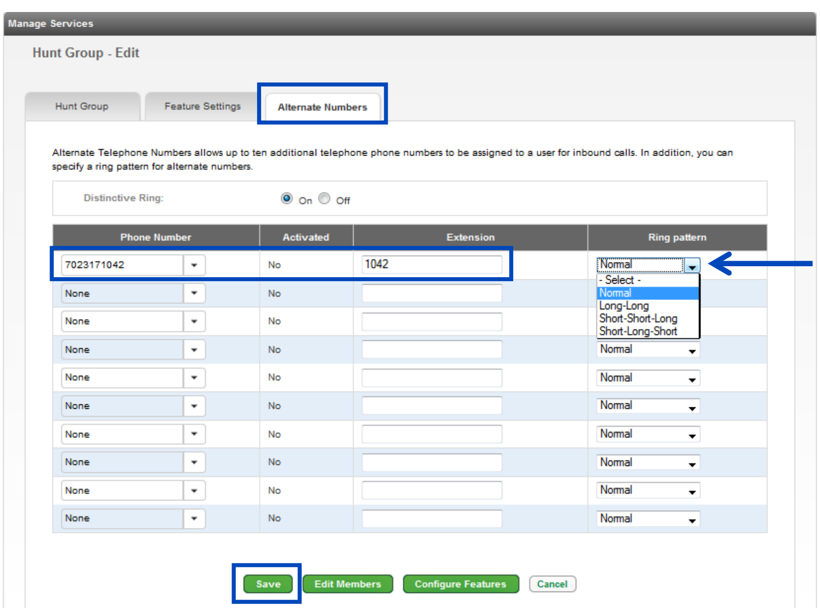
5. To change members assigned to your Hunt Group, from the Hunt Group tab, scroll to the bottom and click the **Edit Members** button.
6. To change configuration settings for your Hunt Group, click the **Configure Features** button.
7. Modify the settings as described in the section for creating your **Hunt Group**.



8. Click the **Features Settings** tab.
9. Choose to enable or disable various settings for your Hunt Group, such as **Call Forward Always** or **Do Not Disturb**.
10. To enable a feature, click the **On** radio button.
11. At any time to disable a feature, click the **Off** radio button.
12. Click the **Edit** button for features to assign schedules or advanced features to those feature settings.
13. Click the **Save** button.



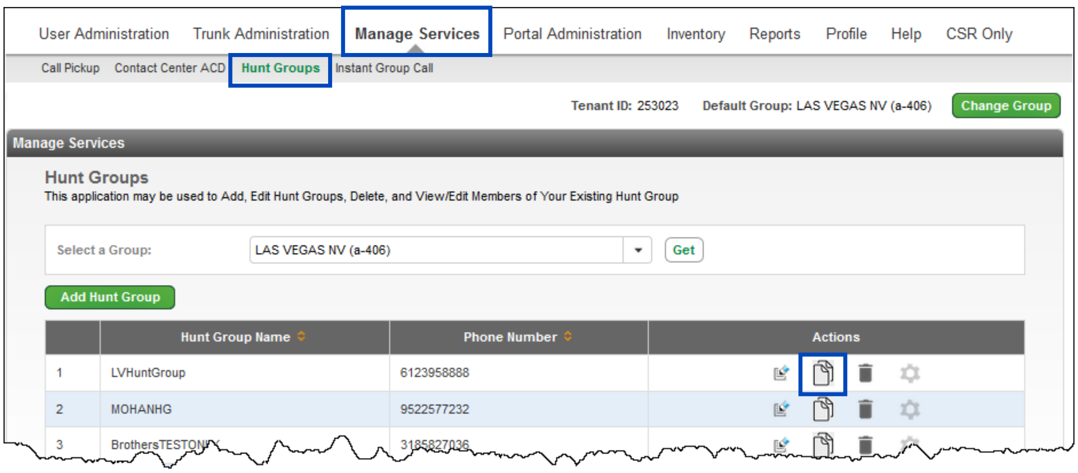
14. Click the **Alternate Numbers** tab.
15. From the **Phone Number** dropdown list, select the Alternate Number that you want to ring to the primary Hunt Group number.
16. The extension will auto populate in the **Extension** field, but this can be modified.
17. From the **Ring Pattern** dropdown list, select the type of ring tone you want to be presented to the Hunt Group members when this number is called.
18. Click the **Save** button.



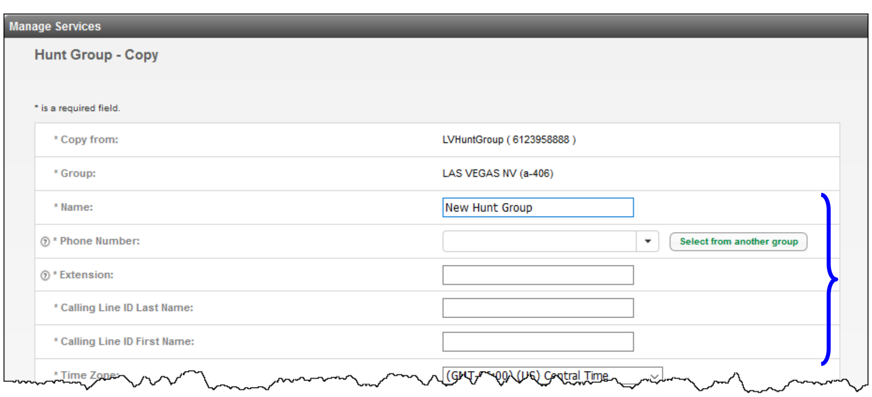
Copying Hunt Groups

When adding a new **Hunt Group**, you can copy an existing **Hunt Group** with like settings, so it doesn't have to rebuilt from the beginning. Be sure to select a **Hunt Group** that has similar settings to what your new **Hunt Group** will need, including the group it needs to be built in.

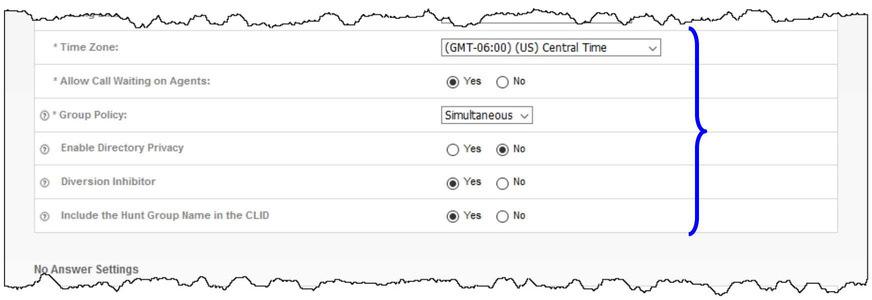
1. Click **Manage Services** from the main menu.
2. Click **Hunt Groups** from the sub menu.
3. Locate the Hunt Group you want to copy and click the **Copy** icon.



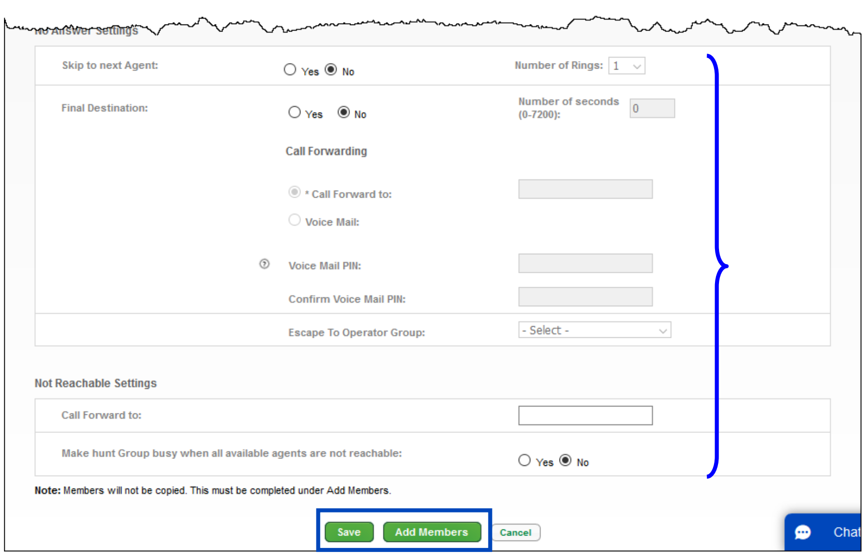
4. Enter the new of the new hunt group in the **Name** field.
5. Pick a number from the existing group by clicking the **Phone Number** drop down list.
6. To pick a number from another group, click the **Select from another group** button.
7. The extension prepopulates based on the selected number, change it within the **Extension** field if necessary according to your dialing plan.
8. Enter the calling names in the **Calling Line ID Last Name** and **Calling Line ID First Name** fields; this is what's presented for caller ID on inbound hunt group calls.



9. Change time zone by clicking the **Time Zone** drop down list if necessary.
10. Change the call waiting setting by clicking the **Yes** or **No Allow Call Waiting on Agents** radio button.
11. Adjust how calls present to the hunt group by clicking and selecting an option from the **Group Policy** drop down list.
12. Adjust the **Enable Directory Privacy** setting by clicking the **Yes** or **No** radio button.
13. Adjust the **Diversion Inhibitor** setting by clicking the **Yes** or **No** radio button.
14. Adjust the **Include the Hunt Group Name** in the CLID setting by clicking the **Yes** or **No** radio button.



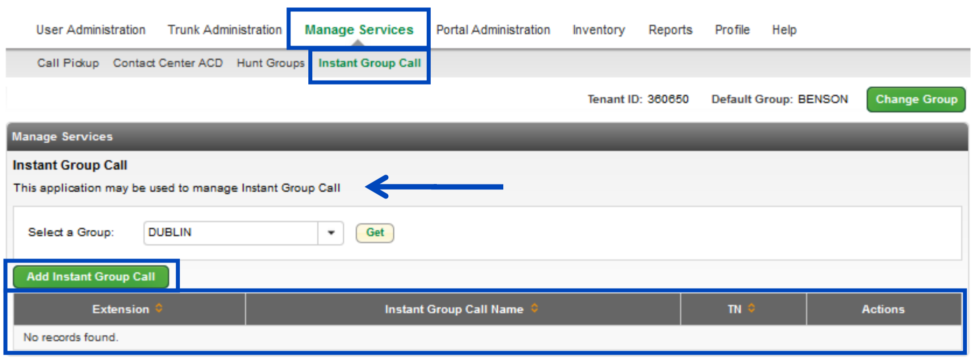
15. Change the **Skip to next Agent** settings by clicking the **Yes** or **No** radio button and number of rings from the **Number of Rings** drop down list.
16. Make **Final Destination** settings by clicking the **Yes** radio button.
17. Forward to another number or send calls to Voicemail.
18. In the **Not Reachable** field, enter a number where you'd like your calls to ring to if our service is unavailable.
19. Click the **Make Hunt Group busy if all agents are not reachable Yes** radio button to enable that feature.
20. Click the **Save** button to save your settings or click the **Add Members** button to add members to the hunt group; members do not copy from the group you copied from.



Instant Call Group

Instant Group Call allows users to call a group of users by dialing a phone number or extension associated to the **Instant Group Call**. The users can be part of the same group or they can be external users.

1. Click **Manage Services** from the main menu.
2. Click the **Instant Group Call** from the sub menu.
3. If you have multiple groups, from the dropdown list, select the group you wish to add an **Instant Group Call** feature to.
4. If you already have **Instant Group Call** group set up, they'll be displayed for editing purposes.
5. Click the **Add Install Group Call** button.



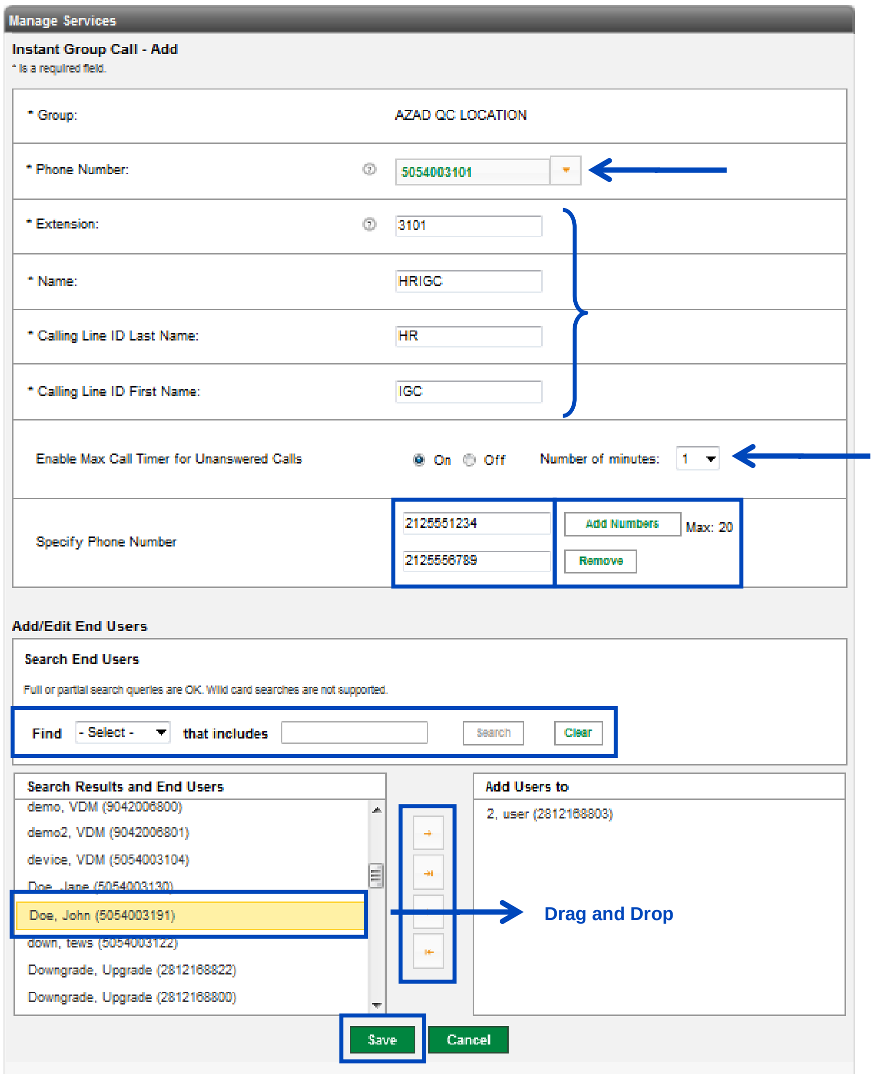
6. From the dropdown list, select the **Phone Number** you wish to assign to this **Instant Group Call**.

   Note: If there are no phone numbers available in your inventory, you'll need to contact your Account Manager to have one added.

7. Enter the **Extension** you want to use if it's different than the auto populated extension.
8. Enter the **Name** of the **Instant Group Call**.
9. Enter the **Calling Line ID Last Name** and **Calling Line ID First Name** for the **Install Group Call**. This is what will display on the user's phone when they receive a call that is being processed from this **Instant Group Call** number.
10. Set the **Enable Max Call Timer for Unanswered Calls**. If you select **On**, you'll need to select the number of minutes you would like each user to be called from the dropdown list. If this is set to **No**, the calls will ring for an unlimited amount of time, or until each party answers or you go to their voicemail.
11. If there are external numbers you would like to add to the **Instant Group Call**, enter the number in the **Specify Phone Number** field and click **Add Numbers**. You can have a maximum of 20 external numbers that can be added. If at any time you wish to remove an external number, click the **Remove** button next to that number.
12. For internal users, enter search criteria for the users you would like to find.

    Note: If your group has less than 1000 users in it, all members of that group will automatically be listed under the **Search Results and End Users** field.

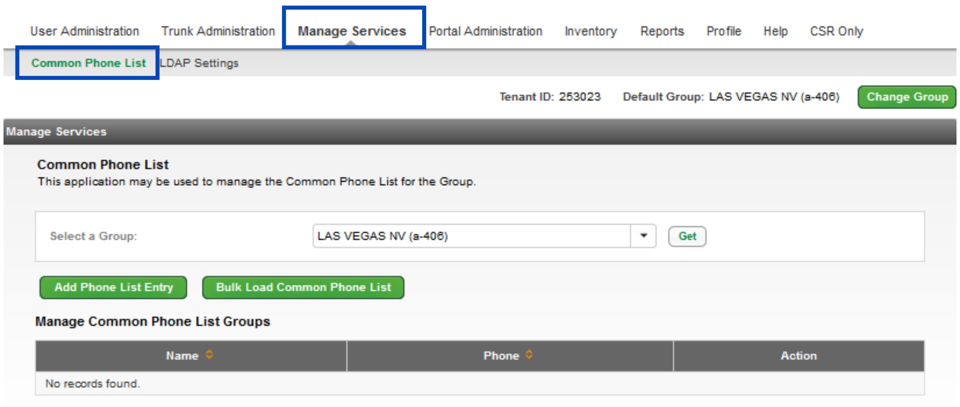
13. Drag and drop the users you would like to add to your **Instant Group Call** from the left column to the right column (you can also select them while holding down the Control button on your keyboard and then click the right arrow in the middle of the columns).
14. When all users have been added to the **Install Group Call**, click the **Save** button.



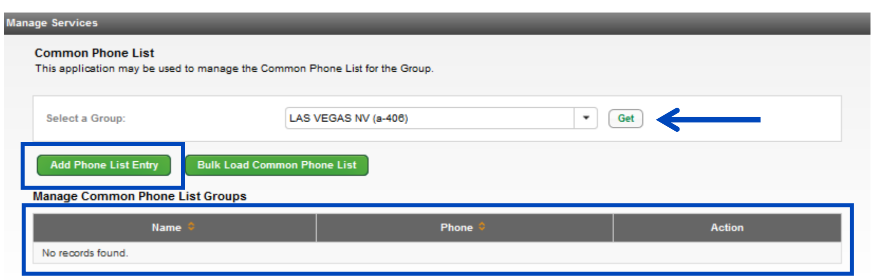
Common Phone List

Common Phone List allows you to add frequently dialed numbers into a directory that can be used by everyone in the Enterprise from the handset if Common Directory has been enabled, and the Group Directory option within the Enterprise Assistant toolbar or, Contacts can be added individually or via bulk upload.

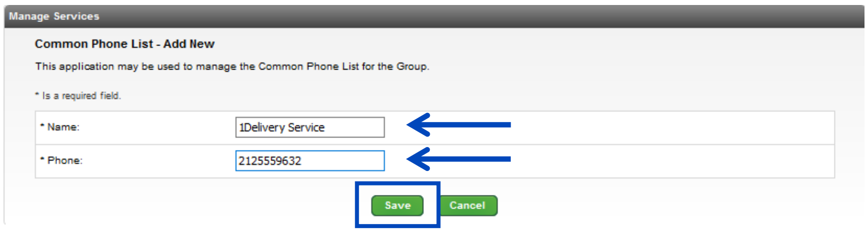
1. Click **Manage Services** from the main menu.
2. Click **Common Phone List** from the sub menu.



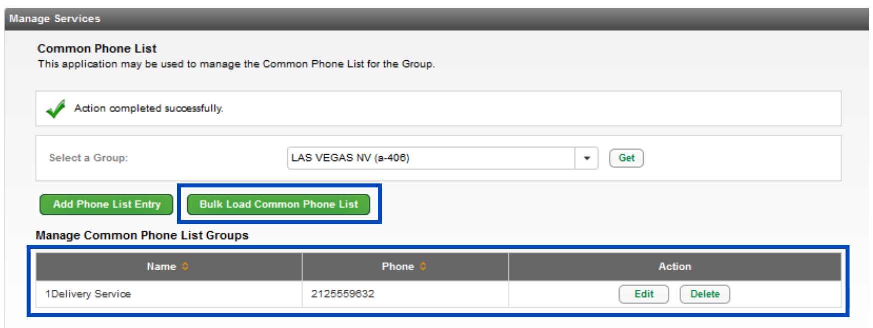
3. From the dropdown list, select the group you wish to add a **Common Phone List** to.
4. Click on the **Get** button.
5. If numbers have already been added to the **Common Phone List** for that group, they'll be displayed below and can be **Edited** or **Deleted**.
6. Entries can be added one at a time or via bulk upload.
7. Click the **Add Phone List Entry** button to manually enter a number to the list.



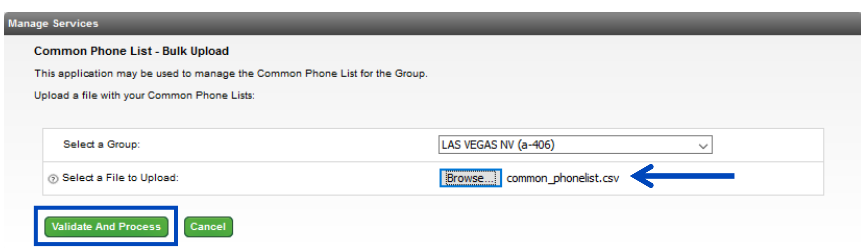
8. Enter a descriptive name in the **Name** field.
9. Enter the appropriate 10-digit number in the **Phone** field.
10. Click the **Save** button.



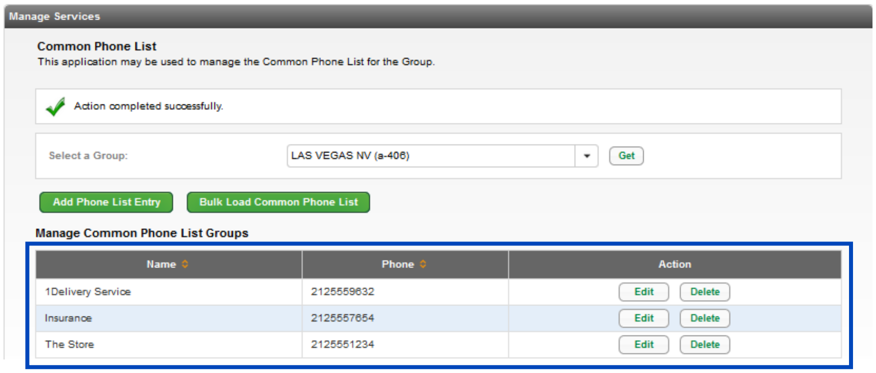
11. Your new entry appears and can be **Edited** or **Deleted** by clicking the appropriate button.
12. Click the **Bulk Load Common Phone List** button.



13. Confirm the group is correct or change the group by from the **Select a Group** dropdown list.
14. Click the **Browse** button and search for your file as you normal for your operating system; hover over the **Select a File to Upload "?"** for details on .csv file format.
15. Click the **Validate And Process** button to upload your entries.



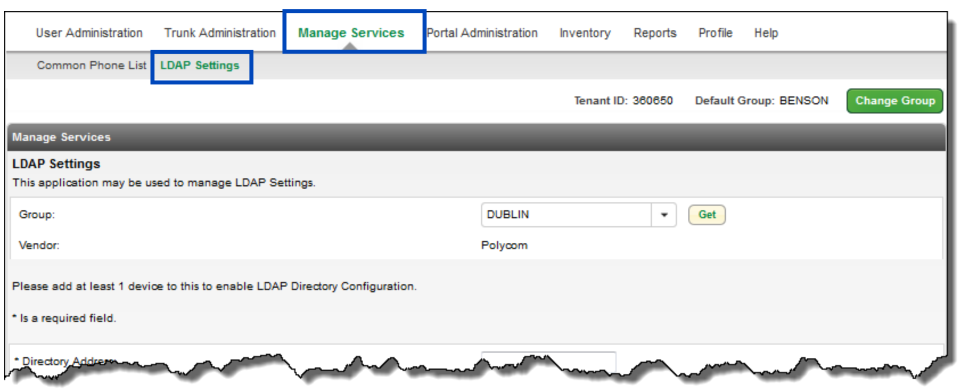
16. Entries display and can be **Edited** or **Deleted** by clicking the appropriate button.



LDAP (Lightweight Directory Access Protocol)

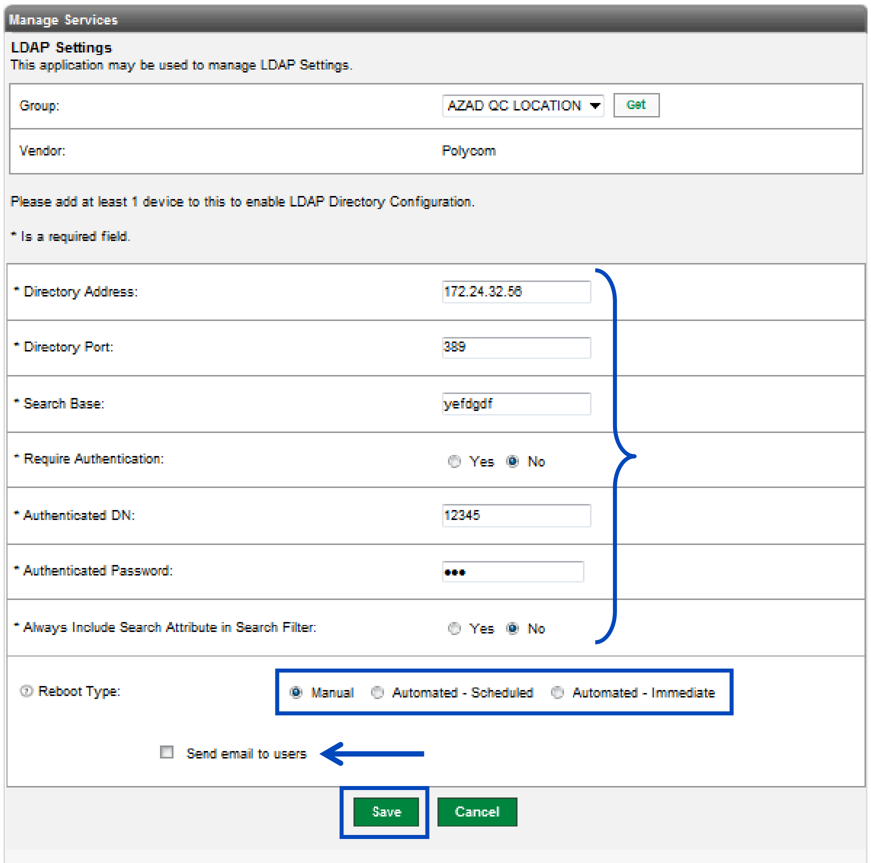
LDAP allows users to use an external Lightweight Directory Access Protocol for click-to-dial and from the directory button on their handset device.

1. Click **Manage Services** from the main menu.'
2. Click **LDAP Settings** from the sub menu.



3. Enter an IP address for Fully Qualified Domain Name (FQDN) in the **Directory Address** box.
4. Enter an integer between 0 and 65535 in the **Directory Port** box. The default TCP port is 389, yours may be different
5. Enter the search root suffix of your directory server in the **Search Base** box. The root suffix should reflect the domain name of the site you're searching.
6. If your directory server requires authentication, click **Yes**. If it does not require authentication, keep the selection as **No**. These controls may speed up your searches.
7. If authentication is required, specify the DN (distinguished name), the unique identifier of the directory account to use for the authentication in the **Authenticated DN** field (up to 256 characters).
8. Enter the corresponding password in the **Authenticated Password** field.

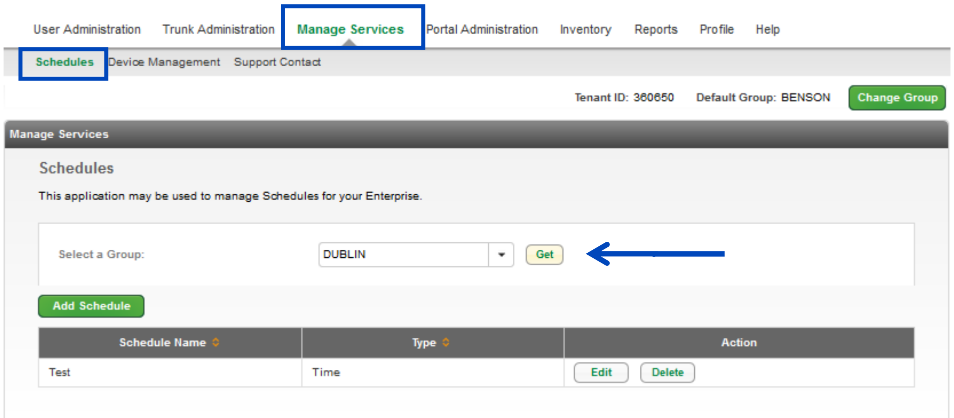
9. Click **Yes** for the **Always Include Search Attribute in Search Filter** if you want to force the current search attribute to be included in all directory server searches, even when the user leaves the search parameter blank.
10. Choose the **Reboot Type**; **Manual**, **Automated-Scheduled** or **Automated-Immediate**. This determines the type of background processing, and the visibility of scheduling and manual controls.
11. To provide your users with email notices regarding updates to the LDAP directory server, click the **Send email to users** box.
12. Click the **Save** button.



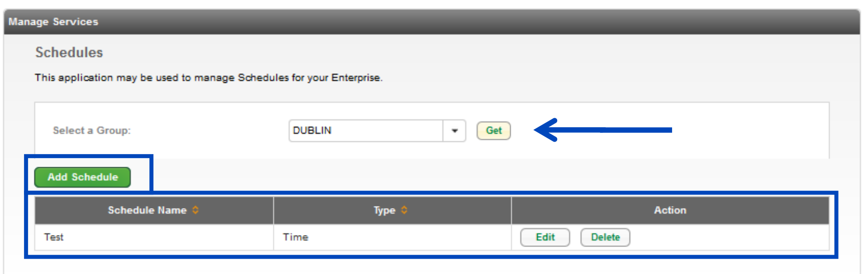
Schedules

Schedules allows you to define schedules at the group level that can be applied to Auto Attendant hours of business, Anywhere, Sequential Ring, Simultaneous Ring, etc.

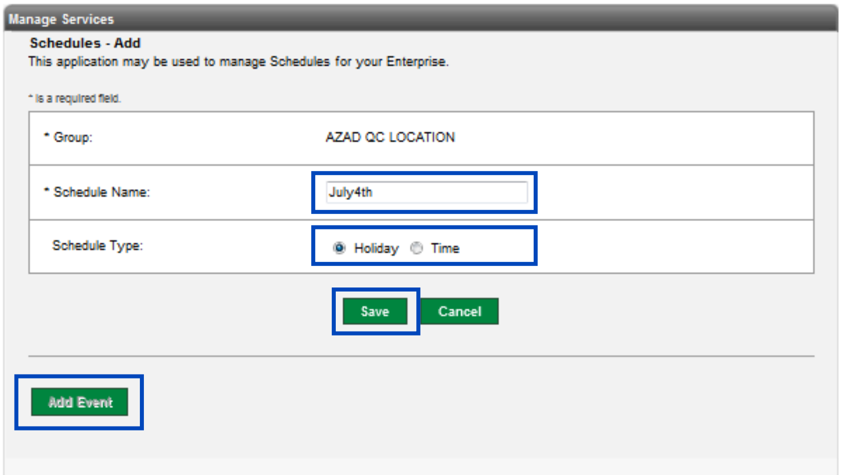
1. Click **Manage Services** from the main menu.'
2. Click **Schedules** from the sub menu.



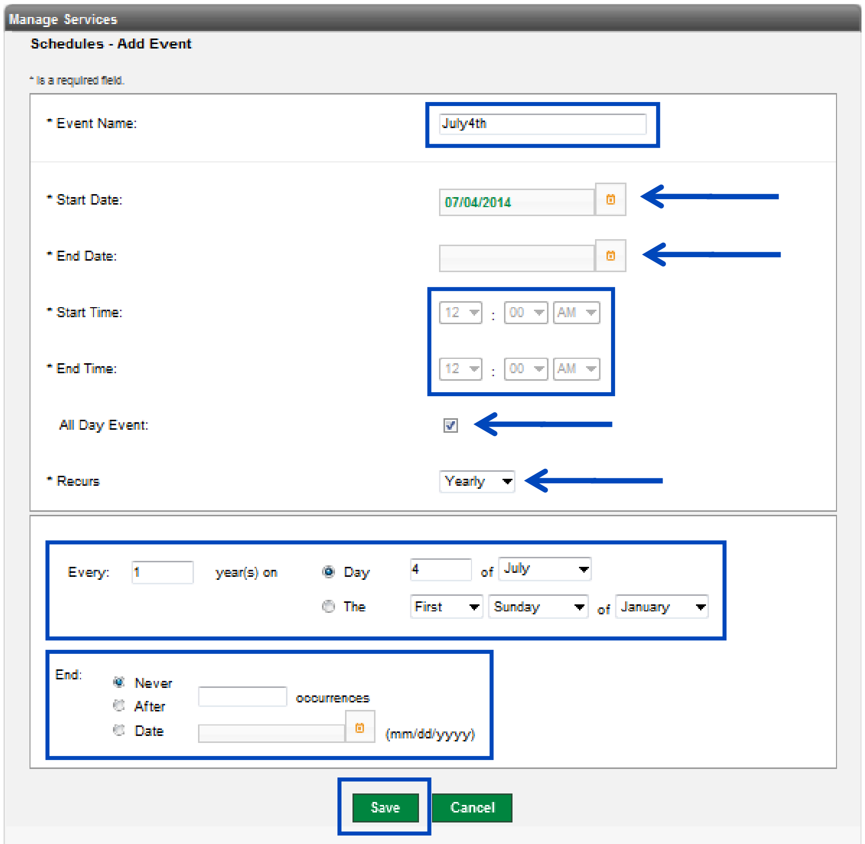
3. If you have more than one location in your tenant, select the group you wish to create a schedule for from the dropdown list.
4. Click on the **Get** button.
5. If there are schedules already defined for that group, they'll be listed below.
6. To add a new schedule, click the **Add Schedule** button.
7. To **Edit** or **Delete** an existing schedule, click the **Edit** or **Delete** button next to the schedule you wish to manage.



8. Enter a **Schedule Name** to define the schedule you're building.
9. Select if it is a **Holiday** or **Time** schedule.
10. Click the **Save** button.
11. Once you **Save** your Schedule, the **Add Event** button will activate. Click on **Add Event** to set the parameters of your **Schedule**.



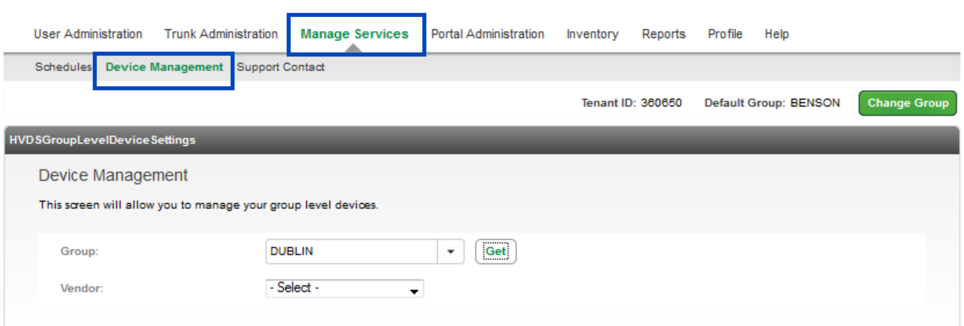
12. Enter an **Event Name** for your schedule.
13. From the dropdown calendar, select the **Start Date** for your **Schedule**.
14. From the dropdown calendar, select an **End Date** for your **Schedule**.
15. From the dropdown lists, select the **Start Time** and **End Time** for your **Schedule**.
16. If your Schedule is an all day event, check the **All Day Event** box. If you choose All Day Event, you don't need to define the **Start Time** and **End Time**.
17. From the dropdown list, select **Never**, **Daily**, **Weekly**, **Monthly** and **Yearly** which best fits your **Schedule**.
18. Complete the remaining information based on your **Schedule** and the required parameters.
19. Click the **Save** button.



Device Management

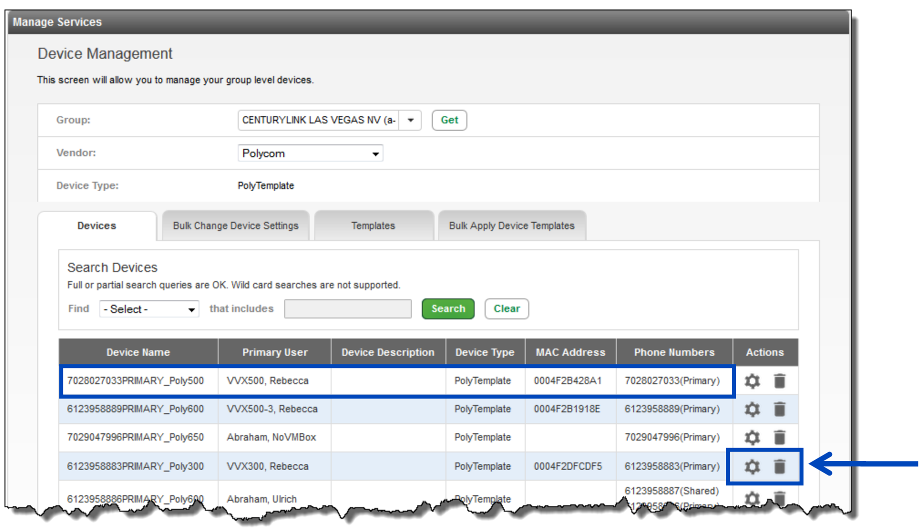
Device Management allows you to manage and change device settings at the group level.

1. Click **Manage Services** from the main menu.'
2. Click **Device Management** from the sub menu.



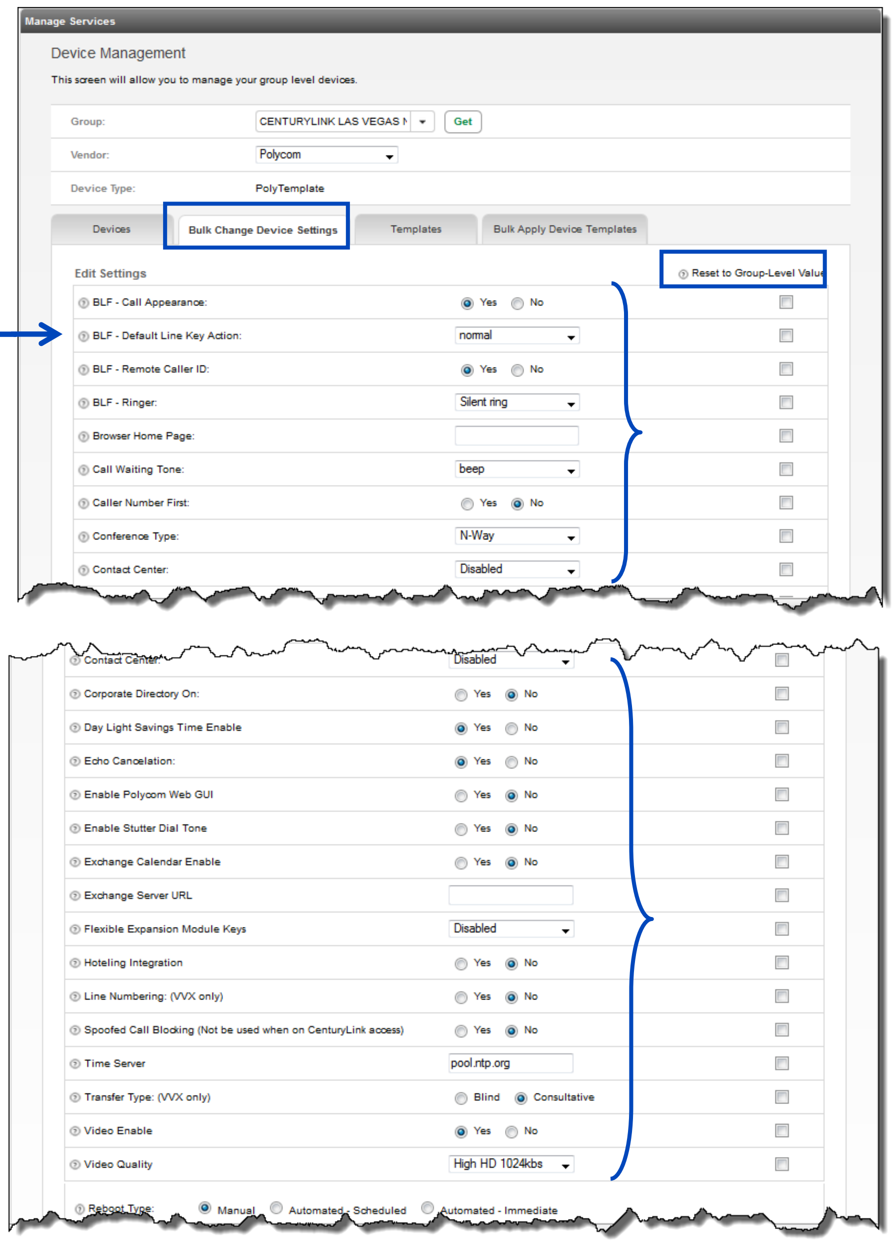
3. If you have more than one location in your tenant, select the appropriate group that you wish to manage from the dropdown list.
4. Select the correct vendor from the **Vendor** dropdown list.
5. Click the **Get** button.

6. All devices for the selected group will be displayed including **Device Name**, **Primary User Name**, **Device Description**, **Device Type**, **MAC Address** and **Phone Number**.
7. The **Phone Numbers** column will display the "**Primary**" number as well as any "**Shared Call Appearance**".
8. To delete a user, click the **Trash** icon.
9. Click on the **Gear** icon to manage a specific device, including adding additional **Shared Call Appearances**, **Busy Lamp Fields** and **Soft Keys**.

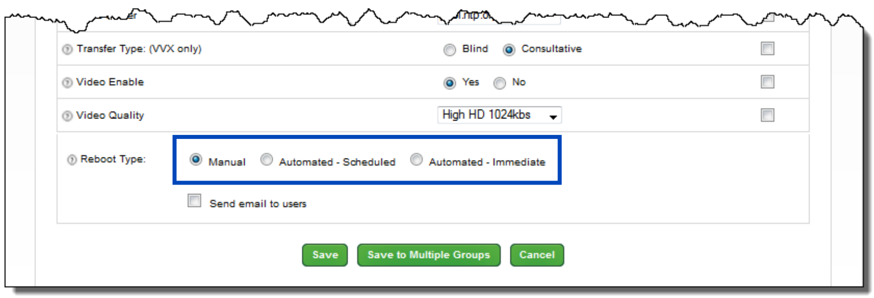


10. Click on the **Bulk Change Device Settings** tab to change group level settings; changes made on this page will affect all users within that group.
11. Change feature settings by clicking **Yes** or **No** radio buttons, selecting options from dropdown lists, or enter field data.
12. To return any setting(s) to the Group-Level Value, check the corresponding box under **Reset to Group-Level Value** check box.

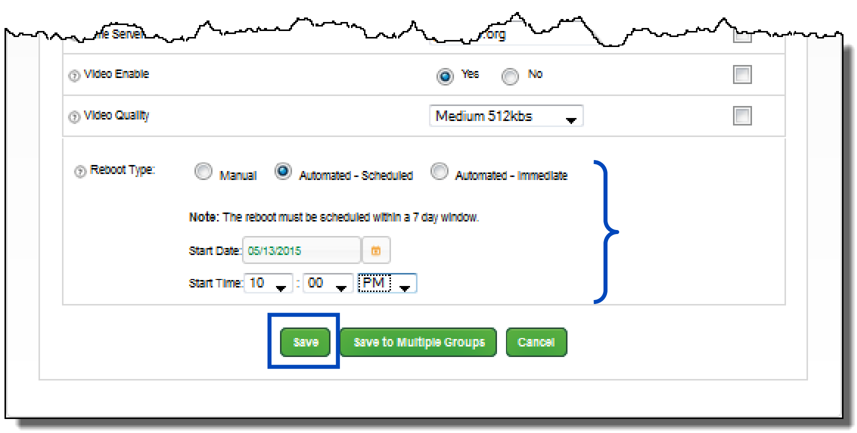
Note: If you're not familiar with a feature, hover over the "?" for a brief description.



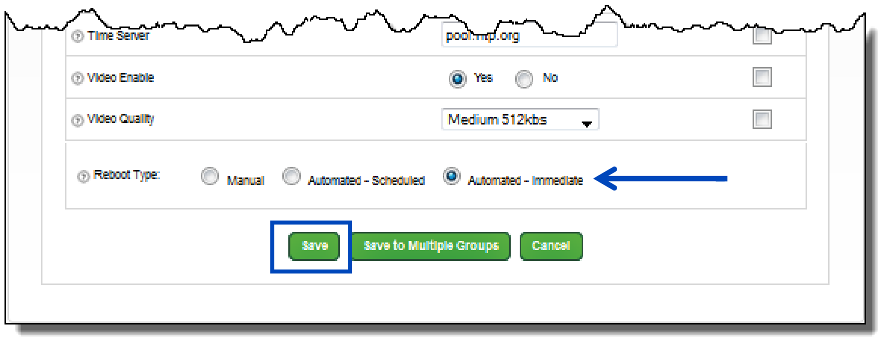
13. Making setting changes will require a reboot of each device. The reboot can be performed Manually, Automated-Scheduled or Automated-Immediate.
    - **Manual** – each device will need to be rebooted by unplugging the data cable, or by accessing the reboot option under Advanced Features
    - **Automated-Scheduled** -- set a specific date/time, within7 days, for the devices within this group to reboot
    - **Automated-Immediate –** all devices within this group will automatically reboot



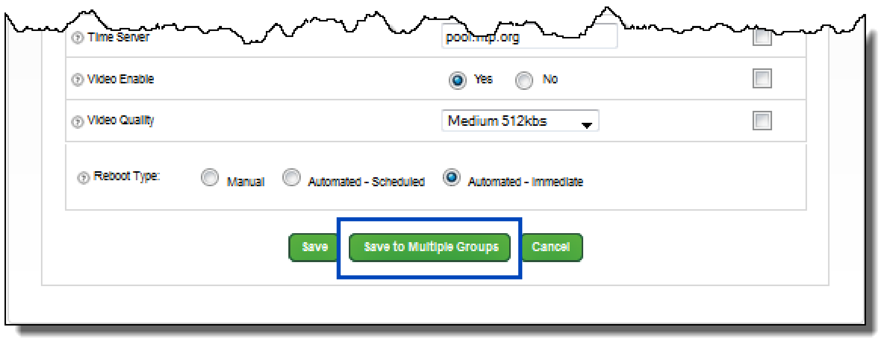
14. Click the **Automated-Scheduled** radio button.
15. Select the preferred reboot date by clicking the **Calendar** icon; reboot must be scheduled within 7 days.
16. Choose your starting time, a.m. or p.m., from the **Start Time** dropdown lists.
17. Click the **Save** button and all devices will reboot at the scheduled time.



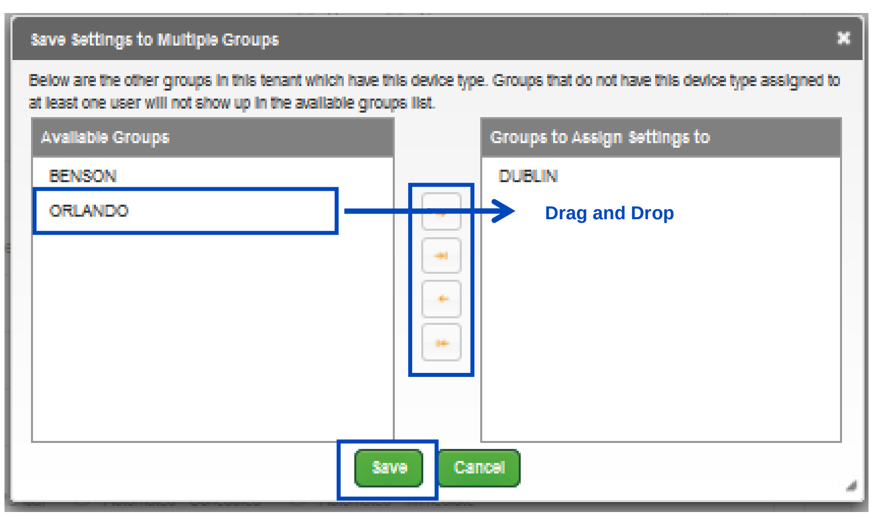
18. Click the **Automated-Immediate** radio button.
19. Click the **Save** button to reboot all devices in this group immediately.



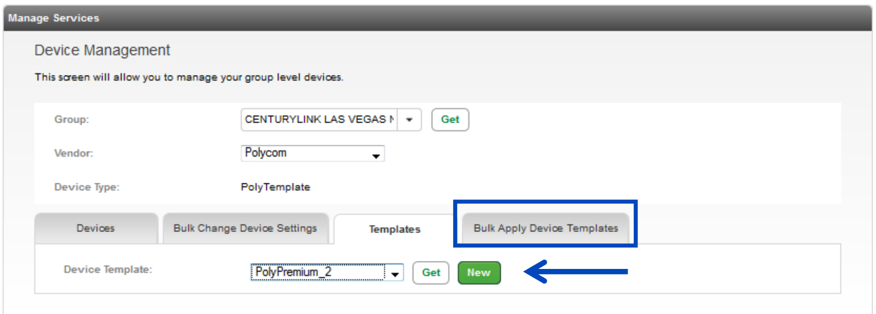
20. If you want to apply the same feature setting changes to additional groups, click the **Save to Multiple Groups** button.



21. **Drag and Drop** groups from the **Available Groups** field to the **Groups to Assign Settings to** field.
22. When all groups have been assigned, click the **Save** button.

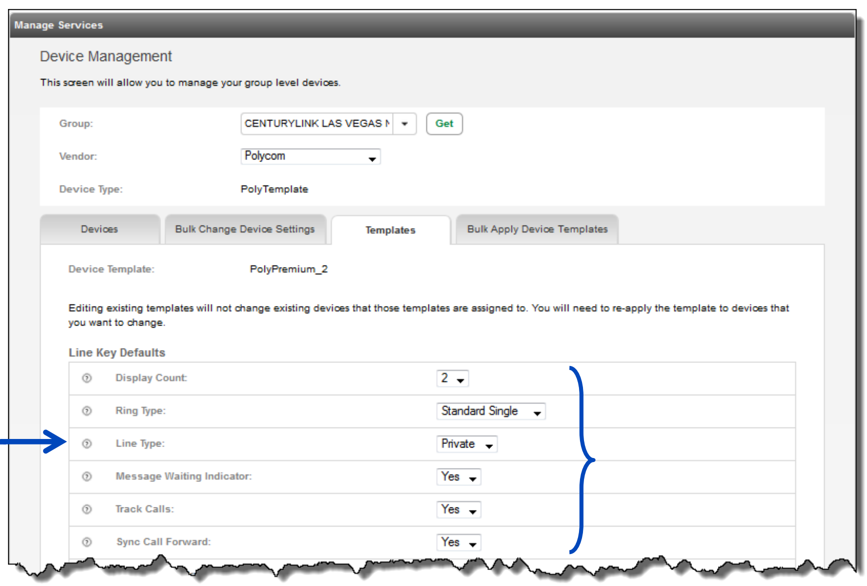


23. Click on the **Templates** tab.
24. Click the **Device Template** dropdown list to review default templates and custom templates that have been created.
25. Once you select a default or custom template, click the **Get** button to access that template; existing default or custom templates can be modified to create new custom templates.
26. Click the **New** button to start a new template from scratch.



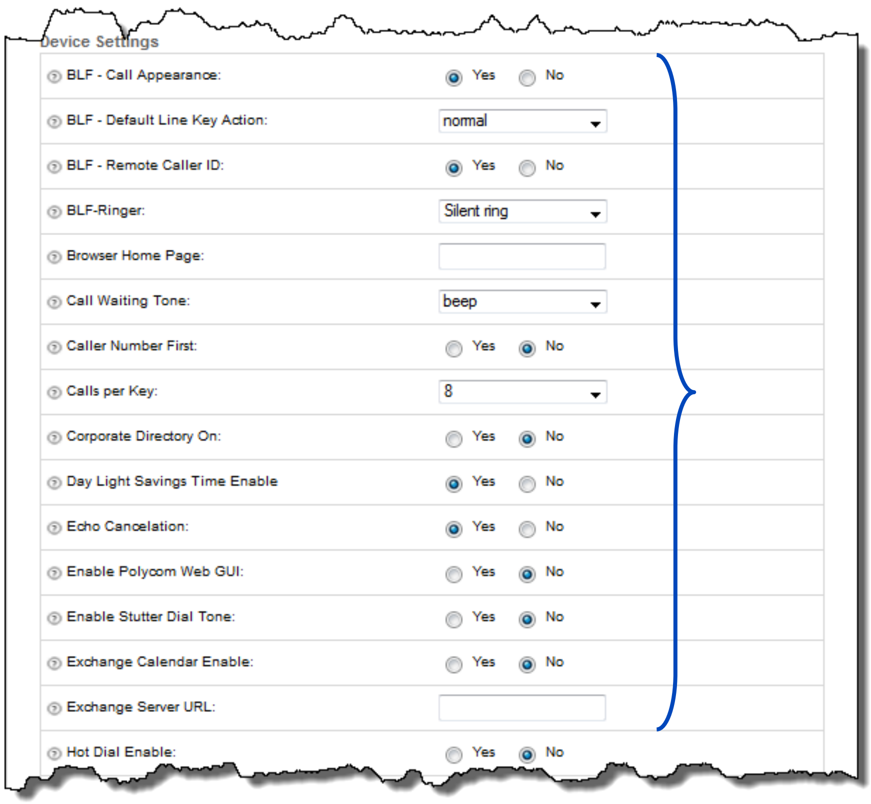
27. Change feature settings by clicking **Yes** or **No** radio buttons, selecting options from dropdown lists, or enter field data.

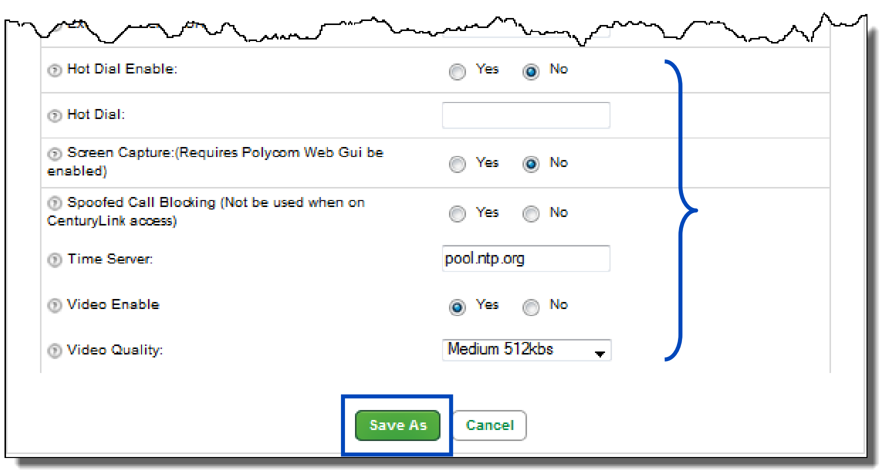
Note: As always, if you're unfamiliar with a feature, hover over the "**?**" for a brief description.



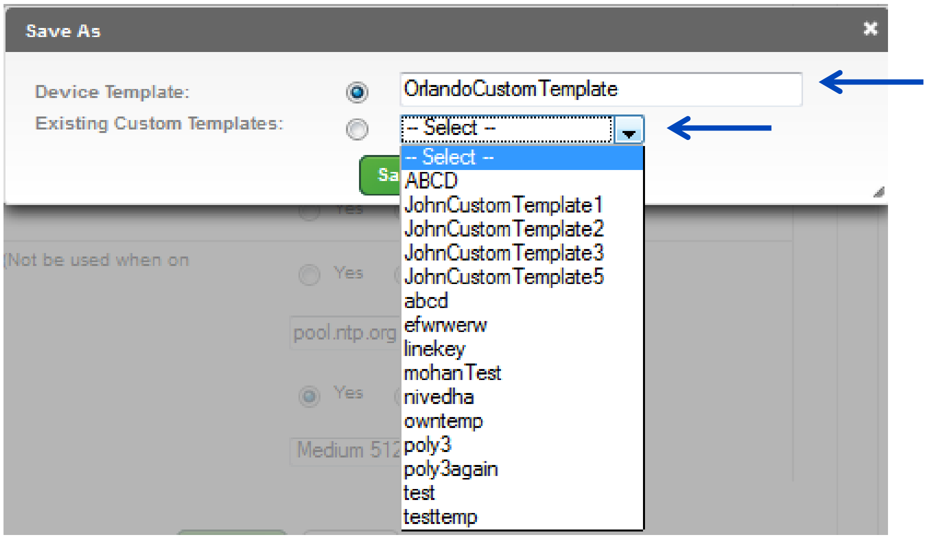
28. If you selected to start with a default or previously created Custom Template, any soft keys built within that template will be displayed.
29. You can clear or remove any of the default soft keys by clicking the **Clear Soft Key** button next to the feature you wish to delete.
30. To add a new custom soft key, click the **Action** dropdown list and select from various features.
31. The **Label** field will pre-fill based on the feature selected, but it is editable so the label can appear with a more familiar name for your users.
32. Check the appropriate boxes depending on where you want your soft key to appear and/or the status of the phone when you want that feature available:
    - **Show On Idle –** the soft key will only be available when the phone is on-hook
    - **Show on Active –** the soft key will only be available while on an active call
    - **Show Before Default Keys –** the soft key will be moved ahead of default features such as Transfer, Hold and Conference

33. Next select **Device Settings** you want applied to your custom template by click the **Yes** or **No** radio buttons, by selecting options from a dropdown list, or by typing information into specific fields.
34. After all settings specific to that custom template are set, click the **Save As** button.


Device Settings
BLF - Call Appearance: Yes No
BLF - Default Line Key Action: normal
BLF - Remote Caller ID: Yes No
BLF-Ringer: Silent ring
Browser Home Page:
Call Waiting Tone: beep
Caller Number First: Yes No
Calls per Key: 8
Corporate Directory On: Yes No
Day Light Savings Time Enable Yes No
Echo Cancelation: Yes No
Enable Polycom Web GUI: Yes No
Enable Stutter Dial Tone: Yes No
Exchange Calendar Enable: Yes No
Exchange Server URL:
Hot Dial Enable: Yes No

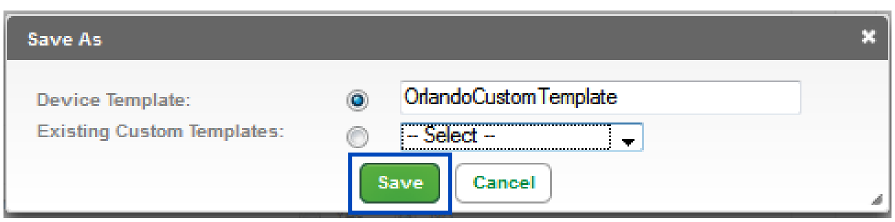

Hot Dial Enable: Yes No
Hot Dial:
Screen Capture:(Requires Polycom Web Gui be enabled) Yes No
Spoofed Call Blocking (Not be used when on CenturyLink access) Yes No
Time Server: pool.ntp.org
Video Enable Yes No
Video Quality: Medium 512kbs
Save As
Cancel

35. To save a new custom template, enter a descriptive name in the **Device Template** field.
36. To save as an existing template, select your template from the dropdown list.

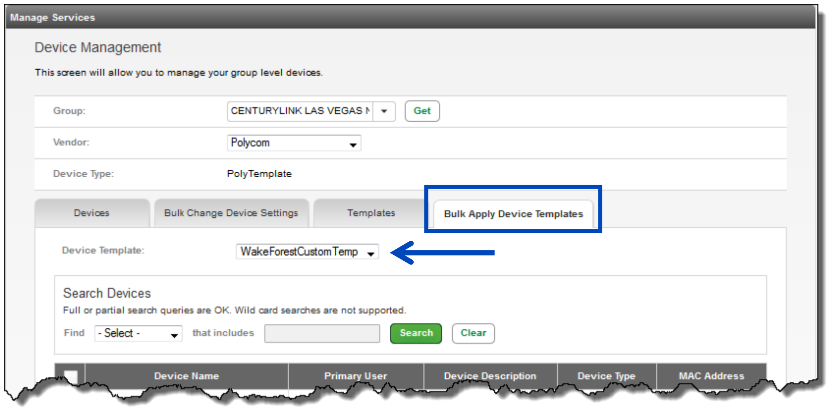


37. Click the **Save** button.
38. If custom templates are built prior to building users, templates can be assigned while creating users individually, or when using the **Bulk Upload Spreadsheet**.
39. Be sure to list the template name in your **Bulk Upload Spreadsheet**, exactly as it was named including upper/lower case and punctuation.

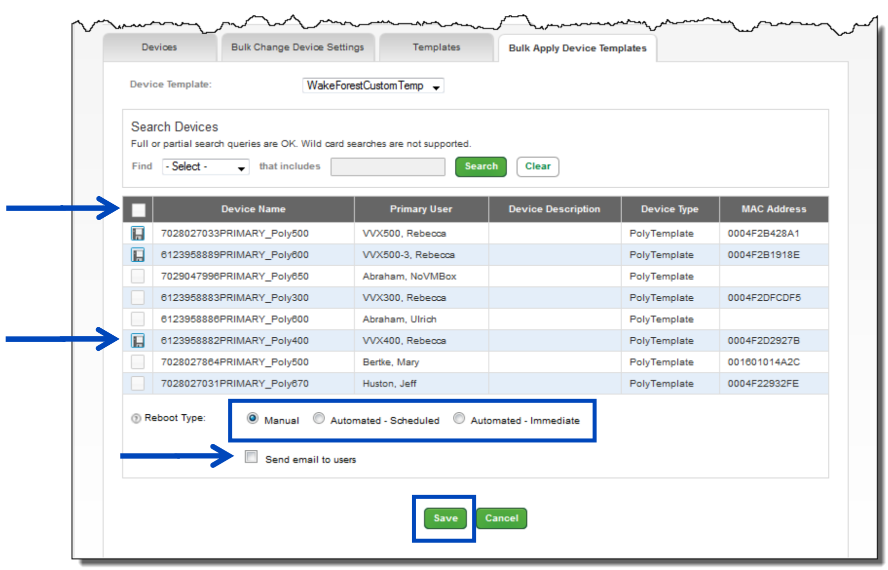
Note: If you create a custom template after your users have been built, the users who require this custom template would have to be deleted and rebuilt for the feature changes to apply. Any new users added after the custom template has been built, can be assigned that template through the Create New User process.



40. Click the **Bulk Apply Device Templates** tab to assign a new template to multiple users.
41. Select the template from the **Device Template** dropdown list.



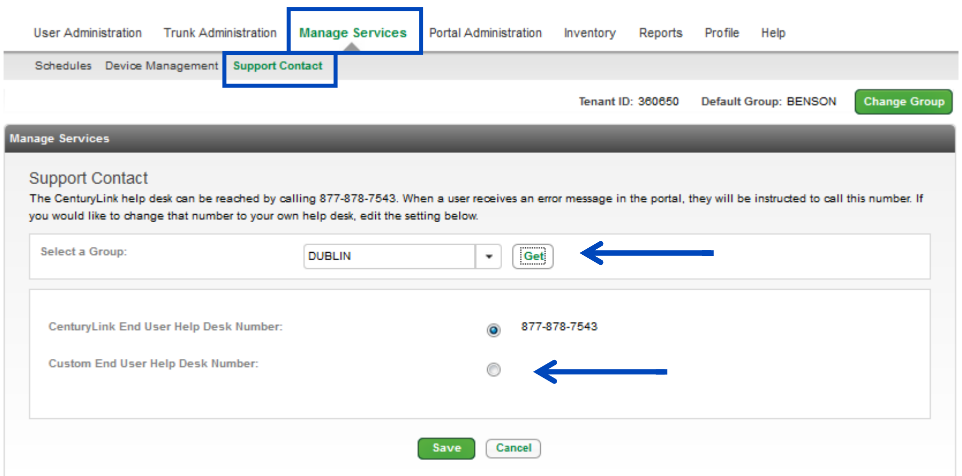
42. Use the **Search Devices** option to search for specific users by First Name, Last Name, MAC Address or Device Name.
43. Click the **Box** in the column heading to select all users, or individual click on the box for each user which wish to update.
44. Making setting changes will require a reboot of each device. The reboot can be performed Manually, Automated-Scheduled or Automated-Immediate.
    - **Manual** – each device will need to be rebooted by unplugging the data cable, or by accessing the reboot option under Advanced Features
    - **Automated-Scheduled** -- set a specific date/time, within7 days, for the devices within this group to reboot
    - **Automated-Immediate** – all devices within this group will automatically reboot
45. If you wish to notify each user of the impending reboot, check the **Send Email to Users** check box.
46. Click the **Save** button to enable the selected reboot option.
47. After all devices are rebooted, new feature settings associated to the newly assigned template, will be in implemented.



Support Contact

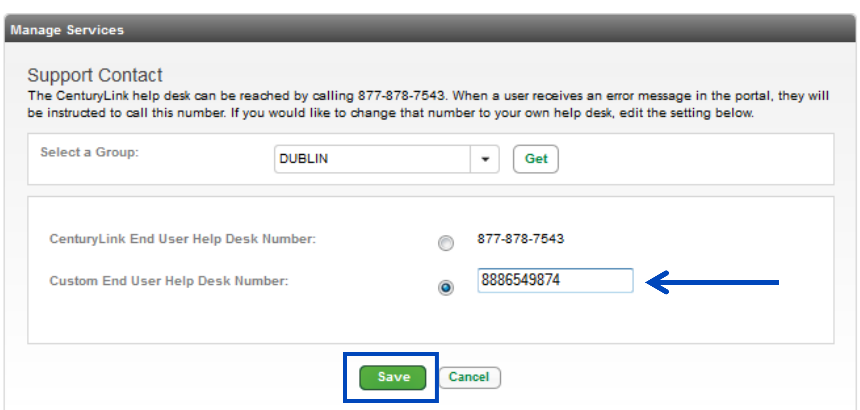
If you prefer that your end users contact an internal resource for support, you have the ability to customize the number within the **Support Contact** option that is provided to your end users if they receive a portal error.

1. Click **Manage Services** from the main menu.'
2. Click **Support Contact** from the sub menu.
3. If you have more than one location in your tenant, select the appropriate group that you wish to manage from the dropdown list.
4. Click the **Get** button.
5. The default support number for CenturyLink support, is selected by default and cannot be modified.
6. To customize the **Support Contact** number, click the Custom **End User Help Desk Number** radio button.



7. In the **Custom End User Help Desk Number** field, enter the number you want to display in the portal.

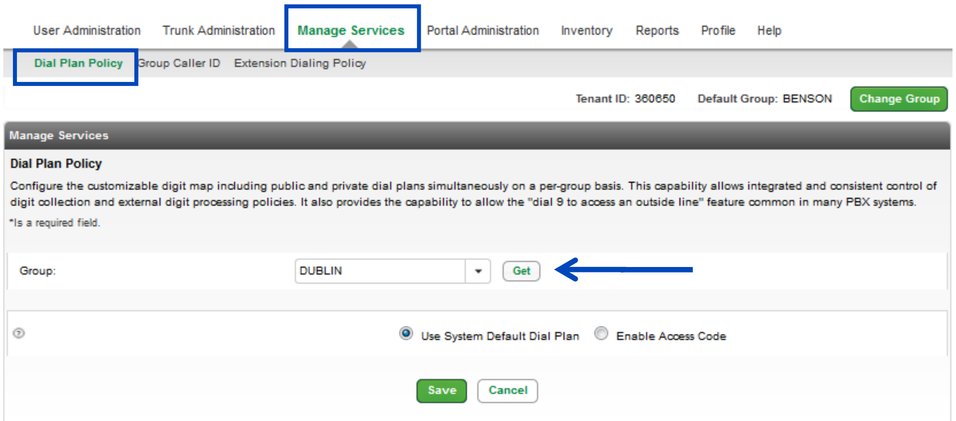
Note: This number can be a toll free or 10-digit phone number.



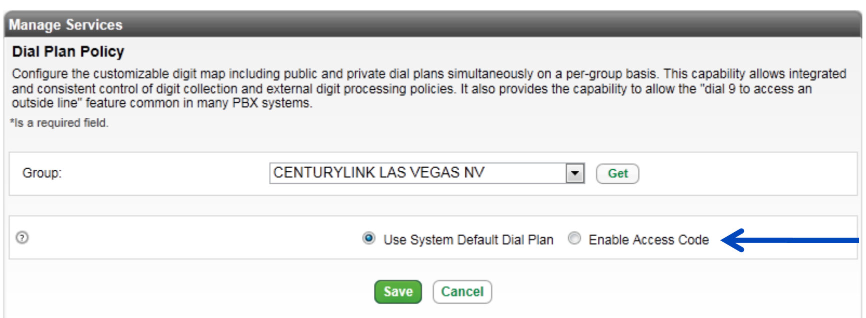
Dial Plan Policy

Dial Plan Policy allows you customize digit mapping including public and private dial plans simultaneously on a per-group basis. This capability allows integrated and consistent control of digit collection and external digit processing policies. It also provides the capability to allow the “dial 9 to access an outside line” feature common on many PBX systems.

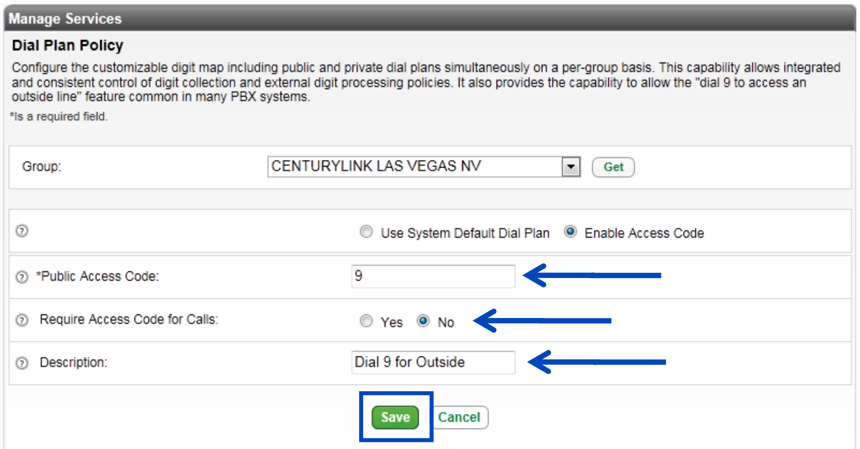
1. Click **Manage Services** from the main menu.
2. Click **Dial Plan Policy** from the sub menu.
3. If you have multiple groups, from the dropdown list, select the group you want to access.
4. Click the **Get** button.



5. Use **System Default Dial Plan** is the default and most commonly used.
6. This setting allows users to dial **10-digits** for all external calls and does not require a “1” or a “9”.
7. To modify this setting, click the **Enable Access Code** radio button.



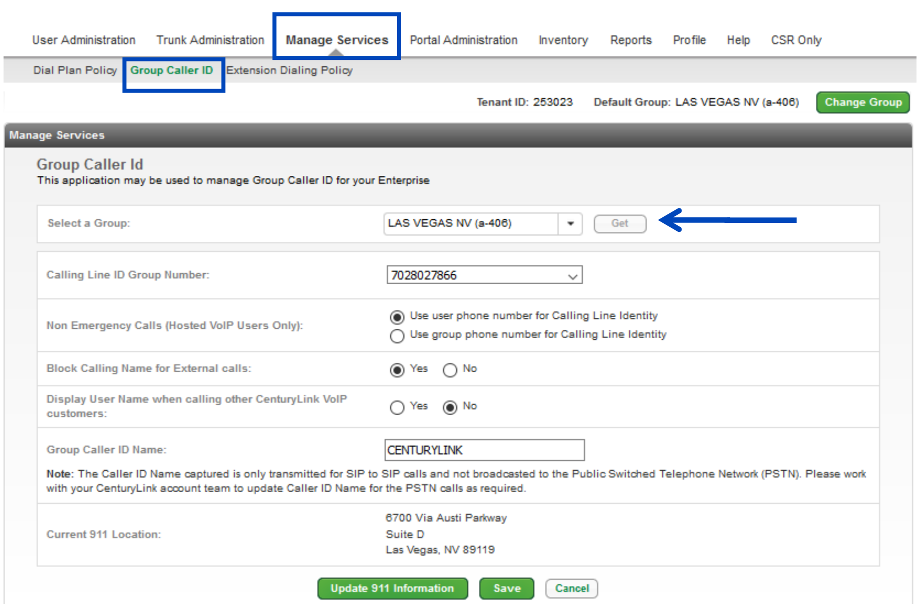
8. In the **Public Access Code** field, enter the digit that will be needed for an 'outside line', such as a 9 or 8, which are most commonly used.
9. If you require this access code for all calls, click the **Yes** radio button.
10. In the **Description** field, enter a description of this dial plan policy.
11. When all policies are entered, click the **Save** button.



Group Caller ID

Group Call ID allows you manage whether an individual's personal 10-digit phone number is out pulsed to the calling party, or if another number such as your company's main number, is presented to the caller for outbound calls.

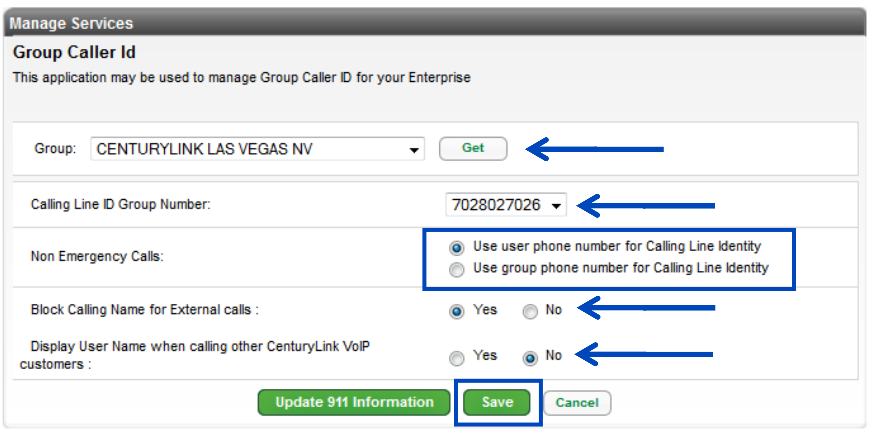
1. Click **Manage Services** from the main menu.
2. Click **Group Caller ID** from the sub menu.
3. If you have multiple groups, from the **Group** dropdown list, select the group you want to manage.
4. Click the **Get** button.



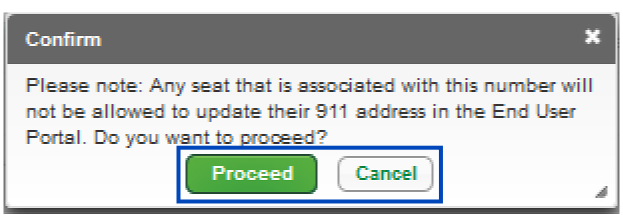
5. **Group Caller ID** information will be displayed for that group.
6. From the **Calling Line ID Group Number** dropdown list, select the number from that group that you want to send for outbound caller ID for the entire group.

Note: If the number you want to change the Calling Line ID Group Number to is being ported, this field will NOT be editable until after the port is complete, 911 is registered, and all ported numbers are marked as active in our system. This could take up to 24 hours after the port, to become available.

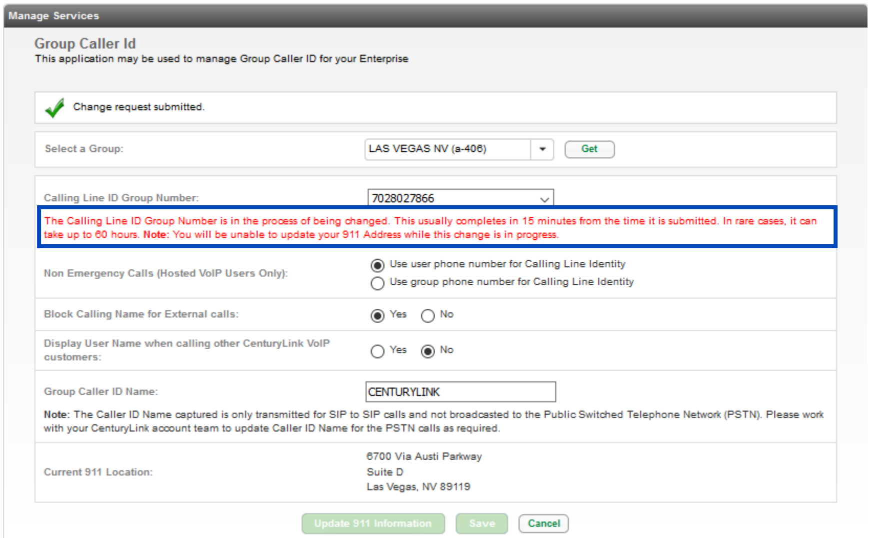
7. For non-emergency calls, select the radio button for the option you prefer, the **Group Calling Line ID** or **User Phone Number**.
8. Choose to block or not block **Calling Name for External** calls by selecting the **Yes** or **No** radio button.
9. If you don't want the User Name to appear for inbound caller ID for to other CenturyLink VoIP customers, click the **No** radio button.
10. Click the **Save** button.



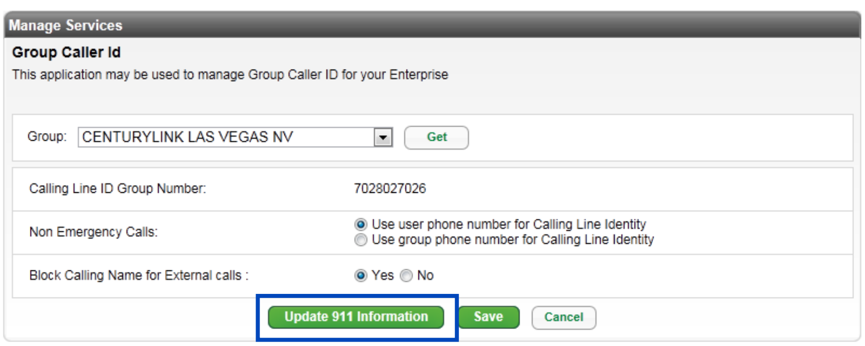
11. Observe the confirmation window, then click **Proceed** to continue to click **Cancel** to end the transaction.



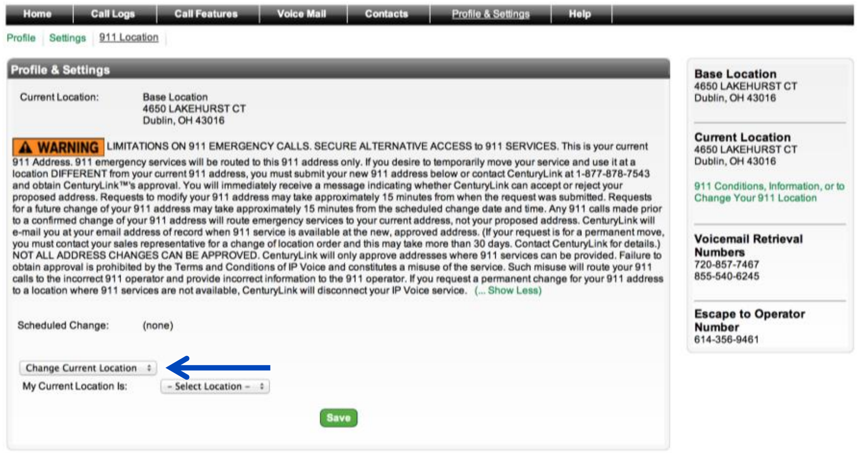
12. A notice displays stating the calling line ID change typically takes 15 minutes but can take up to 60 hours.
13. Changes cannot be made to the 911 address until the calling line ID process change is completed.



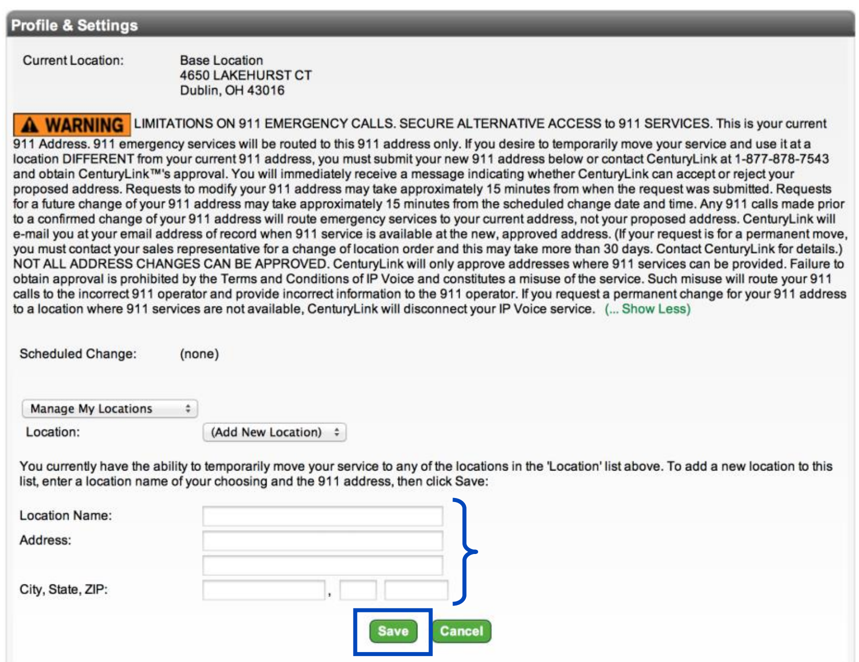
14. The address registered for the **Group Number** is based on the **Base Location** address.
15. If the group Number is assigned to an individual user that is mobile, the temporary address location can be registered with 911 through Manage Services, Group Caller ID.
16. Click the **Update 911 Information** button; this button will be greyed out if a Calling Line Group Number change is in process, you'll have to wait until that process is complete to make the 911 change.



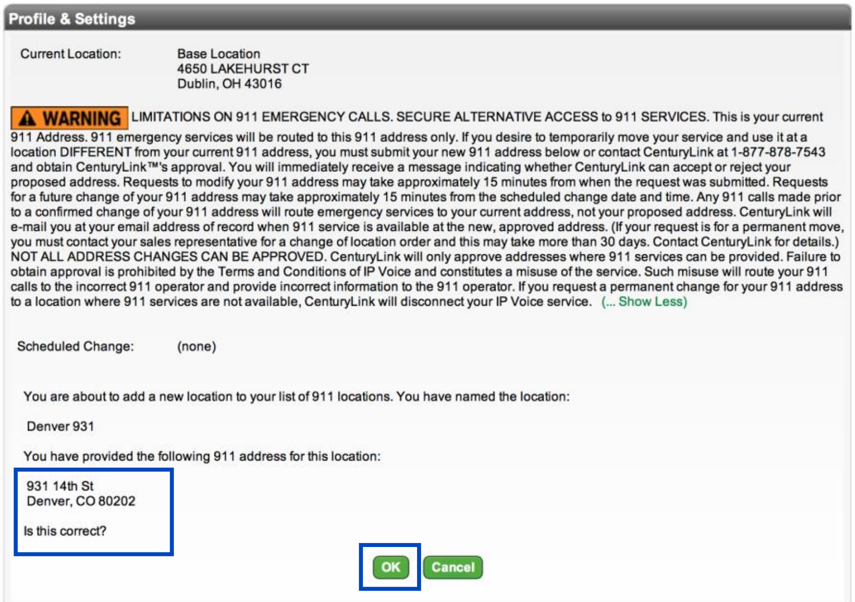
17. Click the **Change Current Location** dropdown list to choose **Manage My Locations**, **Select Location**, or **Add New Location**.
18. Select Add New Location.



19. Enter the **Location Name**.
20. Enter the **Address** for that location.
21. Click the **Save** button.



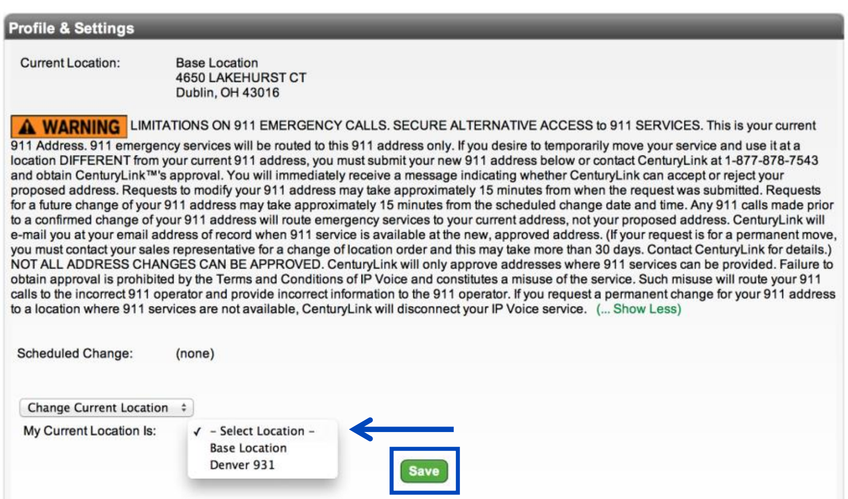
22. Confirm the address was input correctly.
23. Click the **OK** button.
24. Your new location is now an option within your “My Current Location” list.



Changing your 911 Location

Once you have added a new location to your **911 Location List**, you’ll then want to update your location in the 911 system.

1. Click **911 Location** from the **Profile & Settings** sub menu
2. Click **Change Current Location** from the first dropdown list.
3. Select the location you want to change to in the **My Current Location Is** dropdown list.
4. Click the **Save** button.

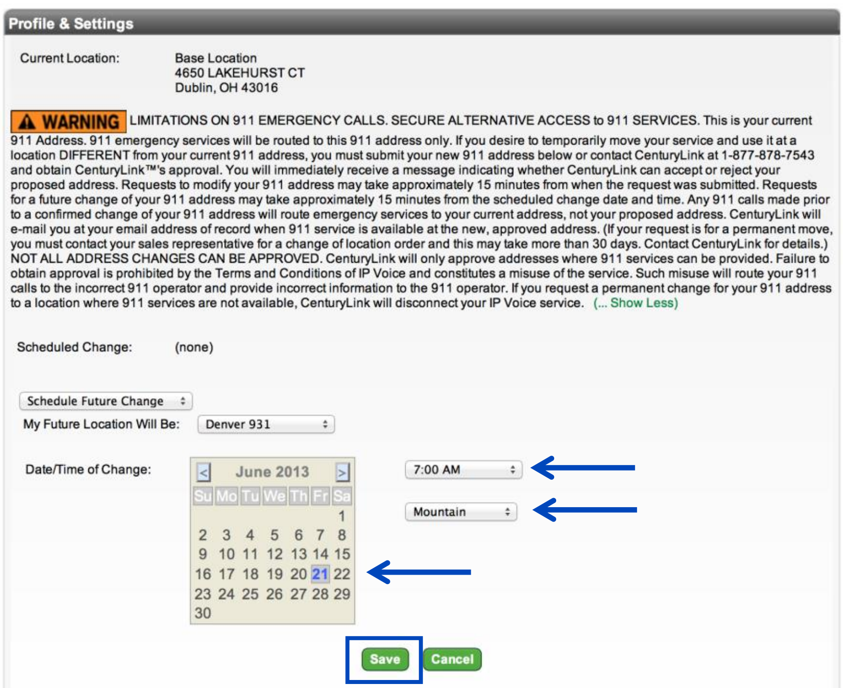


5. Your location will be submitted for registration. You'll receive an email that your order was placed and an email when your order is completed.
6. Remember, when you return to your base location, you'll need to log back into the portal and register the 911 information again to reflect your **Base Location**.
7. Your **Base** and **Current Location** can always be reviewed on the right-hand side of your portal.

Scheduling your 911 Location Change

You can schedule a future 911 Location change. Keep in mind that you can only schedule one change at a time, and if you try to add a schedule when one is already present, it will override the existing one.

1. Click **911 Location** from the Profile & Settings sub menu.
2. Click **Schedule Future Change** from the first dropdown list.
3. Select the location under the **My Future Location Will Be** dropdown list.
4. Select the **Date** you would like the change to take effect from the **Calendar**.
5. Select the **Time** and **Time Zone** you would like the change to take effect.
6. Click the **Save** button.

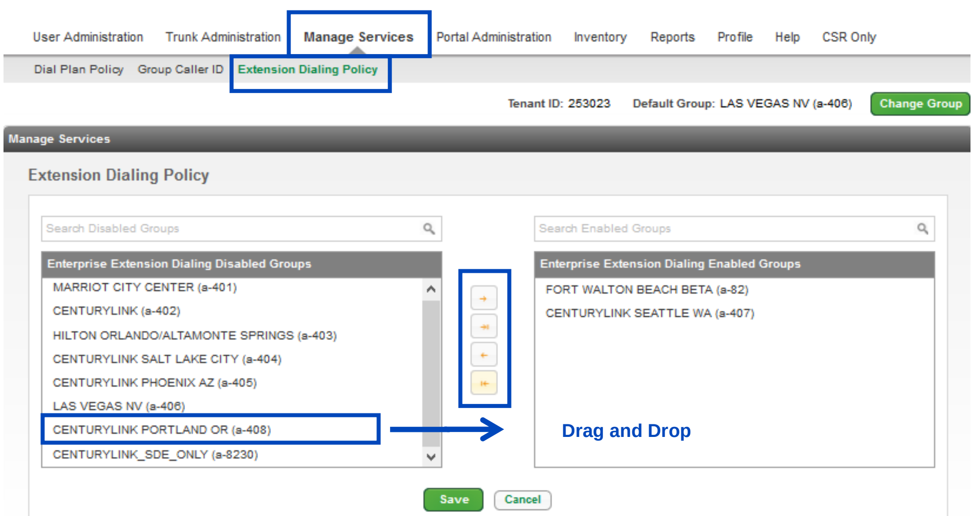


7. Your location change has now been scheduled.
8. You'll receive and email confirming your scheduled registration change.
9. Approximately 15 minutes prior to your requested change date/time, you'll receive another email stating your order has completed and that the new address has been registered.
10. Remember, when you return to your base location, you'll need to log back into the portal and register the 911 information again to reflect you **Base Location**.
11. Or submit a **Schedule Future Change** to coincide with your return to your Base Location.

Extension Dialing Policy

If your company has more than one group or location on our Hosted VoIP service, you can dial between groups by extension, by modifying the **Extension Dialing Plan**.

1. Click **Manage Services** from the main menu.
2. Click **Extension Dialing Plan** from the sub menu.
3. All group locations within your tenant will appear in the **Enterprise Extension Dialing Disable Groups** field.
4. Click a group and drag/drop it to the **Enterprise Extension Dialing Enabled Groups** field or use the arrows between the fields to move groups from field to field.
5. Any group appearing in the Enterprise **Extension Dialing Enabled Groups** field, can extension dial to other groups appearing within that field.
6. When all changes are made, click the **Save** button.



Portal Administration

The **Portal Administration** section allows delegation of management for specific telephone numbers and groups by creating **Sub-Administrator Groups**. This won't impact your abilities as the Administrator. In this section, you also have access to **Call Recording** functionality. Create a link to this portal which can be then be accessed via Control Center.

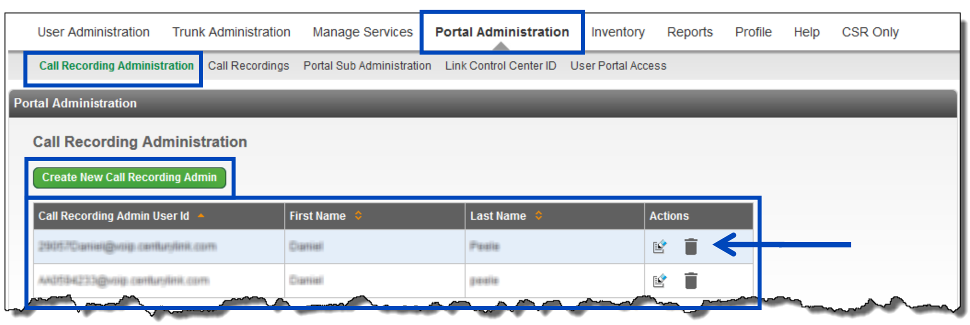
Storage Limits:

- Basic Call Recording License – 1 Gig/user – recordings storage for 7 days
- Standard Call Recording License – 3 Gigs/user – recordings storage for 30 days
- Premium Call Recording License – 34 Gigs/user – recordings storage for 366 days

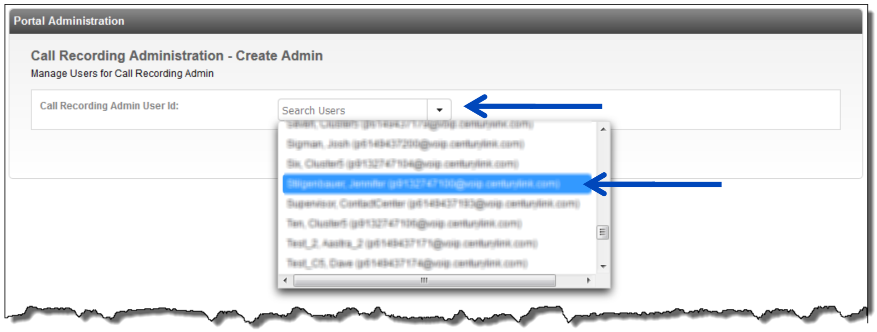
Call Recording Administration

Use **Call Recording Administration** to define individuals who can listen to and manage call recordings. Call recording licenses aren't automatically available on various seat types and must be purchased as an add-on.

1. Click **Portal Administration** from the main menu.
2. Click **Call Recording Administration** from the sub menu.
3. If call recording administrators have already been assigned, they'll be displayed and can be edited or deleted by clicking the appropriate action button.
4. To add a new **Call Recording Administrator**, click the **Create New Call Recording Admin** button.



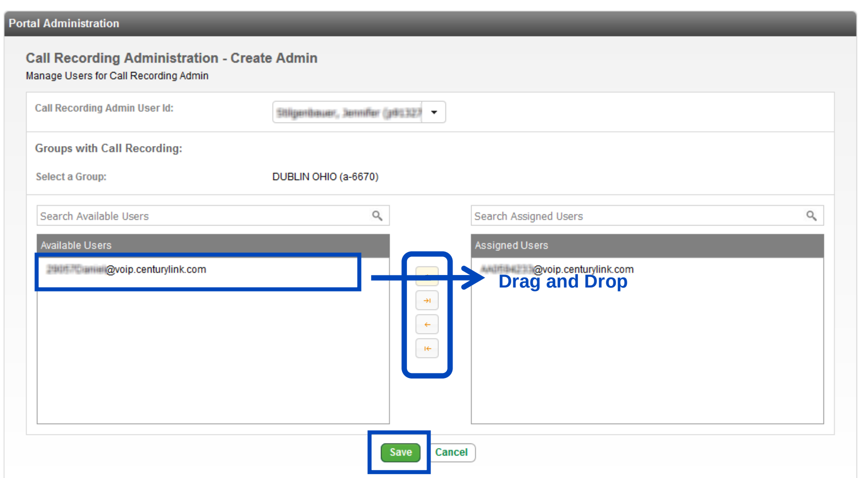
5. Click the **Call Recording Admin User ID** dropdown list.
6. From the list, scroll to find the user you would like to assign.
7. You can also enter a search or partial search in the **Search Users** field.
8. Once you locate the individual, click their name from the dropdown list.



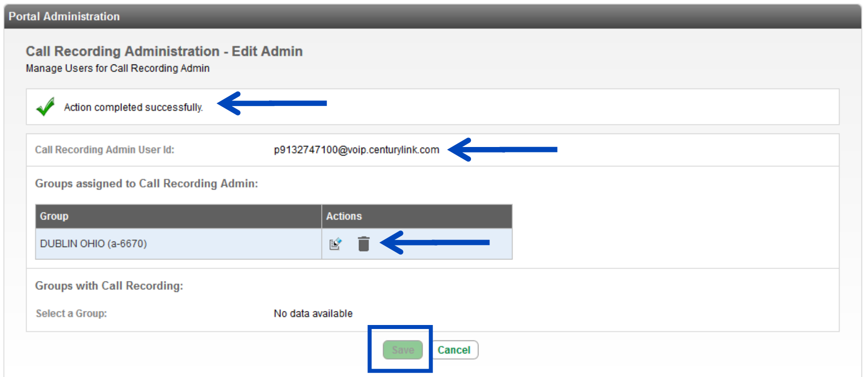
9. All users within Call Recording licenses, appear in the **Available Users** field.

Note: Recording Admins from one group, can manage recordings for users in other groups as long as they are assigned a license.
Note: Licenses are added to Users within the Feature Assignment tab, when editing the user.

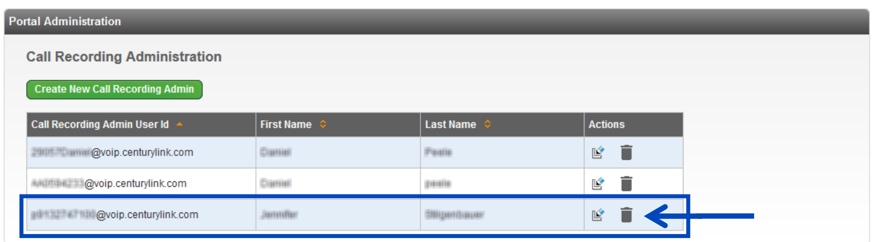
10. Use the arrows or **Drag and Drop** users from the **Available Users** field, to the **Assigned Users** field.
11. This assigns users to this **Call Recording Administrator**, who can then listen to and manage recordings.
12. When all users are assigned to the Assigned Users field, click the **Save** button.
13. This process must be done to add all **Call Recording Administrators**.



14. Confirm the action was successful at the top of the page.
15. A **Call Recording Admin User ID** is assigned to the recording administrator.
16. **Edit** or **Delete** recording admins by clicking the appropriate button.



17. The new administrator appears in the list of **Call Recording Administrators** and can be deleted or edited as needed.



Call Recordings

Individuals defined as **Call Recording Administrators**, can listen to and manage recordings for users assigned to them. **Call Recording Administrators** can manage recordings via the Administrator Portal (if they have Admin Portal access), or via their End User portal.

Call recording is assigned to a specific User ID when implemented. The User ID is used to manage and store call recordings. Changing the User ID for a user when call recording is enabled, is not supported and will impact the ability to retrieve calls that were previously recorded.

In order to change a call recording User ID:

- Disable the call recording feature
- Change the User ID
- Re-enable the call recording feature.

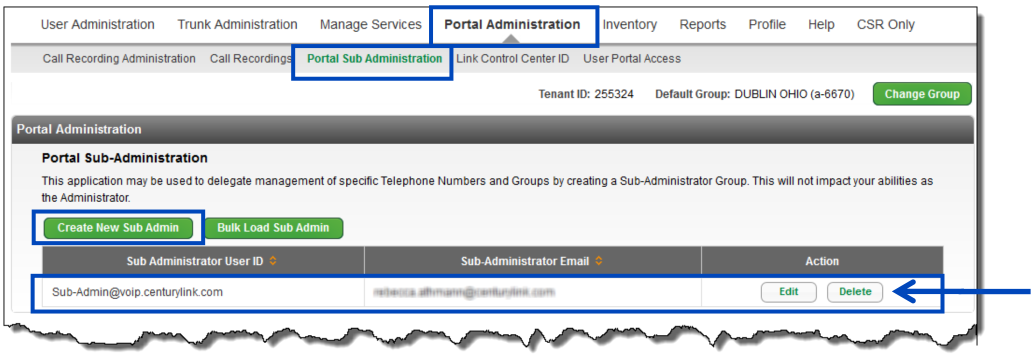
Calls recorded under the previous User ID are not lost and will be accessible by the primary account administrator only.

1. For detailed information on dashboard functionality and managing call recordings, refer to the Call Recording Dashboard User Guide.

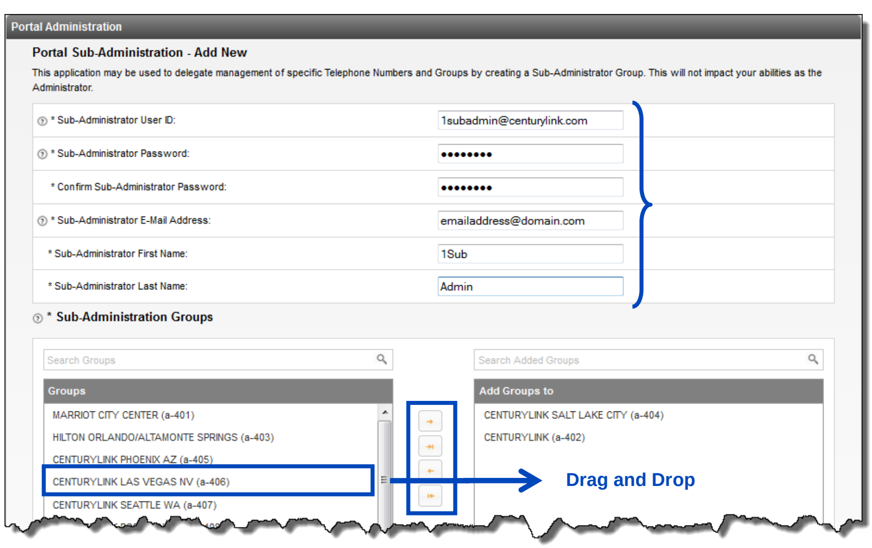
Portal Sub Administration

Use the **Portal Sub-Administration** feature to provide administrative rights to individuals within your organization. You can selectively choose which groups they have authority to administer, as well as which features within each group that they can administer. Multiple sub administrators can now uploaded via the Bulk Upload tool.

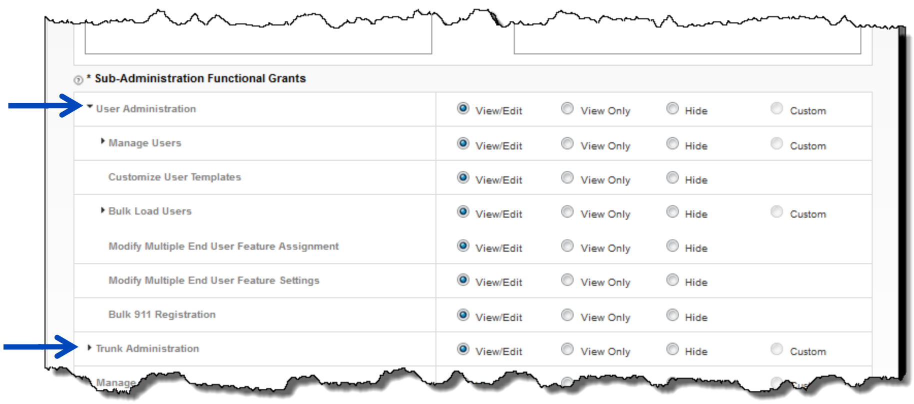
1. Click **Portal Administration** from the main menu.
2. Click **Portal Sub Administration** from the sub menu.
3. If sub administrators have already been assigned, they'll be displayed and can be edited or deleted by clicking the appropriate action button.
4. To add a new **Sub Administrator**, click the **Create New Sub Admin** button.



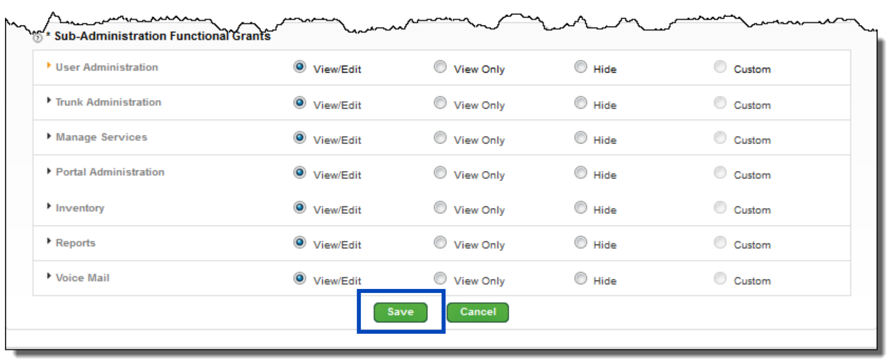
5. Enter information in the fields for the new **Sub Administrator** you're creating.
   - The **Sub-Admin User ID** must be a minimum of 6 characters.
   - The **Sub-Admin Password** must be a minimum of 8 characters, contain 1 Upper case, 1 number and 1 special character.
6. Select the group(s) you want that Sub Admin to have administrative access to by dragging and dropping the appropriate group(s) to the **Add Groups to** field.



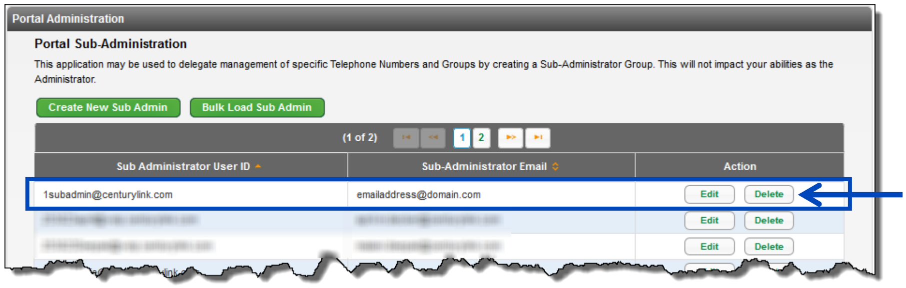
7. Under **Sub-Administration Functional Grants**, select the level of access you wish each Sub-Admin to have by checking or unchecking the boxes.
8. Within each category, you can choose to allow that sub admin the following rights:
    - **View/Edit** –full authority to features within that category
    - **View Only** – can view the information, but cannot administer
    - **Hide** – won't be able to view or administer
    - **Custom** – customize the authority
9. To expand or collapse categories and sub-categories, click the down (▼) and right (▶) arrows.



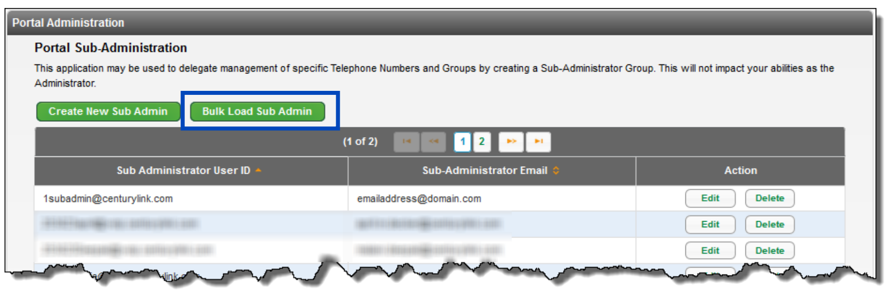
10. Go through each category and sub-category and define that sub-admin's level of authority, by clicking the appropriate radio button.
11. After all settings have been made, click the **Save** button.
12. When the sub-admin logs into their portal, they'll only have access to and administrative right for the categories you selected.



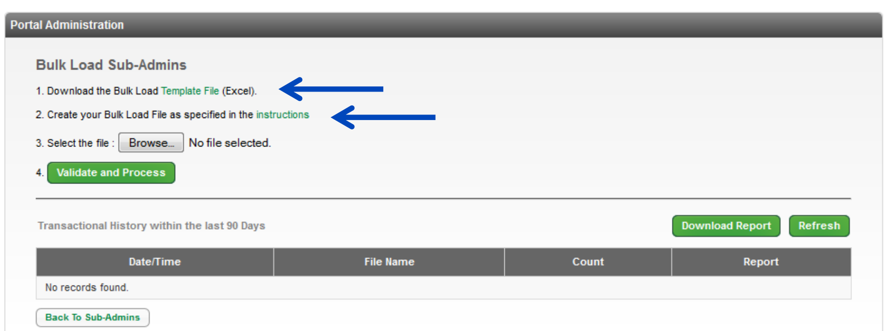
13. Both the primary and sub administrator will receive email notification that a sub admin login has been created.
14. The new sub admin will now be listed and can be edited or deleted at any time by clicking on the **Edit** or **Delete** buttons.



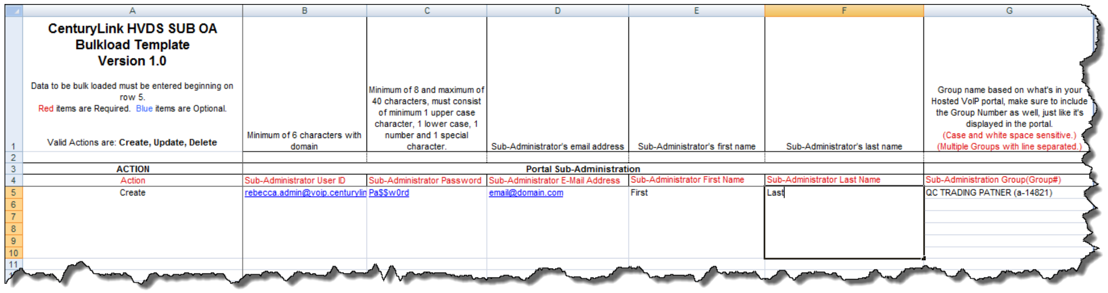
15. If you have several sub administrators that need to be created, use the bulk upload tool by clicking on the **Bulk Load Sub Admin** button.



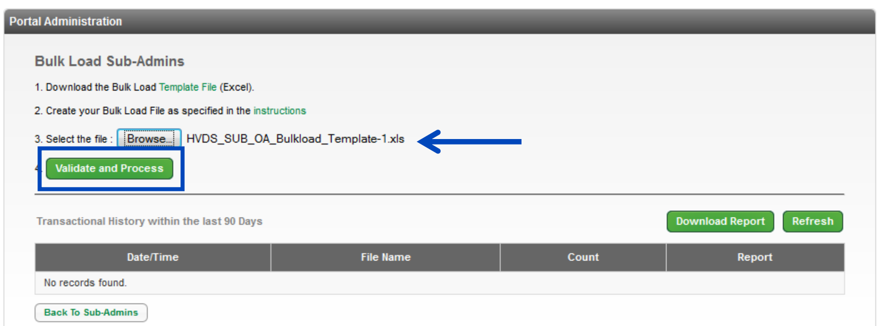
16. Sub administrators are added by using a bulk upload spreadsheet. To download a spreadsheet, click the **Template File** link.



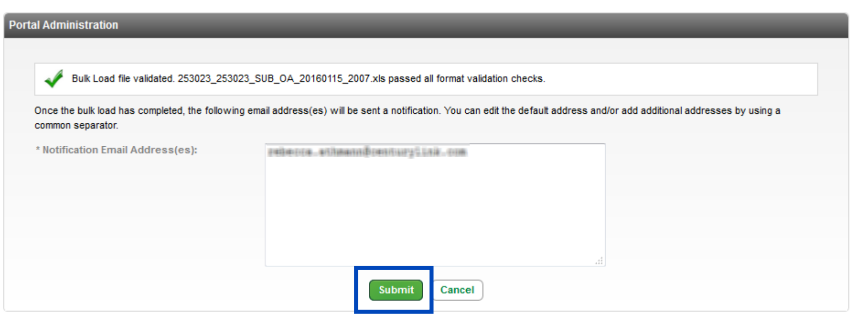
17. Columns Headings in “**Red**” are required fields; Column Headings in “**Blue**” are optional.
18. Column requirements are specific and **CASE** and **White Space** sensitive.
19. When performing a **Bulk Upload**, it is always recommended to download a new **Template File**, and always refer to the **Instructions** for field specifics.



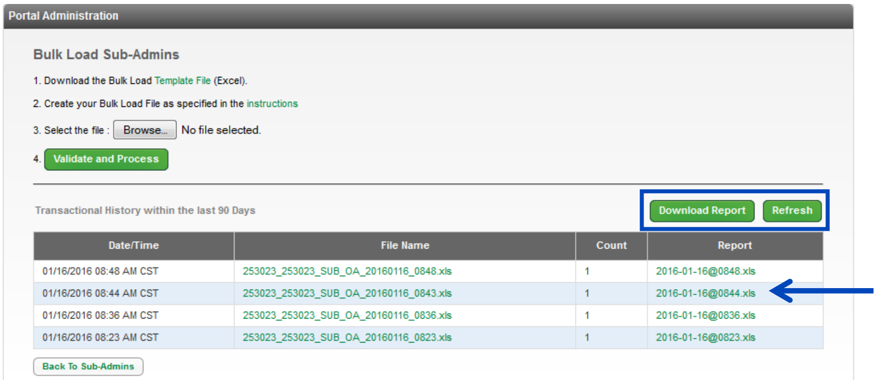
20. Fill out the spreadsheet according to the instructions and save the file to a directory.
21. Click the **Browse** button to locate and select your file.
22. Click the **Validate and Process** button to process your upload.



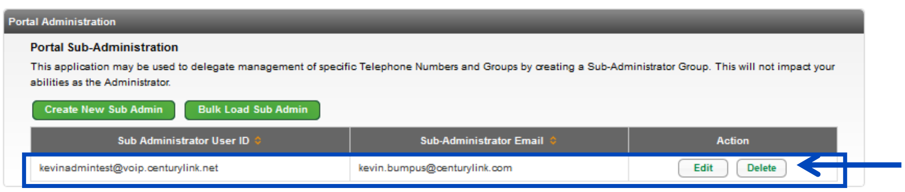
23. You’ll receive a message indicating your spreadsheet passed the validation.
24. In the **Notification Email Address(es)** field, change or add email addresses that should receive notification that the bulk upload is complete.
25. After all email addresses are entered, click the **Submit** button.



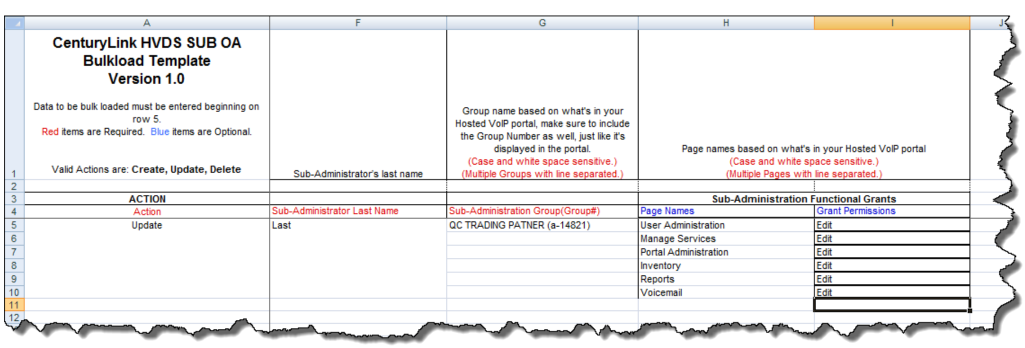
26. Wait for the email notification of bulk upload completion or click the **Refresh** button to update the status in the portal.
27. Once the bulk uploaded is completed, it will be listed in the **Transactional History** field.
28. Click on the link to review the contents of the bulk upload or click the **Back To Sub Admins** button.



29. Your new sub-admin will appear in the table.
30. You can edit permissions or delete a sub admin, by clicking on the **Edit** or **Delete** buttons, or by performing a bulk upload.



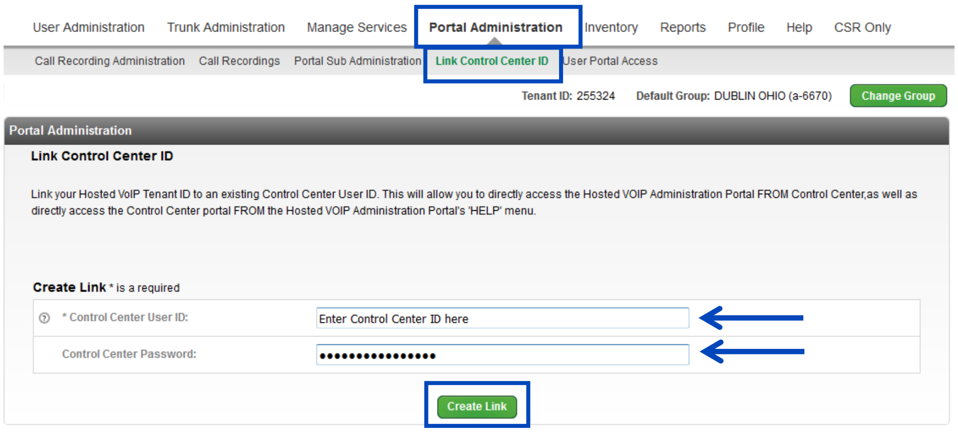
31. If you need to modify multiple Sub-Admins and multiple permissions, you can also achieve that by performing a **Bulk Upload**.
32. Column Headings in **Red** remain required; and Column Headings in **Blue** are optional.
33. Fill out the spreadsheet with existing sub-admin information and change all necessary fields.
34. Column "A" will be "Update" versus Create.
35. Columns "H" and "I" will contain options within the portal, that you can manage sub-admin rights.
36. Once your spreadsheet is completed, save to a file destination, and click the **Validate and Process** button as previously described.
37. Once the upload is completed, the changes contained in the upload will be reflected for each sub-admin affected.



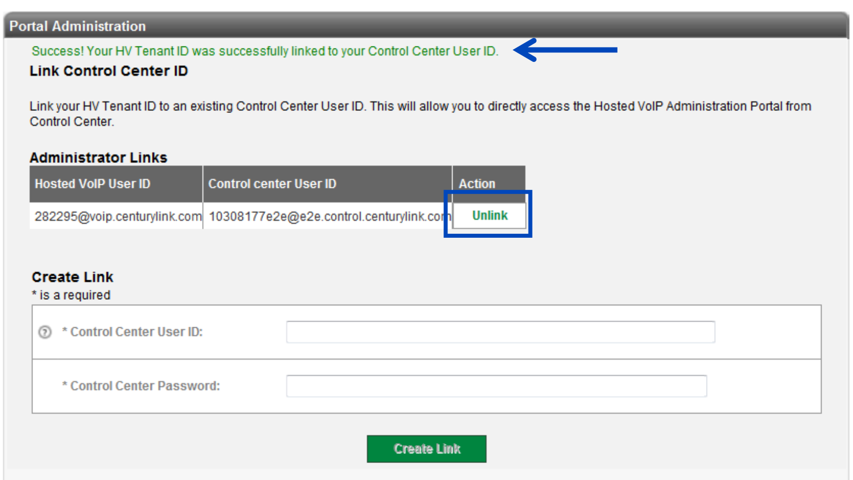
Link Control Center ID

Activating your **Link Control Center ID** gives you the ability to access Control Center from the Admin Portal.

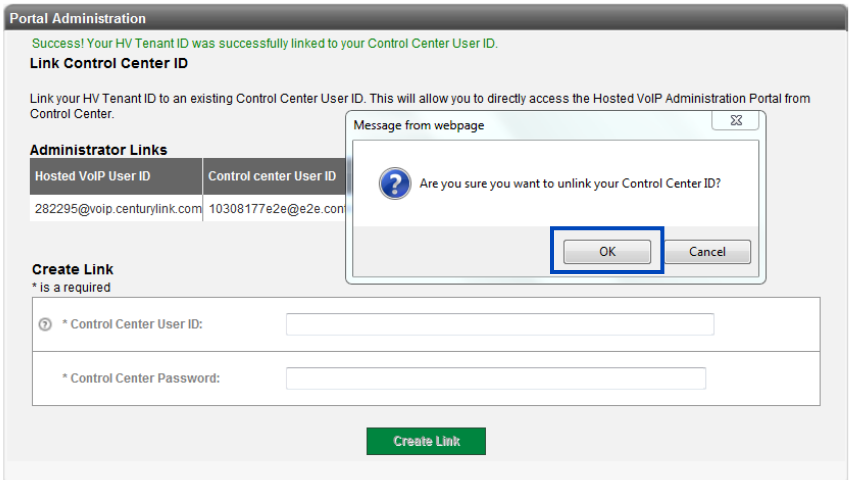
1. Click **Portal Administration** from the main menu.
2. Click **Link Control Center ID** from the sub menu.
3. Enter your **Control Center User ID** and **Password** in the appropriate fields.
4. If you don't have a Control Center ID, please contact your Account Manager.
5. Click the **Create Link** button to link this portal to Control Center.



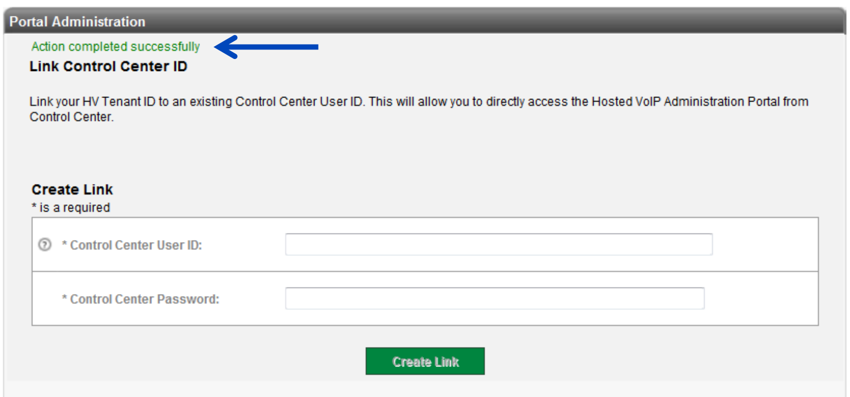
6. You receive a message stating that your link to Control Center was successful.
7. To unlink your portal to Control Center, click the **Unlink** button.



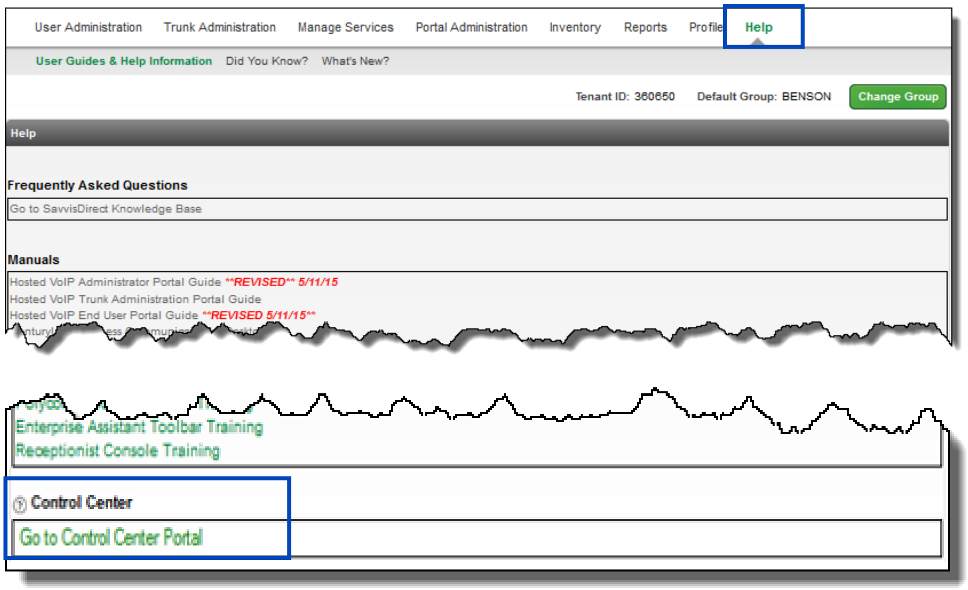
8. You receive a message confirming your intent to **Unlink** your Control Center user ID.
9. Click the **OK** button to proceed with unlinking your account.



10. Receive confirmation that your **Control Center User ID** has been unlinked.



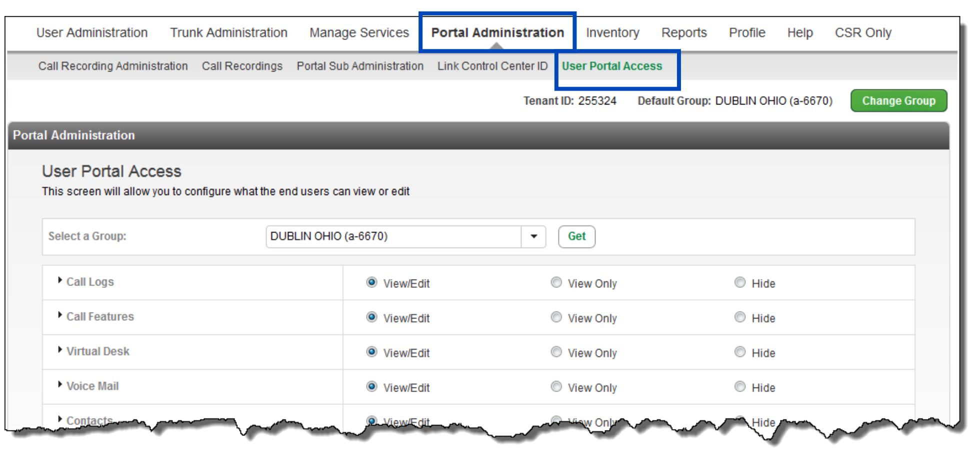
11. With your user ID linked to Control Center, access Control Center via the portal.
12. Click **Help** on the main menu.
13. Scroll to the bottom and click the **Go to Control Center Portal** link.



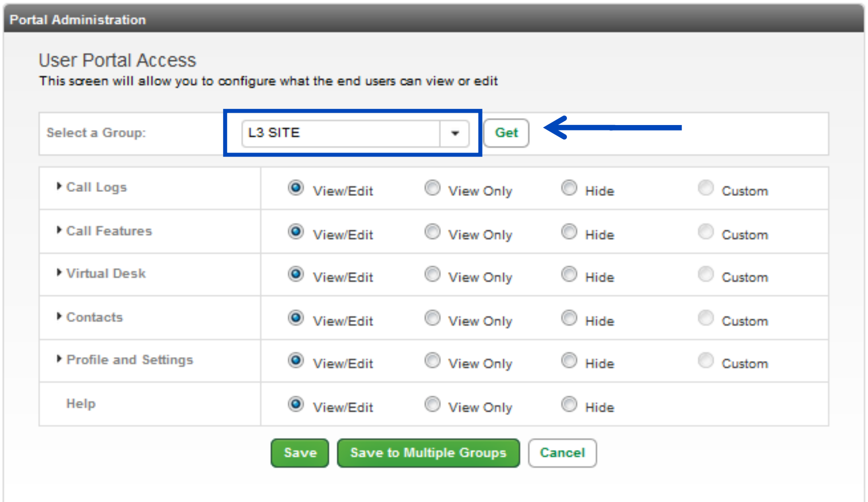
User Portal Access

From within the User Portal Access feature, you can determine, at the Group level, which features and functions your end users have access to in their End User portals.

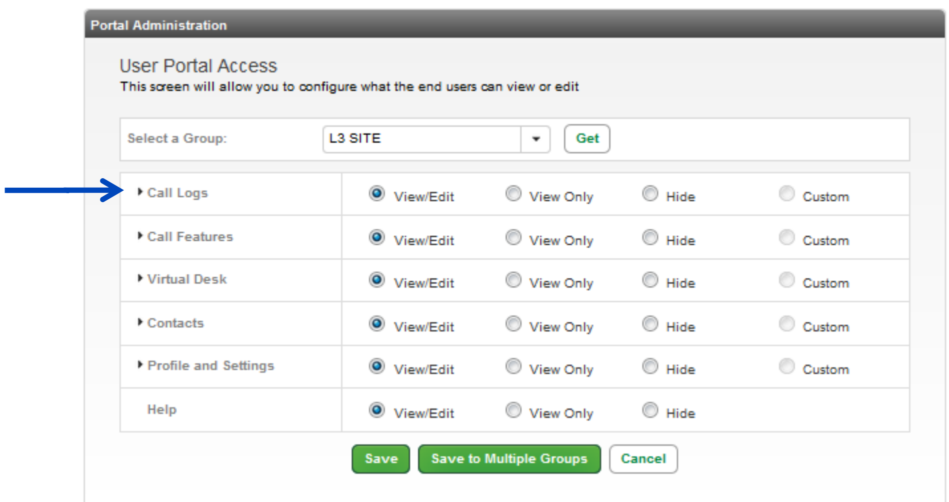
1. Click **Portal Administration** from the main menu.
2. Click **User Portal Access** from the sub menu.



3. Select a group from the **Select a Group** dropdown list, or begin typing your search criteria in the Search a group field to narrow your search if you have several locations within your tenant.
4. Once the group is select, click the **Get** button.

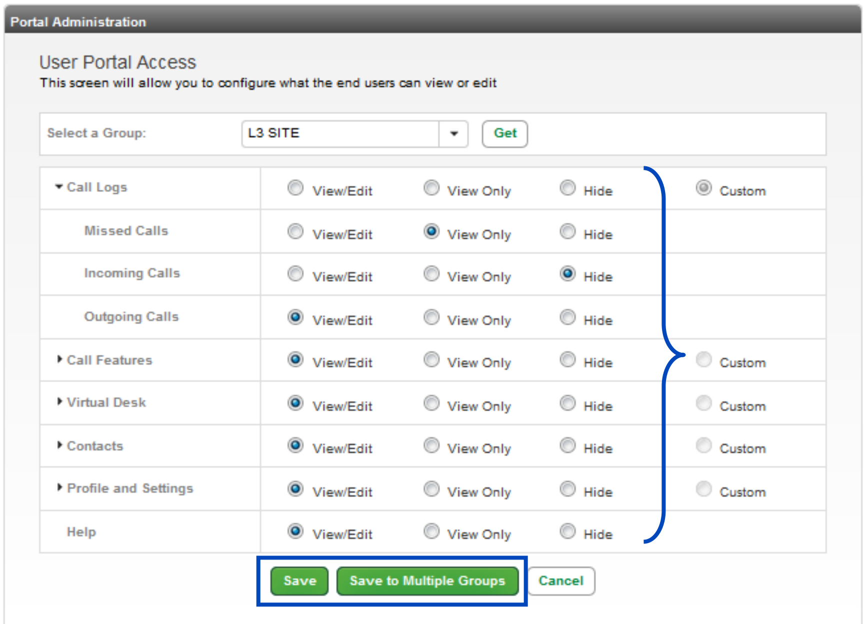


5. Listed for that group, are all the features you can modify for your users.
6. Click the " ⏵ " button to expand a feature grouping.
   - **View/Edit** – these features can be viewed and in the end user's portal
   - **View Only** – these features can be viewed in the end user's portal but cannot be edited or modified
   - **Hidden** – these features won't appear in the end user's portal

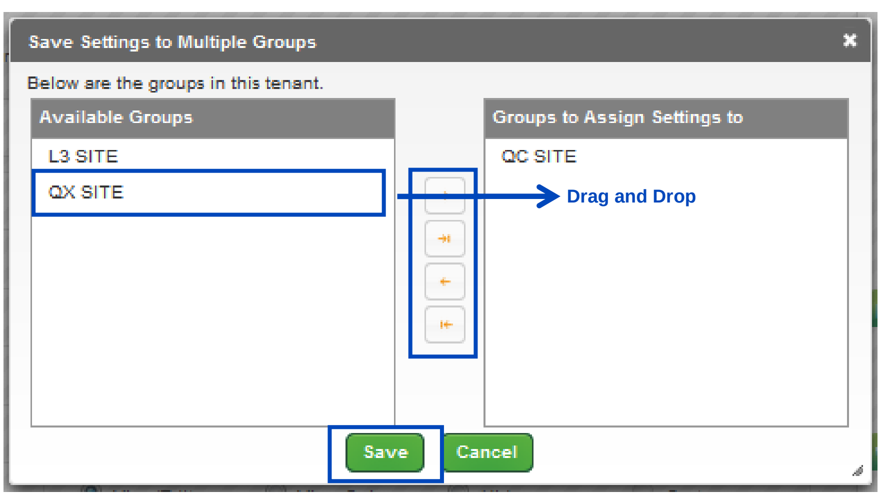


7. After clicking the " ▸ " button on any feature grouping, underlying features will be displayed.
8. Select the appropriate configuration for each feature setting.
9. Click the **Save** button to save the settings for that group.
10. Click the **Save to Multiple Groups** button to enable those settings for additional groups within your tenant.

Note: Expand each of the feature groupings to view the various options within each grouping or review the end of this section for an example of each feature.

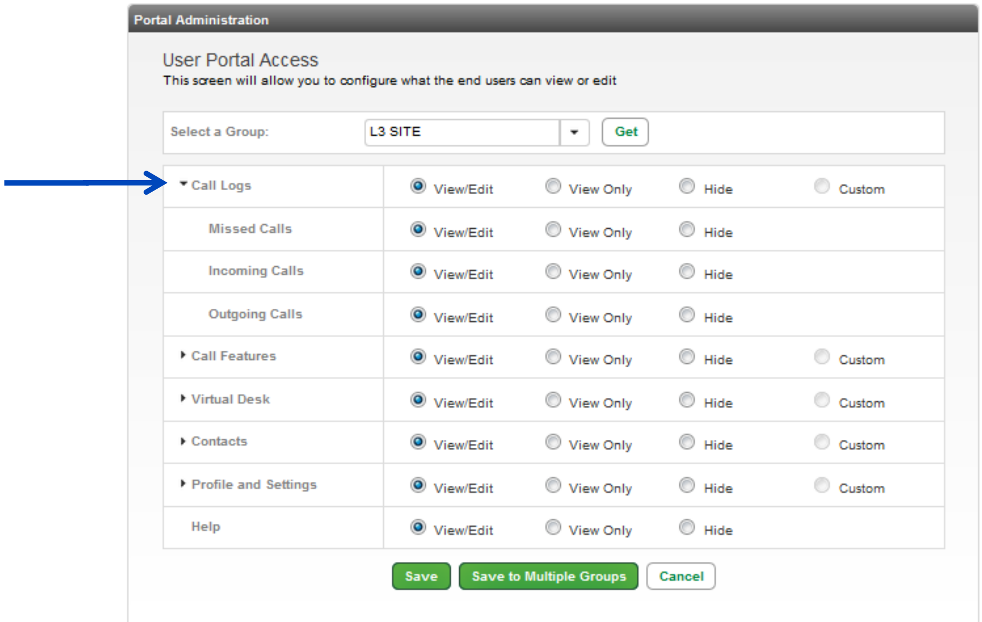


11. Select groups from the **Available Groups** field and drag and drop to the **Groups to Assign Settings to** field.
12. You can also use the arrow buttons between the fields to move groups to and from each field.
13. When all groups are moved to the groups to **Assign Settings to** field, click the **Save** button.



Call Logs

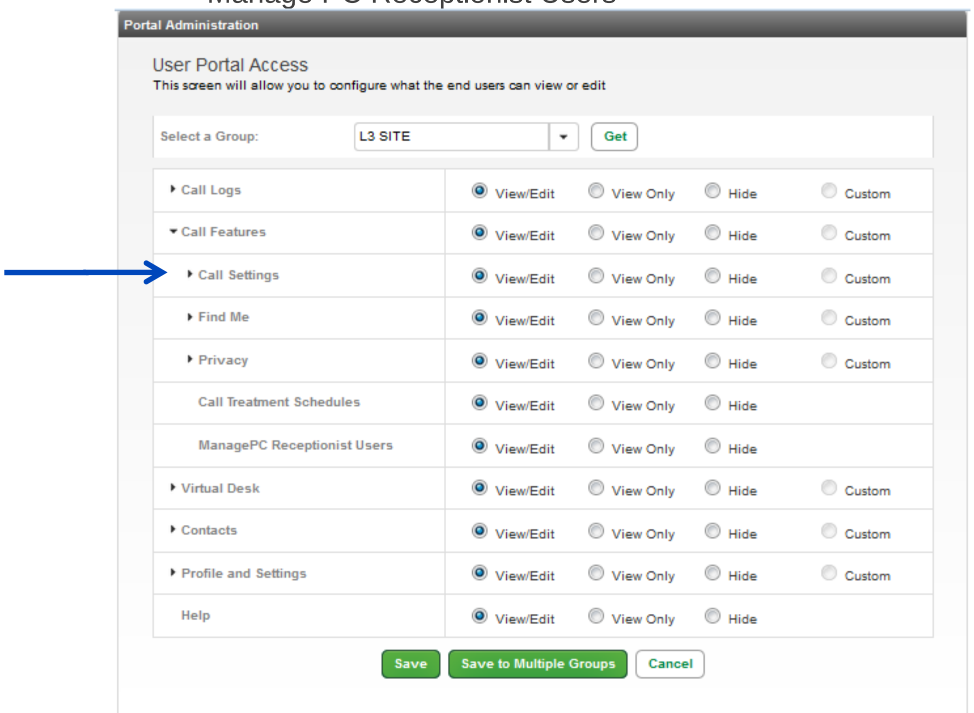
- Missed Calls
- Incoming Calls
- Outgoing Calls



Call Features

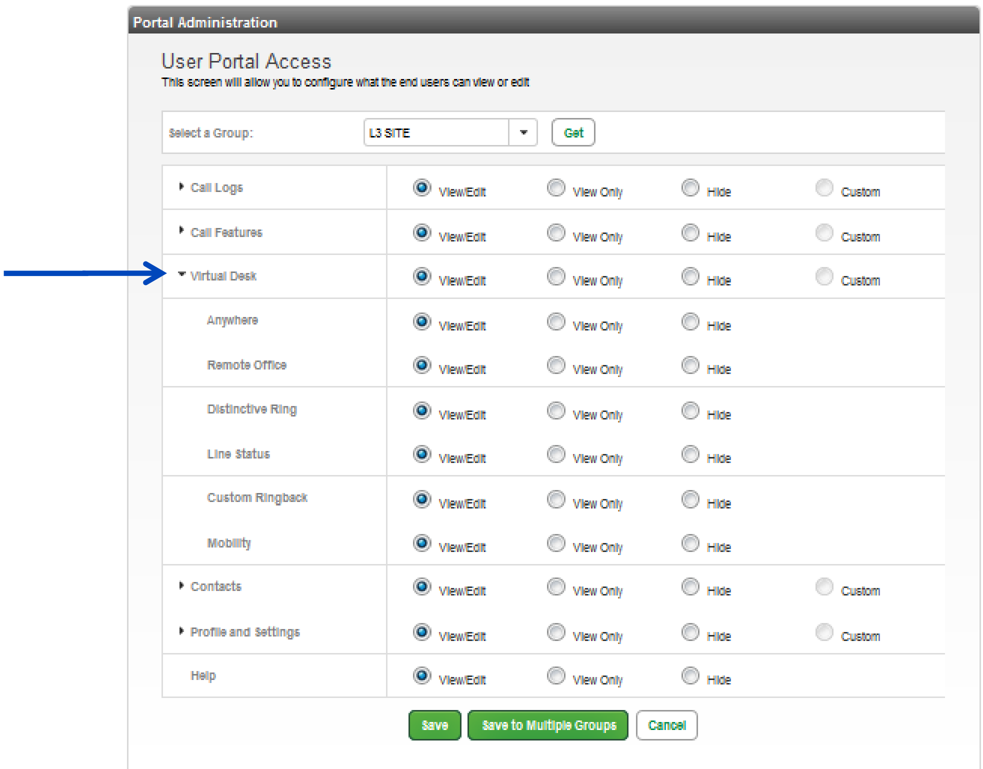
Note: There may be sub features within a feature grouping that can be expanded as well, such as Call Settings within the Call Features grouping. Click the arrow to expand that sub feature.

- Call Settings
- Find Me
- Privacy
- Call Treatment Schedules
- Manage PC Receptionist Users



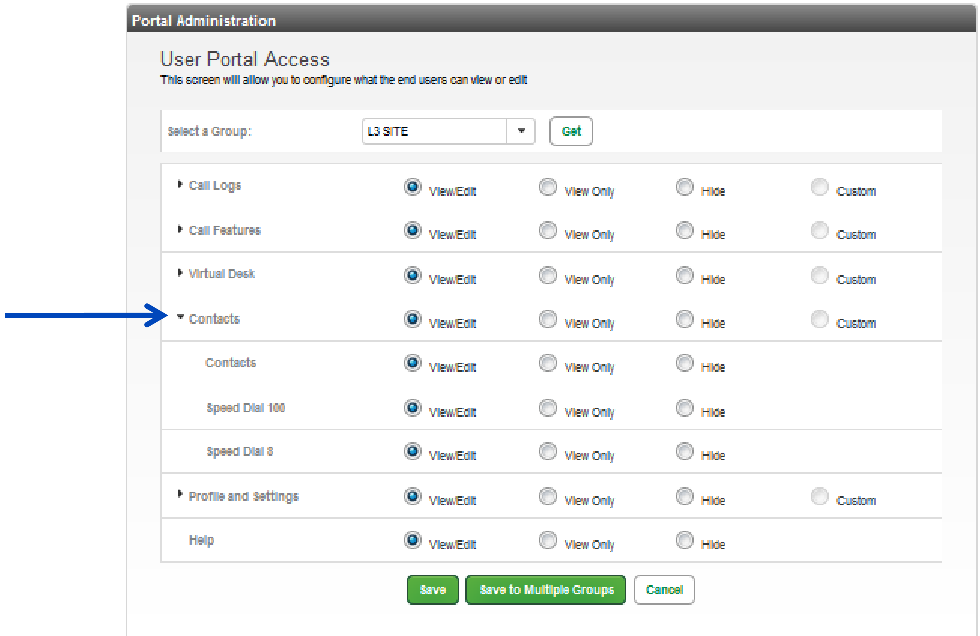
Virtual Desk

- Anywhere
- Remote Office
- Distinctive Ring
- Line Status
- Custom Ringback
- Mobility



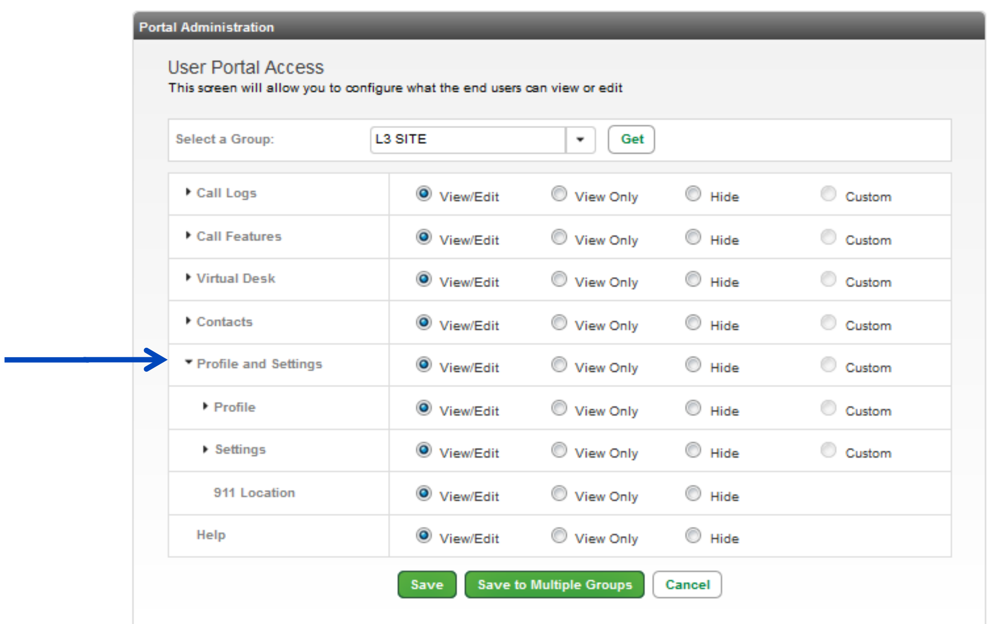
Contacts

- Contacts
- Speed Dial 100
- Speed Dial 8



Profile and Settings

- Profile
- Settings
- 911 Location



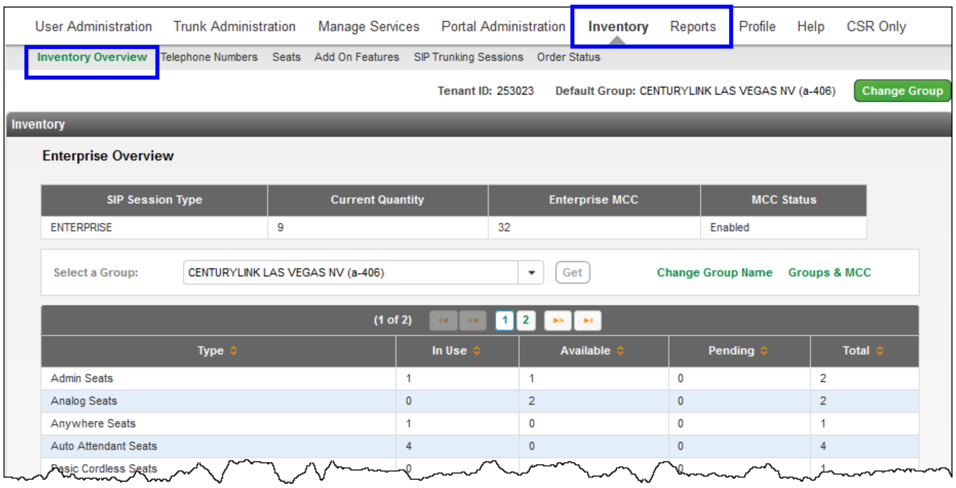
Inventory

The **Inventory** option allows you to monitor inventory of active and available seats, order additional telephone numbers and seats, monitor add on features such as desktop and mobile softphones, and monitor/review open and closed orders.

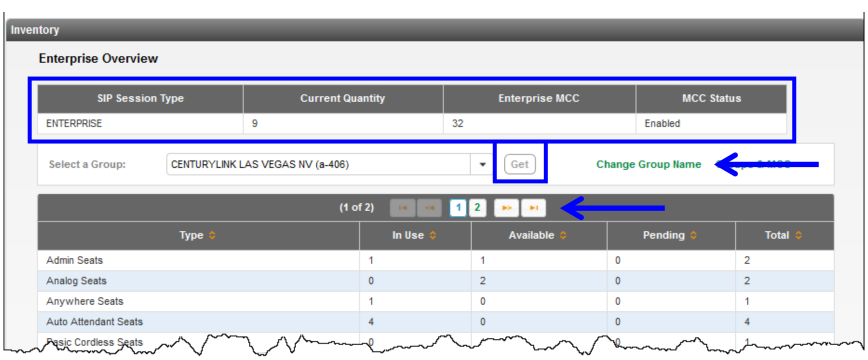
Inventory Overview

Access **Inventory Overview** gives you a view, by group, of inventory In Use and inventory Available.

1. Click **Inventory** from the main menu.
2. Click **Inventory Overview** from the sub menu.



3. The **Enterprise Overview** provides a quick view of MCC inventory across your enterprise.
4. If you have multiple groups, select the **Group** from the dropdown list you want to view.
5. Click the **Get** button.
6. All inventory for that group displays.
7. This includes total number of licenses, licenses in use, and licenses available.
8. Use arrows and page buttons to navigate to additional screens.
9. Click the **Change Group Name** link.



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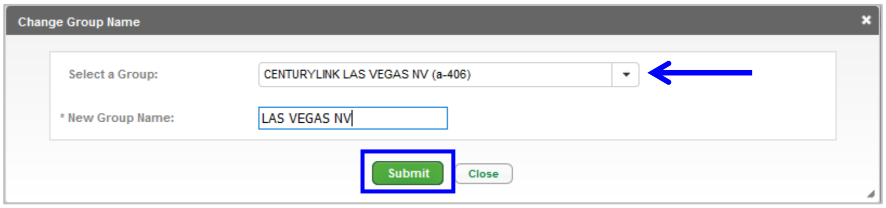
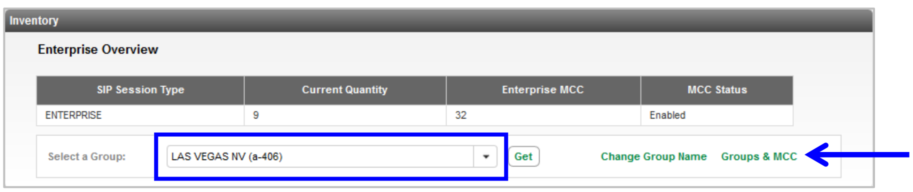
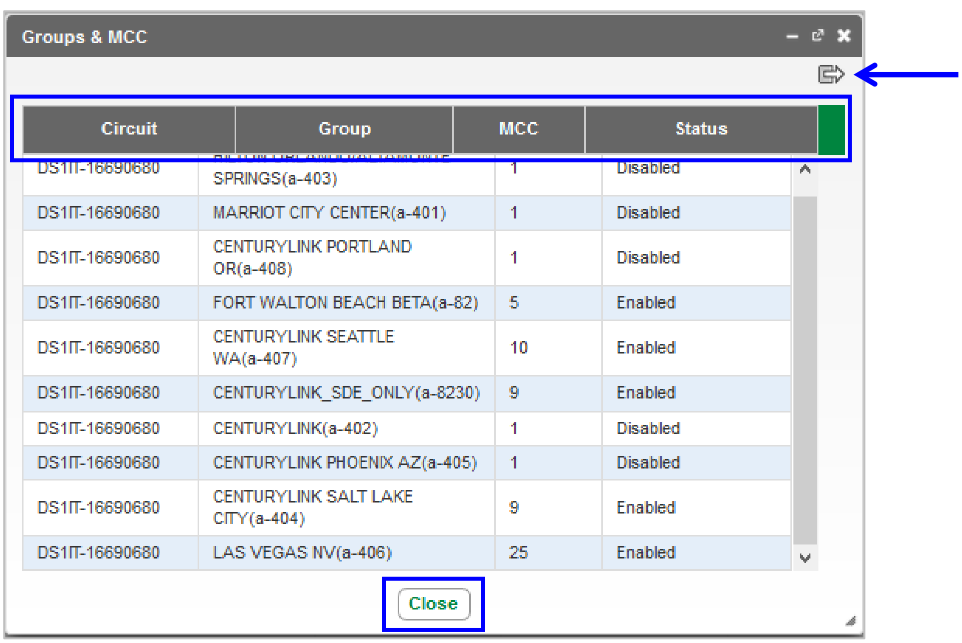
10. The **Group Name** entered for each location within your tenant is input during the ordering process. Based on how the name was entered, you may want to change it based on a name more familiar to you for that location.
11. Click the **Select a Group** dropdown list to select the group you want to rename.
12. In the **New Group Name** field, type in the name as you want that group to display. This only impacts how that group name appears in the portal and doesn't have an impact anywhere else.
13. Click the **Submit** button.



14. The new group name is reflected throughout the portal, unless you choose to change the name again.
15. Click the **Groups & MCC** link.



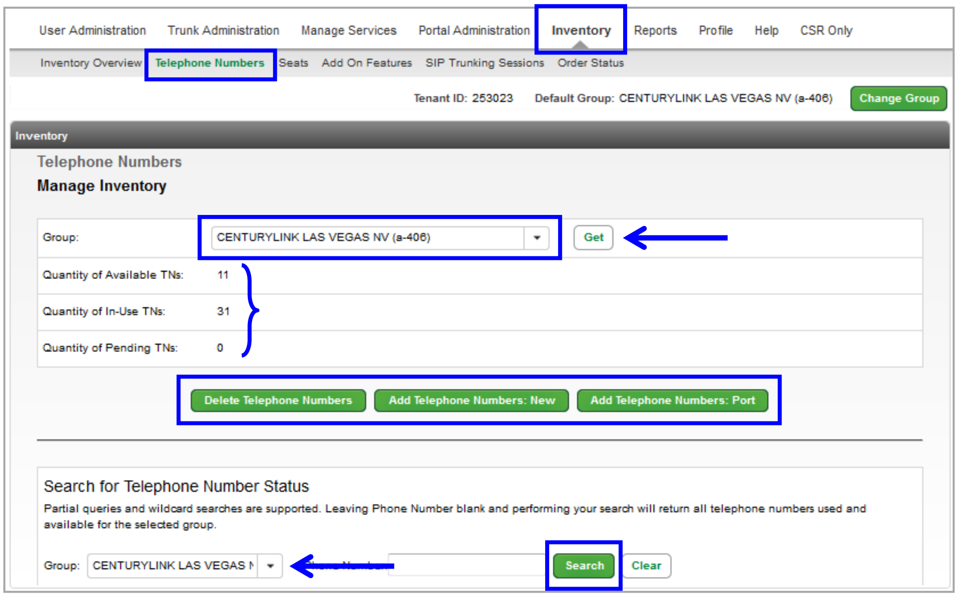
16. Review information by clicking column headings or scrolling up/down.
17. Click the **Export** icon to export details to an Excel spreadsheet.
18. Click the **Close** button.



Telephone Numbers

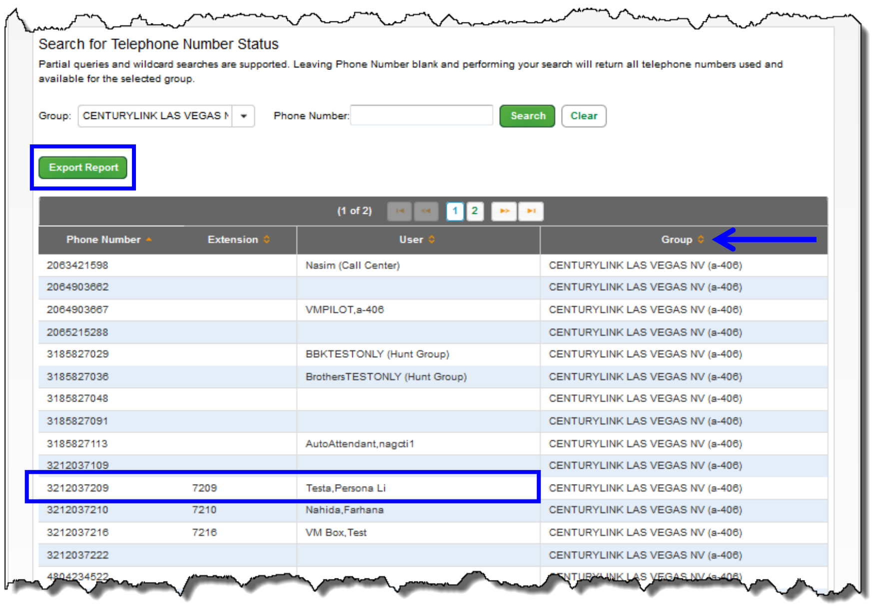
You can **Delete**, **Add:New** and **Add:Ported Telephone Numbers** to your inventory by group level.

1. Click **Inventory** from the main menu.
2. Click **Telephone Numbers** from the sub menu.
3. To view the entire phone number inventory for a specific group, select the location from the **Group** dropdown list.
4. Click the **Get** button.
5. This provides you with **Quantity of Available TNs** (telephone numbers), and **Quantity of In-Use TNs** and **Quantity of Pending TNs**.
6. You can **Delete** or **Add** telephone numbers to your inventory, by clicking the appropriate button.
7. Click the **Group** dropdown list under **Search for Telephone Number Status** to select a location.
8. Click the **Search** button.

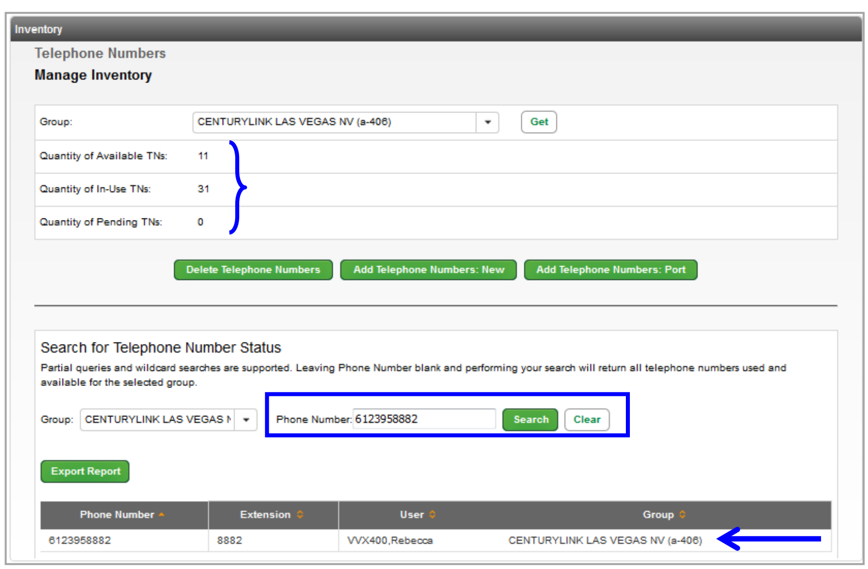


9. This displays the entire phone number inventory for that location, including available numbers and numbers in use.
10. Any telephone number with a name in the **User** column is in use, if there is no name listed in the **User** column, the number is available and can be assigned to a seat or service.
11. The **Extension** column provides the assigned extension number for each telephone number and can be useful if your extensions don't correlate to the 10-digit phone number.

12. Any column can be sorted in ascending or descending order by clicking the up or down orange arrows.
13. You can also export the entire list by clicking the **Export Report** button.



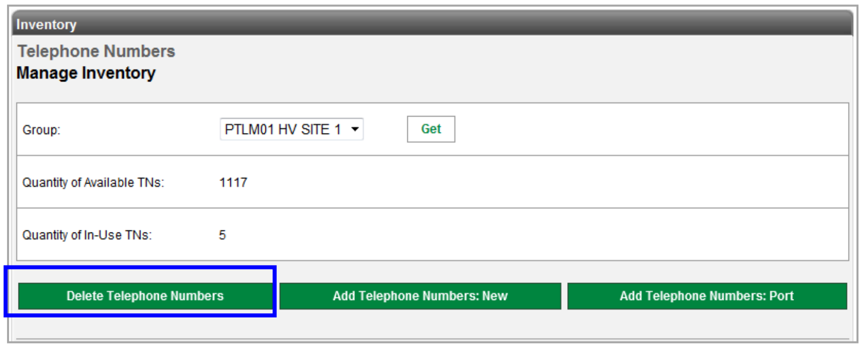
14. If you have a large group and want to refine your search, enter a 10-digit number in the **Phone Number** field
15. Click the **Search** button.



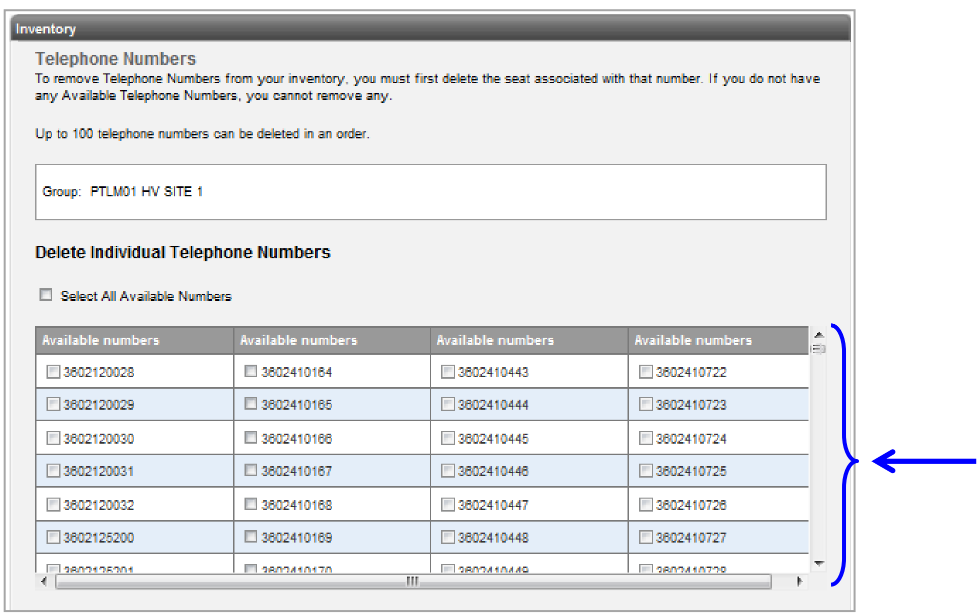
Delete Telephone Numbers

1. To **Delete** one or more telephone numbers, click the **Delete Telephone Numbers** button.

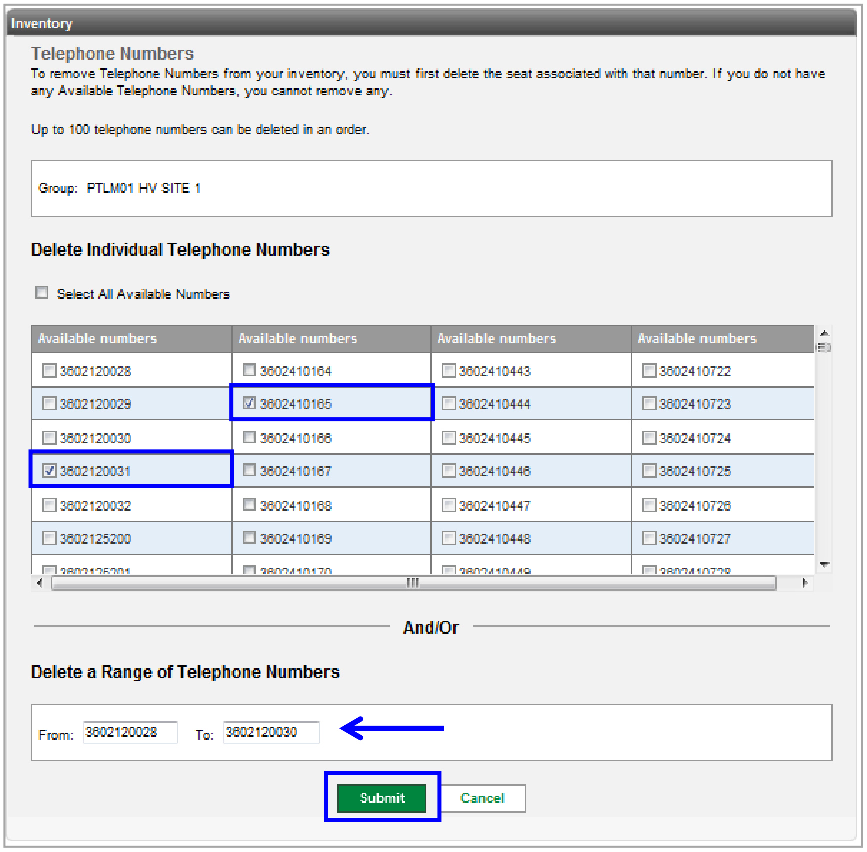
   Note: If you delete a number, or a range of numbers, they'll be permanently removed from your inventory and you won't be able to assign those numbers to users or services.



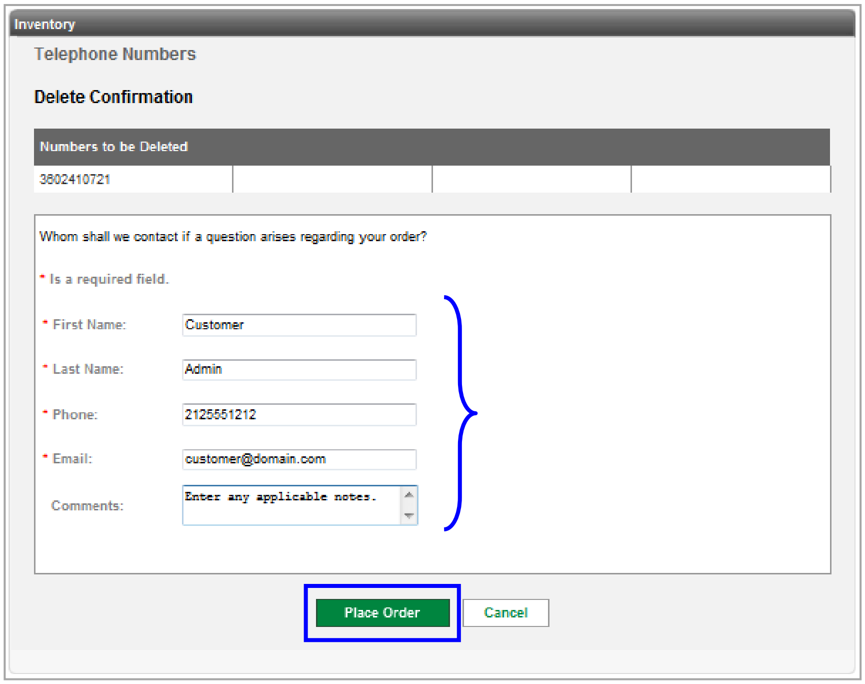
2. All available numbers in that location's inventory display.
3. You can delete up to 100 numbers in one order. If more than 100 numbers need to be deleted, you'll need to submit multiple orders.
4. Numbers are listed in sequential order.
5. You can use the up/down scroll bar to search for the number(s) you wish to delete.



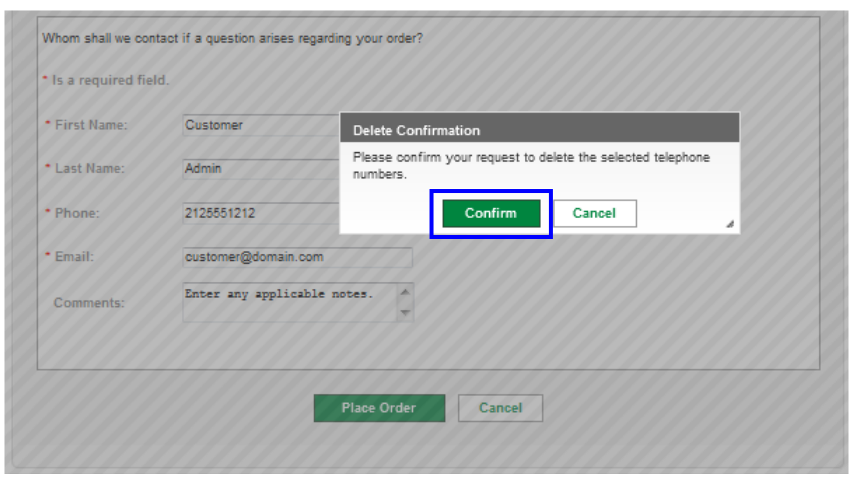
6. To select and delete all telephone numbers in that location (if less than 100), click the **Select All Available Numbers** check box.
7. To delete random numbers, locate the number(s) in the available inventory, and click each corresponding check box.
8. If you wish to delete a range of numbers, enter the **Starting** and **Ending** number of the range, in the **From** and **To** fields.
9. Click the **Submit** button.



10. On the **Deletion Confirmation** screen, confirm or change any missing or incorrect information.
11. You can enter a **Comment** pertaining to the deletion order, but that field is not required.
12. Click the **Place Order** button.



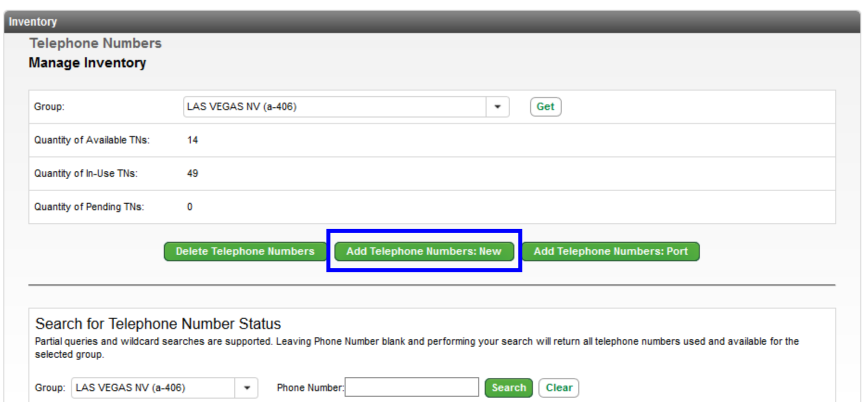
13. You'll need to confirm deletion of the number(s).
14. Click the **Confirm** button.



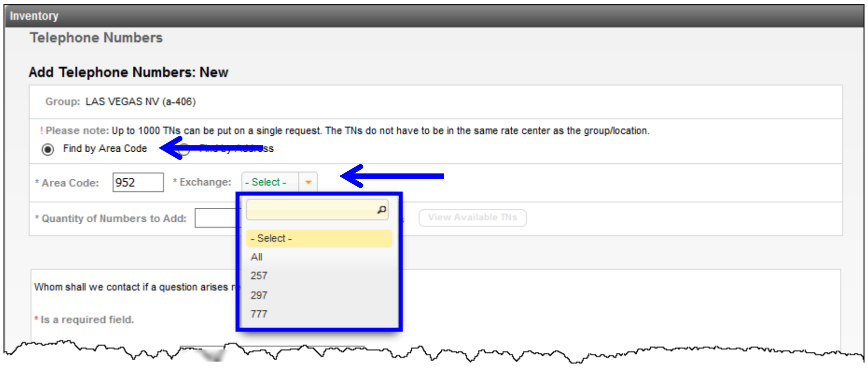
15. You'll be provided with a **Delete Confirmation** notice, which includes an **Order ID** for your reference.
16. Your delete order is complete.
17. Click the **Telephone Inventory** button or proceed to another area of the portal by clicking your desired location on the main or sub menu.

Add Telephone Numbers: New

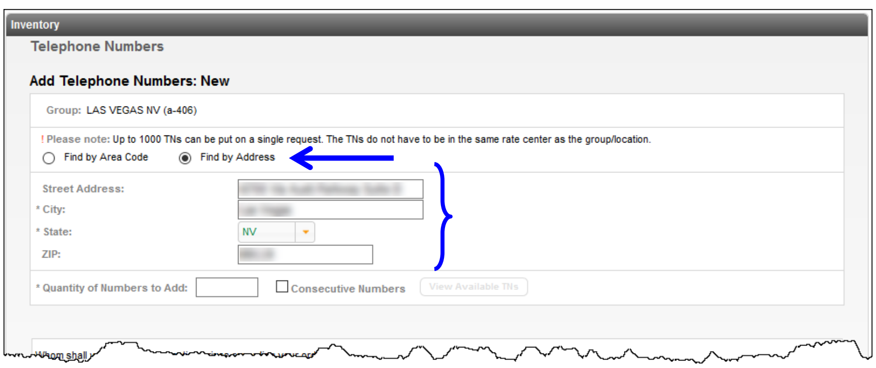
1. To add numbers to your inventory, click the **Add Telephone Numbers: New** or **Add Telephone Numbers: Port**.
    - **New –** new numbers are assigned from CenturyLink's inventory, based on your area code and prefix or address
    - **Port –** numbers you own and want to port to CenturyLink
2. Click the **Add Telephone Numbers: New**.



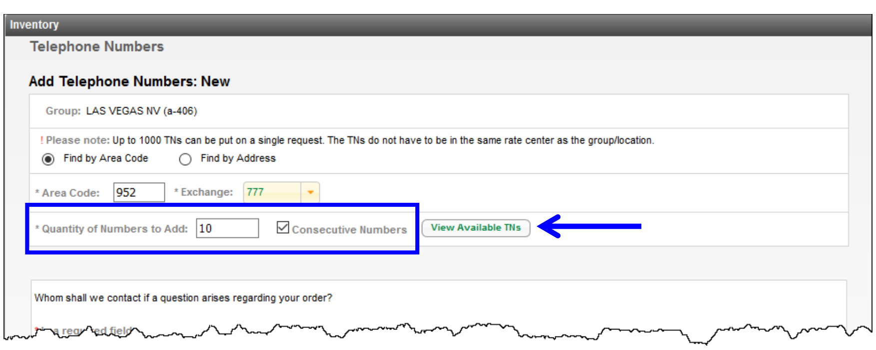
3. Request numbers based on an area code or address.
4. Click the **Find by Area Code** radio button.
5. Enter your preferred area code in the **Area Code** field.
6. Click the **Select** dropdown list and choose from available prefixes.



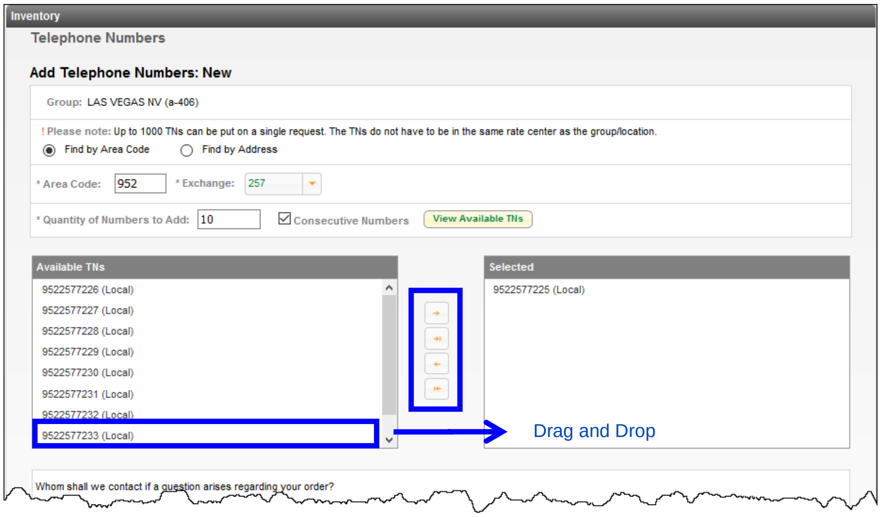
7. Click **Find by Address** radio button if you want to review inventory based on your physical address.
8. Enter your address in the **Street Address** field.
9. Enter your city in the **City** field.
10. Select your state from the **State** dropdown list.
11. Enter your zip code in the **Zip** field.



12. Whether ordering by area code or address, enter the number of required phones numbers in the **Quantify of Numbers to Add** field.
13. Check the **Consecutive Numbers** checkbox if that's a requirement.
14. Click the **View Available TNs** button.



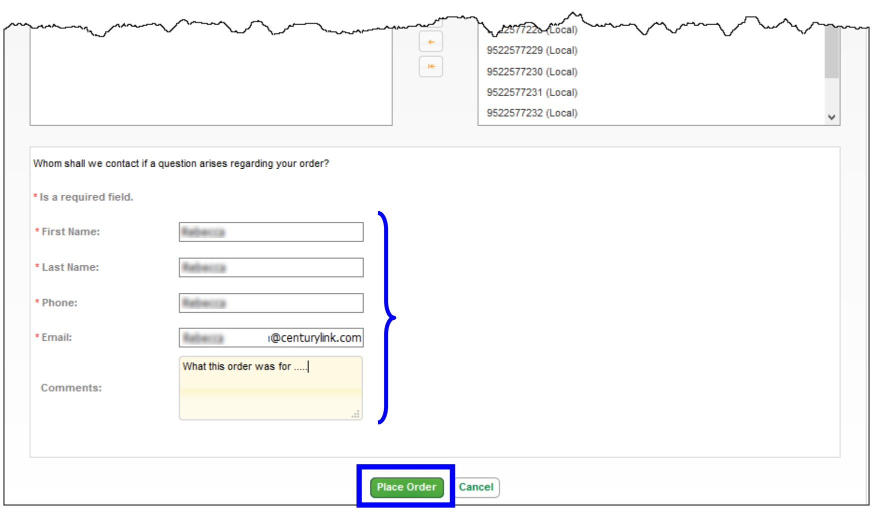
15. Numbers available from CenturyLink's inventory are listed in the **Available TNs** field.
16. After reviewing the numbers, move them to the Selected field by dragging and dropping, or by using the arrow keys between the fields.



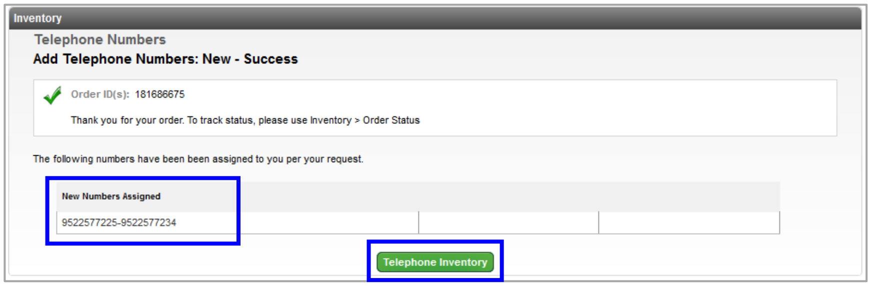
17. Retain prepopulated contact information or change the **First/Last Name**, **Phone** and **Email** fields as needed.

Note: Emails will be sent to the address in the Email field to confirm the order, and when the order is fulfilled.

18. Enter the purpose of the order in the **Comments** field.
19. Click the **Place Order** button.

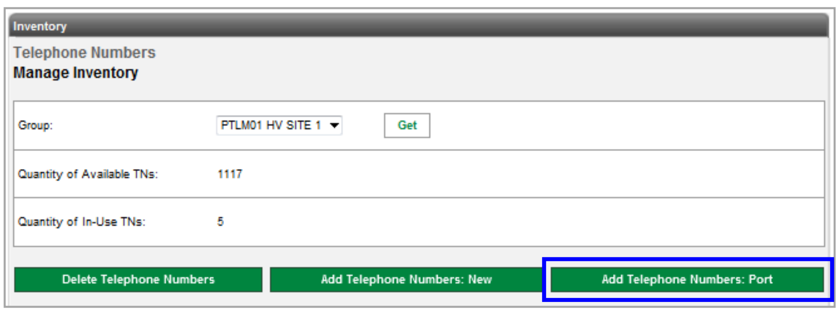


20. You’re presented with confirmation of your order, including an **Order ID** number and a list or range of numbers being processes on that order.
21. Click the **Telephone Inventory** button or proceed to another area of the portal by clicking your desired location on the main or sub menu.

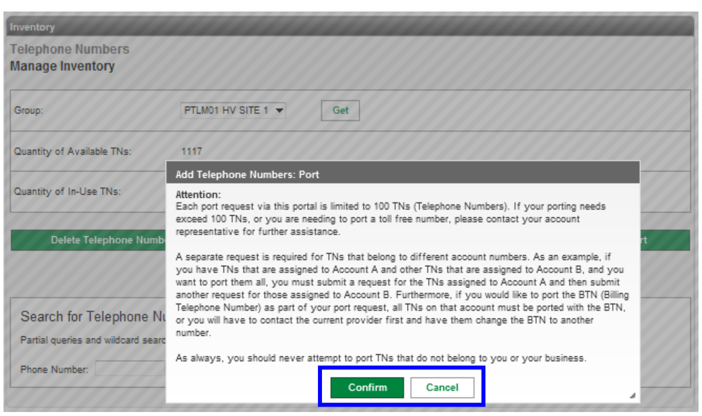


Add Telephone Numbers: Port

1. To add ported numbers to your inventory, click the **Add Telephone Numbers: Port** button.



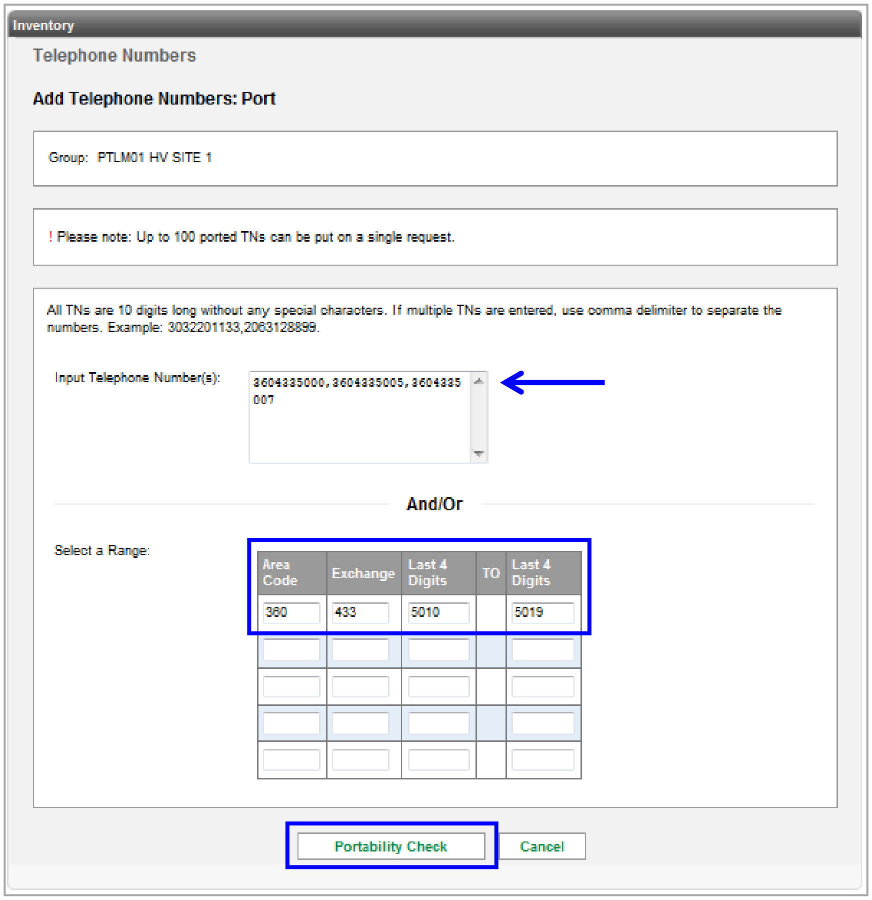
2. Refer to the **Attention** notice. If you click the **Cancel** button, you’ll cancel your request to process a port order.
3. To proceed with your order, click the **Confirm** button.



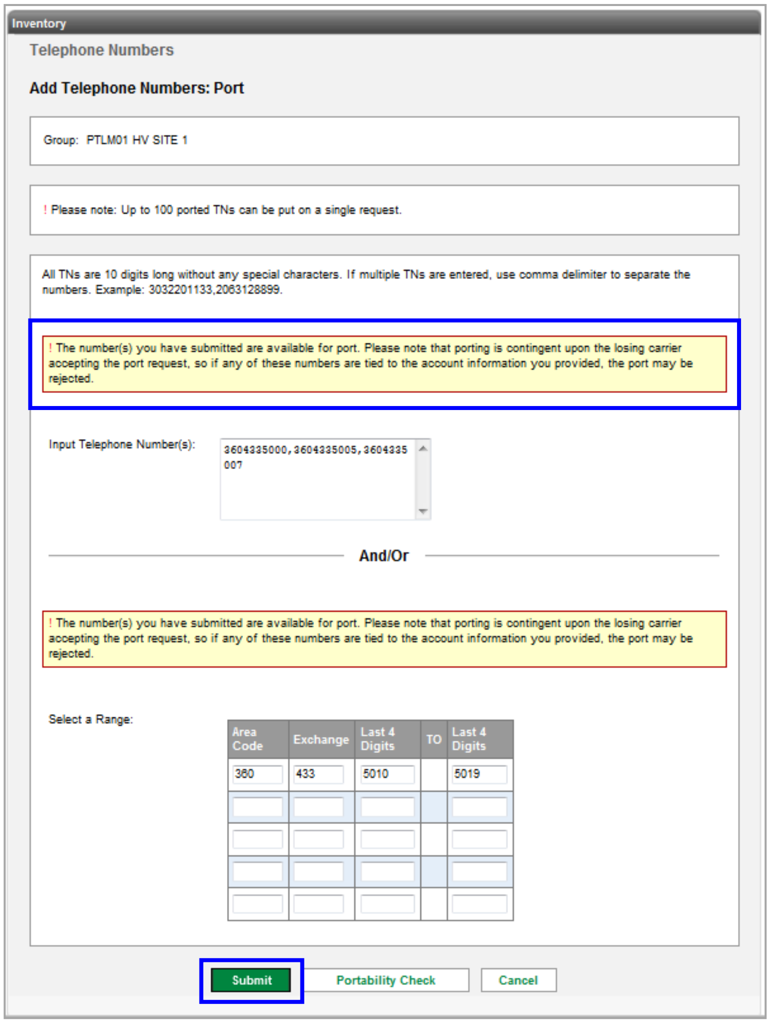
4. Enter non-consecutive numbers, comma separated, in the **Input Telephone Number(s)** field.
5. Enter ranges of numbers in the **Select a Range** field.

   Note: You can have a combination of non-consecutive numbers, and ranges of numbers in one order.

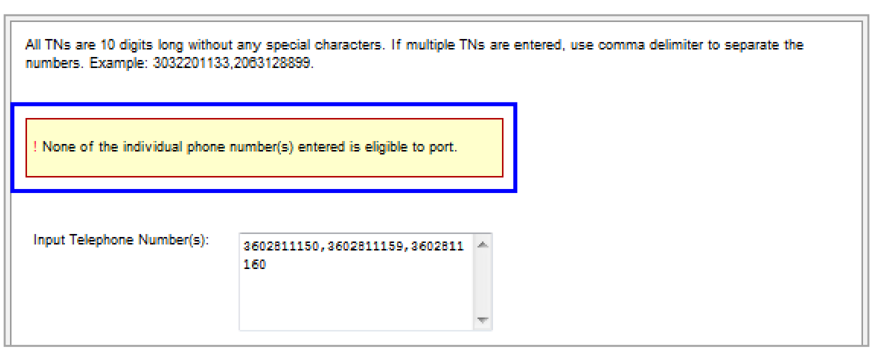
6. Click the **Portability Check** button to confirm whether your numbers can be ported.



7. If your numbers are portable, you'll receive confirmation that you can proceed with your order submission.
8. Click the **Submit** button.

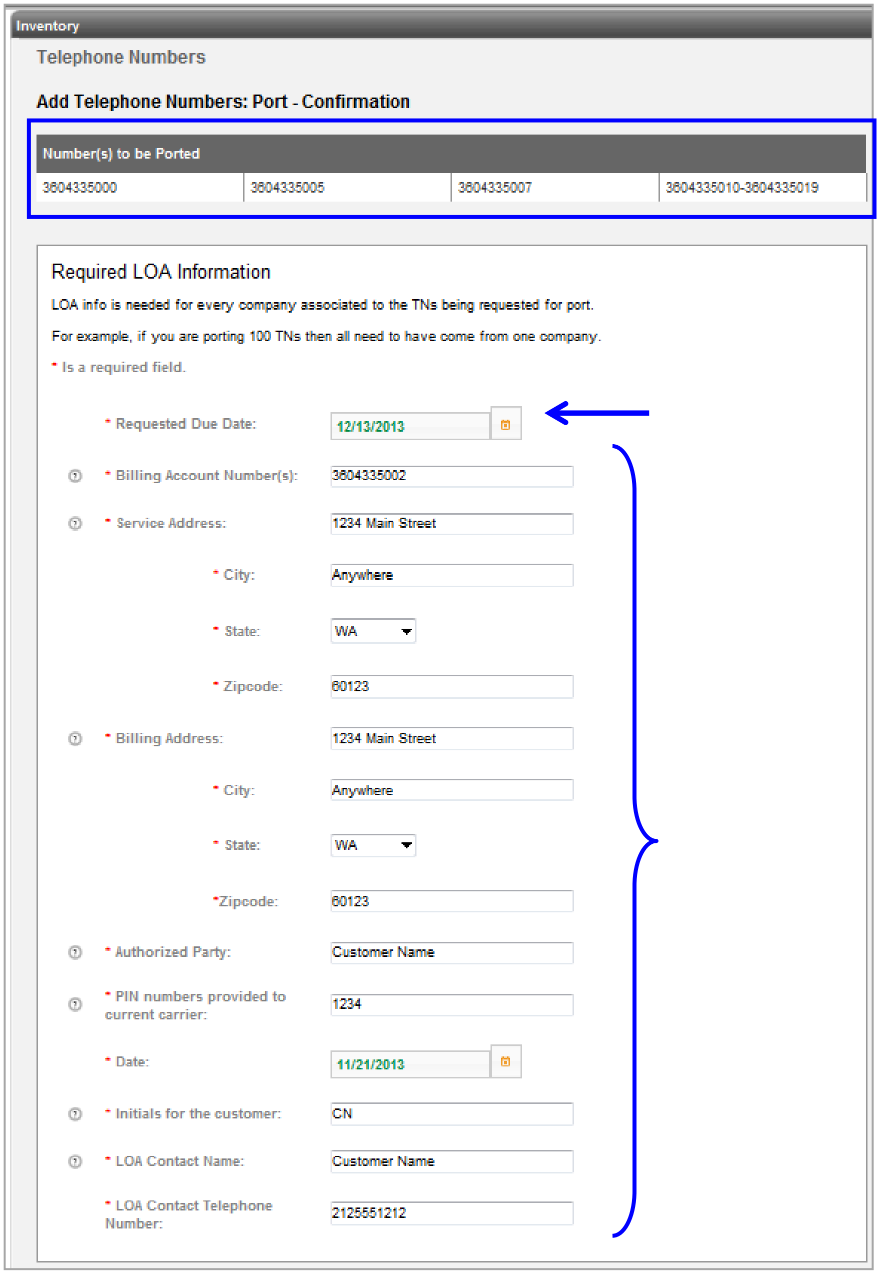


9. You'll receive this error if your numbers are not available to port.



10. An LOA is required to accompany all port orders.
11. Fill out the information in the **Required LOA Information** screen, as it pertains to the information on the account the numbers are currently billed on.

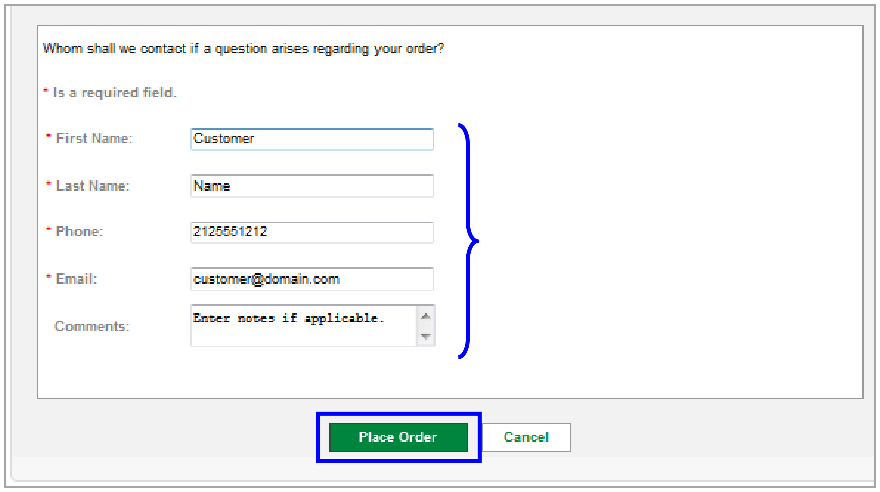
Note: It is suggested you refer to your invoice, and enter information in this screen, exactly as it appears on your invoice, including any punctuation, capitalization, abbreviations, etc., to avoid order rejection from the losing carrier.



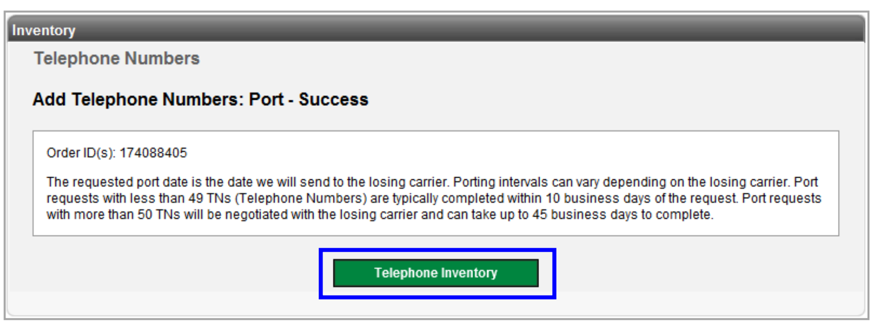
12. Enter contact information in the **First/Last Name**, **Phone** and **Email** fields.

Note: Emails will be sent to the address in the Email field to confirm the order, and when the order is fulfilled.

13. Enter notes pertaining to the order in the **Comments** field (not required).
14. Click the **Place Order** button.



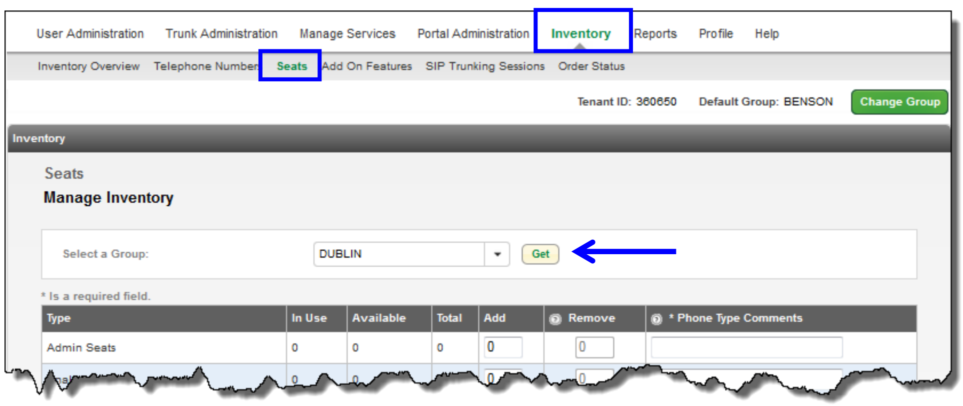
15. You'll receive an **Add Telephone Numbers: Port - Success** confirmation, including an **Order ID** number.
16. Click the **Telephone Inventory** button or proceed to another area of the portal by clicking your desired location from the main or sub menu.



Seats

Manage inventory by adding and removing seats based on your needs. If additional seats requiring physical devices are ordered, they'll be shipped to the address of the group you're ordering services for. If seats are removed that were associated to a physical device, you'll receive a shipping label to easily return devices.

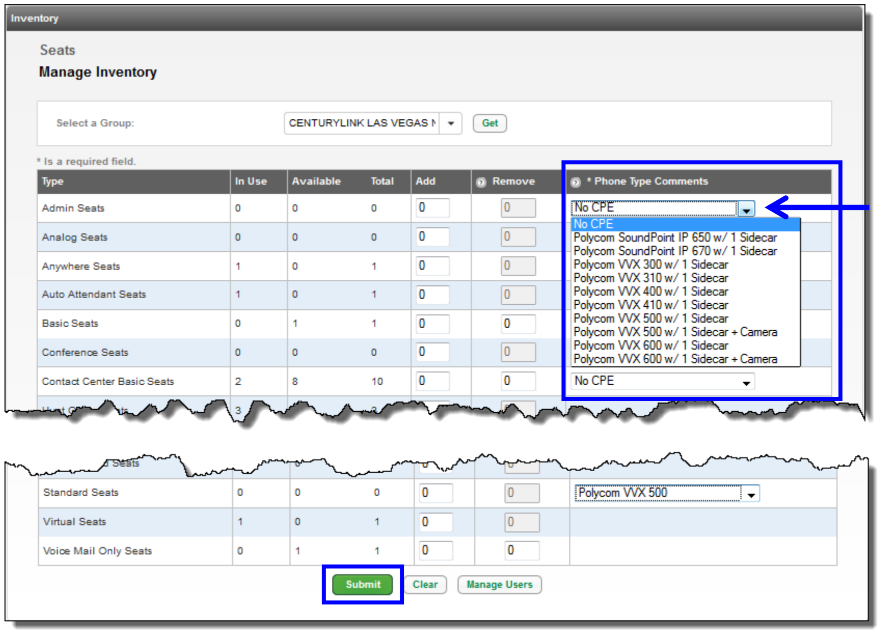
1. Click **Inventory** from the main menu.
2. Click **Seats** from the sub menu.
3. If you have multiple locations, select the location you want to manage from the **Select a Group** dropdown list.
4. Click the **Get** button.



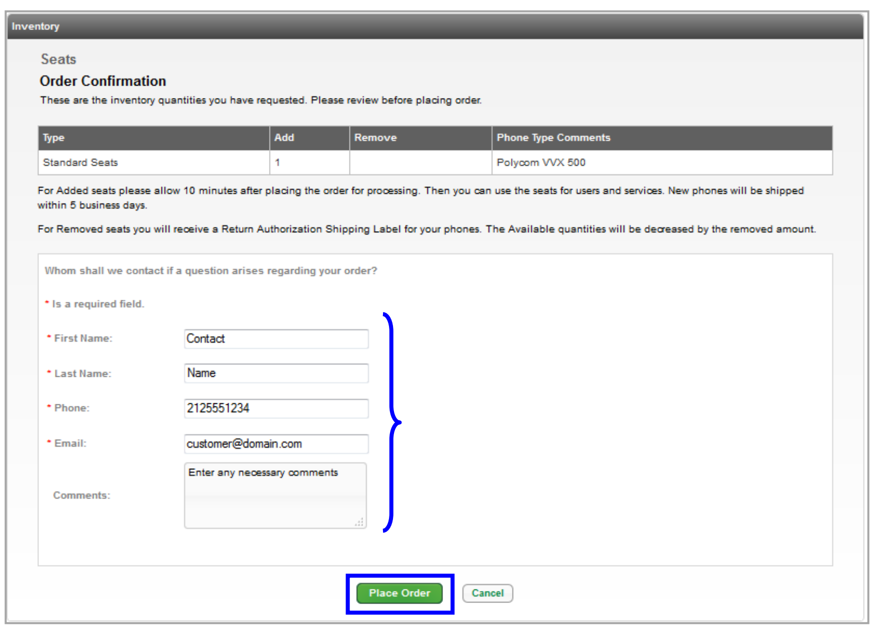
5. Existing inventory for that location displays.
6. See all product types associated to that location including how many are **In Use** and how many are **Available** by seat/product type.
7. You can **Add** to your inventory or **Remove** existing inventory.
8. If you add seat types that have phones or devices associated to them, such as **Basic**, **Standard** and **Premium**, you need to indicate in the **Phone Type Comments** dropdown list, the device type you need shipped. If you need more than one phone or device type, multiple orders will need to be placed.
9. The appropriate device for any seat/license you order populates the dropdown list with the appropriate options.
10. Enter the total quantity for each product type, in the **Add** column. To remove inventory, enter the total quantify of any one product in the **Remove** column.

    Note: You can only remove seat licenses if there is a quantity in the **Available** field indicating those licenses are currently not assigned to a user.

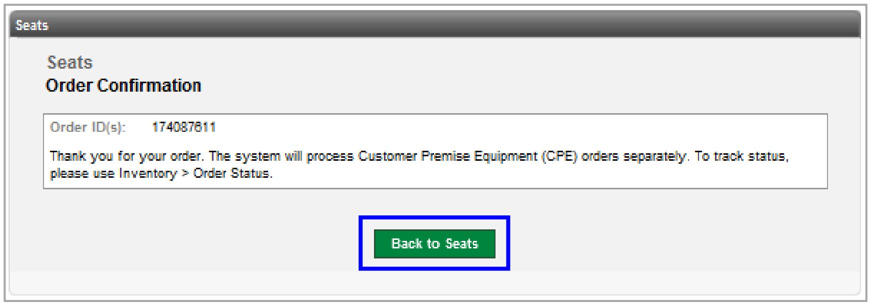
11. If you're removing inventory for products that have phones associated to them, such as **Basic**, **Standard** and **Premium**, you'll receive a shipping label to return the devices.
12. Click the **Submit** button.



13. Confirm or change missing or incorrect information under “**Whom shall we contact**”.
14. You can enter a **Comment** pertaining to the seat order (this field is not required).
15. Click the **Place Order** button.



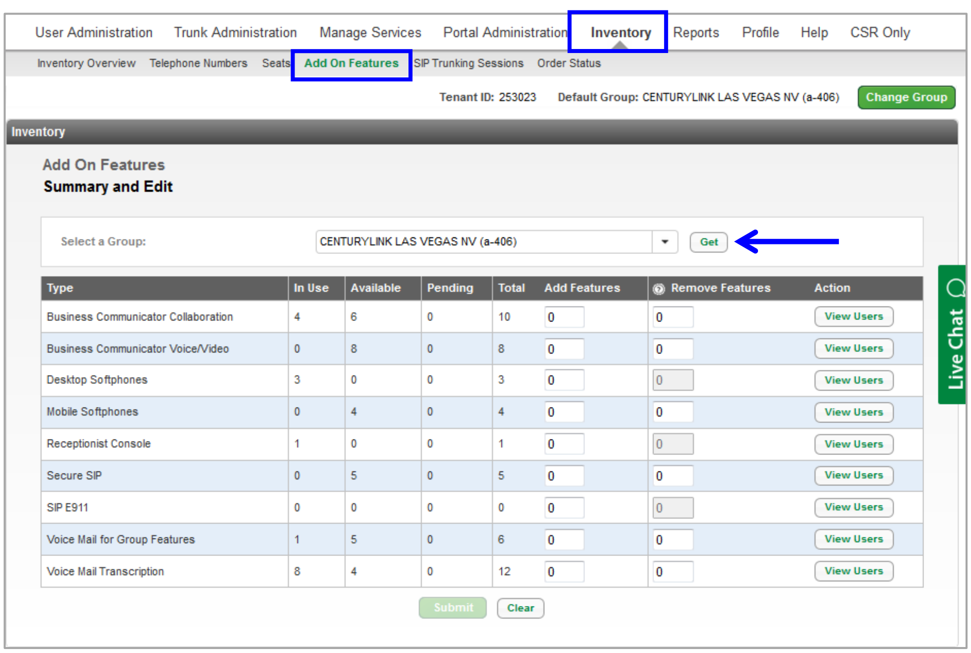
16. You'll receive an **Order Confirmation** which includes an **Order ID** number.
17. You can monitor your order status under **Inventory --> Order Status**.
18. Click the **Back to Seats** button or proceed to another area of the portal by clicking your desired location from the main or sub menu.



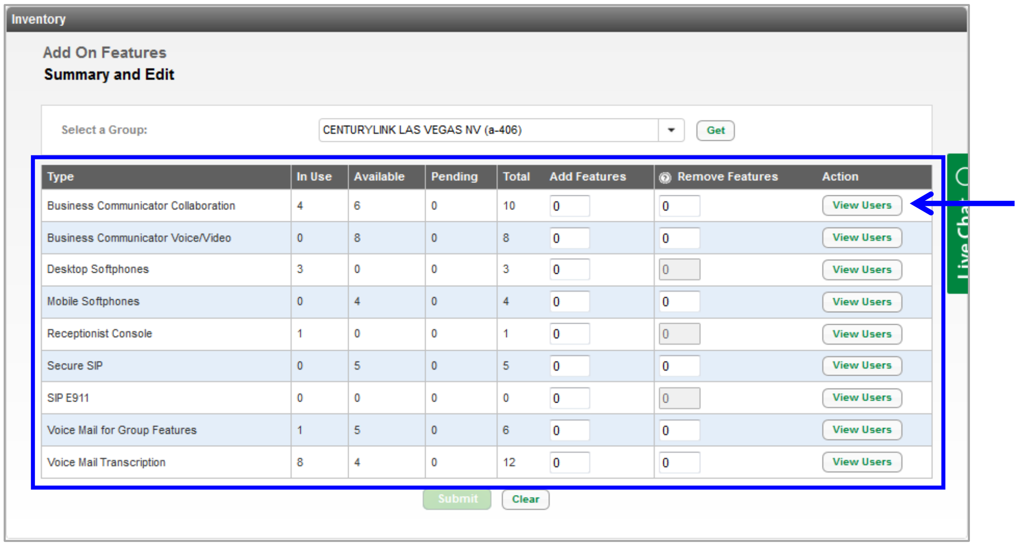
Add On Features

Add On Features allow you to order additional license from the portal such as Business Communicator, call recording, and receptionist console.

1. Click **Inventory** from the main menu.
2. Click **Add On Features** from the sub menu.
3. If you have multiple groups, select the location you want to manage from the dropdown list.
4. Click the **Get** button.



5. Displayed are **In Use**, **Available** and **Total** inventory for the products you currently have and can be ordered.
6. Click **View Users**, next to any product type to which users have licenses assigned to them.



Inventory

Add On Features

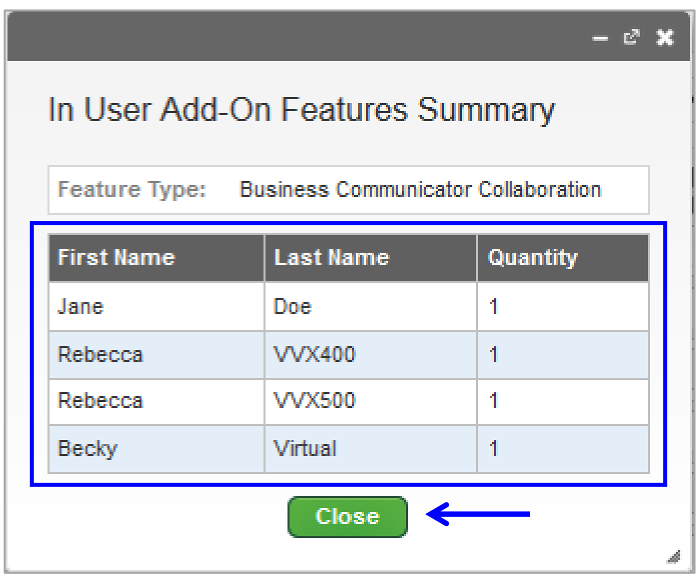
Summary and Edit

Select a Group: CENTURYLINK LAS VEGAS NV (a-406) Get

Type	In Use	Available	Pending	Total	Add Features	Remove Features	Action
Business Communicator Collaboration	4	6	0	10	0	0	View Users
Business Communicator Voice/Video	0	8	0	8	0	0	View Users
Desktop Softphones	3	0	0	3	0	0	View Users
Mobile Softphones	0	4	0	4	0	0	View Users
Receptionist Console	1	0	0	1	0	0	View Users
Secure SIP	0	5	0	5	0	0	View Users
SIP E911	0	0	0	0	0	0	View Users
Voice Mail for Group Features	1	5	0	6	0	0	View Users
Voice Mail Transcription	8	4	0	12	0	0	View Users

Submit Clear

7. All users having that **Add On Feature** assigned, are displayed.
8. When finished reviewing the information, click the **Close** button.



In User Add-On Features Summary

Feature Type: Business Communicator Collaboration

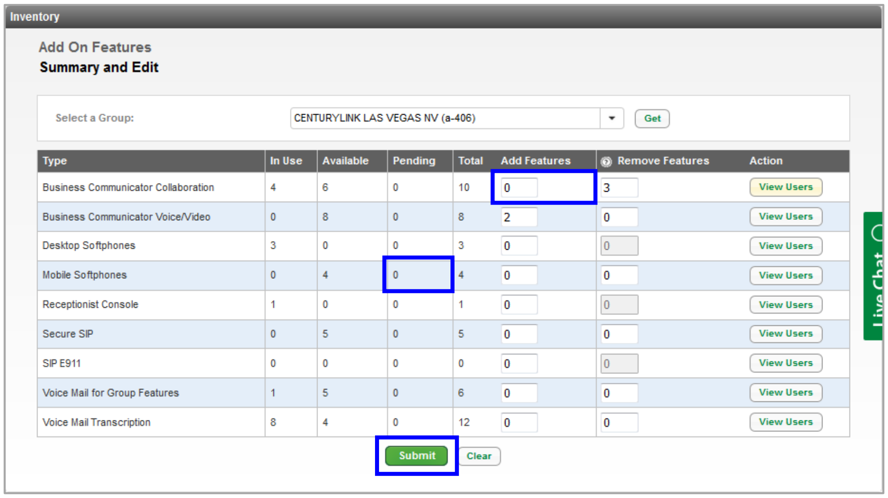
First Name	Last Name	Quantity
Jane	Doe	1
Rebecca	VVX400	1
Rebecca	VVX500	1
Becky	Virtual	1

Close

9. You can **Add** or **Remove** inventory by feature type.
10. To add inventory, enter the number of units required in the **Add Features** column.
11. To remove inventory, enter the number of units you want to remove in the **Remove Features** column.

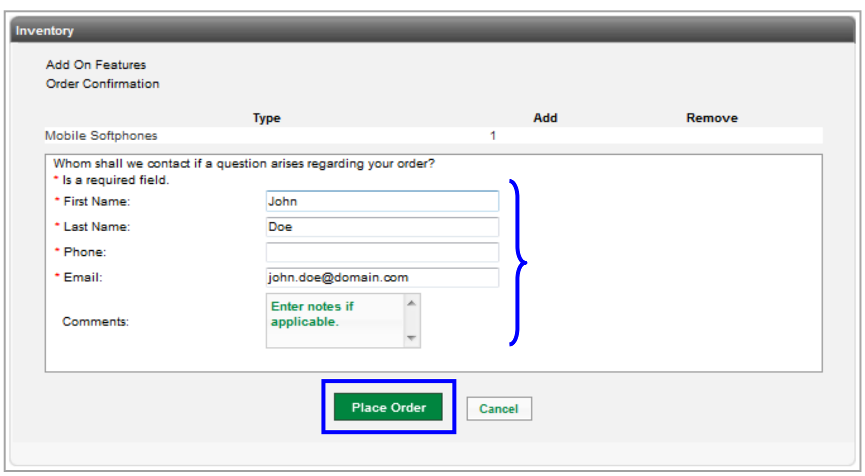
Note: To remove inventory, there must be available licenses to remove, if all licenses are in use, a remove order cannot be placed without unassigning the license from an existing user.

12. Click the **Submit** button.



Type	In Use	Available	Pending	Total	Add Features	Remove Features	Action
Business Communicator Collaboration	4	6	0	10	0	3	View Users
Business Communicator Voice/Video	0	8	0	8	2	0	View Users
Desktop Softphones	3	0	0	3	0	0	View Users
Mobile Softphones	0	4	0	4	0	0	View Users
Receptionist Console	1	0	0	1	0	0	View Users
Secure SIP	0	5	0	5	0	0	View Users
SIP E911	0	0	0	0	0	0	View Users
Voice Mail for Group Features	1	5	0	6	0	0	View Users
Voice Mail Transcription	8	4	0	12	0	0	View Users

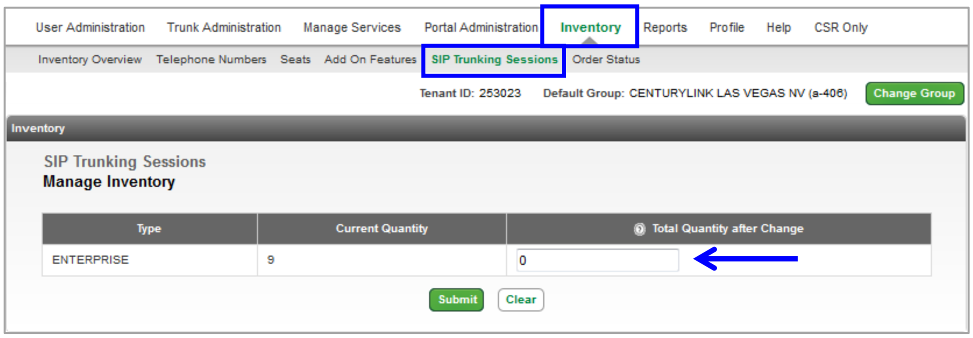
13. Confirm prepopulated contact information is accurate or enter updated information in the fields as shown.
14. The owner of the email address in the **Email** field, receives notification that an order was placed, and receives a second email once when the order is fulfilled. Upon fulfillment, the new services can be assigned for immediate use.
15. Click the **Place Order** button.



SIP Trunking Sessions

As with Trunk Administration within the main menu, you'll only see SIP Trunking Sessions as a sub menu item, if a tenant subscribes to SIP trunking.

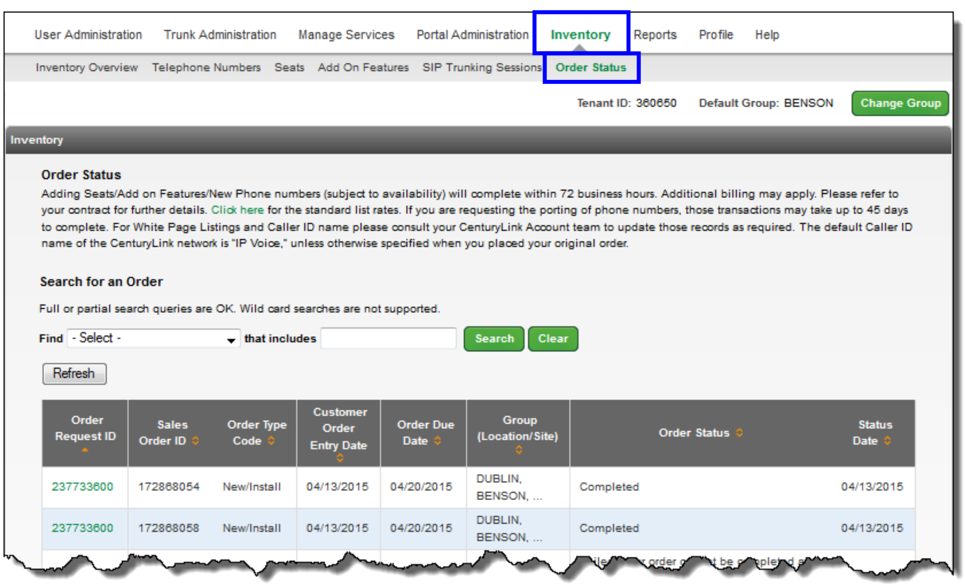
1. Click **Inventory** from the main menu.
2. Click **SIP Trunking Sessions** sub menu.
3. The **Current Quantity** column displays total number of MCCs (maximum concurrent calls) currently available across your enterprise; to change this, enter the new total number of sessions in the **Total Quantity after Change** field.
4. Hit **Enter** on your keyboard, then click the **Submit** button.
5. The order for additional sessions fulfills within approximately 30 minutes.



Order Status

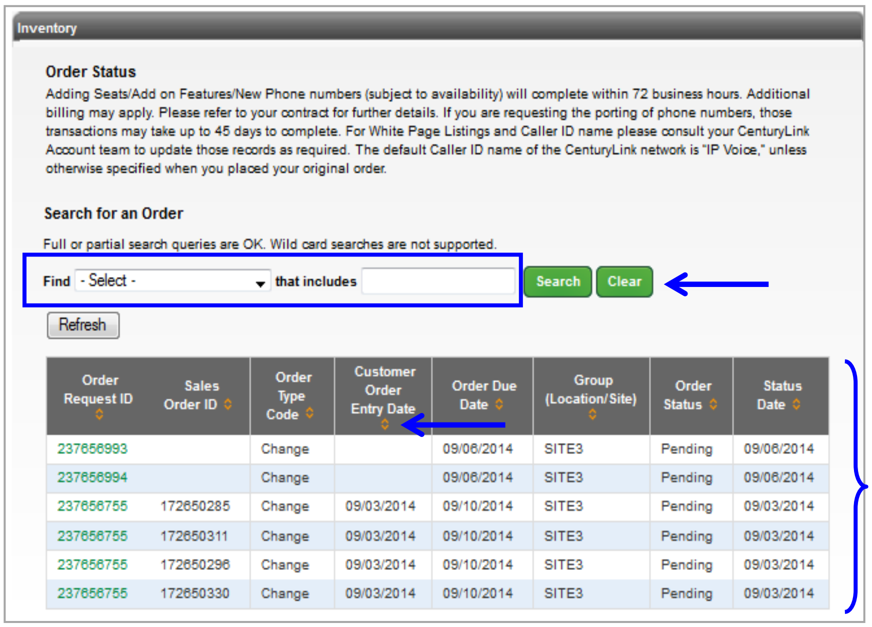
From **Order Status**, check the status of any active or completed order from within the portal.

1. Click **Inventory** from the main menu.
2. Click **Order Status** from the sub menu.

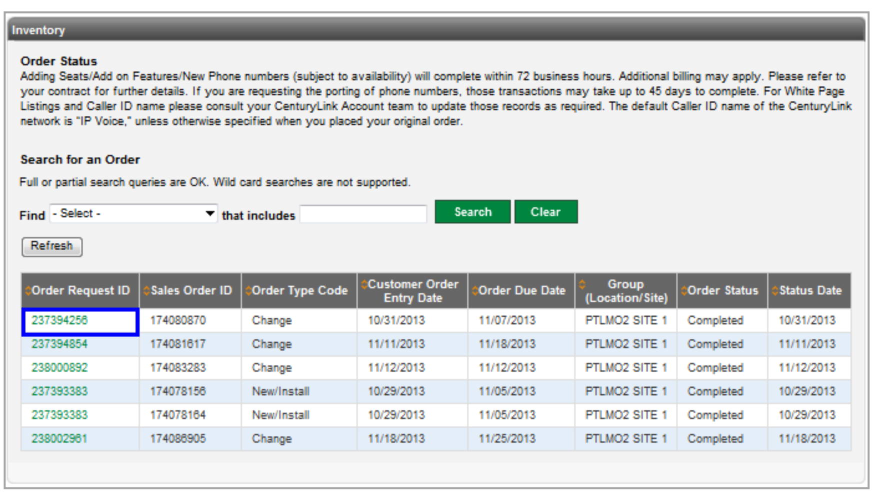


6. All **Orders** for a group will be displayed.

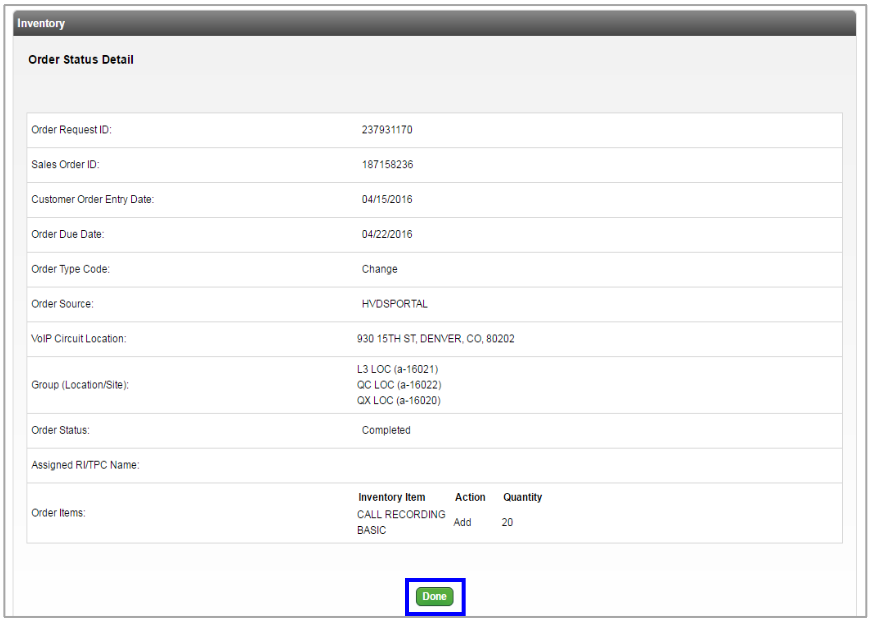
7. To narrow the search in a particular order choose from the following options in the **Find** dropdown list:
    - **Order Request ID**
    - **Sales Order ID**
    - **Customer Order Entry Date**
8. To narrow the search further, enter search criteria within the "**that includes**" field.
9. Click the **Search** button.
10. Ticket information is displayed below, and can be sorted by any of the categories, either ascending or descending, by clicking on the up/down arrow within a column heading.



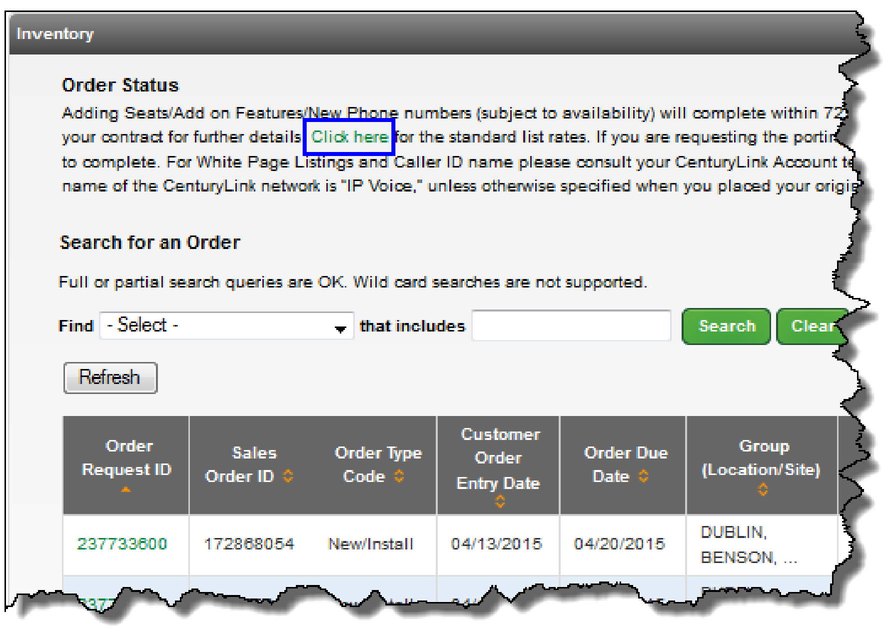
11. Click on an **Order Request ID**, to gain additional information about that order.



12. An **Order Status Detail** window displays information about that order, including the order status.
13. The **Order Items** section outlines inventory requested on the order.
14. Click the **Done** button.



15. For a list of standard seat/product pricing, click **Click Here** in the Order Status section at the top of the inventory page.



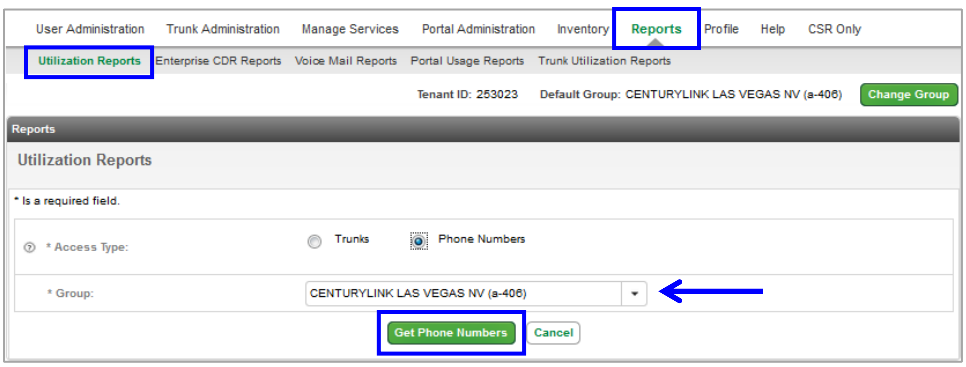
Reports

Reports allow you to run and compile utilization reports by telephone number or groups of telephone numbers, and additional reports for voicemail, portal usage and trunk utilization reports provide statistics for those specific features. Call data is stored for 75 days.

Utilization Reports

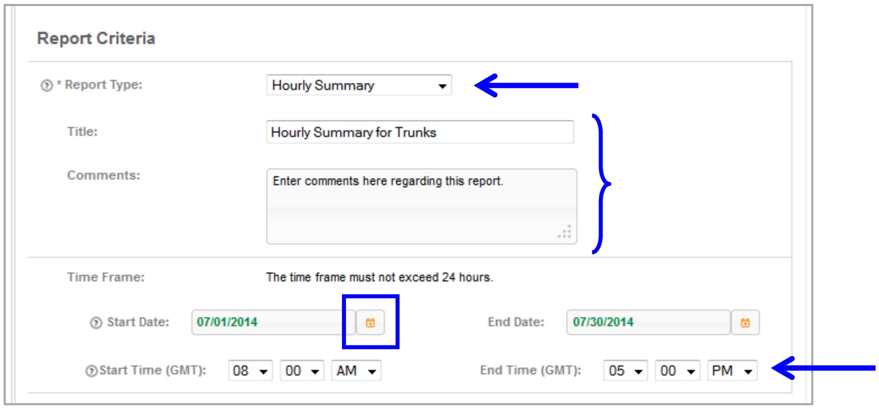
Reports are run in **Summary**, **Bar Chart** and **Detail** format, as well as **Call Detail Reports**. Call details are retained for 75 calendar days.

1. Click **Reports** from the main menu.
2. Click **Utilization Reports** from the sub menu.
3. If your enterprise has multiple groups, select the group you want to run your report for from the **Group** dropdown list; if your enterprise only has one location, that field is static.
4. After your group has been selected, click the **Get Phone Numbers** button.

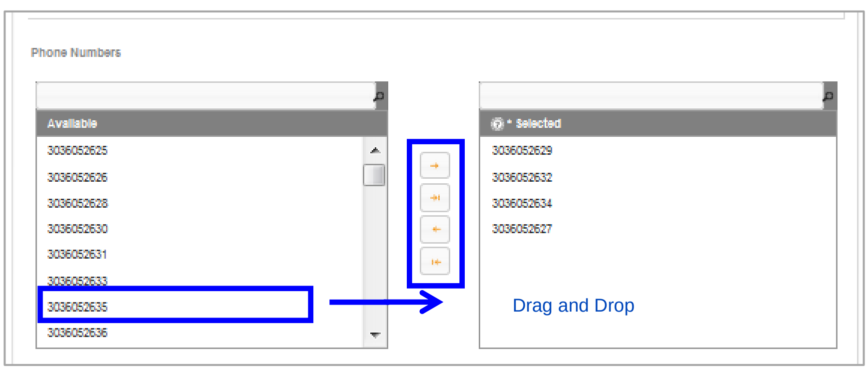


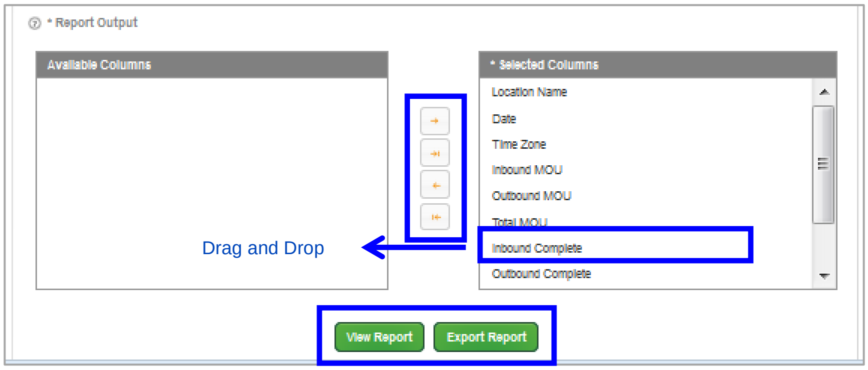
5. From the **Report Type** dropdown list, choose your report type. These are the data aggregation levels for each report.
   - **Hourly Summary** – 5-minutes
   - **Daily Summary** – hour
   - **Weekly Summary** – day
   - **Monthly Summary** – month
   - **Busy Hour Summary –** 5-minutes
6. The **Title** field populates based on the report type selected, this field is editable and can be changed.
7. In the **Comments** field, enter pertinent comments regarding your report.
8. Click the **Calendar** buttons to select a **Start Date** and **End Date**.

9. Click the dropdown lists to select your **Start Time** and **End Time**.
    - To avoid lengthy response time to generate your report, the system limits the time frame for your report.

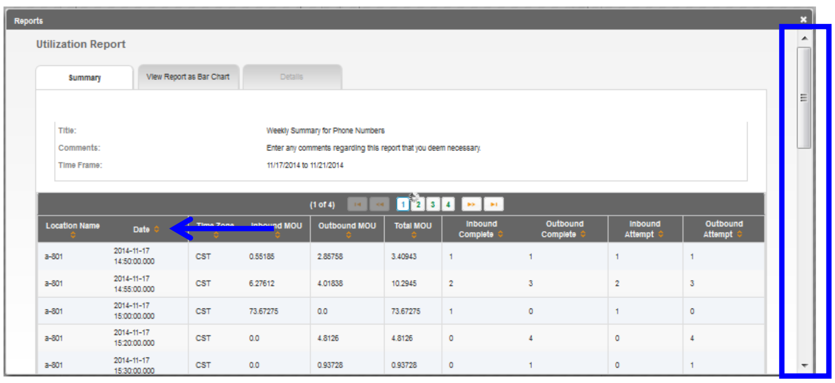


10. Telephone numbers appear in the **Available** field, depending on which report you're running and the group you selected.
11. Drag and drop telephone numbers from the **Available** field to the **Selected** field you want to include in your report.
12. You can also use arrows between the columns to move data between each field.
13. The **Selected Columns** field contains all columns that can be included in your report, all are selected by default.
14. To customize your report, drag and drop columns you don't require in your report to the **Available Columns** field.
15. You can also use the arrow keys to move **Columns** between each field.
16. To rearrange the **Selected Columns** to appear in a different order on your report, click a **Column Name** and drag it to the desired location, or use the up and down arrows to rearrange them.
17. Click the **View Report** or **Export Report** button to process your report.

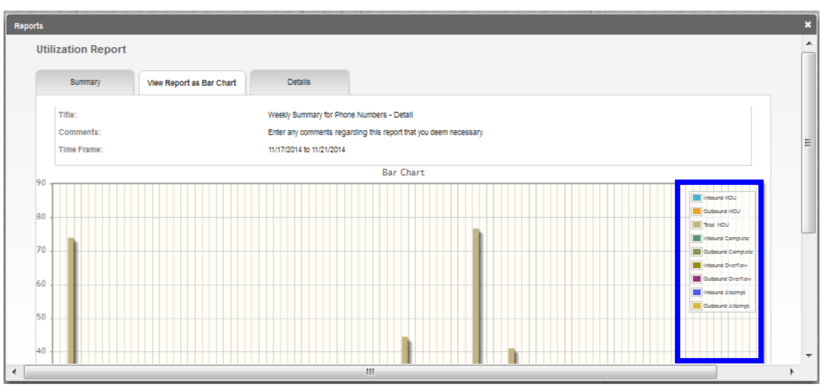




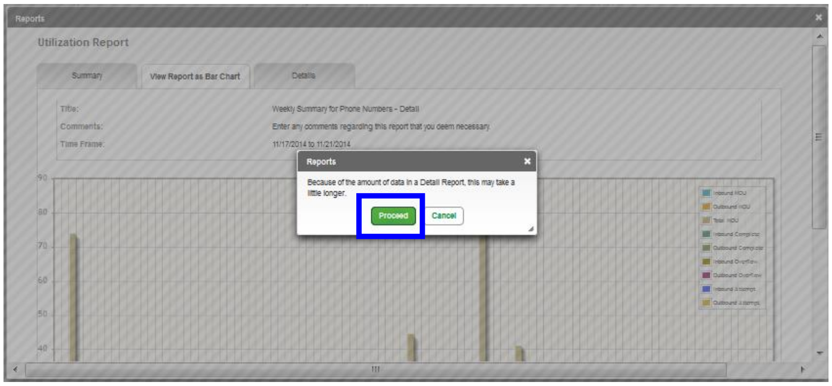
18. If you click the **View Report** button, your report processes based on the criteria you set in the report parameters.
19. The **Summary** tab displays all your call usage information.
20. If your report is large, scroll bars allow you to scroll up and down.
21. The report can be sorted by clicking on the up/down arrow in each column.



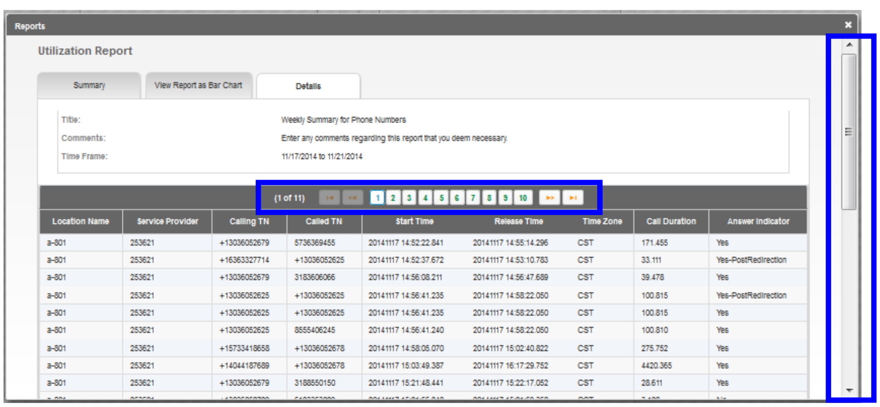
22. Click the **View Report as Bar Chart** tab to see your report results in that format.
23. A legend based on your column names is provided.



24. For more details on your usage and call records, click the **Details** tab.
25. Depending on the report parameters you defined, you may receive a warning message stating that your report may take longer to process depending on those parameters.
26. Click the **Proceed** button.

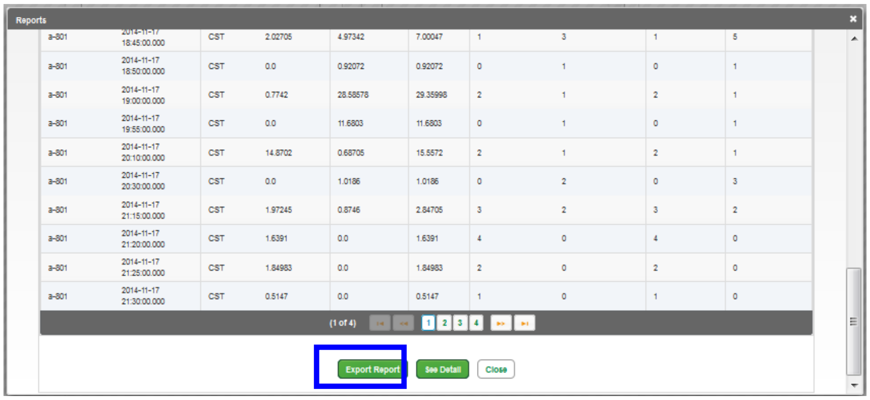


27. Once the report is generated, review the following call detail:
    - **Calling Telephone Number**
    - **Called Telephone Number**
    - **Start/Release Time**
    - **Call Duration**
    - **Answer Indicator**
28. Use the scroll bars to scroll up/down through your report.
29. Or use the page buttons **|< << >> >|** to navigate as well.

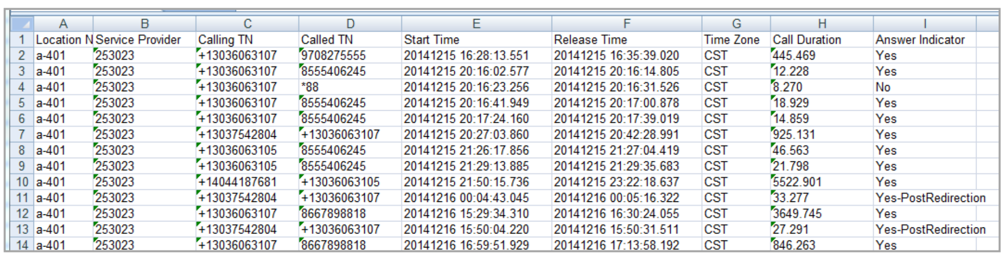


30. To export your report, from the **Summary**, **View Report as Bar Chart** or **Details** tab, scroll to the bottom of the report window.
31. Click the **Export Report** button to export your report details to an Excel spreadsheet.

Note: Each report format option, **Summary**, **Bar Chart** or **Details**, can be exported based on the type of information you require.



32. Calls can be sorted and filtered using standard Excel feature and formatting options.
33. Information contained in the report is based on the report type, **Summary**, **Bar Chart** or **Detail**.



	A	B	C	D	E	F	G	H	I
1	Location N	Service Provider	Calling TN	Called TN	Start Time	Release Time	Time Zone	Call Duration	Answer Indicator
2	a-401	253023	+13036063107	9708275555	20141215 16:28:13.551	20141215 16:35:39.020	CST	445.469	Yes
3	a-401	253023	+13036063107	8555406245	20141215 20:16:02.577	20141215 20:16:14.805	CST	12.228	Yes
4	a-401	253023	+13036063107	*88	20141215 20:16:23.256	20141215 20:16:31.526	CST	8.270	No
5	a-401	253023	+13036063107	8555406245	20141215 20:16:41.949	20141215 20:17:00.878	CST	18.929	Yes
6	a-401	253023	+13036063107	8555406245	20141215 20:17:24.160	20141215 20:17:39.019	CST	14.859	Yes
7	a-401	253023	+13037542804	+13036063107	20141215 20:27:03.860	20141215 20:42:28.991	CST	925.131	Yes
8	a-401	253023	+13036063105	8555406245	20141215 21:26:17.856	20141215 21:27:04.419	CST	46.563	Yes
9	a-401	253023	+13036063105	8555406245	20141215 21:29:13.885	20141215 21:29:35.683	CST	21.798	Yes
10	a-401	253023	+14044187681	+13036063105	20141215 21:50:15.736	20141215 23:22:18.637	CST	5522.901	Yes
11	a-401	253023	+13037542804	+13036063107	20141216 00:04:43.045	20141216 00:05:16.322	CST	33.277	Yes-PostRedirection
12	a-401	253023	+13036063107	8667898818	20141216 15:29:34.310	20141216 16:30:24.055	CST	3649.745	Yes
13	a-401	253023	+13037542804	+13036063107	20141216 15:50:04.220	20141216 15:50:31.511	CST	27.291	Yes-PostRedirection
14	a-401	253023	+13036063107	8667898818	20141216 16:59:51.929	20141216 17:13:58.192	CST	846.263	Yes

Enterprise CDR Reports

Enterprise CDR Reports allows you to schedule call activity reports across your entire enterprise. Reports can be scheduled for daily, weekly or monthly output. Report data purges automatically based on the report type and predefined purge settings.

Report Run Times

Daily Report – runs every day

- Eastern Time 11:00 p.m.
- Central Time 12:00 a.m.
- Mountain Time 1:00 a.m.
- Pacific Time 2:00 a.m.

Weekly Report – runs every Monday

- Eastern Time 11:30 p.m.
- Central Time 12:30 a.m.
- Mountain Time 1:30 a.m.
- Pacific Time 2:30 a.m.

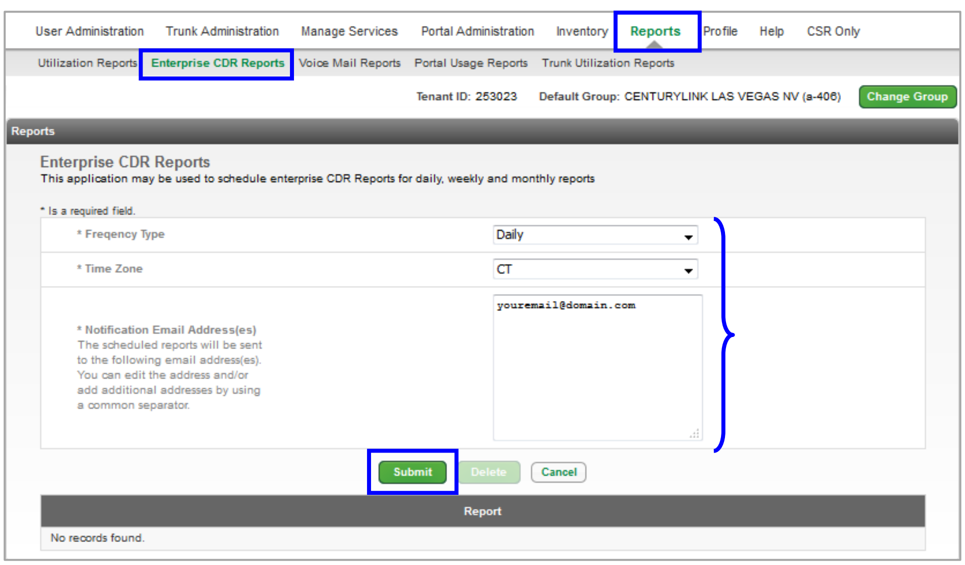
Monthly Report – run the first day of every month

- Eastern Time 11:45 p.m.
- Central Time 12:45 a.m.
- Mountain Time 1:45 a.m.
- Pacific Time 2:450 a.m.

Report Clean Up

- **Daily Reports** older than 30 days
- **Weekly Reports** older than 90 days
- **Monthly Reports** older than 190 days

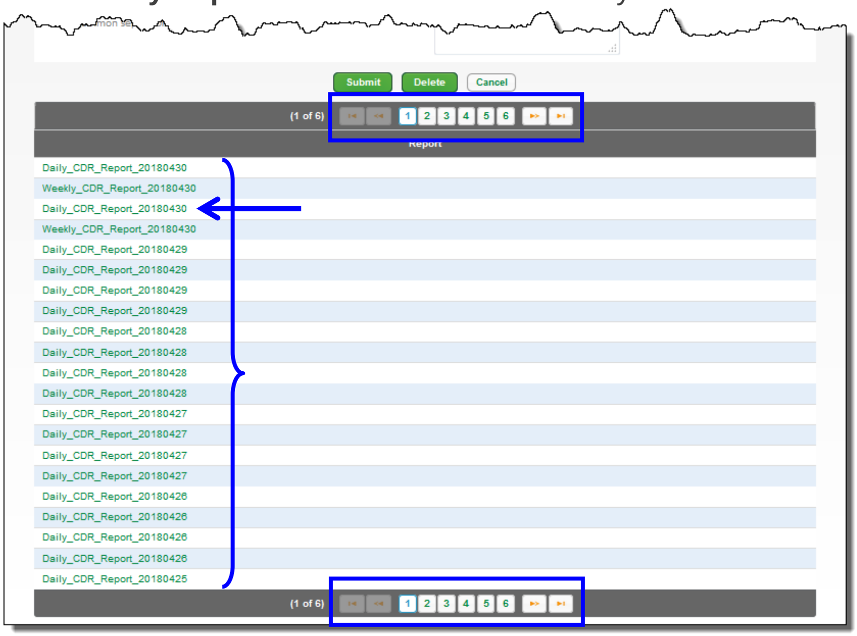
1. Click **Reports** from the main menu.
2. Click **Enterprise CDR Reports** from the sub menu.
3. Select frequency of your report from the **Frequency Type** dropdown list.
   - Daily
   - Weekly
   - Monthly
4. Choose the time zone by clicking the **Time Zone** dropdown list
   - CT – Central Time
   - ET – Eastern Time
   - MT – Mountain Time
   - PT – Pacific Time
5. In the **Notification Email Address(es)** field, enter an email address(es) or distribution list(s); edit or enter additional addresses by using comma separation.
6. Click the **Submit** button.

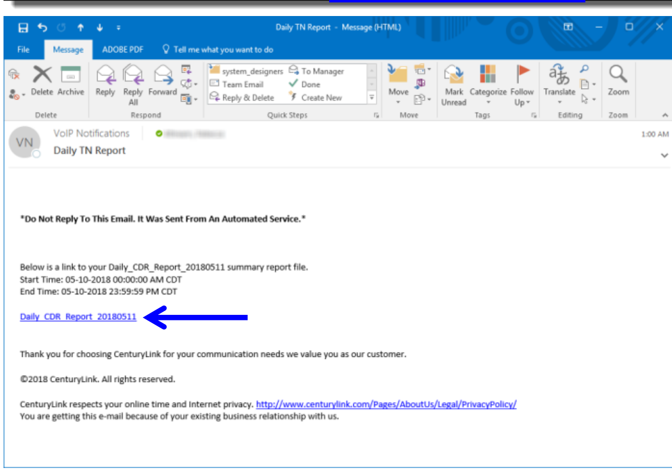


7. After the report runs, an email notification is directed to all email addresses and distribution lists entered in the **Notification Email Address(es)** field; report run times are outlined at the beginning of this section.
8. Click the appropriate link in the **Report** section of the portal to launch or save a report or click the link within the email notification to launch or save the report.
9. Use **Page Buttons** and **Arrows** at the top and bottom of the report section to locate your report based on the report run date.
10. After clicking a report link, **Open** or **Save** the report based on the parameters of your operating system.
11. Reports purge from this list on their expiry date, based on the report type:

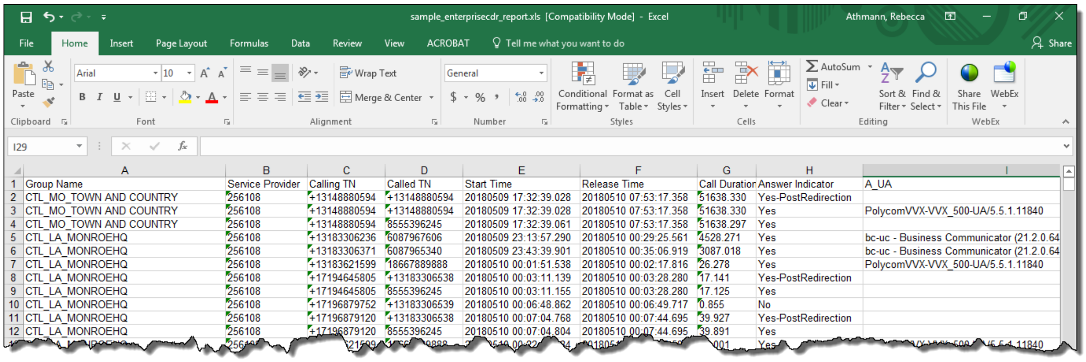
Report Clean Up

- **Daily Reports** older than 30 days
- **Weekly Reports** older than 90 days
- **Monthly Reports** older than 190 days

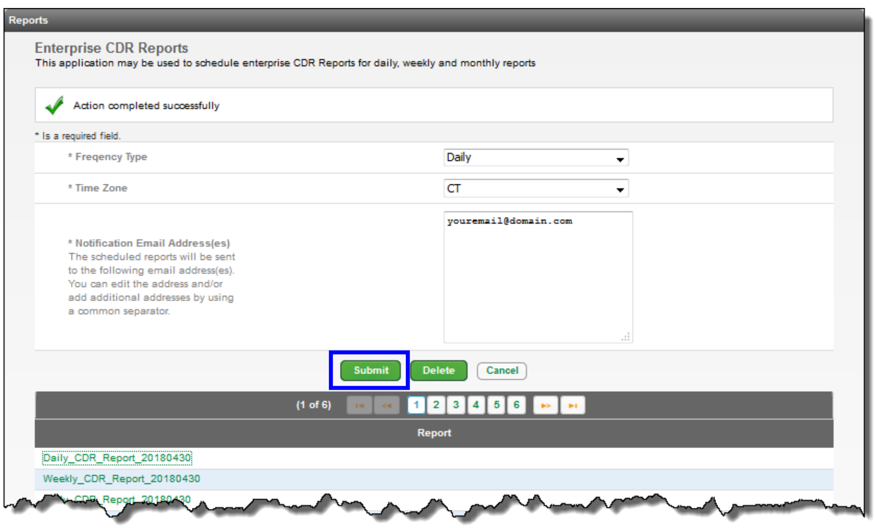




12. Report output is formatted with Excel; allowing you to use all features within that application to format and sort your report data.



13. To change report type, time zone or notification recipients, click dropdown lists and edit email addresses accordingly.
14. Click the **Delete** button to stop recurring reports.

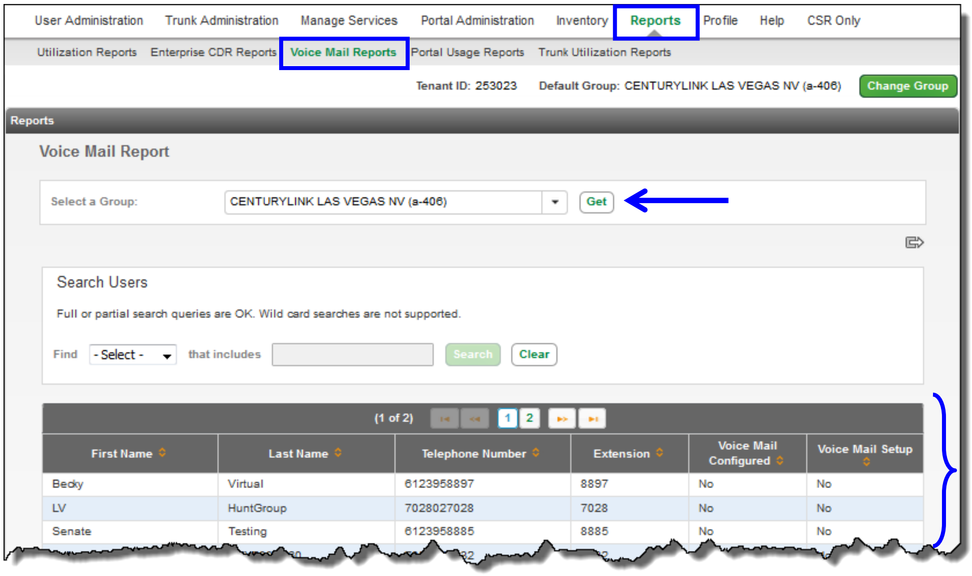


Voice Mail Reports

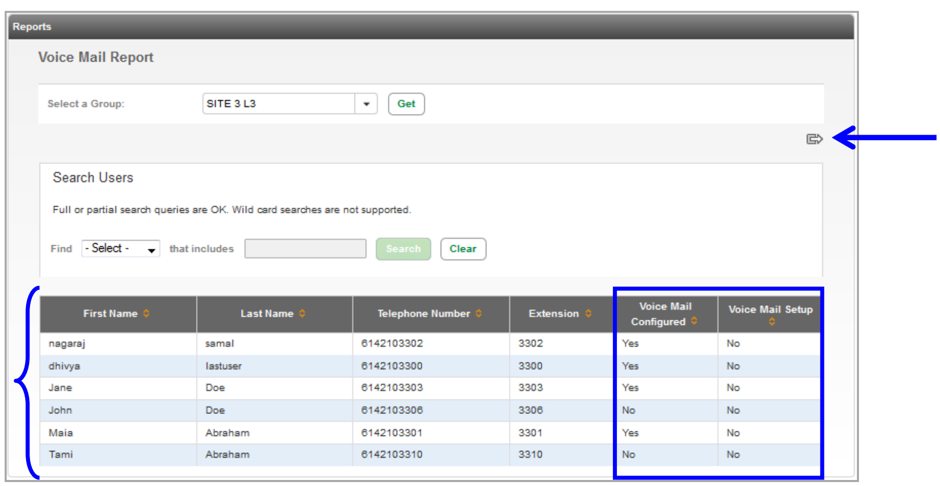
This report option allows you to review and export a report that indicates whether voicemail has been configured, and which mailboxes have been set up by the user. **As a reminder, callers are unable to leave messages for users that don't set up their voicemail, so at the implementation of your services this report is very useful, and for new users.**

1. Click **Reports** from the main menu.
2. Click **Voice Mail Reports** from the sub menu.

3. To change groups, select from the **Select a Group** dropdown list.
4. Click the **Get** button.



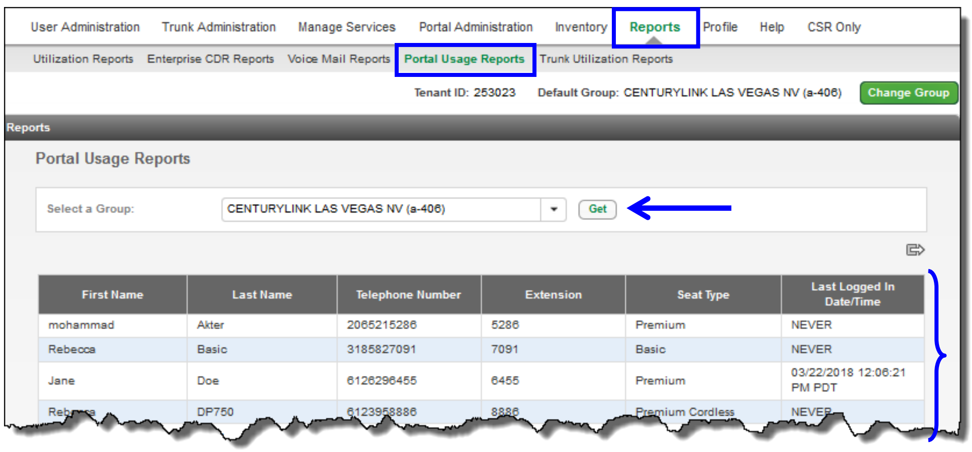
5. All users for that group are displayed, including user **First/Last Name**, **Telephone Number**, **Extension**, **Voice Mail Configured** and **Voice Mail Setup**.
6. Review the **Voice Mail Configured** column to identify users having a voicemail box (some seats don't have voicemail, such as common area seats, conference room phones, etc.).
7. The **Voice Mail Setup** column indicates which mailboxes have been set up by the user.
8. Click the **Export Report** icon.
9. Report output is formatted with Excel; allowing you to use all features within that application to format and sort your report data.



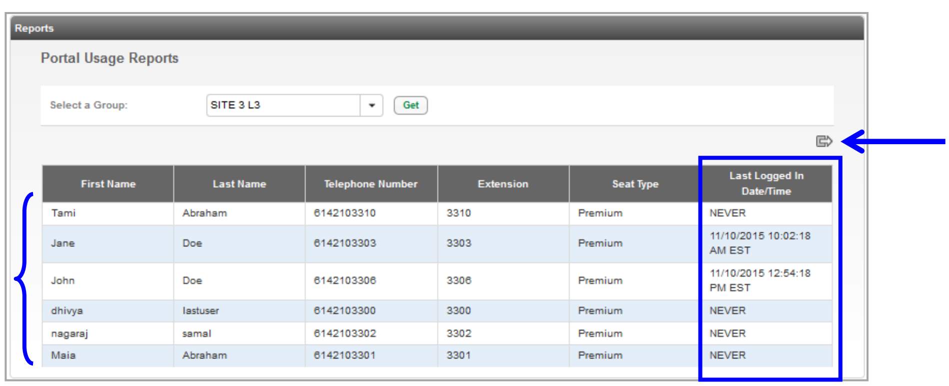
Portal Usage Reports

The **Portal Usage Report** allows you to monitor how often your users access their end user portal. If the end user portal and all features and functions contained within the portal were introduced to your users, this report can be used to determine how often your staff are using this feature.

1. Click **Reports** from the main menu.
2. Click **Portal Usage Reports** from the sub menu.
3. To change groups, select from the **Select a Group** dropdown list.
4. Click the **Get** button.



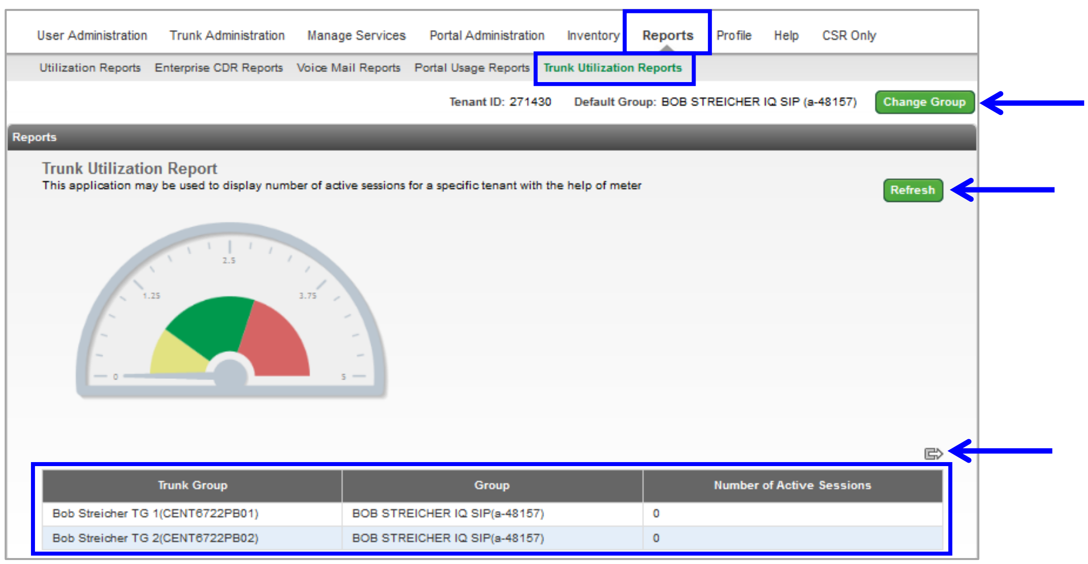
5. All users for that group are displayed, including user **First/Last Name**, **Telephone Number**, **Extension**, **Seat Type** and **Last Logged In Date/Time**.
6. The **Last Logged In Date/Time** column indicates if a user has **Never** accessed their end user portal, or the last **Date/Time** the user logged in.
7. Click the **Export Report** icon.
8. Report output is formatted with Excel; allowing you to use all features within that application to format and sort your report data.



Trunk Utilization Reports

The **Trunk Utilization Report** displays total number of active sessions, by trunk group, in meter format. A session is equal to an active call. This reporting option will not be visible within a group that doesn't utilize SIP Trunking.

1. Click **Reports** from the main menu.
2. Click **Trunk Utilization Report** from the sub menu.
3. Trunk groups for the default group are displayed; if you have multiple groups within your enterprise, change the displayed group by clicking the **Change Group** button selecting the appropriate group from the dropdown list.
4. Click the **Refresh** button to update **Number of Active Sessions**; 1 session is equal to 1 call.
5. Click the **Export Report** icon.
6. Report output is formatted with Excel; allowing you to use all features within that application to format and sort your report data.

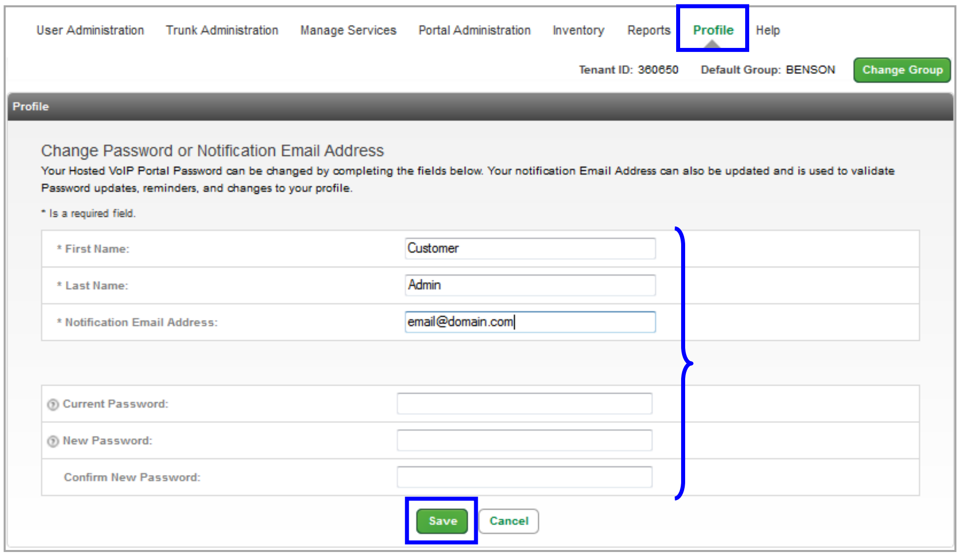


Profile

Contact information contained in the **Profile** section is based information we received for your primary contact. This is only visible to that individual and can only be modified by that individual. If changes are needed due to staff changes, for your security, you'll need to reach out to our repair team for assistance. When certain functions are performed in the portal such as adding/deleting licenses, assigning licenses, etc., the address registered within Profile receives notification of the activity via email.

1. Click **Profile** from the main menu.
2. The administrator is set up based on the information gathered during the implementation process.
3. This information can be changed/modified by the primary administrator at any time including changing the password and email address.

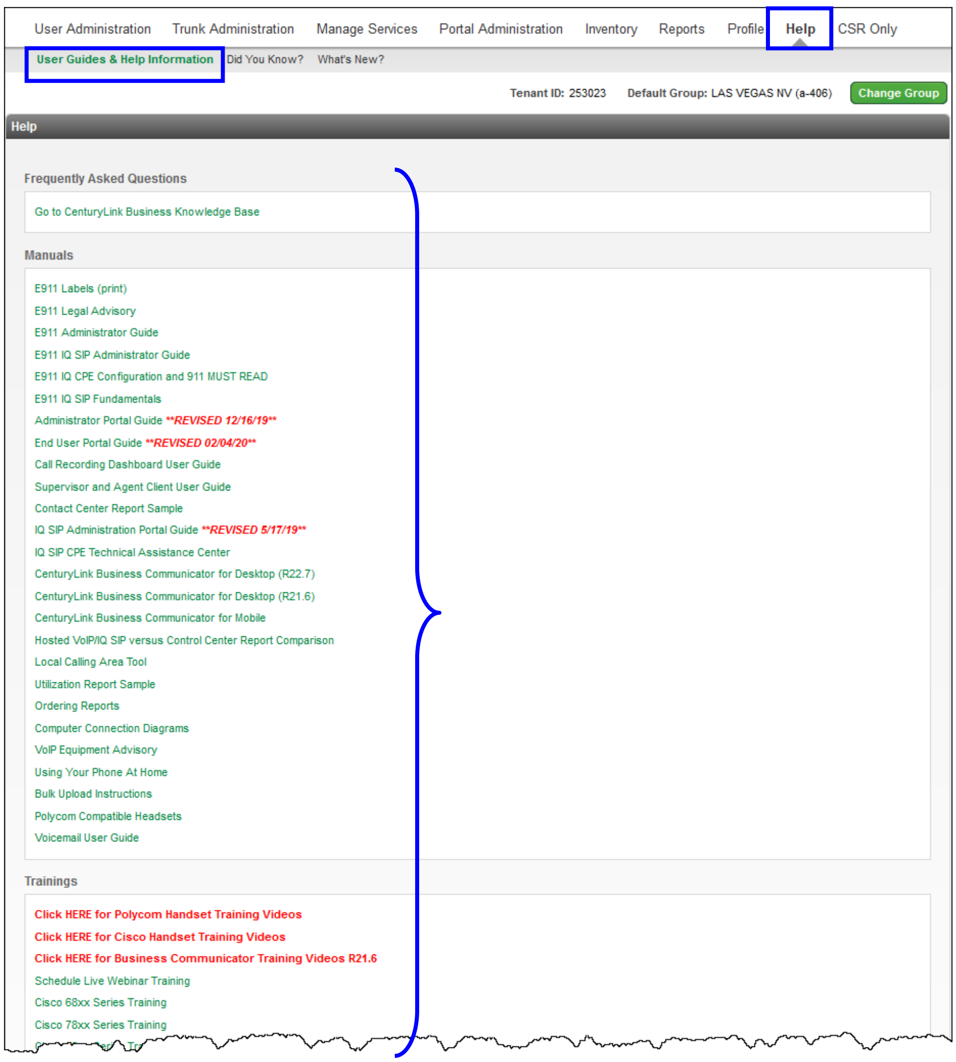
4. Complete the information accordingly in the applicable fields.
5. Click the **Save** button.



Help

Within **Help**, you have access to various training tools and documents such as user guides, quick reference guides, training videos, live chat, and more.

1. Click **Help** from the main menu.
2. Click **User Guides & Help Information** from the sub menu.
3. Within the **Help** page, you'll find items such as **Training Documentation** and **User Guides**.
4. Click the desired link to launch self-help documentation.
5. This feature continually updates as new features become available.



Live Chat

1. Click **Chat with an Expert** on the right side of any portal page to chat with an agent.
2. Live chat hours are **Monday through Friday**, **7a.m. to 8 p.m. Eastern Time**.