Hosted VoIP End User Portal Guide

February 4, 2020
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Portal Navigation

The CenturyLink® Hosted VoIP Portal follows a standard layout throughout. Regardless of where you navigate within this portal, your Main Menu toolbar will always be available to you. All Main Menu options provide you with Sub Menus which can be accessed in two ways; click on a Main Menu option, the Sub Menu appears below the Main Menu. Or hover over a Main Menu option and a dropdown box is provided for you. Either option allows you to navigate to the same advanced features regardless of where you are in the portal.

You will also find a Question Mark icon (“?”) next to features throughout the portal. Hover your mouse over the Question Mark, this gives you a quick tip describing that feature’s functionality.

Note: Some features described in this document may not be available to you depending on your seat type and the features granted to you by your company administrator.

Home Page Navigation

From the Home Page, you have access to a Missed Call Log, Shortcut Widget and Emergency Location Information. When you first access your Hosted VoIP Portal, you will likely not see Missed Calls in your Last 10 Missed Calls list. This list dynamically changes as missed calls are received.

1. The Last 10 Missed Calls field provides you with details of your missed calls. Clicking on the phone number next to the contact initiates a click-to-dial session. You can also click on a call record to add them to your contacts list.

Note: The name displayed is either the name in the CenturyLink Hosted VoIP system that your administrator configured for that user, or it’s the caller ID name received from the incoming caller’s service provider.
2. The **Shortcuts Widget** allows you to quickly enable or disable features such as **Do Not Disturb** and **Call Forwarding**. You can also type or copy/paste a 10-digit number into the **Call This Number** field to use click-to-dial functionality.

3. The **Emergency Location Information** portlet identifies your **Base Location** address, as well as your **Current Location** address which defines the address associated with E911.

4. For access to user guides and other documentation, hover over **Help** from the main menu and select **User Guides & Help Information**, or click on **Help** from the main menu, then select **User Guides & Help Information** from the sub menu.
Call Logs

Call Logs allow you quick and easy access to all your Missed, Incoming, and Outgoing call records. Clicking on the phone number next to the record initiates a click-to-dial session as described earlier. You can also click on the call record to add them to your contacts.

**Note:** The name displayed is either the name in the CenturyLink Hosted VoIP system that your administrator configured for that user, or it’s the caller ID name that was received from the incoming caller’s service provider.

1. Click on Call Logs from the main menu to display the sub menu.
2. From the sub menu, click on the call log you wish to view – Missed, Incoming, Outgoing.
3. All call logs appear in the format as displayed below, and include Date/Time, Name, Phone Number and Call Duration for Incoming and Outgoing calls.
4. Records can be sorted by Date/Time, Name, Phone Number or Duration by clicking on the up/down arrows in the column you want to sort by.
5. All call log records are stored for 60 days.
6. To update data in your call logs while you’re in the portal, click the Refresh button.

7. You can click-to-dial from any call record or add any call record to your Contacts list.
8. To add a call record to your Contacts, click on the Name within the call record.
9. In the Add Contact box, save or replace the Name and Phone Number information.
10. Click the Save button.
11. To place a call from the **Call Logs**, click on the **Phone** number.
12. Click **Close** to close the action box or click **Call** to place a call to that party.
13. Depending on your phone settings, your phone either goes off-hook immediately and begins dialing the number, or your phone rings and you’ll have to answer it prior for the outbound call to be sent.

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**Exporting Call Logs**

In addition to having the ability to view call log detail, you can **Export Call Logs** to retain records for future reference.

1. Click on **Call Logs** from the main menu and select **Missed**, **Incoming** or **Outgoing** from the sub menu.
2. Click the **Export Call Logs** button.

---

3. In the **Export Call Logs** window, choose which report(s) you wish to export.
4. By clicking the **Export All Calls** check box, you will choose to export records for all call logs.
5. If you don’t require an export for all logs, check the boxes for the records you wish to export.
6. Click the **Export** button.
7. Records will be exported to an Excel spreadsheet.
8. Records can then be saved and manipulated using all standard Excel features/functions and formatting options.

<table>
<thead>
<tr>
<th>Call Type</th>
<th>Date/Time</th>
<th>Name</th>
<th>Phone Number</th>
<th>Call Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missed</td>
<td>11/12/14 07:02 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2902</td>
<td></td>
</tr>
<tr>
<td>Outgoing</td>
<td>11/12/14 07:01 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Outgoing</td>
<td>11/12/14 07:00 AM</td>
<td>HVDS113 Tco</td>
<td>614210-7721</td>
<td></td>
</tr>
<tr>
<td>Outgoing</td>
<td>11/17/14 08:52 AM</td>
<td>HVDS113 Tco</td>
<td>*344422</td>
<td>00:00:23</td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:46 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
<tr>
<td>Missed</td>
<td>11/17/14 08:45 AM</td>
<td>HVDS113 Tco</td>
<td>614210-2942</td>
<td></td>
</tr>
</tbody>
</table>

**Call Features**

The **Call Features** menu allows you to manage several features including **Call Recording** settings, **Find Me/Follow Me** and **Call Treatment Schedules**.

**Call Recording**

If you were assigned a **Call Recording** license, you’re allowed to manage various settings as it pertains to the recording of your calls.

1. Click **Call Features** from the main menu, then **Call Recording** from the sub menu.
2. Enable any **Call Recording** option by clicking the corresponding **Radio** button:
   - **Always** - the entire call is recorded but no soft keys are available; call recording stops when the call ends
   - **Always with Pause/Resume** - recording automatically starts when the call connects, displaying a **Pause** soft key; when **Pause** is pressed/tapped, a **Resume** soft key displays; call recording stops when the call ends, storing the recorded portion of the call in the call recording dashboard
   - **On Demand** - recording mode starts when the call connects, but the recorded file is not saved until you press/tap **Record**\(\text{Start}\); when **Start** is pressed/tapped, the recording is saved; recording stops when the call ends
   - **On Demand with User Initiated Start** - call recording does not begin until a **Record** soft key displays; to start recording press/tap **Record**\(\text{Start}\); press/tap **Pause**, **Resume**, **Stop** as necessary
   - **Never** - turns off call recording; recording does not initiate and the phone never displays call recording soft keys
3. By default the **Play Call Recording Start/Stop Announcement** is enabled. Uncheck the box to disable.  

   **Note:** Be aware there are legal requirements based on your State, with regards to informing callers they’re being recorded. Be sure you understand your State’s requirements.

4. Select from three **Pause/Resume Notification** settings by clicking the appropriate radio button:
   - **None** - does not provide notification
   - **Beep** - notifies call participants with a beep when call recording is paused and resumed
   - **Play Announcement** - notifies call participants with an announcement when call recording is paused and resumed

5. Click the **Repeat Record Call Waiting Tone** check box to enable this feature.

6. In the **Seconds** field, from 10-1800 seconds, choose how often you want the warning tone to play.

7. Click the **Save** button.
Call Settings

Call Settings gives you, as a user, quick access to call control features for your phone such as Call Waiting, Auto Callback, and Push To Talk.

1. Click on Call Features from the main menu, then Call Settings from the sub menu.
2. Remember to hover over the “?” if you’re not sure what a feature is for.
3. To change a setting, click the radio button corresponding to that feature, or click Edit buttons.
4. Changing some features requires you to change settings or edit fields, complete the required fields as necessary.
5. Click the Save button.

![Call Settings menu](image)

Call Waiting

Call Waiting allows you to receive another call while you’re on the phone. You can turn it on or off for all calls and then selectively turn it back on or off using the feature access codes.

Auto Callback

Auto Callback allows you to request notification when a busy line within your office becomes available. A distinctive ring is used to notify you when the user is available.
**Push to Talk**

*Push to Talk* is similar to an intercom feature. Control users allowed to call you in this manner.

1. Once *Push to Talk* is on, press the **Edit** button to configure the settings.
   - When *Auto Answer* is **On**, your phone automatically answers incoming *Push to Talk* calls.
   - **Outgoing Connection Type** allows two options:
     i. Select **One-way Voice** to establish a one-way path. If this option is selected, then the originator of the call can talk to the party receiving the call, but the party receiving the call cannot talk to the originator of the call.
     ii. Select **Two-way Voice** to establish a two-way path. If this option is selected, then both the originator of the call, and the party receiving the call can talk to each other.
   - **Access List** options include the following:
     i. Check **Allow calls only from the users selected below** to accept *Push To Talk* calls only from users displayed in the list.
     ii. Check **Allow calls from everyone except the users selected below** to accept *Push To Talk* calls from everyone except users displayed in the list.
   - **Available Users/Selected Users:**
     i. **Available Users** are individuals within your group.
     ii. Search for users by *Last Name* or *First Name* or use the scroll bar to scroll through the list.
     iii. Drag and drop users from the **Available Users** list to the **Selected Users** list.
     iv. Click the **Save** button.
Automatic Hold/Retrieve

**Automatic Hold and Retrieve** provides an alternate method to hold and retrieve calls. Incoming calls are automatically held and retrieved without having to press any keys.

Barge-In Exempt

With **Barge-In Exempt** enabled, you're blocking barge-in attempts from other users with Directed Call Pickup with Barge-In; this means they cannot barge into your call. If this feature is disabled, users can join your active calls with or without a barge-in tone.

Directed Call Pickup with Barge-in

**Directed Call Pickup with Barge-in** allows you to dial a feature access code followed by an extension to pick up or barge-in on an active call for a user in your office. If the call has not been answered, then it is picked up. If the call has been answered, the barge-in occurs. A barge-in results in a three-way call being created between you, the user in your office being barged-in on, and the other party the user is connected to. You can turn on and off the warning tone for when you use this feature.

**Note:** Your administrator controls which users you can use call pickup with.

Music On Hold

The **Music On Hold** setting allows individual users to enable or disable Music On Hold. To change the setting, click the appropriate radio button and click the **Save** button.

**Note:** If your administrator has chosen to not enable the Music On Hold feature for your group, you won’t be able to turn it on. This feature can only be enabled/disabled if they’ve allowed you to have Music On Hold.

Contact Center Standard

If you’re a member of a Contact Center, also known as a Call Center, ACD or Call Queue, and have a Contact Center Supervisor or Contact Center Standard seat, you’ll have the ability to sign-in/sign-out, and change agent status within your portal. You can also perform these functions with soft key integration or via the Supervisor or Agent Clients. **This option is only be visible in your portal of you have a Contact Center Standard or Supervisor seat.**

1. Click the Contact Center Standard **Edit** button.
2. The names of the Contact Centers you’re a member of are indicated in the **Call Center ID** column.
3. The **Join Call Center** column defines whether you’re "Joined" into a Contact Center:
   - **Checkmark** - indicates you’re **Joined** into that Contact Center
   - **Unchecked** – you’re **not Joined** into that Contact Center
4. Check and uncheck the appropriate boxes to **Join** and **Unjoin** Contact Centers as necessary.

5. Click the **Save** button.

   **Note:** If you’re unable to uncheck any of the Contact Centers you’re a member of, this is your indication that your company administrator has not enabled this feature and you’re a permanent member of that Contact Center.

6. Change your agent status by selecting options from the **ACD State** dropdown box:
   - **Sign-In** - signs you into any Contact Center you’re a member of and joined
   - **Sign-Out** - signs you out of any Contact Center you’re a member of and joined
   - **Available** - makes you ready to receive calls from any Contact Center you’re a member of and joined
   - **Unavailable** - prevents you from receiving calls from any Contact Center you’re a member of and joined
   - **Wrap-Up** - allows you to complete post call duties, and changes your status to Available automatically once the timer expires, the timer length is based on a setting made by your company administrator

7. Click the **Save** button.
Call Treatment Schedules

Call Treatment Schedules are used to configure services such as Call Notify, Selective Call Acceptance, Selective Call Rejection, Selective Call Forwarding, Simultaneous Ring, and Sequential Ring. Once you set up a schedule and assign it to various services, you’ll only have to change that schedule once and it impacts all services it’s assigned to.

In this example, we’re going to set up an After Hours time schedule, based on the following working hours:

- **Mon-Thur** – 8:00 a.m. to 5:00 p.m.
- **Fri** – 8:00 a.m. to 12:00 p.m.
- **Sat-Sun** – Closed

1. Click **Call Features** from the main menu, then **Call Treatment Schedules** from the submenu.
2. Click the **Add Schedule** button.

3. Enter a description for your schedule in the **Schedule Name** field.
4. Select the appropriate radio button for a **Holiday** or **Time** schedule.
5. Click the **Save** button.
6. After receiving the **Action Completed Successfully** notice, click the **Add Event** button.

![Add Event Button](image1)

7. Enter a name for your event in the **Event Name** field; you can have multiple events within one Schedule.

8. The **Start Date** and **End Date** is selected based on whether your event is within one 24 hour period or crosses to the next; in this example the Start and End date need to be different 24 hour periods; select the **Start Date** and **End Date** by clicking on calendar icons.

9. Select your start and end times by clicking dropdown boxes for **Start Time** and **End Time**.

10. If this schedule will be an all day event, check the **All Day Event** box.

11. Select the recurrence level from the **Recurrence** dropdown box; if a recurrence option other than Never is selected, additional options will be provided.

   - Never
   - Daily
   - Weekly
   - Monthly
   - Yearly
12. Enter the recurrence frequency in the **Every** field, if this event will be every week, enter a “1”.
13. Select the days of the week for your event; in this example the schedule is for Mon-Thur, so those days are selected.
14. Choose the options for an **End** date for your event if applicable or keep **Never** enabled if this event should continue indefinitely.
15. Click the **Save** button.

16. You now have an **After Hours** schedule with one event for Mon-Thurs after hours.
17. To add another event to that same schedule, click the **Add Event** button again.
18. Add the Event Name.
19. Select the Start and End Date; since this schedule is in one 24 hour period, it will be the same start/stop date.
20. Select the Start and End Times.
21. Select if it is an All Day Event.
22. Select the Recurrence option.
23. Enter how often it should recur and select Friday.
24. Click the Save button.

25. Your After Hours schedule now has an event for Mon-Thur and Fri.
26. To add your weekend event to that same schedule, click the Add Event button again.
27. Add the **Event Name**.
28. Select the **Start** and **End Date**, which can be the same date.
29. Check the **All Day Event** box since this is an all day event; the **Start Time** and **End Time** functionality becomes disabled.
30. Select your **Recurrence**.
31. Enter 1 for every week recurrence, and check **Sunday** and **Saturday**.
32. Click the **Save** button.

![Image of event creation process]

33. You have now successfully created and saved three events within one **Schedule**.
34. The After Hours schedule can now be used in features such as **Call Forward Selective**, **Simultaneous Ring** and **Sequential Ring**.
35. Delete an event at anytime by clicking the **Delete** button.
36. To modify or edit an event, click the **Edit** button.
37. Click the **Save** button to continue.
38. Follow this same process to build additional **Schedules** with different event dates and times.

### Find Me

The **Find Me** section of the portal offers quick access to call routing features, including **Simultaneous Ring** and **Sequential Ring**.

1. Click on **Call Features** from the main menu, then **Find Me** from the sub menu.
2. Review the **Find Me** features and activate those features you wish to utilize.
3. Not all features need to be activated or used, and it is recommended that you don’t enable multiple features at the same time.
4. Be frugal on what you enable, so you don’t cause unnecessary issues by defining too many rules.
5. After all setting changes have been made, click the **Save** button.

**Send All Calls to Voicemail**
Sends all calls directly to voicemail without ringing your phone.

**Send Busy Calls to Voicemail**
Sends all calls directly to voicemail if your line is busy; this should be enabled by default.

**Send Unanswered Calls to Voicemail**
Send unanswered calls to voicemail after ringing at your device; this should be enabled by default.

**Call Forwarding Not Reachable**
Automatically forwards your calls to another phone number if your device is not reachable, such as a disaster, power outage, etc.; this should be set up so if an event occurs, your calls ring to the defined numbers.

**Call Forwarding Always**
Automatically forwards all your calls to another phone number.
Call Forwarding Busy
Automatically forwards your calls to another phone number if your line is busy; by default calls roll to voicemail, which is typically the standard setting for this option.

Call Forwarding No Answer
Automatically forwards your calls to another phone number if you don’t answer your phone after a determined number of rings. By default calls roll to voicemail, which is typically the standard setting for this option.

Call Forwarding Selective
Automatically forward incoming calls to a different phone number when pre-defined criteria, such as a phone number, time of day or day of week, are met.

1. Click the Edit button.
2. Enter the Default Call forward to phone number / SIP-URL in the field if you want all calls to be forwarded. Different numbers can be added when you define particular rules.
3. Make sure Is Active is checked.
4. Checking the Play Ring Reminder when a call is forwarded causes your phone play a short audible ring when receiving a call; it’s intended as a reminder that your phone is forwarded.
5. Click Add Rule to display the rule menu.
6. Provide a Description for the rule you’re creating.
7. Specify the forwarding number you want to use for this entry. You can either select Use Default Forward Phone Number / SIP-URI which uses the number configured on the previous page, or select Forward to another Phone Number / SIP-URI, which allows you to have a specific number for specific rules. If you select Forward to another Phone Number / SIP-URI, you’ll need to enter the phone number in the field provided.
8. Select the Time Schedule.
   Note: Time Schedules can be added via the Call Treatment Schedule sub menu.
9. Select the Holiday Schedule.
10. Determine which calls you’d like to forward:
   • If you want all calls forwarded to your forwarding number, select Any phone number.
   • To forward only a selected group of phone numbers, select Following phone numbers.
   • Check the Any private number box to have all calls from private numbers forwarded directly to your forwarding number; be careful as you could prevent customers from reaching you.
   • Check the Any unavailable number box to have all calls from unavailable numbers forwarded to your forwarding number; be careful as you could prevent customers from reaching you.
   • Fill text boxes under Specific phone numbers, entering the complete phone number.
   Note: You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can appear only at the end of a group of digits and “?” wild cards.
   • If you need to specify more than 12 numbers, you’ll need to make a new Call Forwarding Selective entry with the same forwarding number as the current entry, then add the rest of the numbers you want forwarded.
11. Click the Done with Add Rule button.
**Note:** A single Rule only accommodates either a Time Schedule or Holiday Schedule. If you want to use both, you’ll 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, results in the following error.
Call Notify

Send an email with the caller's name and number to a specified email address when pre-defined criteria, such as phone number, time of day or day of week, are met.

1. Click the **Edit** button next to **Call Notify** in the **Find Me** menu.
2. Enter the **Email Address** you’d like the call notification sent to.
3. If you want emails sent for every call received, press the **Save** button and you're finished. Otherwise, you can continue to step 4 and add specific rules for when emails will be sent.
4. Click **Add Rule** to display the rule menu.

![Call Notify Interface](image)

5. Provide a **Description** for the rule you’re creating.
6. Select the **Time Schedule**.
   **Note:** Time Schedules can be added via the Call Treatment Schedule sub menu.

7. Select the **Holiday Schedule**.
8. Determine which calls you’d like to receive an email notification for:
   - If you want to receive an email notification for all calls, select **Any phone number**.
   - To receive an email notification only for a selected group of phone numbers, select **Following phone numbers**.
   - Check the **Any private number** box to receive an email notification for all calls from private numbers.
   - Check the **Any unavailable number** box to receive an email notification for calls from unavailable numbers.
   - Fill in text boxes under **Specific phone numbers**, entering the complete phone number.
     **Note:** You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can appear only at the end of a group of digits and “?” wild cards.
   - If you want to specify more than 12 numbers, you need to make a new Call Notify rule, and add the rest of the numbers you want to be notified for.
9. Click the **Done with Add Rule** button.

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**Do Not Disturb**

Automatically forwards calls to your voice messaging service, if configured, otherwise the caller hears a busy tone. The **Play Ring reminder when a call is blocked** check box causes your phone to play a short audible ring when receiving a call, this is intended as a reminder that **Do Not Disturb** is enabled. When Do Not Disturb is activated, the icon next to your extension appears with an “X”, which is a visual that your phone is in Do Not Disturb mode. When Do Not Disturb is deactivated, the “X” is replaced with a phone icon.

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**Simultaneous Ring**

**Simultaneous Ring** allows you to list up to 10 phone numbers or SIP-URI addresses you’d like to ring, in addition to your primary phone when receiving incoming calls. This feature is helpful when you’re not at your phone and would like your cell phone to ring for incoming calls. You can also turn off **Simultaneous Ring** when you’re at your desk. The criteria for each **Simultaneous Ring** entry can be a list of up to 12 phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria for an entry must be satisfied for the call to enter **Simultaneous Ring** (phone number and day of week and time of day). If the criteria do not match, the call continues as if this service was not turned on. **Warning**: if your cell phone or other phone has voice mail that picks up before your office voice messaging picks up, your voice mails could be on an alternate voice messaging system!
1. Click the **Edit** button next to **Simultaneous Ring** in the **Find Me** menu.
2. Select when you’d like to receive **Simultaneous Ringing** for your phone. You can do so for all calls, or just when you’re not actively on a phone call, click the appropriate radio button.
3. Click the **Add Number** button to add phone numbers you’d like to ring for incoming calls.

![Simultaneous Ring](image)

4. Enter the **Phone Number / SIP-URI** that you’d like to ring. Check the **Answer confirmation required** check box if you’d like the system to require you to press a button on your phone before passing the call to you. It is suggested you leave this unchecked.
5. Click the **Save** button. Repeat steps 3 through 5 until you’ve added all numbers you’d like to ring for incoming calls.

![Simultaneous Ring - Add Simultaneous Ring Number](image)

6. You can now add optional rules for when **Simultaneous Ringing** occurs. Click the **Add Rule** button.

![Simultaneous Ring - Add Rule](image)
7. Provide a Description for the rule you’d like to create.
8. Select the Time Schedule.
   Note: Time Schedules can be added via the Call Treatment Schedule sub menu.
9. Select the Holiday Schedule.
10. Determine which calls you’d like Simultaneous Ringing to be active for:
    • If you want Simultaneous Ringing to be active for all calls, select Any phone number.
    • To have Simultaneous Ringing active for a selected group of phone numbers only, select Following phone numbers.
    • Check the Any private number box to have Simultaneous Ringing active for all calls from private numbers.
    • Check the Any unavailable number box to have Simultaneous Ringing active for calls from unavailable numbers.
    • Fill text boxes under Specific phone numbers, and enter the complete phone number.
      Note: You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can appear only at the end of a group of digits and “?” wild cards.
11. If you want to specify more than 12 numbers, you’ll need to make another Simultaneous Ringing rule, adding the rest of the numbers you want Simultaneous Ringing to be active for.
12. Click the Done with Add Rule button.

Sequential Ring

Sequential Ring allows you to sequentially ring up to 5 devices or locations, in addition to your primary device, for a specified number of rings. The 5 locations can be either a phone number or a SIP-URI. The feature applies to calls matching your pre-defined criteria. Use this service to ring calls from your manager, a family member, or an important customer on your cell phone, alternate business phone, or home phone.

The criteria for each Sequential Ring entry can be a list of up to 12 phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria for an entry must be satisfied for the call to trigger Sequential Ring (phone number and day of week and time of day). If the criteria do not match, the call continues as if this service was not turned on.
Several services take precedence over the **Sequential Ring** service. Some of these services are:

- Call Forwarding Always
- Call Forwarding Selective
- Selective Acceptance
- Selective Rejection

If you’ve activated any of the above services, the call continues as if the **Sequential Ring** service was not turned on. Conversely, the **Sequential Ring** service takes precedence over the following services, among others:

- **Call Forwarding Busy - Call Forwarding No Answer - Voice Messaging**

1. Click the **Edit** button next to **Sequential Ring** in the **Find Me** menu.
2. Enter the **Phone Numbers** you’d like to ring. Make sure you put them in order from first to last.
3. Check the **Answer confirmation required** check box next to each number if you’d like the system to require you to press a button on your phone before passing the call to you.
4. Select the **Number of Rings** you’d like each location to ring before moving to the next number on the list. Keep in mind that the more rings you have for each location, the better chance the calling party will disconnect before cycling through all your numbers.
5. Check the box **Enable Base Location first** if you want your office phone to ring before the other numbers on the list.
6. Select the **Number of Rings** for your office phone (base location)
7. Check the box **Continue the search process if base location is busy** if you want the system to continue calling your other numbers when all your office lines are in use.
8. Check the box **Enable caller to skip searching process** if you’d like incoming callers to have the option to go straight to your voice mail.
9. If you’d like to add a rule for when **Sequential Ring** activates, click the **Add Rule** button.
10. Provide a **Description** for the rule you’d like to create.
11. Select the **Time Schedule**.
   
   **Note:** Time Schedules can be added via the Call Treatment Schedule sub menu.

12. Select the **Holiday Schedule**.
13. Determine which calls you’d like Sequential Ringing to activate for:
   - If you want for Sequential Ringing to be active for all calls, select **Any phone number**.
   - To have Sequential Ringing active for a selected group of phone numbers only, select **Following phone numbers**.
   - Check the **Any private number** box to have Sequential Ringing active for all calls from private numbers.
   - Check the **Any unavailable number** box to have Sequential Ringing active for calls from unavailable numbers.
   - Fill text boxes under **Specific phone numbers** and enter the complete phone number.
   
   **Note:** You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can appear only at the end of a group of digits and “?” wild cards.

14. If you want to specify more than 12 numbers, add another new Sequential Ringing rule, and add the rest of the numbers you want Sequential Ringing to be active for.
15. Press the **Done with Add Rule** button.
16. Click the **Save** button to save your settings.

![Sequential Ring](image)

**Hoteling**

**Hoteling Host** allows users to associate their seat profile to your handset device. **Hoteling Guest** allows you to associate your profile to a handset device that is defined as a Hoteling Host.

1. Click **Call Features** from the main menu, then **Hoteling** from the sub menu.

![Call Features](image)

2. To make your device a hotel host, click the **Hoteling Host On** radio button; if you don’t wish to host another user, select the **Hoteling Host Off** radio button.

   **Note:** With Hoteling Host enabled, a GuestIn softkey displays on your phone for guests to login; a GuestOut softkey displays for guests to logoff. These softkeys only display if softkey integration is enabled by your company administrator.

3. **Enforce Time Limit** allows you to define how long a guest can associate to your seat; to define a time, click the **On** radio button and enter the number of hours in the **Hours** field. Guests will be forced off your device when reaching that time limit.
4. **Permission Level** allows you to determine if anyone from within your organization can associate to your phone or contain that access to individuals within your own group or location.

5. If a guest does associate their profile to your handset device, the Last Name, First Name, Phone Number, Extension, Location Dialing Code and Associated Date for that user appears in the **Associated Guest** field.

6. To enable your ability to associate your profile to a Hotel Host device, click the **Hoteling Guest On** radio button; if you don’t wish to associate to another device, click the **Hoteling Guest Off** radio button.

7. To set the time limit of guest association, click the **Enforce Time Limit On** radio button; enter the number of hours you wish to remain associated in the **Hours** field. Once that time limit is met, your profile drops from the Hotel Host it was associated to.

8. The **Guest Pin** allows you to log into a Host device; the PIN must be numeric between 6-8 charters in length.

9. To log into a Host Device, click the **GuestIn** softkey, enter your 10-digit phone number and PIN.

10. To log into a Host Device from the portal, find **Available Hosts** and drag/drop them to the **Associated Host** field.

11. Click the **Save** button.
Managing PC Receptionist Users

Manage PC Receptionist Users allows you to add users within the Receptionist PC Console you wish to monitor. Those users are listed under Favorites within the Receptionist PC Console and can be easily used to process calls and monitor status of those individuals.

Note: If you’re not assigned a Receptionist Soft Console, you won’t see Manage PC Receptionist Users within the Call Features sub menu.

1. Click Call Features on the main menu, then Manage PC Receptionist Users from the submenu.
2. Select which group from the Select a Group dropdown box to find the users you wish to monitor or select Search ALL – Across Enterprise to display all users within your company.
3. Select the users from the Search Results field you wish to monitor (you can monitor up to a maximum of 200 users across your enterprise).
4. Drag and Drop those users from the Search Results field to the Monitored Users field.
5. To refine your search, select your search criteria from the Find dropdown box, First Name, Last Name or Phone.
6. Enter the search criteria or partial search criteria in the “that includes” field.
7. Click the Search button.
8. Once all users are moved to the Monitor Users field, click the Save button.
9. A sign on link to launch the **Receptionist PC Console** can be found in the upper right-hand corner of your portal.
10. Click on this link to launch the PC Console.

11. When you’ve logged into the **Receptionist PC Console**, expand the **Favorites** directory under **Contacts**.
12. The users selected to monitor are displayed.
13. Their phone status indicates whether they’re available, on a call, forwarded or in do not disturb mode.

**Privacy**

Within the **Privacy** section, define call rejection and call blocking settings.
Anonymous Call Rejection

Anonymous Call Rejection allows you to reject calls from callers who have blocked the display of their number. Only deliberate anonymous numbers are rejected. Callers whose numbers are unavailable, are not rejected. Callers that are rejected are informed that you’re not accepting calls from unidentified callers. Your phone does not ring and you don’t receive any indication they called. However, this does not apply to calls within your company. Be careful if enabling this, as you could prevent customers from reaching you.

Selective Call Rejection

Reject calls when pre-defined criteria, such as phone number, time of day or day of week, are met.

1. Click the Edit button next to Selective Call Rejection under the Privacy menu.
2. Click the Add Rule button.
3. Provide a Description for the rule you’re creating.
4. Select the Time Schedule.  
   Note: Time Schedules can be added via the Call Treatment Schedule sub menu.
5. Select the Holiday Schedule.
6. Determine which calls you would like Selective Call Rejection to be active for:
   - If you want Selective Call Rejection activated for all calls, select Any phone number.
   - To have Selective Call Rejection active for a selected group of phone numbers only, select Following phone numbers.
   - Check the Any private number box to have Selective Call Rejection active for all calls from private numbers; be careful, as you could prevent customers from reaching you.
   - Check the Any unavailable number box to have Selective Call Rejection active for calls from unavailable numbers; be careful, as you could prevent customers from reaching you.
   - Fill text boxes under Specific phone numbers, entering the complete phone number.
   Note: You can use wild cards. The "?" is a wild card that can replace a single digit anywhere in a digit string. A trailing "*" represents a digit string and can appear only at the end of a group of digits and "?" wild cards.
7. If you want to specify more than 12 numbers, add another new Selective Call Rejection rule, and add the rest of the numbers you want Selective Call Rejection active for.
8. Press the **Done with Add Rule** button.

9. Click the **Save** button to save your rule settings.

**Selective Call Acceptance**

Only **Accept** calls when pre-defined criteria, such as phone number, time of day or day of week, are met.

1. Click the **Edit** button next to **Selective Call Acceptance** under the **Privacy** menu.
2. Click the **Add Rule** button.
3. Provide a **Description** for the rule you’re creating.
4. Select the **Time Schedule**.
   
   **Note:** Time Schedules can be added via the Call Treatment Schedule sub menu.

5. Select the **Holiday Schedule**.
6. Determine which calls you would like Selective Call Acceptance to be active for:
   - If you want Selective Call Acceptance to be active for all calls, select **Any phone number**.
   - To have Selective Call Acceptance active for a selected group of phone numbers only, select **Following phone numbers**.
   - Check the **Any private number** box to have Selective Call Acceptance active for all calls from private numbers; be careful, as you could prevent customers from reaching you.
   - Check the **Any unavailable number** box to have Selective Call Acceptance active for calls from unavailable numbers; be careful, as you could prevent customers from reaching you.
   - Fill text boxes under **Specific phone numbers**, entering the complete phone number.
     
     **Note:** You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can appear only at the end of a group of digits and “?” wild cards.

7. If you want to specify more than 12 numbers, add another new Selective Call Acceptance rule, and add the rest of the numbers you want Selective Call Acceptance to be active for.
8. Click the **Done with Add Rule** button.
9. Click the **Save** button to save your rule settings.

### Calling Line ID Blocking

When the **On** radio button is selected, caller ID for all outbound calls will be blocked; if you keep this setting to **Off**, you can selectively block caller ID by pressing *67* on your keypad before dialing the 10-digit phone number.

### Virtual Desk

The **Virtual Desk** menu allows you to manage several features including **Anywhere**, **Remote Office**, **Distinctive Ring**, **Line Status** and **Custom Ringback** and **Mobility**.

#### Anywhere

The **Anywhere** feature allows you to utilize this feature to move active calls seamlessly from your IP handset to a defined **Anywhere** device, such as a mobile phone; or conversely from your assigned **Anywhere** device to your IP handset.

1. Click **Virtual Desk** on the main menu, then **Anywhere** from the sub menu.
2. This feature is available on **Premium** seats only.
3. If this feature is not available for your seat type, you won’t see the “**Anywhere**” option under the **Virtual Desk** main menu.
4. **Alert all locations for Click-to-Dial calls** option:
   
a. When turned on, this option causes all your devices (primary phone, Shared Call Appearances, softphones, etc.) to ring when using click-to-dial. Once you answer any of your devices, a call to the recipient is then dialed. If you don’t answer one of your devices, the call will not be sent.

5. Click the **Add Phone Number** button.

6. Enter the **Phone Number** (10-digits only) of the phone or mobile device you wish to use to receive calls away from your office.

7. Enter a **Description** of that device.

8. Click the **Yes** radio button for **Enable This Location** to activate this feature.

   **Note:** If you enable your Anywhere device, calls ringing to your desktop handset ring your desktop phone as well as your enabled Anywhere device; select No if you don’t want both devices to ring. If this feature is defined but not enabled, you can still move calls between your desktop handset and Anywhere device, this setting prevents your Anywhere device from ringing for all incoming calls.

   **Note:** If you download the Business Communicator App on your SmartDevice, the Enable This Location feature should be turned off by selecting NO.

9. Select any additional features you want to activate, click the **Save** button.
Prevent Redirection
Prevents calls from being redirected to voice mail.

Require Answer Confirmation
Requires you to press a button to answer a call on your mobile device. It is suggested that you keep this feature disabled to more easily answer your call.

Enable Mobility Applications
Determines whether call control is to be performed by the application server.

Selective Criteria
Selective Criteria allows you to determine which calls ring to your Anywhere device only when pre-defined criteria, such as phone number, time of day or day of week, are met.

1. After information on the Phone Number tab is completed and Saved, click the Selective Criteria tab.
2. Click the Add button.
3. Enter a Description for your Selective Criteria.
4. Click the Use Anywhere radio button to active this feature.
5. Select the appropriate Time Schedule from the dropdown box. If you created and saved a Time Schedule within Call Treatment Schedules, that option will be available in the dropdown box.
6. Select a Holiday Schedule.
7. Determine which calls you would like Selective Criteria to be active for:
   • If you want your Selective Criteria to allow calls from any number, select Any External Phone Number.
   • To have your Selective Criteria active for a selected group of phone numbers only, select The Following Phone Numbers.
   • Check the Any private number box to have Selective Criteria active for all calls from private numbers.
• Check the **Any unavailable number** box to have **Selective Criteria** active for calls from unavailable numbers.

• Fill text boxes under **Specific Numbers**, entering the complete phone number.

  **Note:** You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can appear only at the end of a group of digits and “?” wild cards.

8. If you want to specify more than 12 numbers, add another new **Selective Criteria** rule, and add the rest of the numbers you want **Selective Criteria** to be active for.

9. Click the **Save** button.

10. Click the **Save** button, or click **Add** to enter another Selective Criteria option and follow steps 3 through 9 as described above.
Move an Active Call from your IP Handset to Your Anywhere Device

After your Anywhere device is defined, move calls seamlessly between your IP handset and your Anywhere mobile device.

1. Click Virtual Desk from the main menu, then Anywhere from the sub menu.
2. The Anywhere pilot number you’ll use is listed under the Available Anywhere Numbers section.
3. It’s strongly suggested this number be added as a speed dial or contact on your Anywhere mobile device for easy access.

4. With a call in progress on your IP handset, dial your Anywhere pilot number from your Anywhere mobile device.
5. When you hear "Destination Digits", enter *11# on your mobile device.
6. The caller moves seamlessly from your IP handset to your Anywhere mobile device.

Make a Call From your Anywhere Device

Making a call from your Anywhere device sends the caller ID of your IP handset, not the caller ID of your mobile device.

1. Dial the Anywhere pilot number.
2. When asked to enter Destination Digits, enter the number you wish to dial.
3. The call is sent, and the party you’re calling sees the caller ID of your IP handset.

Move an Active Call from Your Anywhere Device to Your IP Handset

If you placed a call using Anywhere from your mobile device and return to the office, you can seamlessly move that call to your IP handset.

1. From your IP handset, press the Pull softkey.
2. This seamlessly moves the call from your Anywhere device to your IP handset.
3. If you don’t have a Pull softkey, establish dial tone and dial *11 on your keypad.
Custom Ringback

Custom Ringback allows you to provide a custom ring tone or recording heard by callers when your line is ringing. This can be enabled for all calls, or for specific calls matching your pre-defined criteria. Use this service to play a different ring back to your manager, a family member, or a customer. The criteria for each Custom Ringback Selective entry can include a list of up to 12 phone numbers or digit patterns, a specified time schedule, or a specified holiday schedule. All criteria for an entry must be satisfied for the ring back to be played (phone number and day of week and time of day). Otherwise, regular ring back is played to the caller, as if this service was not used.

1. Click Virtual Desk from the main menu, then Custom Ringback from the sub menu.
2. Click the Create Custom Ringback button.

3. On the General Settings tab, enter a Description for your Custom Ringback setting.
4. Next to Active, click the Yes radio button to activate this feature, click No at any time to deactivate it.
5. From the Time Schedule dropdown box, choose to activate this feature Every Day All Day, or select any personal or group time schedule that has already been set up.
6. If you have set up Holiday Schedules, select your schedule from the Holiday Schedule dropdown box.
7. Within Alert Calls From section, you can define which call types follow this rule; if you want this rule to be in use for all incoming calls, the Any Phone Number radio button should be active.
8. To define specific numbers, click the radio button next to The Following Phone Numbers.
9. Then choose from Any Private Number, Any Unavailable Number or Specific Numbers. All three options can be enabled.
10. Click the Save button to save your settings.
11. If checking the **Specific Numbers** box, you’ll have the ability to enter up to 12 numbers you want to follow this rule.
12. Enter the **10-digit number** for each number you want to follow this rule.
13. Click the **Save** button to save your settings.
14. The **Custom Ringback** only be plays for individuals calling from those numbers, all others will hear the standard ring.
15. To upload your Custom Ringback file, click the **Initial Ringback** tab.
16. If the radio button for **No Personal Ringback** is selected, the ring back file will not play.
17. If the ring back file you want to play is on a network, click the **URL** radio button.
18. Enter the URL of the file in the **URL** field.
19. To upload an audio ring back file from your computer, click the **Personal Ringback File** button.
20. Click the **Browse** button to locate your audio file based on your operating system.
21. Click the **Save** button to save your settings.

**Distinctive Ring**

**Distinctive Ring** allows you to make your phone ring with different rings based on pre-defined criteria. Use this service if you want to know when a specific person calls such as your manager or spouse, or when you would like to easily tell when a call is from inside or outside your group. The criteria for each **Distinctive Ring** entry can be a list of up to 12 phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria for an entry must be met for the phone to ring with a different tone (phone number and day of week and time of day).

1. Click **Virtual Desk** from the main menu, then **Distinctive Ring** from the sub menu.
2. Click the **Create New Distinctive Ring** button.
3. Enter a **Description** for your **Distinctive Ring**.
4. Click the **Active** radio button to activate this feature.
5. Select the appropriate **Time Schedule** from the dropdown box. If you created and saved a Time Schedule within Call Treatment Schedules, that option will be available in the dropdown box.
6. Select a **Holiday Schedule**.
7. Determine which calls you would like **Distinctive Ring** to be active for:
   - If you want your **Distinctive Ring** to play for calls from any number, select **Any External Phone Number**.
   - To have your **Distinctive Ring** play for a selected group of phone numbers only, select **The Following Phone Numbers**.
   - Check the **Any private number** box to have **Distinctive Ring** play for all calls from private numbers.
   - Check the **Any unavailable number** box to have **Distinctive Ring** play for calls from unavailable numbers.
   - Fill text boxes under **Specific Numbers**, entering the complete phone number.
     - **Note**: You can use wild cards. The "?" is a wild card that can replace a single digit anywhere in a digit string. A trailing "*" represents a digit string and can appear only at the end of a group of digits and "?" wild cards.
8. If you want to specify more than 12 numbers, add an additional new **Distinctive Ring** rule, and add the rest of the numbers you want **Distinctive Ring** to be active for.
9. Click the **Save** button.
Line Status

Line Status is an information only screen. It provides information about your phone such as whose line may appear on your phone as either a BLF or Shared Call Appearance, phones you may appear on, the configuration of those lines, etc. If changes are needed, contact your company administrator.

1. Click Virtual Desk from the main menu, then Line Status from the sub menu.
2. Hover over the “?” for a description of each feature.

Busy Lamp Field

- Indicates if your line appears on another user’s phone
- Lists lines appearing on your phone
- Indicates ring type for those users – ring or silent
- Default line key action – normal or automata
- Call appearance status – enabled or disabled
- Remote caller ID – enabled or disabled

Shared Call Appearances

Lists information about any users you monitor:

- Device Name
- MAC address of their device
- User it belongs to
- Action
Shared Call Appearance Configuration

- Status of alerting all appearances when you click-to-dial – yes or no
- Status of your ability to retrieve calls from another location – yes or no

Multiple Call Arrangement Configuration

- Status of bridging between locations – yes or no
- Status of multiple call arrangement – yes or no
- Status of bridging warning tone – yes or no

Mobility (Business Communicator)

Business Communicator is the next generation softphone offered to Hosted VoIP customers. If you were assigned a Business Communicator, it’s reflected in the welcome email you received from your administrator. The links to download the application to your desktop (PC or MAC), or mobile devices such as smart phones and tablets, can be found by clicking on Help from the main menu, and then within the Downloads section.

1. One license allows you to download and use the application on multiple devices.
2. Hover over or click on Help from the main menu.
3. Scroll to Downloads and click on the link to download the device for your operating system, PC or MAC.

Note: If a license was not assigned to you, you won’t see these options under Downloads in your portal.
4. Apps for mobile devices can be acquired by clicking on the links below, or by visiting the app store for your mobile device.

5. If downloading the applications via the app store on your mobile device, be sure to download the correct app.

6. Look for this following Business Communicator icon.

7. Click on Virtual Desk from the main menu, then Mobility from the sub menu.
8. To activate Mobility between your IP handset, softphone and another device, click the On radio button.
9. From the Phone to Ring dropdown box, you can choose your preferred option:
   - Both – rings your IP handset, Mobile App and your mobile device dialer
   - Fixed – rings your IP handset and Mobile App (suggested setting)
   - Mobile – rings your mobile device dialer only
10. In the Mobile Number field, enter the mobile number you wish to assign.
11. Toggle the Yes or No radio buttons for the remaining features to enable or disable them according to your preference.
   - Alert for Click-to-Dial – rings the user’s mobile phone when the user makes a click-to-dial call
   - Enable Division Inhibitor – prevents redirection of unanswered incoming calls
   - Requires Answer Confirmation – prompts the user to enter a confirmation digit before completing the mobile call leg answered by the user (not recommended)
   - Use CenturyLink-based Call Control Services – specifies that call control is to be performed by CenturyLink and not by the mobile device
12. Click the Save button.
Remote Office

Remote Office allows you to use your home phone, a mobile phone, or even a hotel phone as your business phone. When Remote Office is enabled ("on"), calls to your desktop handset only ring to your Remote Office device, the call will not be presented to your desk phone.

1. Click Virtual Desk from the main menu, then Remote Office from the sub menu.
2. Enter the phone number (10-digits only) you want to designate as your Remote Office location.
3. Click the Remote Office On radio button to activate this feature; click the Remote Office Off radio button when you do not wish to utilize this feature.
4. Click the Save button.
Voice Mail

The Voice Mail section of the portal allows for quick and easy access to your Voice Mail messages and mailbox settings. Remember, Voice Mail must first be setup through the phone by pressing the Messages key or by calling the Voice Mail Retrieval Number; found on the right side of the portal's main landing page. 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.

Inbox

The Inbox allows you to view, play, and delete your voice mail messages. This includes the ability to see the name of the sender, phone number, and time/date stamp for the message.

1. Click Voicemail from the main menu, then Inbox from the sub menu.

2. All messages, new and saved, are listed in your inbox. New messages will be identified with BOLD text and a Green dot icon.

3. Information about each message, such as Name, From Number, Received date and Length of message are provided for quick review.

4. Messages can be sorted within any column by clicking on the orange up/down arrows.

5. To Play a message, check the box next to the message you want to play, and click the Play icon.

6. The length of the message is listed under the Length column as well as next to the Play icon.

Note: Playing a message in your portal turns off your message waiting light but will not mark the message as played in your phone voicemail box.
7. To **Delete** a message or messages, or **Mark Them as Heard** or **Unheard**, check the check box next to the message(s) you wish to manage.

8. Select the icon above the **Inbox** based for the action you wish to accomplish, or select **Delete** or **Mark as Unheard** in the play message pane.

9. To selectively choose multiple messages, use **Ctrl-Alt** or **Ctrl-Shift** to select your options.

   **Note:** If you delete a message from this Inbox, it will be deleted from your phone voicemail box.

10. To download a message, click the **Download Voicemail** icon after selecting a message.

11. The action window appearing is based on the browser you’re using.

12. You can choose to play the message by clicking **Open With**, or you can save the file by clicking **Save File**.

13. Click the **Ok** button.
14. The Escape To Operator Group you’re assigned to, is indicated in the upper right hand corner of the Inbox window.

15. Your Escape To Operator Group is where callers route to if they press “0” while listening to your greeting; None indicates you’ve not been assigned to an Escape To Operator Group.

16. Callers can choose to flag messages as Private or Urgent.

17. Messages with a Red Exclamation Point icon, indicates the message was flagged as Urgent.

Settings

The Settings screen allows you to configure specific mailbox settings, reset your password, and enable voicemail forwarding to email.

1. Click Voicemail from the main menu, then Settings from the sub menu.

2. If you click the Enable radio button for Announcement Only Mailbox, caller aren’t allowed to leaves messages; they’re dropped after your greeting is played.

3. To change the PIN for your telephone voicemail box, enter the new PIN in the Mailbox PIN field.
4. Confirm that PIN by entering it in the **Verify Mailbox PIN** field.

5. Select **Standard** or **Rapid** from the **Prompt Speed** dropdown box; this controls the speed of the **Telephone User Interface** (TUI) when you dial into our voicemail box.

6. Click the **Enable** or **Disable** radio buttons to manage the following features:
   - **Automatically Play Envelope Information** – audibly provides Date/Time and Length of voicemail message
   - **Play Additional Ring Before Greeting** – prevents the beginning of your greeting from being cut off
   - **Auto Play** -- automatically plays messages when you log into your mailbox
   - **PIN Skip** – allows you to skip entering your voicemail PIN if you’re calling from your desk phone; for security purposes, it’s suggested this feature remain disabled.
7. **Voice Mail Forwarding** allows you to send copies of voicemails to your email inbox.
   - **Forward & Delete** – forwards a copy to your email inbox, but doesn’t retain a copy in your phone voicemail box (the only copy of your message will be in email)
   - **Forward & Save** – forwards a copy to your email inbox and also retains a copy in your phone voicemail box
   - **Disable** – default setting if you choose to not use this feature
8. After choosing your forwarding option from the dropdown box, enter an email address(es) in the **Forward to Email Address** field.
   - **Note:** Multiple email addresses and distribution lists can be entered in the Forward to Email Field, using comma separation.
9. Click the **Save** button.

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**Names and Greetings**

From **Names and Greetings**, upload **Name** and **Greeting** recordings, select **Open Hours Greeting Type**, and upload recordings for **Extended Absence** greetings. To manage recordings from this portal, you’ll first need to access and set up your voicemail box including recording your name, greeting and defining your open and closed schedules.

1. Click **Voicemail** from the main menu, then **Name and Greetings** from the sub menu.
2. **Name** and **Greeting** recordings can be uploaded, recorded, deleted or played.
3. Click the greeting type you want to manage from the **Open Hours External Greeting Type** dropdown box and select from the following options:
   - **Standard Greeting with Number** – caller is greeted with a standard greeting including your number
   - **Standard Greeting with Name** – caller is greeted with a standard greeting including your recorded name
   - **External Personal Greeting** – caller is greeted with your recorded external greeting
4. Click the **Save** button.

5. Record any of your greetings or rerecord your name by clicking the **Record** button next to the greeting type you want to change.
6. You can also manage your greetings by clicking the **Upload** button.
7. Click the **Browse** button to locate your greeting tile.
8. Files can be retrieved from any file location including local drives, network drives or removable drives based on your operating system.
9. Once your file is selected, it appears next to Select File.
10. Click the **Upload** button to complete the upload of your greeting.

![Image of upload process]

11. Your uploaded greeting can be played or reviewed by clicking the green play “>” button.
12. Click the **Delete** button to remove current recordings.

![Image of delete process]

### Notifications

The **Notifications** option allows you to manage your **Message Waiting Indicator** and set up **Outcall Notification** to a cell phone or **Text Notification** to an email inbox.

1. Click **Voicemail** from the main menu, then **Notifications** from the sub menu.
2. The **Message Waiting Indicator** settings turns the light on/off on your desktop handset.
3. Choose to **Enable** or **Disable** this setting by selecting the appropriate radio button; **recommended setting is Enable**.
4. Once setting changes are made, click the **Save** button.

![Image of notifications settings]
5. Click the **Outcall Notification** tab.
6. Click the **Active Schedule** dropdown box and choose an option from the list.

7. From the **Message Type Notification** dropdown box, choose from **All Messages** or **Urgent**, which should prompt the sending of a text notification.
8. Enter the 10-digit phone number of the device receiving the text, in the **Out Call Number** field; input for this field is numeric only, no dashes or special characters.

9. Click the dropdown box to select your **Delivery Interval** for Urgent Messages; Immediate or 1 hour, 2 hours, 4 hours, 1 day, Never.
10. Click the dropdown box to select your **Delivery Interval** for Normal Messages; Immediate or 1 hour, 2 hours, 4 hours, 1 day, Never.
11. Click the dropdown box to select your **Number of Times to Retry** for Urgent Messages; 1, 2, 3 .... 10.
12. Click the dropdown box to select your **Number of Times to Retry** for Normal Messages; 1, 2, 3 .... 10.
13. Click the dropdown box to select your **Retry Interval** for Urgent Messages; 0-15 minutes.
14. Click the dropdown box to select your **Retry Interval** for Normal Messages; 0-15 minutes.
15. Click the dropdown box to choose from three **Notification** options:
   - Notifications OFF, 24 hours a day
   - Notifications ON, 24 hours a day
   - Notifications ON, during these times** - must define Start/End times for Monday-Friday and Saturday-Sunday.
16. In this example, text notifications are sent from **7:30a.m. to 5:30 p.m., Monday through Friday**.
17. No text notifications are sent on **Saturday** and **Sunday**.
18. Click the **Save** button.

19. Click the **Text Notification** tab.
20. In the **Notification Enabled for** dropdown box, select from **None, All Messages** or **Urgent Messages**. It is recommended to select **All Messages**, as most individuals neglect to mark messages as **Urgent**.
21. In the **Email(s) field**, enter the email address(es) or distribution lists that should receive Text Notification to Email when a message is left.
22. Click the **Save** button.
Work Schedule

Unlike the Schedule option within the Notifications feature, Work Schedule allows you to change the days and time your Open and Closed greetings play for your callers.

1. Click Voicemail from the main menu, then Work Schedule sub menu.
2. Select the days of the week you want your schedule to take effect by check or unchecking the check boxes.
3. Once your days are select, choose the Weekday or Weekend schedule based on the days selected.
4. From the Weekdays or Weekend dropdown box, choose your option from the following:
   - Play Open/Personal Greeting during these times
5. Once all settings have been made, click the Save button.

Contacts

Contacts allows you to save frequently used contacts to your portal for quick access. Contacts can be added one at a time, or via bulk upload. Once saved, utilize the click-to-dial feature directly from your contacts list. You can also add/modify your Speed Dial 8 and Speed Dial 100 lists to easily dial from your handset using a 1 or 2 digit code.
Adding One Contact

Contacts can be added in individually or in bulk.

1. Click Contacts from the main menu, then Contacts from the sub menu.
2. Contacts previously added, are displayed within the contacts table.
3. Sort columns by clicking up/down arrows to sort in ascending or descending order.
4. Click the New Contact button.

![Image of contact page]

5. Enter the Name of the new contact.
6. Enter the Phone Number for the new contact, 10-digits only.
7. If you’d like that contact to be associated as a Favorite on your handset, click the Favorite check box.
8. Click the Save button.
9. Receive notification your contact has been successfully added.
10. Your contact is now available within your Personal Contacts list.
11. Click directly on the contact Name to edit the contact information.
12. Click directly on the Phone Number to dial that contact.
13. Click the Delete button to delete that contact.

![Contact Management UI](image)

**Adding Multiple Contacts**

Multiple entries can be added to Contacts by uploading a .csv file.

1. Hover over the “?” next to Select a File to Upload.
2. Information pertaining to file format requirements are provided.

![Multiple Contact Import](image)
3. Click the **Browse** button from the contact window.

4. Select your document from any file location or external storage device.

5. The selected file is listed next to the **Browse** button.

6. Click the **Validate and Process** button to upload your contacts.

7. All contacts contained in your file are now available in your **Contacts** list.
**Speed Dial 8**

**Speed Dial 8** allows you to set up to eight speed dial numbers that can be dialed by entering a 1-digit number.

1. Click on **Contacts** from the main menu, then **Speed Dial 8** from the sub menu.
2. In the **Phone Number** and **Name** fields, enter the number as you would dial it and provide a unique name for each entry.
3. Click the **Save** button.
4. From your handset, **WITHOUT** dial tone, enter the 1-digit code on your keypad. Establish dial tone by lifting the handset, or by pressing the headset or handsfree button.

```plaintext
<table>
<thead>
<tr>
<th>Speed Dial Code</th>
<th>Phone Number</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2125551234</td>
<td>John Call</td>
</tr>
<tr>
<td>3</td>
<td>2125550874</td>
<td>Mike's Work</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

[Image: Speed Dial 8 interface]
**Speed Dial 100**

**Speed Dial 100** allows you to program up to 100 numbers that can be dialed by entering # plus a 2-digit number.

1. Click **Contacts** from the main menu, then **Speed Dial 100** from the sub menu.
2. If any **Speed Dial 100** numbers have been previously programmed, they display in your Speed Dial 100 list.
3. Click the **Add** button.

4. From the **Speed Dial Code 100** dropdown box, select the 2-digit code you wish to dial, such as 00.
5. Enter the contact’s name in the **Name** field.
6. Enter the contact’s number, as you would dial it, in the **Phone Number** field.
7. Click the **Save** button.
8. You receive a successful notification that your **Speed Dial 100** entry was added.
9. Click the **Edit** button at any time to change or reuse that 2-digit speed dial code.

![Speed Dial 100 interface](image)

10. To dial a **Speed Dial 100** entry from your handset, **WITHOUT** dial tone, enter **# + 2-digit code** on the keypad.
11. Press or tap the **Dial** soft key, or lift the handset, press the headset or speaker phone button.
12. Your call is sent to that number.
Call Recordings

If you’re defined as a Call Recording Administrator, access recordings for users assigned to you.

1. Click Call Recordings from the main menu, then Call Recordings from the sub menu.
2. Refer to the Call Recording User manual, for details on reviewing and managing recorded calls.

3. If you’re not defined as a Call Recording Administrator, and click on Call Recordings, you’ll receive the following error.
Profile & Settings

Profile and Settings allow you to update overall settings in the portal such as your contact information, password, and your 911 Location.

Profile

The Profile menu allows you to update your contact email address and add additional contact numbers that can be used when other employees try to call from the Enterprise Assistant Toolbar.

1. Click Profile & Settings from the main menu, then Profile on the sub menu.
2. The email address noted in the Notification E-Mail Address field is where notifications are sent for password resets, etc; confirm this Email Address is correct.

3. Make the necessary changes or add contact numbers to be used for click-to-dial from the Enterprise Assistant Toolbar.
4. It’s not necessary to make any changes to your Profile, the only field required is the Email Address field, which is denoted with an *.
5. Click the Save button.
Settings

The Settings menu allows you to update your time zone and your portal password.

1. Click Profile & Settings from the main menu, then Settings from the sub menu.
2. If your Time Zone is incorrect, choose the correct Time Zone from the dropdown box.
3. Enter a new Password for your Hosted VoIP portal, retype your new Password.
4. Click the Save button.

   **Note:** Changing this password changes the password to log into this portal, and also syncs with the password used to log into various applications such as Business Communicator, Supervisor or Agent Clients, Receptionist PC Console, Call Recording Dashboard and Enterprise Assistant Toolbar. If you change this portal password, you’ll use the new password to log into any of the applications noted above you’re assigned to.

911 Location

Anytime you’re using your phone at a service address other than your Base Location, you should log into your portal and update your 911 Location. This ensures that any emergency calls placed will be routed to the proper 911 Center. Be sure to read the entire disclosure on the 911 Location page before proceeding.
Adding a New 911 Location

1. Click **Profile & Settings** from the main menu, then **911 Locations** from the sub menu.
2. Click the “Show More” link for a full description of limitations and important information on changing your 911 location address.

3. The “**Base Location**” is your primary office address and is registered with 911 when your phone is built.
4. Select the **Add Location** button.
5. Enter a **Location Name** that describes the location of that address.
6. Enter the **Address Line 1**; the street address.
7. Enter **Address Line 2**; which is typically a suite number, floor or cube number.
8. Enter **City, State and Zip Code** for that location.
9. Click the **Save** button.

10. Your new location is now available in your address list but has not been registered with 911 at this point; to register this address click the **Set as Current Location** button.
11. Click the **Edit** button to change the location name.
12. Click the **Delete** button to delete an address entirely and/or if modifications need to be made to an existing address; if modification need to be made, the address must be deleted and re-added.
Changing your 911 Location

Once you’ve added a new location(s) to your 911 Location List, you’ll then be able to register any of those locations with 911.

1. Click Profile & Settings from the main menu, and 911 Location from the sub menu.
2. Click the Set as Current Location button.

3. You can change your address now or scheduling for a future date.
4. Click the Change Now button.
5. A confirmation box appears listing the address you’re changing with 911.
6. If the location and information is correct, click the OK button.

![Change Location](image1)

7. Your new location will be submitted for processing. You’ll receive an email confirming your order was placed, and an email when your order is completed.
8. Click the OK button.
9. 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.
10. Your Base and Current Location can always be reviewed on the right rail of your portal.
11. Click the OK button.

![Change Location](image2)
Scheduling a 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 overrides the existing one.

1. Click 911 Location from the Profile & Settings sub menu.
2. Click Set as Current Location for any locations you have predefined.

3. Click the Schedule a Future Change button to continue.

4. Click the Calendar icon next to the Date field.
5. Select the Date from within the calendar you want the 911 change to take effect.
6. Click the **Time** dropdown box.
7. Select the time, a.m. or p.m., that you want the 911 change to take effect.

8. Click the **Time Zone** dropdown box.
9. Select the **Time Zone** you’ll be in when the 911 change takes effect.
10. Review and confirm all your changes are correct.
11. Click the **Save** button.

![Schedule Future Change](image)

12. A confirmation box appears listing the changes you’re about to make.
13. To continue with these changes, click the **OK** button.

![Confirmation Box](image)
14. An information window appears confirming your change request has been submitted.
15. If a scheduled change was submitted, a confirmation email will be received within approximately 15 minutes of your scheduled change date and time.
16. Click the OK button.

17. You’ll see your Base Location is still registered as your 911 location.
18. The Scheduled Change will indicate the date and time of your scheduled change.
19. It also indicates the address/location that’ll register at that time/time.
20. To cancel this scheduled change, click the Cancel Change button.
21. Refer to the right rail on the main landing page of your portal, which always indicates your Base Location and Current Location.
22. The Current Location reflects the address/location that is currently registered with 911.
Help

Help provides download links for toolbars and softphones, and also provides access to quick reference guides and training materials.

1. Hover over Help on the main menu and select User Guides & Help Information, Did You Know? or What’s New?
2. Or click on Help from the main menu.

3. After clicking Help from the main menu, click on the document you wish to review.