



BUSINESS VOICE PORTAL USER GUIDE

USER GUIDE | May 2022

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Voice Portal Guide

Limited Users

VOICE PORTAL

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

Sign In for Voice Portal

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

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



The image shows a login form for PenTeleData. At the top is the PenTeleData logo. Below it is the heading "Login". There are two input fields: "Username" and "Password". The "Username" field has a red border and a red error message "Username is Required" below it. Below the "Password" field is a checkbox labeled "Remember Me". At the bottom is a "Login" button.

FIRST-TIME ACCESS

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

User Info

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



User Info - Sarah Jane (s.jane)

Account Name:	Documentation Demo
Account Number:	Business Cloud Comm.
Direct Phone Numbers:	1 (435) 628-3774
E911 Address:	CP-8851 256 Somerset Ln, Santa Clara, UT 84765
Outbound Caller ID:	14356283774
Devices:	CP-8851 - Line 11 CP-8851 - Line 2

IMPORTANT

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

Phone Numbers

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

Phone Numbers

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

Call Handling

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

Call Handling

Scheduling [Manage Schedules](#) 3 Schedules

Call Waiting

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

Ring Phone
Forward All
Sim Ring
Find Me

No Answer Send to Voicemail after 20 seconds

Busy Send to Voicemail

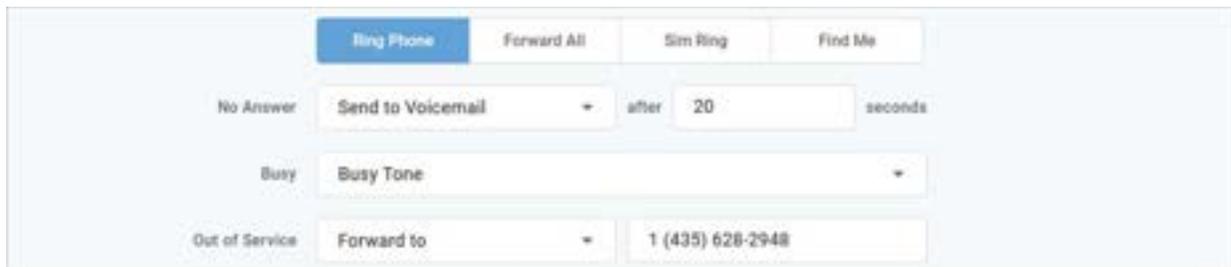
Out of Service Send to Voicemail

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

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

Ring Phone

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

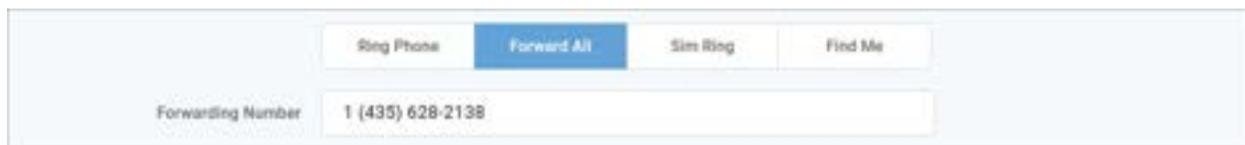


FEATURE	DESCRIPTION
No Answer	The call is unanswered after a specified number of seconds.
Busy	The device is busy (already in use and Call Waiting is not enabled).
Out of Service	The device has lost power or is otherwise not registering as an active device.

Forward All

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

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



Simultaneous Ring

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

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

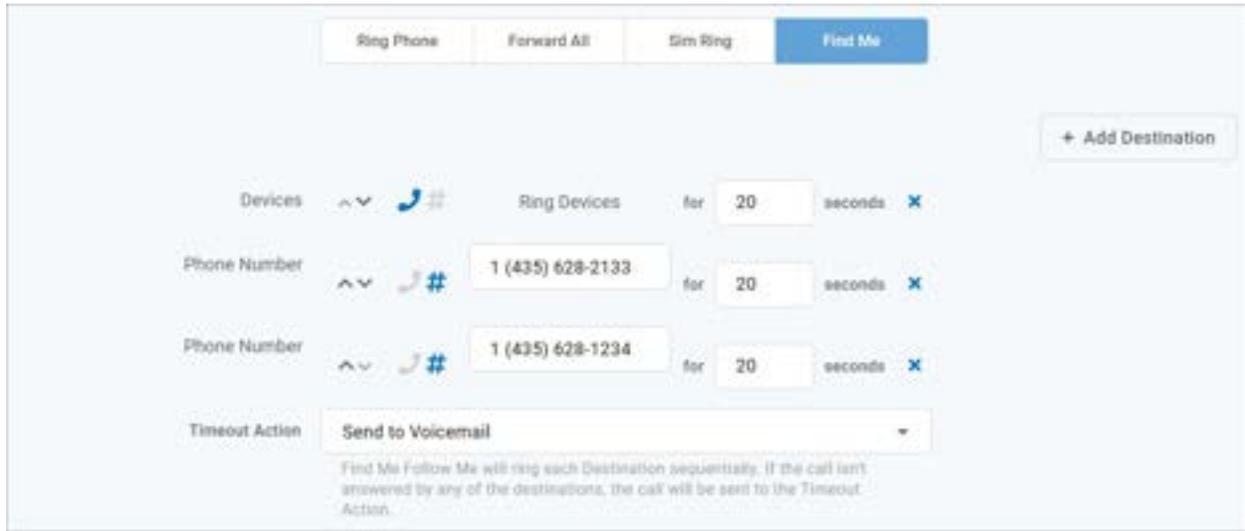
FEATURE	DESCRIPTION
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [+Add Number].
No Answer	<p>Choose what happens when the call is unanswered:</p> <ul style="list-style-type: none"> • Busy Tone • Forward to (add a forwarding number) • Ring Forever •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

VOICEMAIL

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

Find Me/Follow Me

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



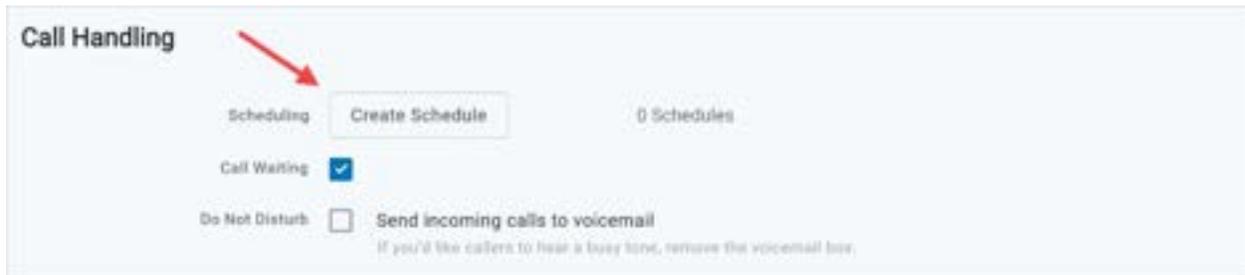
FEATURE	DESCRIPTION
Destinations	<p>Indicate if calls should route through  Devices or  Phone Numbers by clicking the respective icons.</p> <ul style="list-style-type: none"> • Use the   arrows to reorder the destinations. • Click [+ Add Destination] to add more destination fields.
Devices	<p>In the field provided, enter a timeout setting. Remember, calls that ring longer than 120 seconds may be disconnected by the carrier.</p>
Phone Number	<p>Enter the phone number calls should progress to and how long each number will ring.</p>
Timeout Action	<p>Choose what will happen to the call after all destinations have timed out:</p> <ul style="list-style-type: none"> • Busy Tone • Send to Voicemail

Schedules

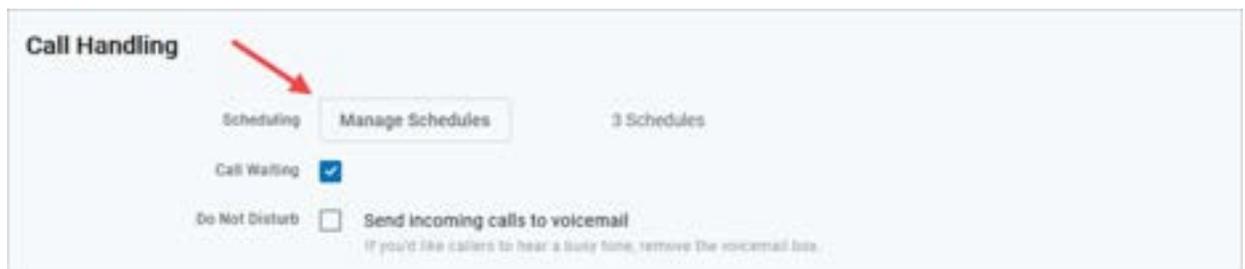
Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

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

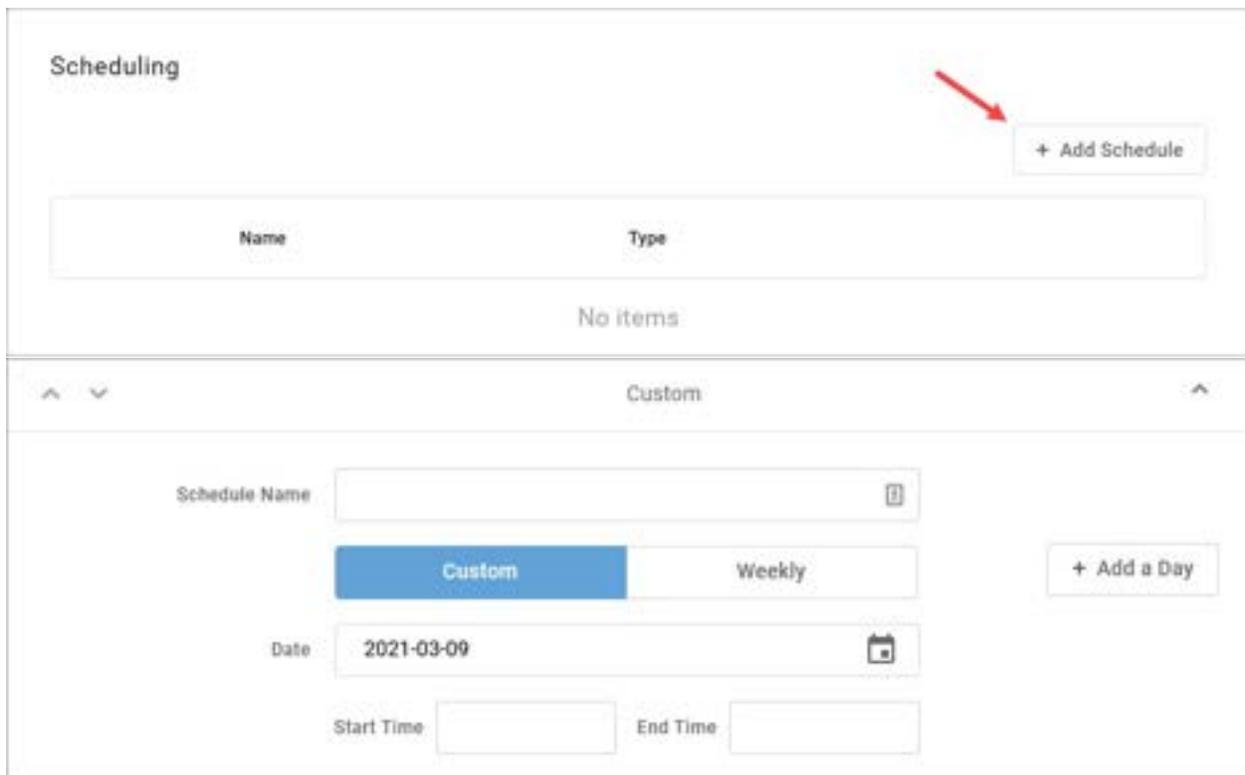
1. Within the Call Handling section, click [Create Schedule].



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



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



3. **SCHEDULE NAME:** Give the schedule a name.
4. **TYPE:** Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).
 - On a Custom schedule, click [+ Add a Day] to add another section.

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

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

Call Handling

Call Waiting

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

Ring Phone Forward All Sim Ring Find Me

No Answer Send to Voicemail after 20 seconds

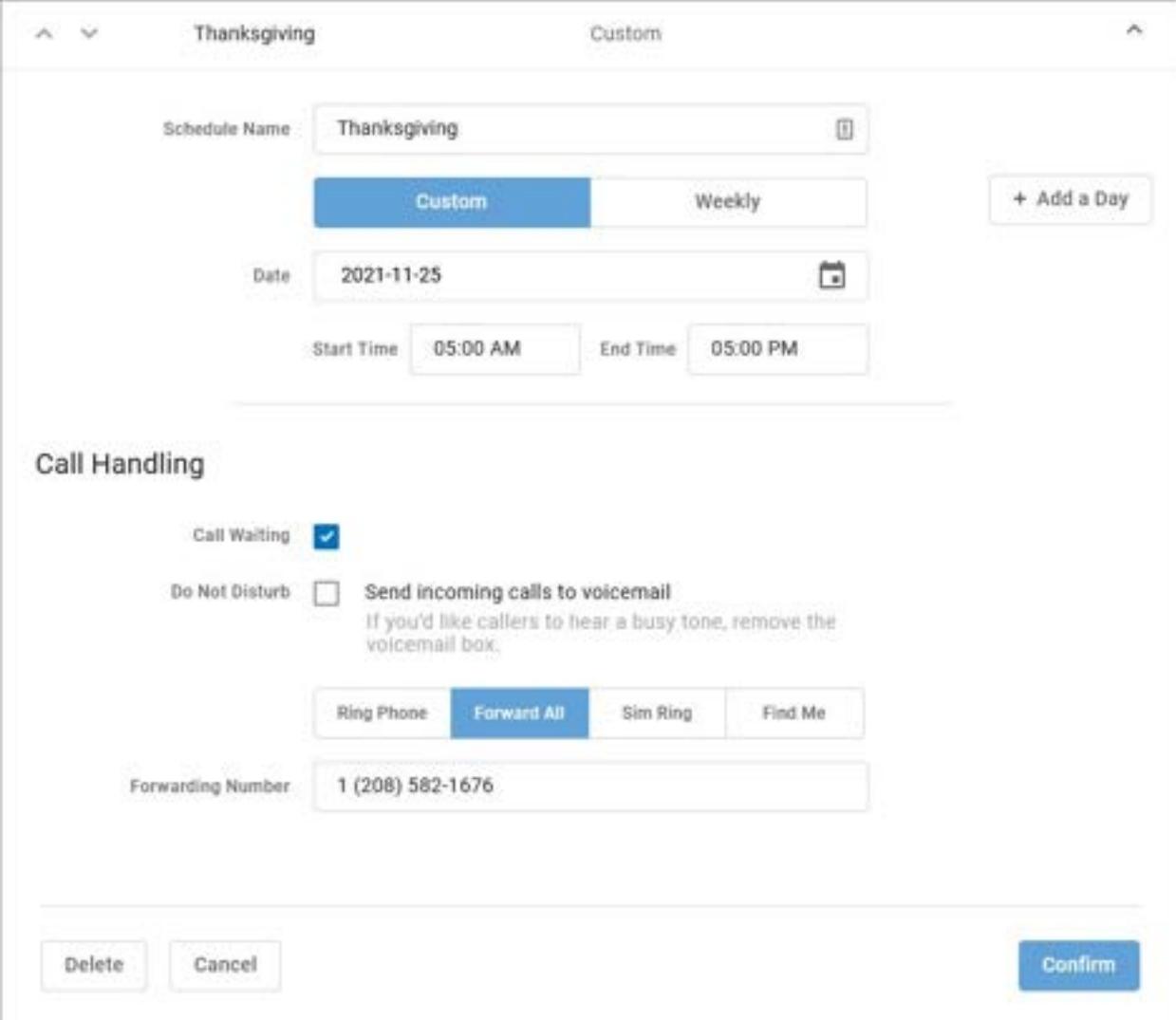
Busy Send to Voicemail

Out of Service Busy Tone

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

Example of a Custom Schedule

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



Thanksgiving Custom

Schedule Name: Thanksgiving

Custom Weekly + Add a Day

Date: 2021-11-25

Start Time: 05:00 AM End Time: 05:00 PM

Call Handling

Call Waiting

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

Ring Phone Forward All Sim Ring Find Me

Forwarding Number: 1 (208) 582-1676

Delete Cancel Confirm

Call Screening

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

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

Call Screening Categories

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

Custom Callers

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

Call Screening Behaviors

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

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

[Voicemail and Unified messaging Guide](#)

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

[Voicemail and Unified Messaging](#)

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

[Voicemail to Email](#)

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

[Access on Power/Connectivity Failure](#)

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

[Remote Access to Voicemail](#)

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

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

[Busy and No Answer Voicemail Greetings](#)

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

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

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

[Shared Voicemail](#)

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

Voicemail Box Greetings

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

Messages

Voicemail messages saved to the box are listed here.

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

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

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

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

MESSAGE WAITING INDICATOR

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

Message Settings

Message Settings

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

Enter email addresses, separated t

FORWARD VOICEMAIL TO EMAIL

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

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

Voicemail Transcription (BCC ONLY)

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

With voicemail transcription, you can:

Get important messages when you can't take a call

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

Keep searchable records of business voicemails

Easily forward messages you've received

Message Settings

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

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

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

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

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

Click [Save].

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



New voicemail from 15704600694 for voicemail box: Kevin Silliman

From: noreply@cymbus.com

To: kss

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



Hi Kevin,

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

From: WIRELESS CALLER / 1 (570) 460-0694
Time: Thursday, October 28, 2021 at 8:57 AM
Duration: 00:07
Transcription:

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

Thanks,

Penteledata Voice Team

Info

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

Voice Portal Guide

Admin/Account Manager Users

VOICE PORTAL

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

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

Sign In for Voice Portal Access

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



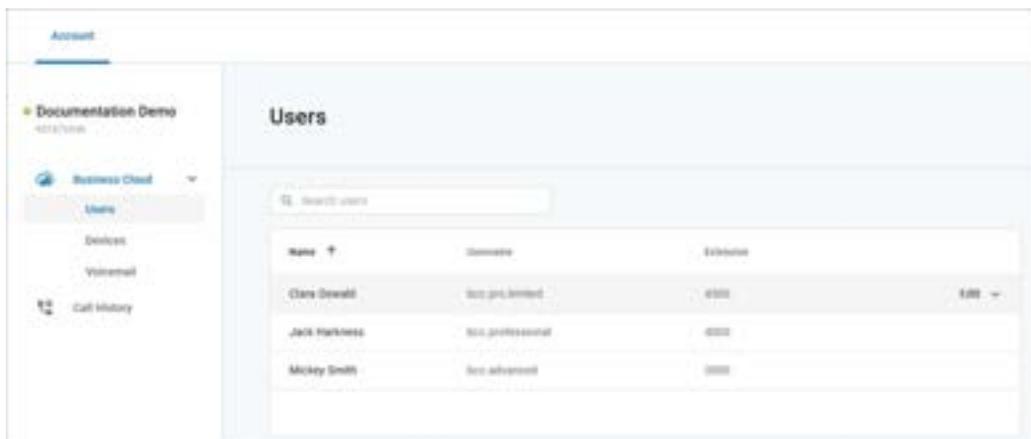
The image shows a login form for PenTeleData. At the top is the PenTeleData logo. Below it is the heading "Login". There are two input fields: "Email Address or Username" and "Password". The "Email Address or Username" field has a red border and a red error message "Username Is Required" below it. To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

FIRST-TIME LOGIN

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

USERS

All users on your account are listed here. To edit the settings for a specific user, hover over the user and click Edit on the right.



The screenshot shows a web interface for managing users. On the left is a navigation menu with options: "Account", "Documentation Demo", "Business Cloud", "Users", "Devices", "Voicemail", and "Call History". The "Users" section is active. The main content area is titled "Users" and contains a search bar "Search users". Below the search bar is a table with columns "Name", "Domain", and "Extension".

Name	Domain	Extension
Clara Oswald	tel-prod-internal	4000
Jack Harkness	tel-professional	4000
Mickey Smith	tel-advanced	4000

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

Call Details

Call Details

Assigned Phone Number **1 (610) 900-4937**

Extension Number **4937**

Caller ID Number **1 (610) 900-4937**

Caller ID Name **PenTeleData NCC**

Caller ID Enabled

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

Unlimited Local Calling

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

Call Screening

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

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

Call Screening

[+ Add Caller](#)

Screening Forward Number:
This is the destination Number used when Forward is selected as a Call Screening setting.

Anonymous Caller:

Toll-free Caller:

All Other Callers:

Custom Caller(s):

<input type="text" value="12125551234"/>	<input type="text" value="Allow with Priority Ring"/>	<input type="text" value="X"/>
<input type="text" value="17175551234"/>	<input type="text" value="Forward"/>	<input type="text" value="X"/>
<input type="text" value="18015551234"/>	<input type="text" value="Voicemail"/>	<input type="text" value="X"/>

Priority Ring:

[hide extra callers](#)

CALL SCREENING CATEGORIES

FEATURE	DESCRIPTION
[+ Add Caller]	Starts the process of setting up call screening behaviors for a specific phone number. The specific callers who are being screened and the associated screening behavior are listed under the <i>Custom Callers</i> field.
Screening Forward Number	Enter a destination phone number that will be used when This is the destination number used when a call screening category is set to <i>Forward</i> .
Anonymous Caller	Choose what happens to incoming calls that don't send caller ID.
Toll-Free Caller	Choose what happens to incoming calls from a toll-free number.
All Other Callers	Choose what happens to all other incoming calls, unless otherwise defined by a custom rule.
Custom Callers	Click [+Add Caller] to define the screening behavior for a specific phone number. If there are more than two custom callers, click ...and X more at the bottom to see them.

CALL SCREENING BEHAVIORS

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

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

Call Handling

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

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

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

RING PHONE

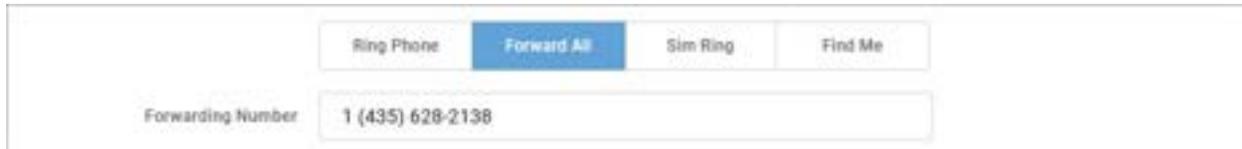
This is the path incoming calls will follow when the call isn't answered, the line is busy, or the device is out of service. For each circumstance, callers can be sent to voicemail, hear a busy tone, be forwarded to another number, or ring forever.

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

FORWARD ALL

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

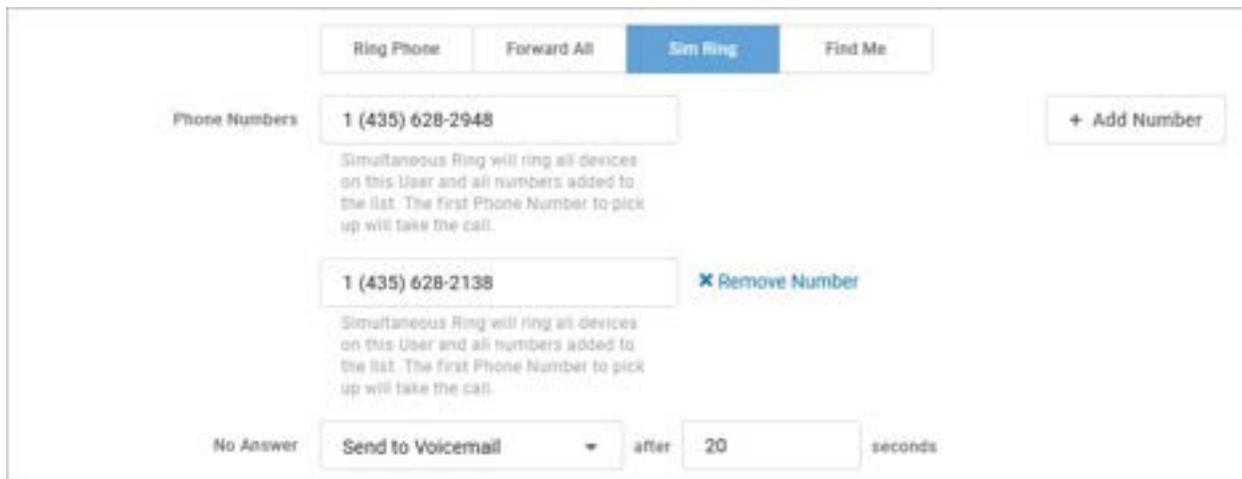
Once a *Forwarding Number* is entered, this feature can be enabled or disabled from the device by dialing star codes.



SIMULTANEOUS RING

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

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



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

FIND ME/FOLLOW ME

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

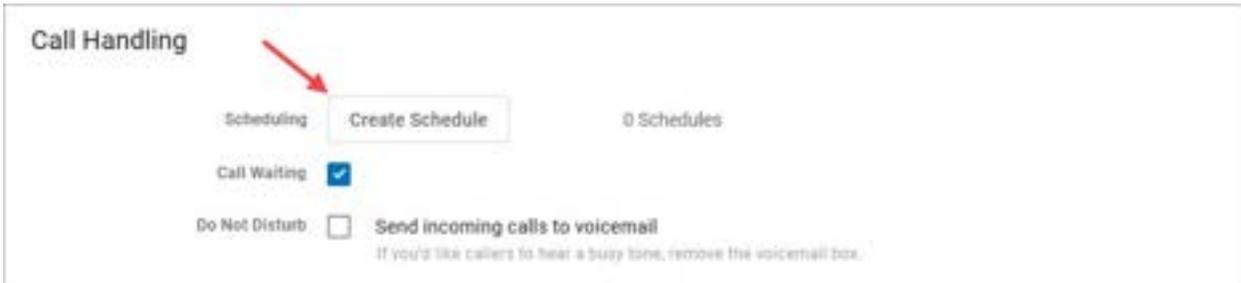
FEATURE	DESCRIPTION
Destinations	<p>Indicate if calls should route through Devices or Phone Numbers by clicking the respective icons.</p> <ul style="list-style-type: none"> • Use the arrows to reorder the destinations. • Click [+ Add Destination] to add more destination fields.
Devices	<p>In the field provided, enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.</p>
Phone Number	<p>Enter the phone number calls should progress to and how long each number will ring.</p>
Timeout Action	<p>Choose what will happen to the call after all destinations have timed out:</p> <ul style="list-style-type: none"> • Busy Tone • Send to Voicemail

SCHEDULES

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

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

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



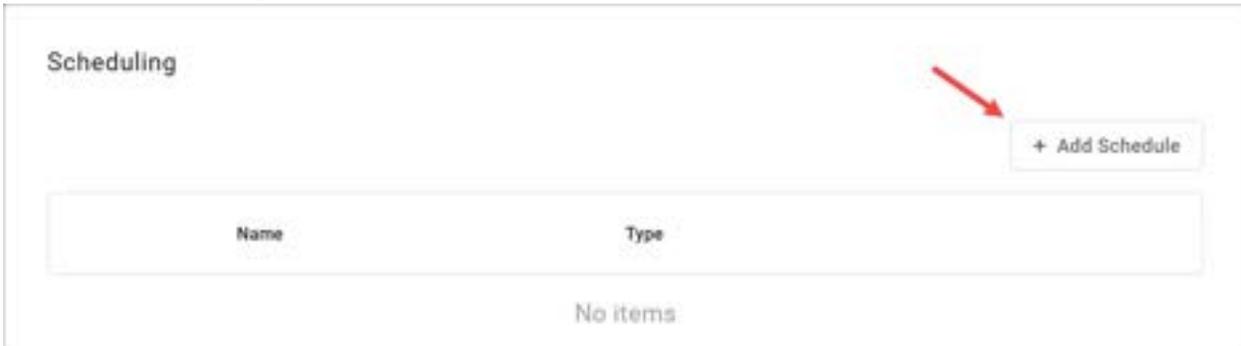
Call Handling

Scheduling **Create Schedule** 0 Schedules

Call Waiting

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

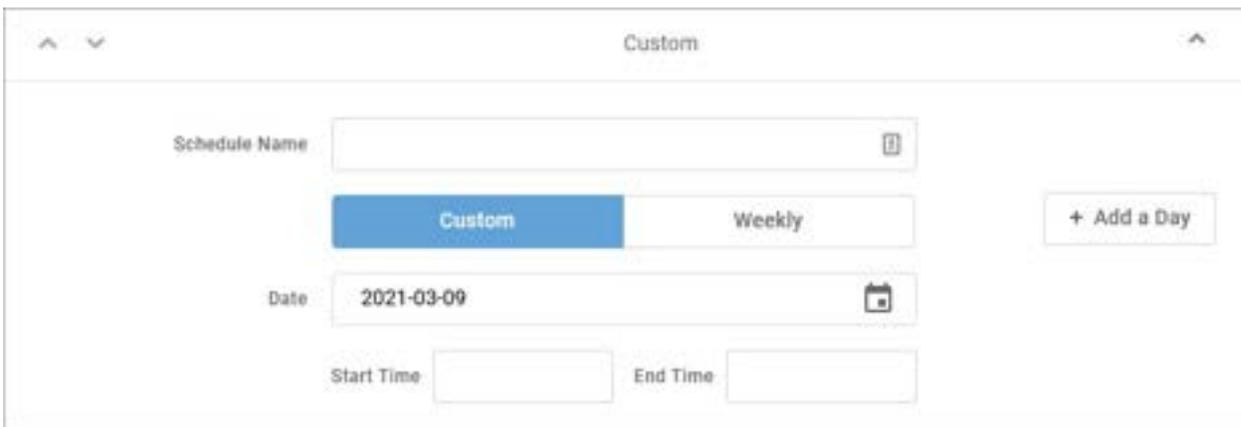
2. In the Scheduling window, click [+Add Schedule].



Scheduling

+ Add Schedule

Name	Type
No items	



Custom

Schedule Name

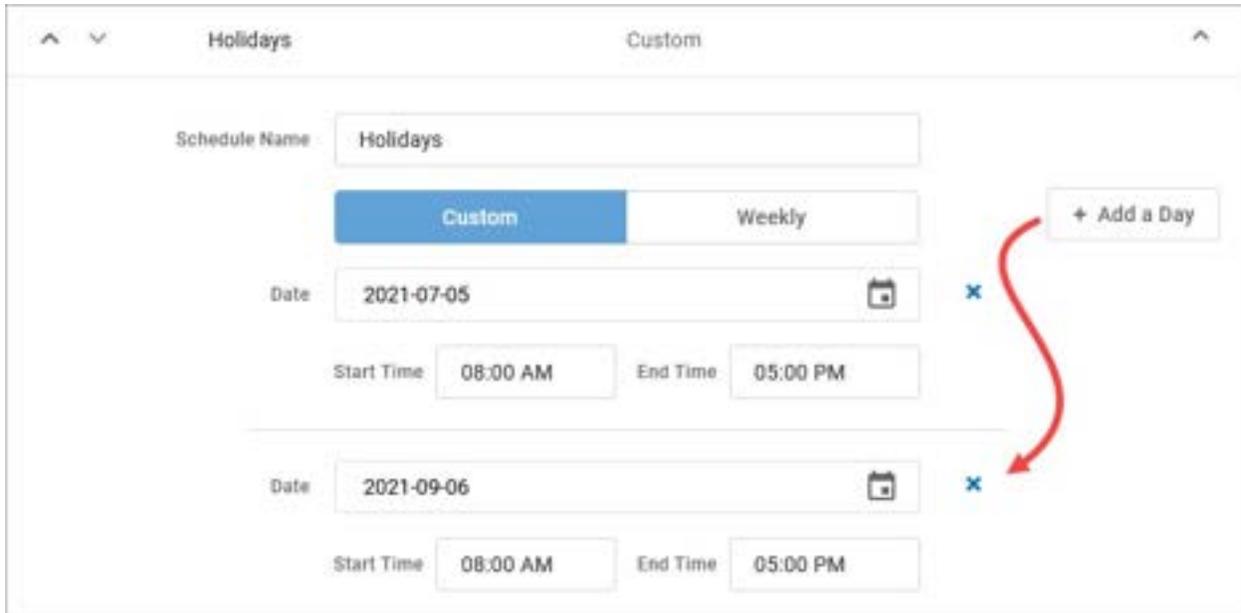
Custom Weekly **+ Add a Day**

Date

Start Time End Time

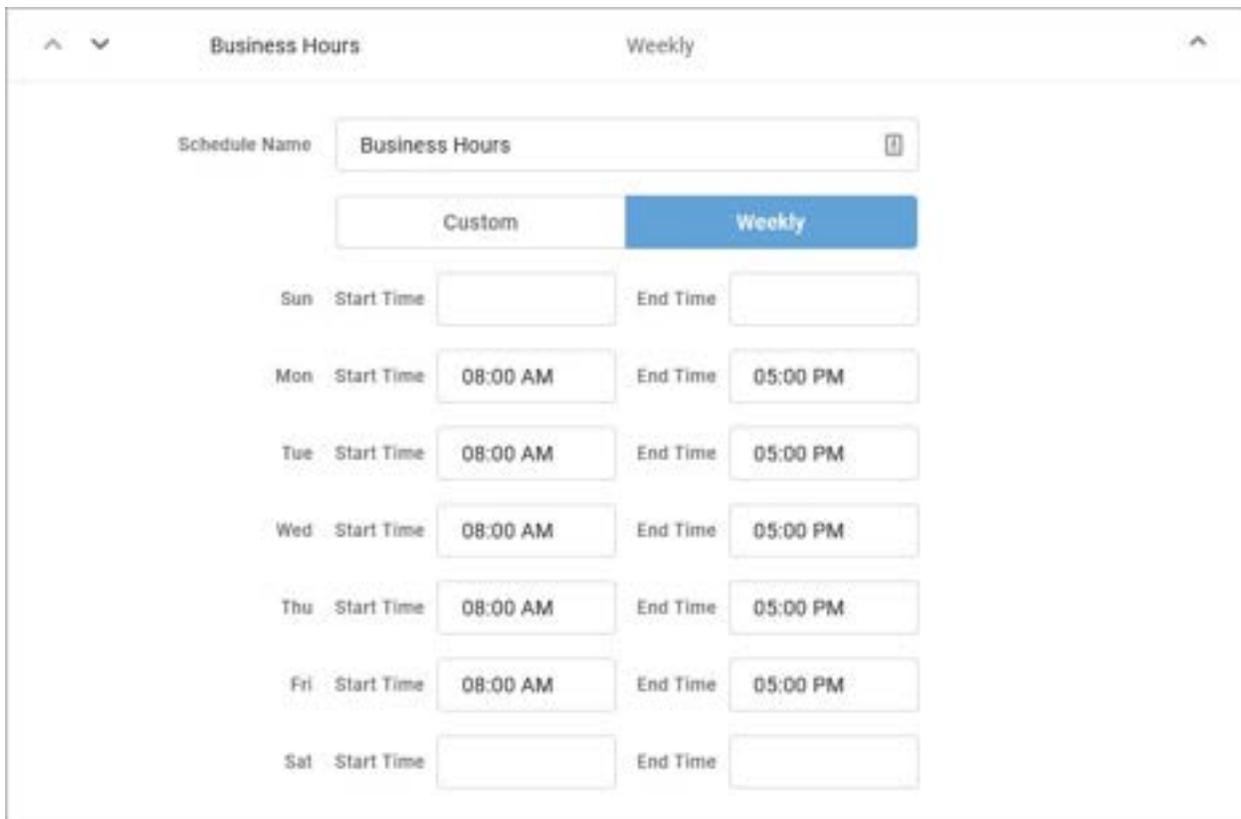
3. **SCHEDULE NAME:** Give the schedule a name.
4. **TYPE:** Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).

- On a Custom schedule, fill in the dates and times the schedule will be in effect. If not using a 24-hour time, include AM or PM. Click [+ Add a Day] to add another section.



The screenshot shows the 'Holidays' configuration page with the 'Custom' tab selected. The 'Schedule Name' is 'Holidays'. Below the tabs, there are two entries for custom dates. The first entry is for '2021-07-05' with a start time of '08:00 AM' and an end time of '05:00 PM'. The second entry is for '2021-09-06' with the same start and end times. A red arrow points from the '+ Add a Day' button to the second entry. Each entry has a blue 'x' icon to its right for deletion.

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



The screenshot shows the 'Business Hours' configuration page with the 'Weekly' tab selected. The 'Schedule Name' is 'Business Hours'. Below the tabs, there are seven rows for the days of the week. Each row has 'Start Time' and 'End Time' input fields. Monday through Friday have '08:00 AM' for the start time and '05:00 PM' for the end time. Sunday and Saturday have empty input fields for both start and end times.

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

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

Custom Schedule Example

In the custom schedule example below, calls received between 5:00 AM and 5:00 PM on November 25, 2021, will be forwarded to 1-208-582-1676. Any call outside of that specific time will follow the call handling set up in the main Call Handling section.

Devices

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

Sarah Jane		bcc.standard		2000	
Calls	Devices	Plans	Settings	Voicemail	1
Device Lines					
Device Type	MAC Address	Line Number			
Cisco 8851 (3PCC)	0010fa6e384a	1-10			
Referenced Devices					
Device Type	MAC Address	Line Number	Device Owner		
CP-8851	bbbccddd242	2	Jack Harkness		

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

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

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

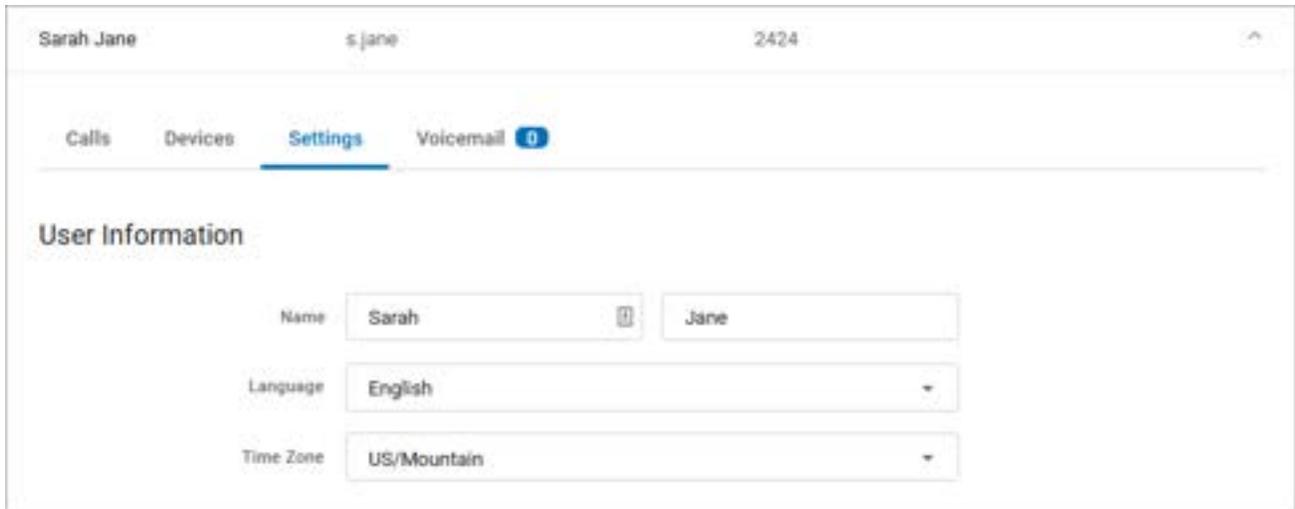
PENTELEDATA CYMBUS DEVICES

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

Settings

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

User Information



Sarah Jane s.jane 2424

Calls Devices **Settings** Voicemail 0

User Information

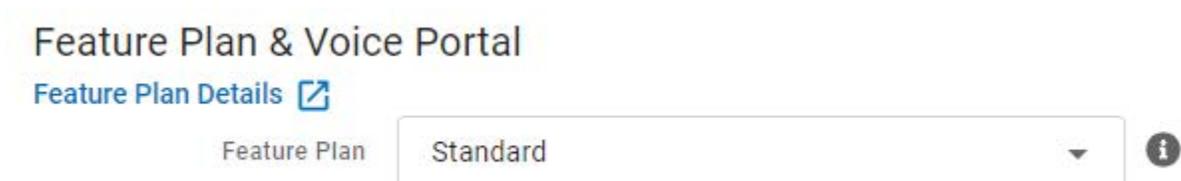
Name Sarah Jane

Language English

Time Zone US/Mountain

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

Feature Plan (BCC only)



Feature Plan & Voice Portal

[Feature Plan Details](#)

Feature Plan Standard

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

Voice Portal

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

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

Voice Portal Access

Email 

Username

End-User Role 

 Resend Welcome Email

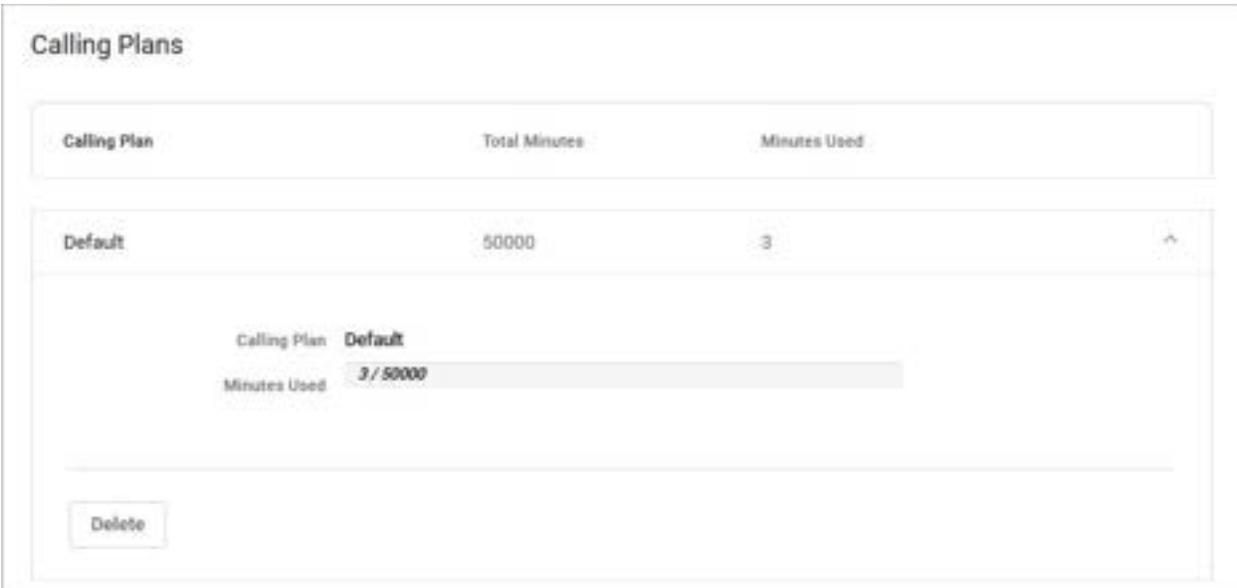
Last Send: Nov 30th 2021, 6:49 am

 Reset Password

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

Calling Plans

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



Calling Plan	Total Minutes	Minutes Used
Default	50000	3

Calling Plan: **Default**
Minutes Used: **3 / 50000**

Delete

CONTACT SUPPORT

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

Voicemail and Unified messaging Guide

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

Voicemail and Unified Messaging

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

Voicemail to Email

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

Access on Power/Connectivity Failure

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

Remote Access to Voicemail

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

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

Busy and No Answer Voicemail Greetings

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

Voicemail Message Waiting Indicator (MWI)

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

Shared Voicemail

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

Voicemail Box Details

Test 6851	16109004557	2001
-----------	-------------	------

[Calls](#)
[Devices](#)
[Settings](#)
[Voicemail 2](#)

Voicemail Box Details

Voicemail Box Name

Owner **Test 6851**

[Reset PIN](#) ⓘ

Language **English**

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

VOICEMAIL MANAGEMENT

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

Voicemail Box Greetings

Users can upload and download their voicemail greetings and personal name recordings. Click the field to select a file from your computer, then click **[Upload]**. The upload will accept WAVE, MP3, and OGG files that are less than 10MB.

Voicemail Box Greetings ?

Basic Greeting Click Here Upload

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

Personal Name Click Here Upload

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

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

Busy Greeting Click Here Upload

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

No Answer Greeting Click Here Upload

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

Messages

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

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

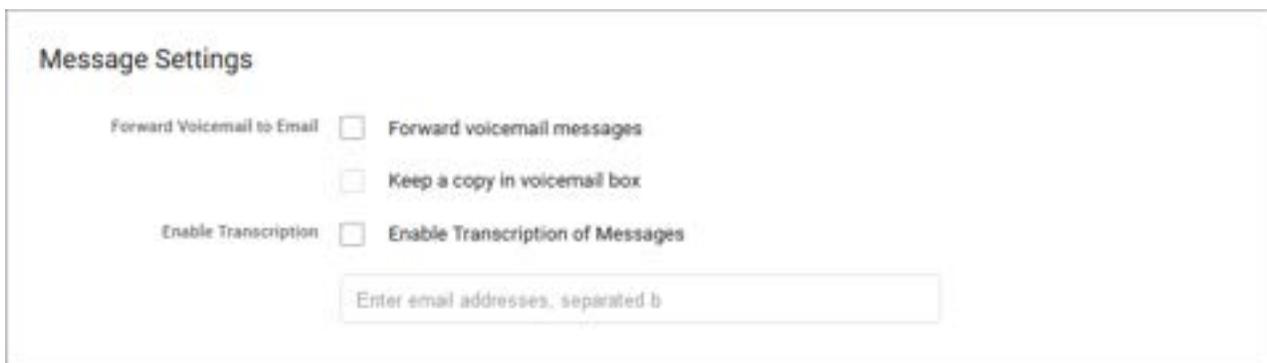
1-3 of 3

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

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

Message Settings

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



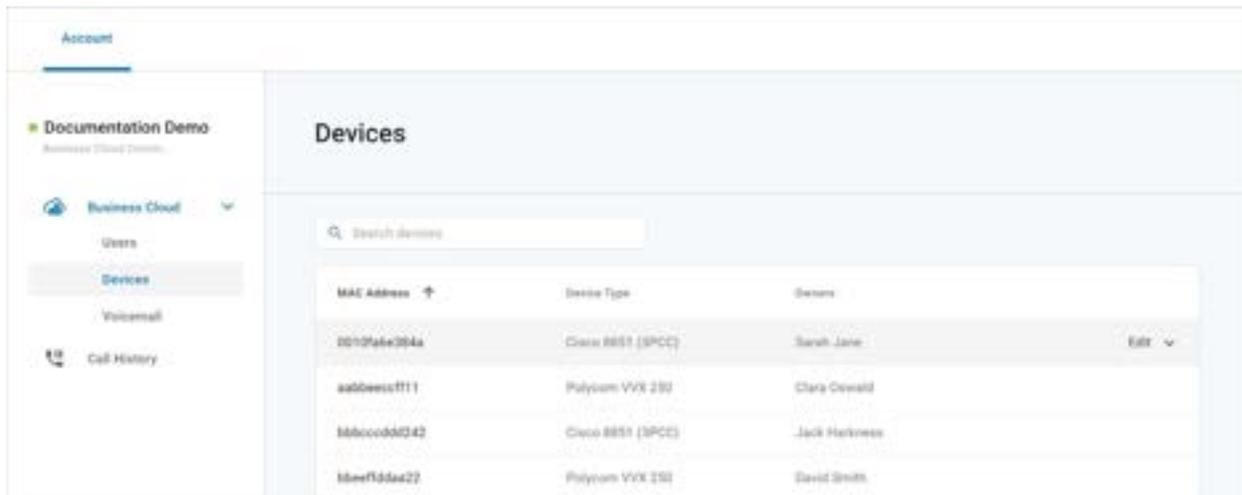
The screenshot shows a 'Message Settings' form with the following elements:

- Forward Voicemail to Email:** A section containing two checkboxes:
 - Forward voicemail messages
 - Keep a copy in voicemail box
- Enable Transcription:** A section containing one checkbox:
 - Enable Transcription of Messages
- Email Address Input:** A text box with the placeholder text 'Enter email addresses, separated by'.

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

DEVICES

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



To view and manage device settings:

1. Go to either:
 - Account > Business Cloud or Cloud PBX > Users > Devices tab
 - Account > Business Cloud or Cloud PBX > Devices
2. Locate the device you want to manage and click Edit on the right.

PENTELEDATA CYMBUS DEVICES

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

Device Info

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

The screenshot shows a table with the following data:

Polycom VVX 601	64167f5555a	1-16	⤴
-----------------	-------------	------	---

Below the table is a 'Device Info' section with the following details:

- MAC Address: 64167f5555a
- Device Type: Polycom VVX 601
- Configuration Status: Yes ✓ [Details](#) ▼
- Swap Device:
- [Bulk Line Configuration](#) ▼

Configuration Status

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

Bulk Line Configuration

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

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

The screenshot shows the 'Bulk Line Configuration' interface with the following elements:

- [Bulk Line Configuration](#) ⤴
- Export Current Configuration: Device Lines
- Import New Configuration:
- Expected header row of LINE_NUMBER, LINE_TYPE, REFERENCE, REFERENCE_NAME

IMPORT FILE FORMAT

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

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

EXAMPLE IMPORT FILE

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

Line Configuration

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

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

Line Configuration		
Line Number ↑	Type	Assignment
1	Device Line	
2	Call Park	Parking Spot 1
3	Deactivated	Edit ▾
4	Paging Group	Back Office
5	Presence/BLF	David Smith
6	Shared Line	Clara Oswald
7	Speed Dial	*456

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

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

CONTACT SUPPORT

For any other device changes, please contact Customer Support.

Call Park

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

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



The screenshot shows a 'Device Line Info' form with two dropdown menus. The first dropdown, labeled 'Type', is set to 'Call Park'. The second dropdown, labeled 'Assignment', is set to 'Parking Spot 1'.

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

Device Line

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

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



The screenshot shows a 'Device Line Info' form. The 'Type' dropdown is set to 'Device Line'. Below this, there is a '911 Callback Number' field. A 'SIP Credentials' menu is expanded, showing a 'Fax Enabled' checkbox which is checked. To the right of the checkbox, it says 'This line is connected to a fax machine'. Below this, there is a note: 'Incoming faxes answered by the voicemail box are always allowed. Enabling fax here changes the device configuration to enable fax settings. These settings will negatively affect voice call quality.'

FAX ENABLED

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

Paging Group

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

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



The screenshot shows a form titled "Device Line Info" with two dropdown menus. The first dropdown, labeled "Type", is set to "Paging Group". The second dropdown, labeled "Assignment", is set to "Back Office".

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

Presence/BLF

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



The screenshot shows a form titled "Device Line Info" with two dropdown menus. The first dropdown, labeled "Type", is set to "Presence/BLF". The second dropdown, labeled "Assignment", is set to "Sarah Jane". Below the dropdowns, there is a small text box that reads: "Presence States include Busy, Available and Ringing of 1 or more of their devices is on a call. Lines assigned to presence will also enable Speed Dialing between users."

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

Shared Line

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

Inbound calls ring on both devices and either user can answer it on their IP phone.

Outbound calls from the shared line utilizes the outbound caller ID as the shared user.

Dialing a star code (for forwarding calls, accessing voicemail, etc.) while on the shared line also affects the assigned user.

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

Device Line Info

Type: Shared Line

Assignment: Clara Oswald

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

EXAMPLE OF A SHARED LINE

The example below shows a shared line between David Smith and Clara Oswald.

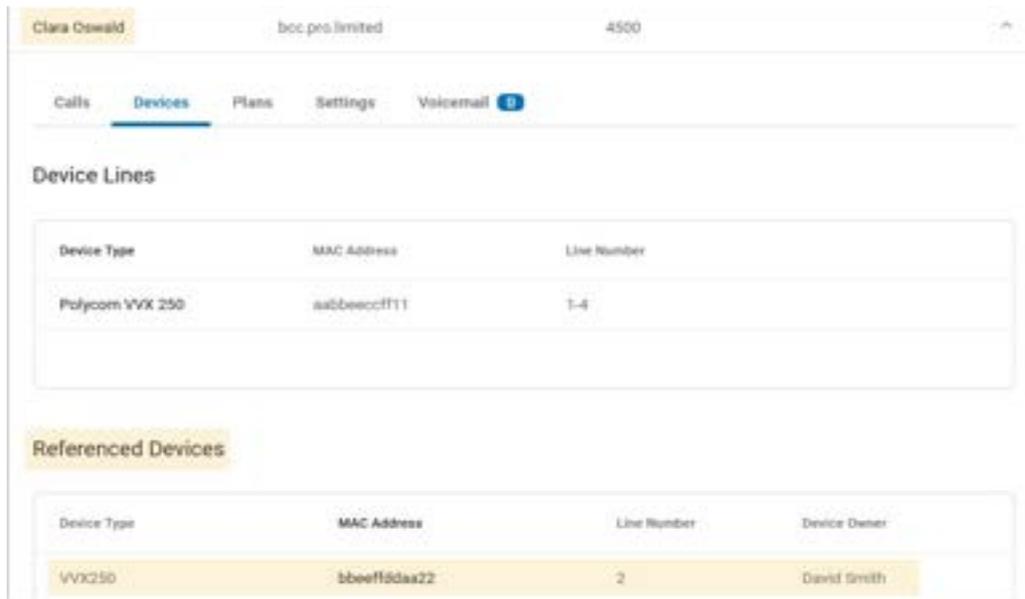
In the first image, we see the user David Smith has set up a shared line with Clara Oswald on his Polycom VVX device.

The screenshot shows the configuration page for user David Smith (ID: dsmith, 1405). The 'Devices' tab is active. Under 'Device Lines', a table lists a Polycom VVX 250 device with MAC address bbef9d3aa22 and line number 1-4. Below this, the 'Line Configuration' section shows a table with two lines: Line 1 is a 'Device Line' and Line 2 is a 'Shared Line' assigned to 'Clara Oswald'.

Device Type	MAC Address	Line Number
Polycom VVX 250	bbef9d3aa22	1-4

Line Number	Type	Assignment
1	Device Line	
2	Shared Line	Clara Oswald

In the second image, we see in Clara's Devices tab that the VVX 250 belonging to David Smith is shown in the Referenced Devices section.



Speed Dial

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

ASSIGNING A SPEED DIAL

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

Device Line Info

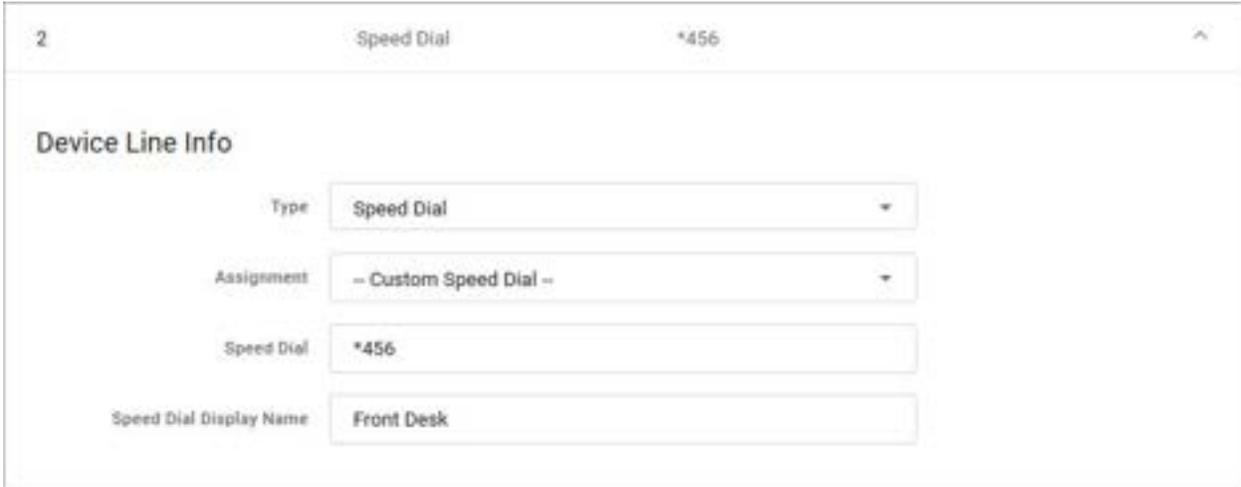
Type:

Assignment:

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

ASSIGNING A CUSTOM SPEED DIAL

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



2 Speed Dial *456

Device Line Info

Type Speed Dial

Assignment - Custom Speed Dial -

Speed Dial *456

Speed Dial Display Name Front Desk

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

Sidecar

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



Sidecar

Sidecar Type CP-BEKEM-3PCC

Number Of Sidecars 1

- **SIDECAR TYPE:** Select a sidecar type from the menu. This list will only display options that are compatible with the IP phone being managed.
- **NUMBER OF SIDECARS:** Select the number of sidecars being added to the IP phone.

Sidecar

Sidecar Type: CP-8800-A-KEM-3PC

Number Of Sidecars: 1

[Bulk Sidecar Setup](#)

Line Number	Type	Assignment
Sidecar 1 - Page 1 Line 1	Deactivated	
Sidecar 1 - Page 1 Line 2	Deactivated	
Sidecar 1 - Page 1 Line 3	Deactivated	
Sidecar 1 - Page 1 Line 4	Deactivated	
Sidecar 1 - Page 1 Line 5	Deactivated	
Sidecar 1 - Page 1 Line 6	Deactivated	
Sidecar 1 - Page 1 Line 7	Deactivated	

Bulk Sidecar Setup

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

There are three bulk sidecar setup options:

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

Choose an option, then scroll down past the lines and click Save to implement it.

Sidecar

Sidecar Type: CP-8800-A-KEM-3PC

Number Of Sidecars: 1

Bulk Sidecar Setup ▲

Sidecar Line Setup: [Dropdown]

Line Number		
Sidecar 1 - Page 1 Line 1	Alphabetically	
Sidecar 1 - Page 1 Line 2	By Extension	
Sidecar 1 - Page 1 Line 3	Custom	

IMPORTANT

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

ALPHABETICALLY

Users are assigned to lines in reverse alphabetical order.

Sidecar

Sidecar Type:

Number Of Sidecars:

[Bulk Sidecar Setup](#) ▾

Line Number	Type	Assignment
Sidecar 1 - Page 1 Line 1	Speed Dial	Mickey Smith
Sidecar 1 - Page 1 Line 2	Speed Dial	Clara Oswald
Sidecar 1 - Page 1 Line 3	Speed Dial	Jack Harkness
Sidecar 1 - Page 1 Line 4	Speed Dial	David Smith
Sidecar 1 - Page 1 Line 5	Speed Dial	John Doe

BY EXTENSION

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

Sidecar

Sidecar Type:

Number Of Sidecars:

[Bulk Sidecar Setup](#) ▾

Line Number	Type	Assignment
Sidecar 1 - Page 1 Line 1	Speed Dial	David Smith
Sidecar 1 - Page 1 Line 2	Speed Dial	Mickey Smith
Sidecar 1 - Page 1 Line 3	Speed Dial	Jack Harkness
Sidecar 1 - Page 1 Line 4	Speed Dial	Clara Oswald
Sidecar 1 - Page 1 Line 5	Speed Dial	John Doe

CUSTOM

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

Sidecar

Sidecar Type: CP-8800-A-KEM-3PC

Number Of Sidecars: 1

[Bulk Sidecar Setup](#)

Sidecar Line Setup: Custom

Bulk Sidecar Setup will overwrite the current Sidecar setup.

Unassigned Users

- David Smith
- Jack Harkness
- John Doe
- Mickey Smith

All users will be setup as Speed Dial Lines

Assigned Users

- ▲ Scroll up the Unassigned Users list
- >> Add all users to the Assigned Users list
- > Add the selected user to the Assigned Users list
- < Removes selected user from the Assigned Users list
- << Removes all users from the Assigned Users list
- ▼ Scroll down the Unassigned Users list

Reassign End User Accounts

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

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

How It Works

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

New user default settings

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

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

Account and Call History Records

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

Features and settings that switch

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

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

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

Steps to Reassign an End User Account

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

The screenshot shows the user profile for Mickey Smith (rickysmith, 2250) in the Admin Portal. The 'Voicemail' tab is selected. The 'Call Handling' section includes options for scheduling, call waiting, media friends, and do not disturb. A red arrow points to the 'Reassign' button at the bottom left of the form.

Mickey Smith rickysmith 2250

Calls Devices Settings **Voicemail**

Scroll down

Call Handling

Scheduling Create Schedule 0 Schedules

Call Waiting

Media Friends

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

Ring Phone Forward All Sim Ring Find Me

No Answer Send to Voicemail after 20 seconds

Busy Send to Voicemail

Out of Service Send to Voicemail

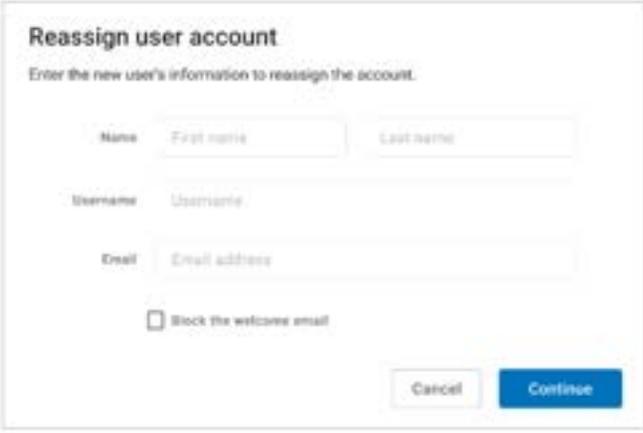
Reassign Cancel **Save**

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

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

3. Enter the new user's information.

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



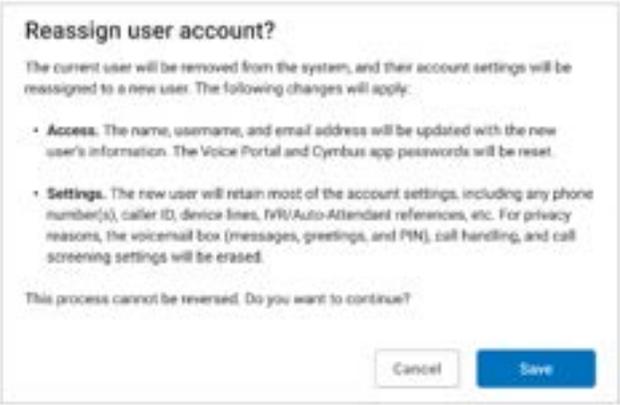
The form is titled "Reassign user account" and contains the following fields and options:

- Name:** Two input fields for "First name" and "Last name".
- Username:** One input field for "Username".
- Email:** One input field for "Email address".
- Block the welcome email
- Buttons: "Cancel" and "Continue".

4. Read and agree to the warning.

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

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



The dialog is titled "Reassign user account?" and contains the following text and options:

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

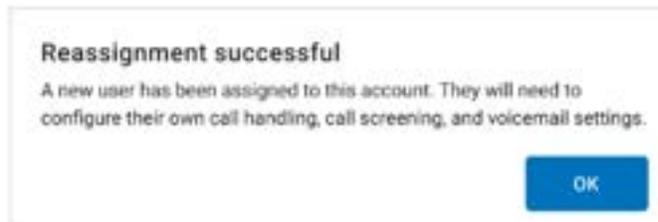
- **Access.** The name, username, and email address will be updated with the new user's information. The Voice Portal and Cymbus app passwords will be reset.
- **Settings.** The new user will retain most of the account settings, including any phone number(s), caller ID, device lines, IVR/Auto-Attendant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

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

Buttons: "Cancel" and "Save".

5. Reassignment successful.

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



Info

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

AUTO-ATTENDANT (Business Cloud Only)

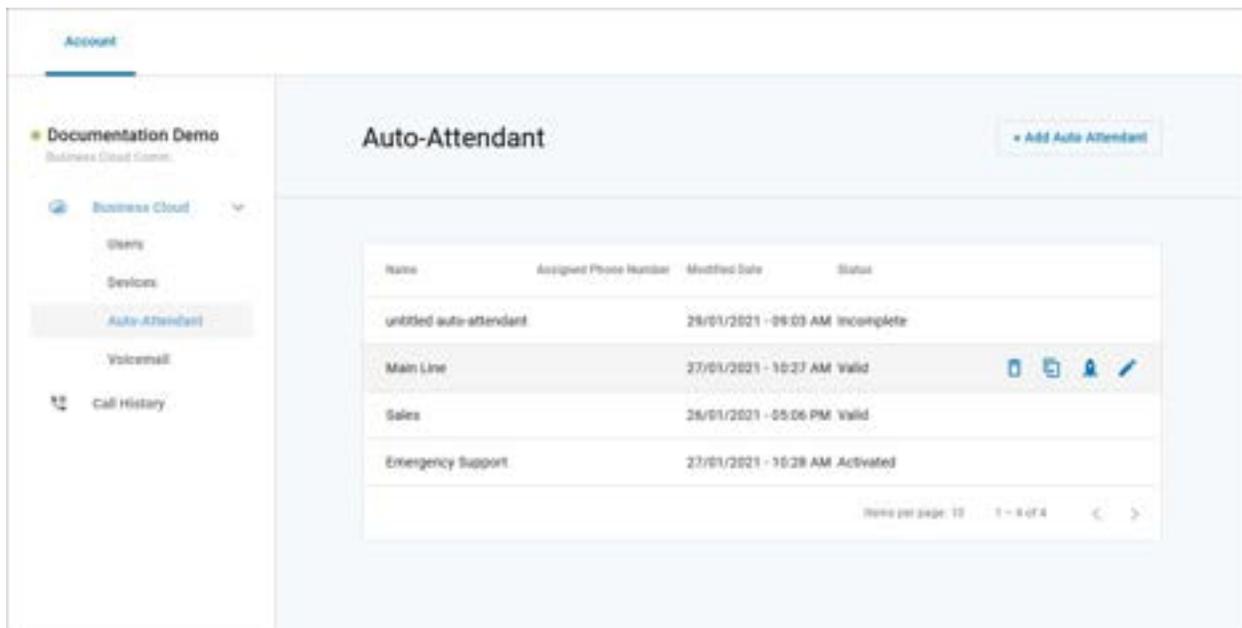
Managing inbound calls is a crucial part of how an organization handles everyday business. Auto-attendants enable identification, segmentation, and routing of callers to the most appropriate agent within your team. It's a simple, effective, and completely customizable tool which will significantly reduce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

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

Overview

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

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



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

Tools

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

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

Auto-Attendant Setup

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

Add an Auto-Attendant

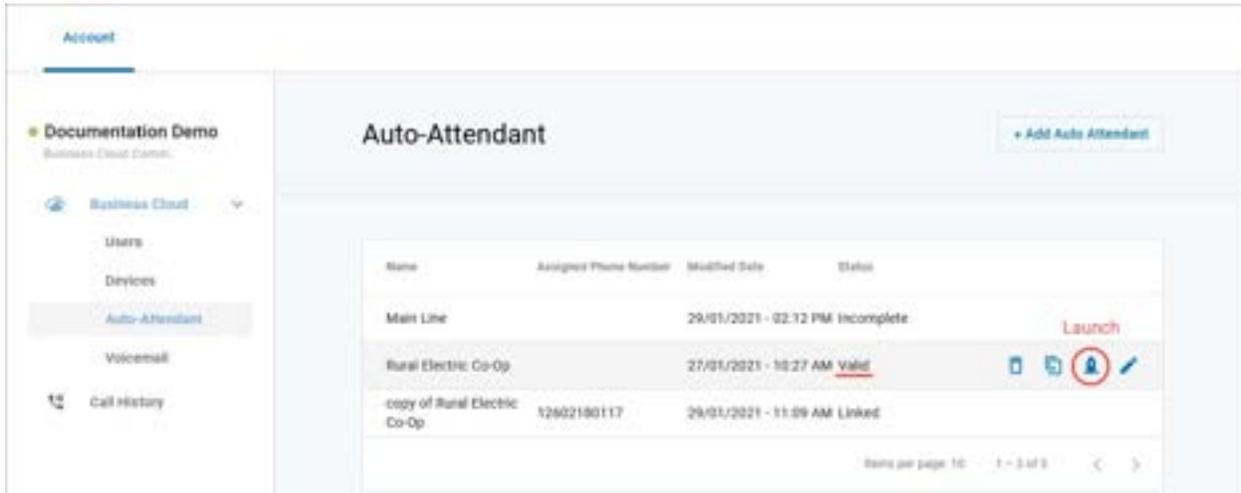
1. Click [+ Add Auto-Attendant].
2. The auto-attendant builder will open in a new window. If your browser doesn't allow pop-ups, it may ask if you want to allow this one.
3. Enter a name for this auto-attendant.
4. Click the  Add icon to select and add a new route (see the summary below). When a route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

AUTO-ATTENDANT ROUTES SUMMARY

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

Activate an Auto-Attendant

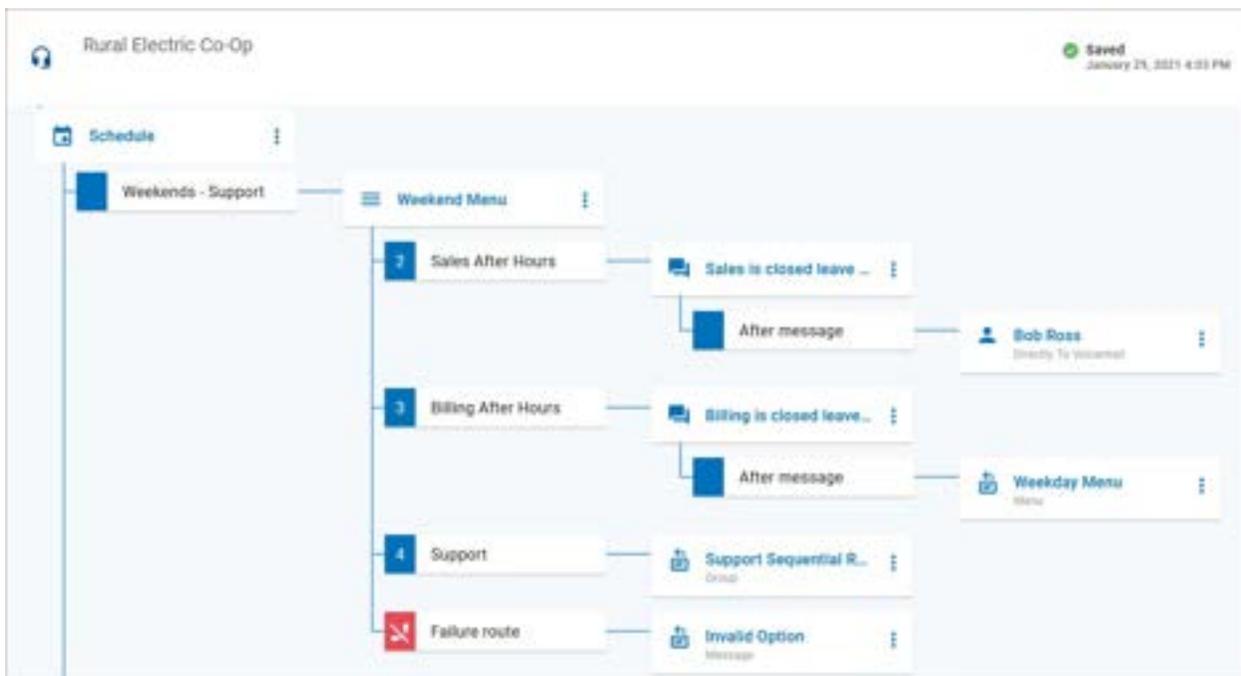
When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to "Valid." At this point, you can click the  Launch icon to activate it.



ASSIGN A PHONE NUMBER

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

EXAMPLE OF A COMPLETED ROUTE



Auto-Attendant Routes

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

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

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

INFO

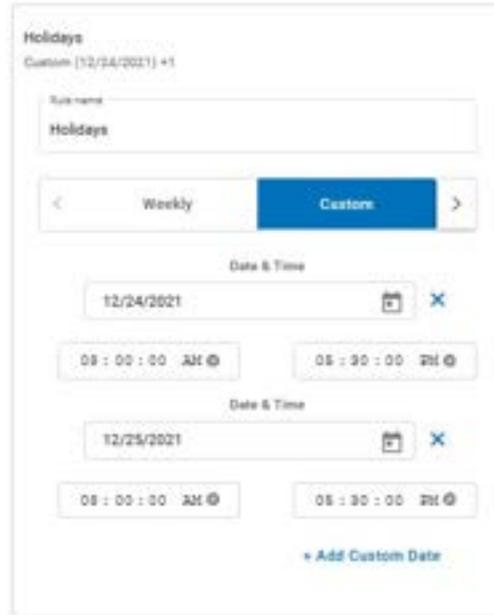
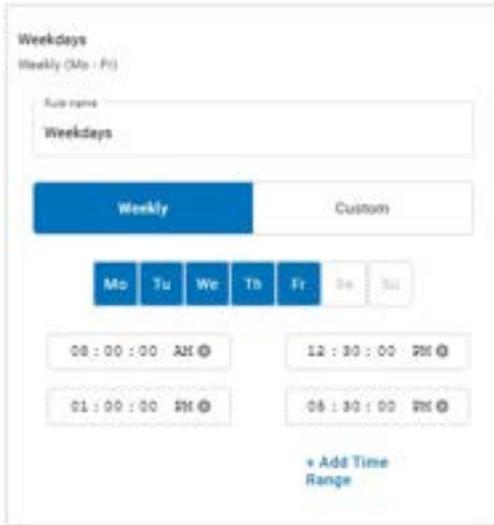
For best results, use Chrome or Firefox (not Safari).

Schedule

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

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

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



DELETE A RULE

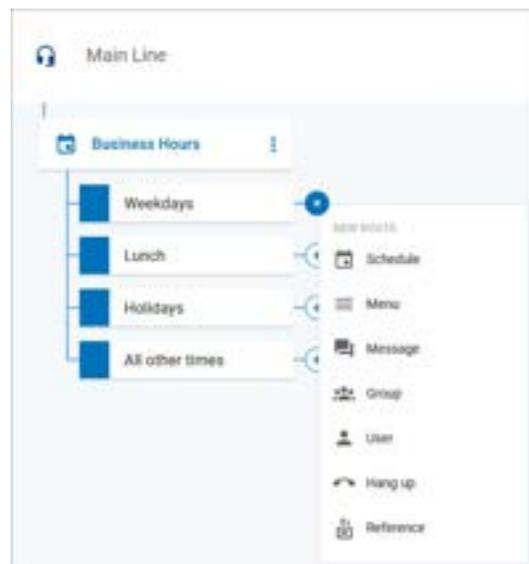
To delete a rule, click the  trash icon. The rule will be crossed out, but if you change your mind, it can still be  restored or  edited until the schedule is saved. Once you save the schedule, though, any deleted rules will be deleted permanently.



SAVE

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

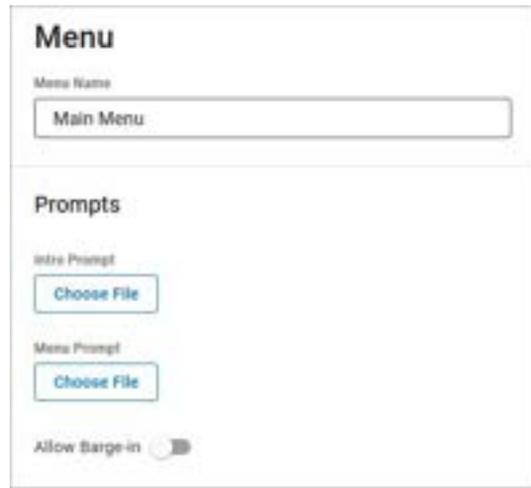
By default, an "All other times" route will be added to determine where calls are routed during times that aren't specified by a rule.



Menu

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

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

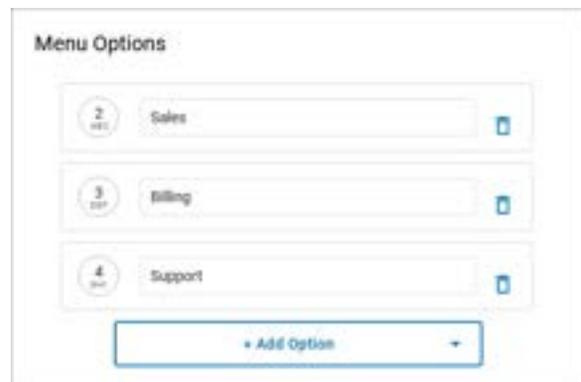


FIELD	DESCRIPTION
Intro Prompt	The recorded audio that a caller will hear upon entering the menu. A WAV file must be uploaded before the menu can be saved.
Menu Prompt	The recorded audio that a caller will hear after the introduction prompt has completed. A WAV file must be uploaded before the menu can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

MENU OPTIONS

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

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



FAILURE ROUTING

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

Failure Routing

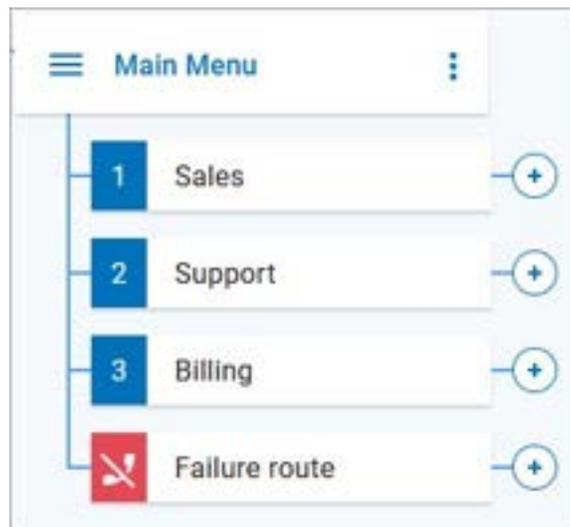
Menu Timeout (Seconds)

Max Invalid Selections

Invalid Prompt

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

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



Message

The caller will hear a pre-recorded message.

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

Group

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



The screenshot shows a configuration form for a 'Group'. The form includes the following fields and controls:

- Group Name:** A text input field containing the value 'Support'.
- Allow Call Queuing:** A toggle switch that is currently turned on (blue).
- Max # of Calls:** A numeric input field with a value of 'Limit number (1-50)' and a warning icon. Below the field, the text 'Queue size is required.' is displayed.
- Max Time (Minutes):** A numeric input field with a value of 'Number Of Minutes (1-360)' and a warning icon. Below the field, the text 'Max Time is required.' is displayed.
- Ring Timeout (Seconds):** A numeric input field with a value of 'Number Of Seconds (3-120)' and a warning icon. Below the field, the text 'Timeout value is required.' is displayed.

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

CALL QUEUEING

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

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

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

User Ring Strategy

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

User Ring Strategy

Simultaneous: Ring all users at the same time

Sequential: Ring users in order

Users

(choose a user) X

Valid user must be selected.

+ Add User

Ring Timeout (Seconds)

Number of seconds (1-120)

Timeout value is required.

User Ring Strategy

Simultaneous: Ring all users at the same time

Sequential: Ring users in order

Users	Timeout (Sec)
Bob Ross	15s
Alice Cooper	15s

Total Ring Time: 0 min 30 sec

+ Add User

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

User

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

User

Bob Ross

Send calls directly to user's voicemail

Directory

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

DIAL BY...

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

Directory

Dial by...

Last Name

First Name

CUSTOM AUDIO

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

Custom Audio

Intro Prompt (Optional)

[Choose File](#)

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

Invalid Selection (Optional)

[Choose File](#)

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

FAILURE ROUTING

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

Failure Routing

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

Timeout (Seconds)

Timeout value is required.

Max Invalid Selections

Max invalid selections is required.

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

Hang Up

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

Hang_up

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

Reference

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

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

Reference

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

GROUP
Support Sequential Ring
MENU
Weekday Menu ✓
Weekend Menu
MESSAGE
Billing is closed leave a msg
Invalid Option
No one is home, leave a msg
Sales is closed leave a msg
SCHEDULE
Schedule
USER
Alice Cooper
Bob Ross
Bob Ross

VOICEMAIL

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

The screenshot shows the 'Voicemail' section of a web interface. On the left is a navigation menu with options: 'Documentation Demo', 'Business Cloud' (with a dropdown arrow), 'Users', 'Devices', 'Voicemail' (highlighted), and 'Call History'. The main area is titled 'Voicemail' and contains a search bar labeled 'Search voicemail boxes'. Below the search bar is a table with the following data:

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

Voicemail Box Details

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

The screenshot shows the 'Voicemail Box Details' form. At the top, it displays 'Amy Pond' as the name and '0/0' as the voicemail count. The main section is titled 'Voicemail Box Details' and contains a form field for 'Voicemail Box Name' with the value 'Amy Pond' and an 'Owner' field with the value 'Amy Pond'.

Voicemail Box Greetings

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

Voicemail Box Greetings ?

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

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

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

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

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

Messages

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

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

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

1-3 of 3 ⏪ ⏩

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

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

MESSAGE WAITING INDICATOR

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

Message Settings

Message Settings

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

Enter email addresses, separated t

FORWARD VOICEMAIL TO EMAIL

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

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

Voicemail Transcription (BCC ONLY)

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

With voicemail transcription, you can:

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

Message Settings

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

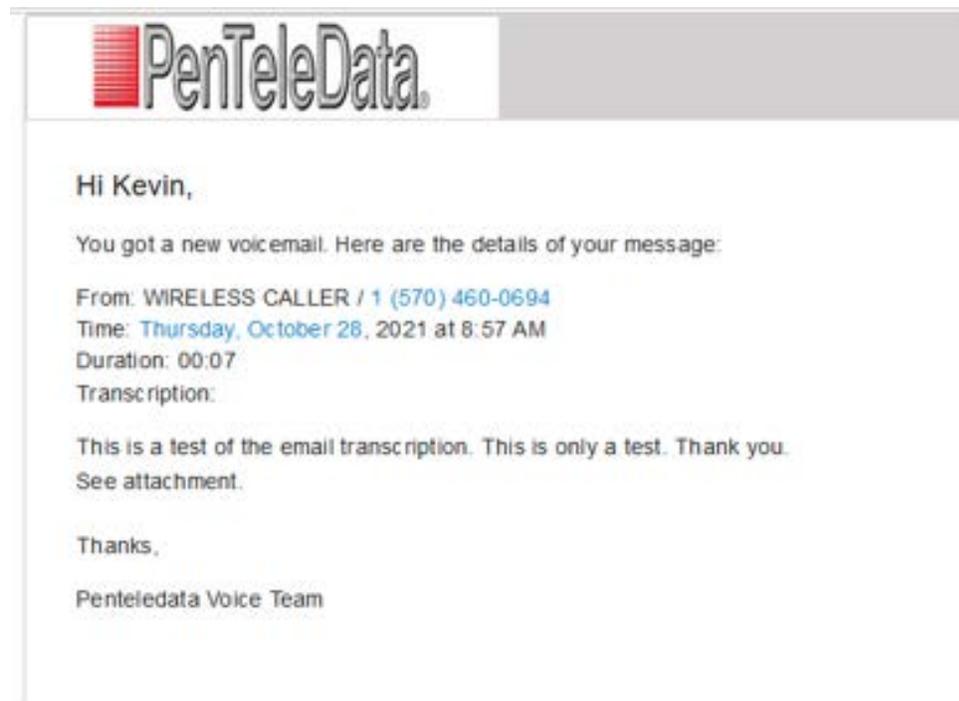


New voicemail from 15704600694 for voicemail box: Kevin Silliman

From: noreply@cymbus.com

To: kss

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



Info

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

CALL HISTORY

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

The screenshot shows a web interface for 'Call History'. On the left is a navigation menu with 'Call History' selected. The main area contains a table with the following data:

Date	Type	Call Flags	Reset Filters
3/16/2021 1:42 PM PST	Incoming	1 (206) 555-0423 206-555-0423	1 (206) 555-0423 206-555-0423
3/16/2021 1:42 PM PST	Outgoing	1 (206) 555-0333 206-555-0333 and 206-555-0333	1 (206) 555-0434 206-555-0434
3/16/2021 1:41 PM PST	Incoming	1 (206) 555-0433 206-555-0433	1 (206) 555-0433 206-555-0433 and 206-555-0433
3/16/2021 1:41 PM PST	Incoming	1 (206) 555-0433 206-555-0433	1 (206) 555-0441 206-555-0441

Filters

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

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

The filter interface consists of three panels:

- Dates:** A calendar view for March 2021 and April 2021. Below the calendar are two date input fields (mm/dd/yyyy) and buttons for 'Reset' and 'Save'.
- Type:** A panel with checkboxes for 'Inbound' and 'Outbound', and a 'Save' button.
- Call Flags:** A panel with checkboxes for 'SELECT ALL', 'Answered', 'Busy', 'Forwarded', 'Missed', and 'Sent to VM', and a 'Save' button.

Details

For more information about a call, hover over a record and click Details on the right.

3/10/2021 1:42 PM MST 6 seconds	1 (860) 555-3253 HARTFORD-EAST HARTFORD-MIDDLT...PROVO-OREM, UT	1 (801) 555-6434	0	Details ▾
------------------------------------	--	------------------	---	------------------

3/10/2021 1:42 PM MST 6 seconds	1 (860) 555-3253 HARTFORD-EAST HARTFORD-MIDDLT...PROVO-OREM, UT	1 (801) 555-6434	0	⌵
------------------------------------	--	------------------	---	---

Block 1 (860) 269-3253

Time and Length

Start Time	03/10/2021 1:42:36 PM MST
Connected Time	03/10/2021 1:42:36 PM MST
End Time	03/10/2021 1:42:42 PM MST
Billed Length	0 seconds
Actual Length	6 seconds

Cost

Cost	\$0
In Calling Plan	Yes
Rate Per Minute	\$0

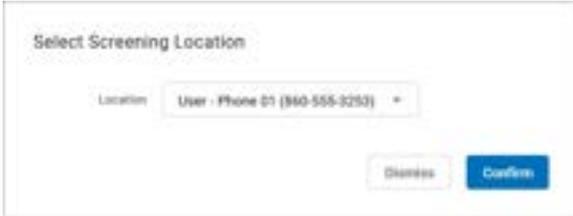
Origination

Number	1 (860) 555-3253
Location	HARTFORD-EAST HARTFORD-MIDDLETOWN, CT
Category	Off Network

Termination

Number	1 (801) 555-6434
Location	PROVO-OREM, UT
Category	On Network

[Technical Details](#) ▾

FIELD	DESCRIPTION
Block	<p>If necessary, you can block the inbound caller. Click [Block] to add the inbound caller to the user's or account's blocked caller list (in Call Handling).</p> 
Time and Length	Start time, connected date and time, end date and time, billed length, and actual length.
Cost	The total cost, whether it was included in the calling plan, and the rate per minute.
Origination	The originating number, location, and category (On or Off Network).
Termination	The terminating number, location, and category (On or Off Network).
Technical Details	View all the technical details of the call. This can be helpful to Customer Support when troubleshooting call issues

ACCOUNT SETTINGS

Emergency Notification System

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

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

How It Works

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

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

Update E911 Records

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

Configure Notifications

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

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

The screenshot shows the PenTeleData Admin Portal interface. On the left is a navigation menu with 'Settings' selected and 'General' highlighted. The main content area is titled 'Account Settings' and 'Emergency Notification'. It features a section for 'Emergency Call Notifications' with a checkbox for 'Alternative solution in use'. Below this are input fields for 'Email' (containing 'example@gmail.com') and 'SMS' (containing '1234567890'). To the right is a 'Testing Notifications' section with instructions and a 'Test Notification' button.

Alternative solution in use

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

Testing Notifications

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

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

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

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

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

Example SMS Text Notifications

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

Example Email Notifications

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

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

Emergency Notification Log

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

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

Expand an entry for details.

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

Music On Hold

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

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

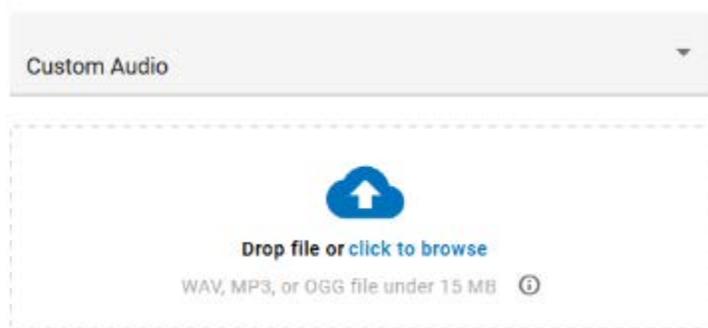
1. Go to **Settings > Music On Hold**.
2. Select a setting from the drop-down menu to apply it to the account:
 - **None (Intermittent Beep)**. The caller will hear two short beeps every 15 seconds.
 - **Standard Options**. Choose from one of three looped, copyright-free audio files.
 - **Custom Audio**.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

Listen to the audio file in your browser

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

Upload Custom Audio

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



1. To upload a custom audio file, do one of the following:
 - Drag and drop the file from your computer to the upload area.

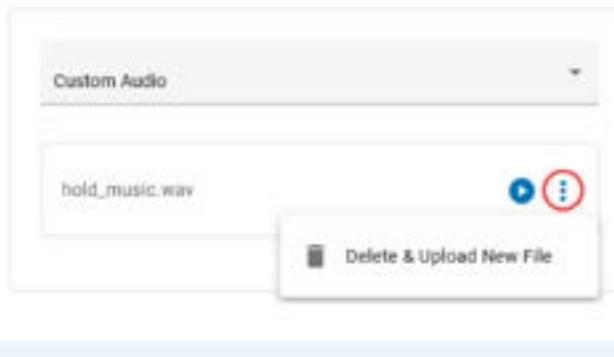
- Click the link in the upload area, then select an audio file from your computer and click **[Open]**.
2. Once uploaded, the file will be converted and optimized for use by the phone system, which *will* result in some degree of quality loss. To hear what it sounds like, click the **play** button on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

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



Change Custom Audio

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



Music On Hold Best Practices

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

The Benefits of Music On Hold Marketing

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

Increase Quality Time

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

Enhance Their Brand

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

Impact Callers Mood

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

Tips for the Perfect Music On Hold

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

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

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

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

Finding Affordable, Legal Music

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

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

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

Sound Quality

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

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

Recommendation

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

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