

Hosted Voice Product Training Call Director

Agenda

1. What is a Call Director?
2. Customer Benefits
3. Example of a Call Director
4. How to Log In
5. Setting up Rules
6. Setting up a Schedule
7. Setting up Special Days
8. Additional Tabs

NHC Academy: 24x7 Online Training

[Agents Academy Home Page](#)

[NHC Web Site](#)

[NHC NewVoice Hosted Services](#)

[Sample End User](#)

[Sample Admin](#)

IP Phone Training

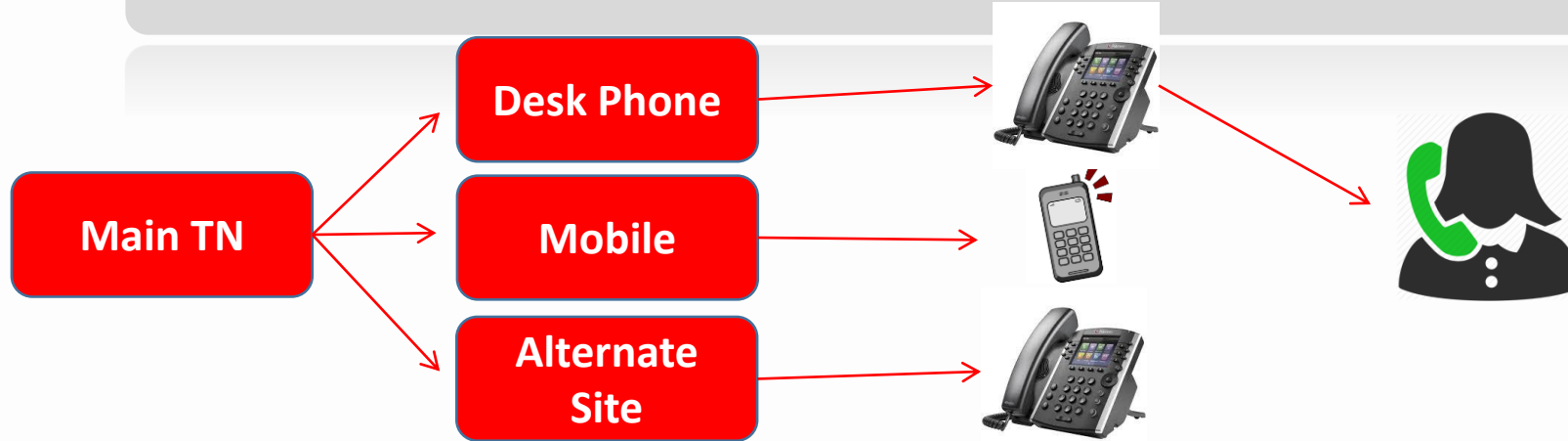


Polycom® SoundPoint® VVX-500 IP Business Phone - Interactive Training Guides

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- [Introduction](#)
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What is a Call Director?



A Call Director gives you the ability to route calls from your main number to alternate destinations.

This Allows automatically routing the main number to any 10 digit domestic phone number, send all calls to the main number to voicemail or set up a weekly call routing schedule based on: time of day, day of week, calling party and configure for holidays or special days in advance based on a calendar.

Calls can also be setup to ring numbers sequentially. Control of call router is through a secure administrative portal where customers can make updates and changes from any Internet connection 24 by 7 and 365 days a year.

What are the Benefits of Call Director?

**Main TN Day
Time**



**Main TN
Night Time**

A screenshot of the 'Easy Attendant' software interface. The window has a title bar 'Easy Attendant' and a menu bar with 'Main', 'Easy Attendant Menu', and 'Extensions'. The 'Easy Attendant Menu' is selected. The main area is divided into two panes. The left pane, titled 'Assign functions to each key on the caller's phone', contains a list of 10 keys (1-0) with dropdown menus for each. Key 1 is set to 'Play Announcement', key 2 to 'Transfer to Phone' (5309), key 3 to 'Transfer to Voicemail' (0900), key 4 to 'Transfer to Phone' (0905), key 5 to 'Dial by Extension', key 6 to 'Dial by Name', key 7 to 'Unassigned', key 8 to 'Unassigned', key 9 to 'Play Announcement', and key 0 to 'Transfer to Phone' (e.g. (123) 456 7890). The right pane, titled 'Record initial greeting', contains a text area with a placeholder message: 'This announcement welcomes your callers, and tells them what options they can select from. These should match the options you have configured in the panel to the left. e.g. "Welcome to Bob's Tires. Press 1 for ..." (see full example)'. There are 'record' buttons next to the text area and at the bottom of the pane. At the bottom of the window are 'Apply' and 'Cancel' buttons.

Allows for Built in Disaster Recovery. Access The CommPortal from any internet connection to redirect the number to a alternate location in the case of power failures or other issue that may effect your service.

Allows you to create call flow rules and apply them to a schedule to be used at different times of the day depending on your business needs.

For example when a call hits you main number during the day you can select to have it live answered . If no one is available have it go to an auto attendant. For night you can have it go direct to the auto attendant.

Log In



NHC newVoice Administrator Phone
Settings

Please log in below.

Number:

Password:

Login

If you have forgotten your password, please contact
customer support.

Open up a web browser

Navigate to

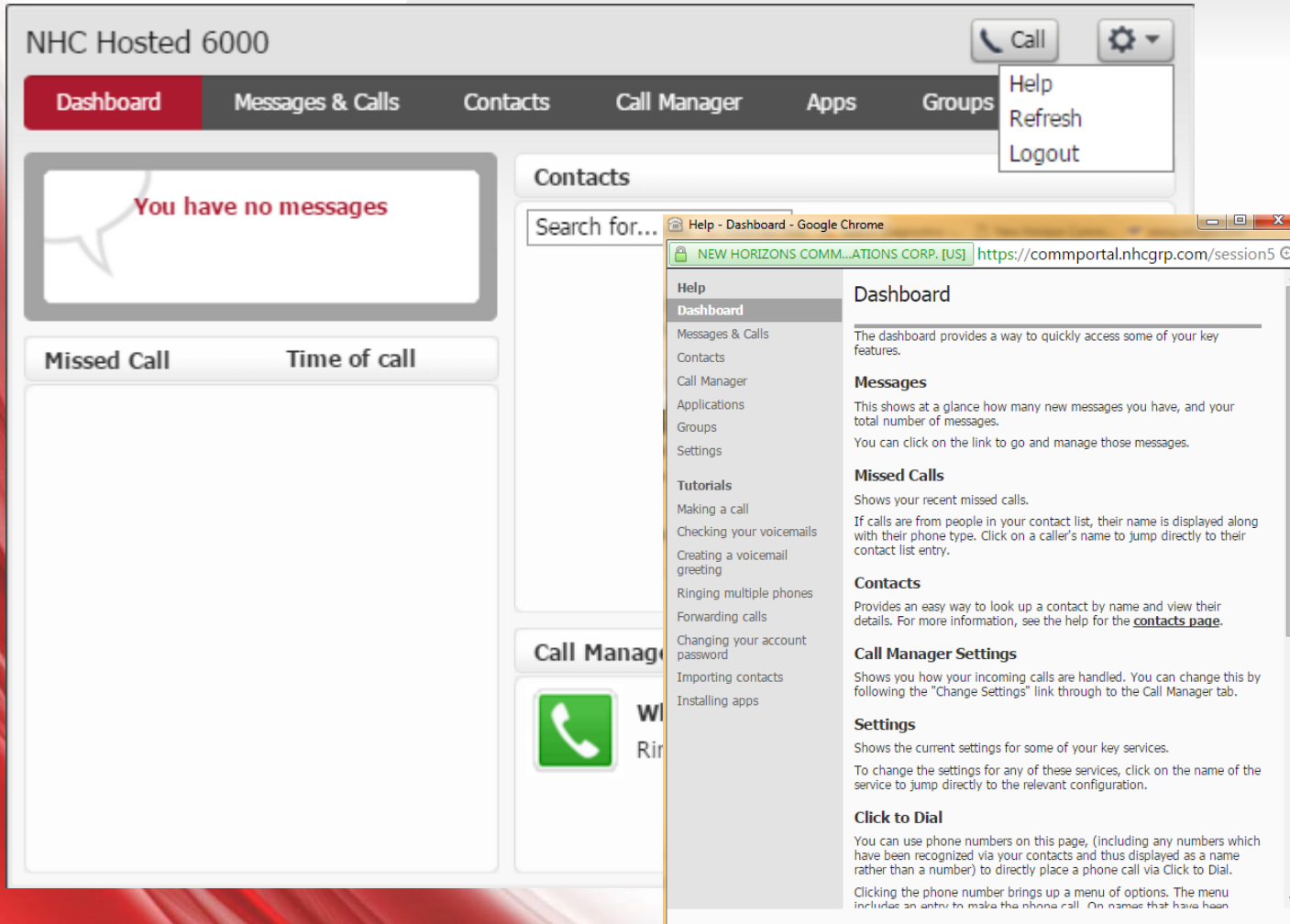
<https://commportal.nhcgrp.com>


You will need to enter the following
information.

Number – This is your 10 digit telephone
number.

Password – This is your Commportal
Password

CommPortal Help



For on demand help, click on the Settings  icon.
(located at the top right corner)

Select Help

Call Manager

Call Director

Dashboard Messages & Calls Contacts **Call Manager** Apps Settings

Summary Rules Weekly Schedule Special Days

When I receive a call

☒ Ring my phone

☐ Forward to <enter a number>

☐ Send to voicemail

Call Manager lets you decide who, how and when callers can reach you. [Learn more](#)

Set up [rules](#) for more advanced control.

Set a [weekly schedule](#) to apply different rules based on time, or day of the week.

▼ **Additional options**

These options apply in all cases where you've chosen to have your phone ring.

If I don't answer:

☐ Forward to <enter a number>

Apply Cancel

The Call Manager allow you define how incoming calls are handled.

You have a number of choices on how Incoming calls can be handled.

- Forward to another number
- Use one of your Set of Rules
- Use a different set of rules depending on time of day.

**For a Call Director you must set to forward to or set up Rules and/or a weekly schedule. The Ring my Phone setting will make you call router inoperable.*

Call Manager - Rules

Call Director

Call

Dashboard Messages & Calls Contacts **Call Manager** Apps Settings

Summary **Rules** Weekly Schedule Special Days

Create rules to handle calls differently, depending on who is calling.
Once you've set up some rules, use the [Summary](#) tab to start using them.
You can also use the [Weekly Schedule](#) to choose when different sets of rules are used.
To begin, start with [an example set of rules](#).

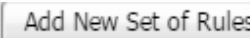
Add New Set of Rules Rename Apply Cancel


The Call Manager rules tabs give you a number of options to work with. To get started with a Example set of rules Click start with an example set of rules.

Call Manager - Rules

The screenshot shows the 'Call Director' application window. The top navigation bar includes 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager' (highlighted), 'Apps', and 'Settings'. Below this, the 'Rules' tab is selected, showing sub-tabs for 'Summary', 'Rules', 'Weekly Schedule', and 'Special Days'. A text box explains: 'Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.' The main area is divided into 'Sets of Rules' and 'Normal'. Under 'Sets of Rules', a list shows 'Normal' (selected), 'Reject Calls' with a delete icon, and 'Screen Calls' with a delete icon. The 'Normal' section contains a text area with the default rule: 'Default: All calls will ring your phone using the Standard Ringtone'. At the bottom of this section are 'Move Up', 'Move Down', 'Edit', and 'Add New Rule' buttons. The bottom of the window features 'Add New Set of Rules', 'Rename', 'Apply', and 'Cancel' buttons.

The Example Set of rules will give you:
Normal Calls
Rejected Calls
Screen Calls

There is also the option to Add New Set of Rules By Selecting the Add New Set of Rules Button 

To Remove a Set of rules click the  Next to the rule.

Hit Apply to save the changes.

Each Set of Rules have different options that you can configure via the **Edit** button.

Call Manager - Rules

Call Director

Dashboard Messages & Calls Contacts **Call Manager** Apps Groups Settings

Summary

Rules give you the Summary

Sets of Rules

Normal

Reject Calls

Screen Calls

When no rules apply in the "Normal" set of rules

When no rules apply

- ☐ ring my phone using the Standard Ringtone ▼
- ☐ forward to <enter a number> ▼
- ☐ send to voicemail
- ☐ reject the call
- ☐ ask the caller to say their name before I accept the call
- ☒ ring more than one phone at the same time or in sequence
- ☐ ask the caller to say their name before ringing more than one phone at the same time or in sequence

< Back Next > Finish Cancel

Click a radio button to determine what happens when this Rule is applied in the Call Manager

To forward the call directly to another number click the forward to radio button and fill in the telephone number field. Then click the Finish button

To ring more than one phone at a time click on the ring more than one phone radio button and click Next.

Call Manager – Timing

When no rules apply in the "Normal" set of rules

When no rules apply

☐ ring my phone using the Standard Ringtone
☐ forward to <enter a number>
☐ send to voicemail
☐ reject the call
☐ ask the caller to say their name before I accept the call
☒ ring more than one phone at the same time or in sequence
☐ ask the caller to say their name before ringing more than one phone at the same time or in sequence

2 Next > Finish Cancel

When no rules apply in the "Normal" set of rules

Choose which phones you would like to ring when no rules apply

Enter the phone number you want to ring, and for how long.

The first phone will always start ringing immediately and you can have more than one phone ring at the same time. If a line is busy, the next available phone will start ringing immediately.

All phones will stop ringing as soon as one phone is answered.

If you don't answer or all lines are busy, the action selected here will be applied instead of any global configuration you may have configured on the Summary page.

3

Phone Number: My Phone Start: 0 End: 120 Add 4

Ring my phone using the Standard Ringtone

If I don't answer or all lines are busy, forward to Voicemail 5

< Back Next > Finish Cancel

When no rules apply in the "Normal" set of rules

Choose which phones you would like to ring when no rules apply

Seconds into call: 0 30 60 90 120

Seconds into call	0	30	60	90	120
My Phone					X
(555) 867 5309					X
(555) 555 1212					X

Phone Number: <enter a number> Start: 0 End: 120 Add

Ring my phone using the Standard Ringtone

If I don't answer or all lines are busy, forward to Voicemail

< Back 6 Finish Cancel

** Note: Each ring last approximately five seconds*

Configuration of ring more that one phone at a time of in sequence.

When Enabled it allows you to redirect calls to alternate telephone numbers.

You Can configure multiple destinations to ring in sequence, simultaneously, or in a combination.

To Start Either Add a New set of rules or Hit Edit to and existing set.

1. Select the Radio Button for ring more than one phone.
 2. Hit Next
 3. Add 1st phone to ring and determine the start and end time for phone to ring
 4. Click Add
- Repeat for all additional phones
5. Choose a option for if the call is not answered
 6. Click Finish

Call Manager – Timing

Call Director Call Settings

Dashboard Messages & Calls Contacts **Call Manager** Apps Settings

Summary **Rules** Weekly Schedule Special Days

Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.

Sets of Rules	Normal
Normal	<i>Default:</i> All calls will ring more than one phone
Reject Calls ✕	
Screen Calls ✕	

Move Up Move Down Edit Add New Rule

Add New Set of Rules Rename Apply Cancel

Click **Apply** to activate the changes



Call Manager – Applying Rules

Call Director

Dashboard Messages & Calls Contacts **Call Manager** Apps Settings

Summary Rules Weekly Schedule Special Days

When I receive a call

☐ Ring my phone

☐ Forward to

☐ Send to voicemail

☒ Use my **Normal** rules (or [set up new rules](#))

☐ Handle depending on the time or day

Set a **weekly schedule** to apply different rules based on time, or day of the week.

▼ **Additional options**
These options apply in all cases where you've chosen to have your phone ring.

If I don't answer:

☐ Forward to

Apply Cancel

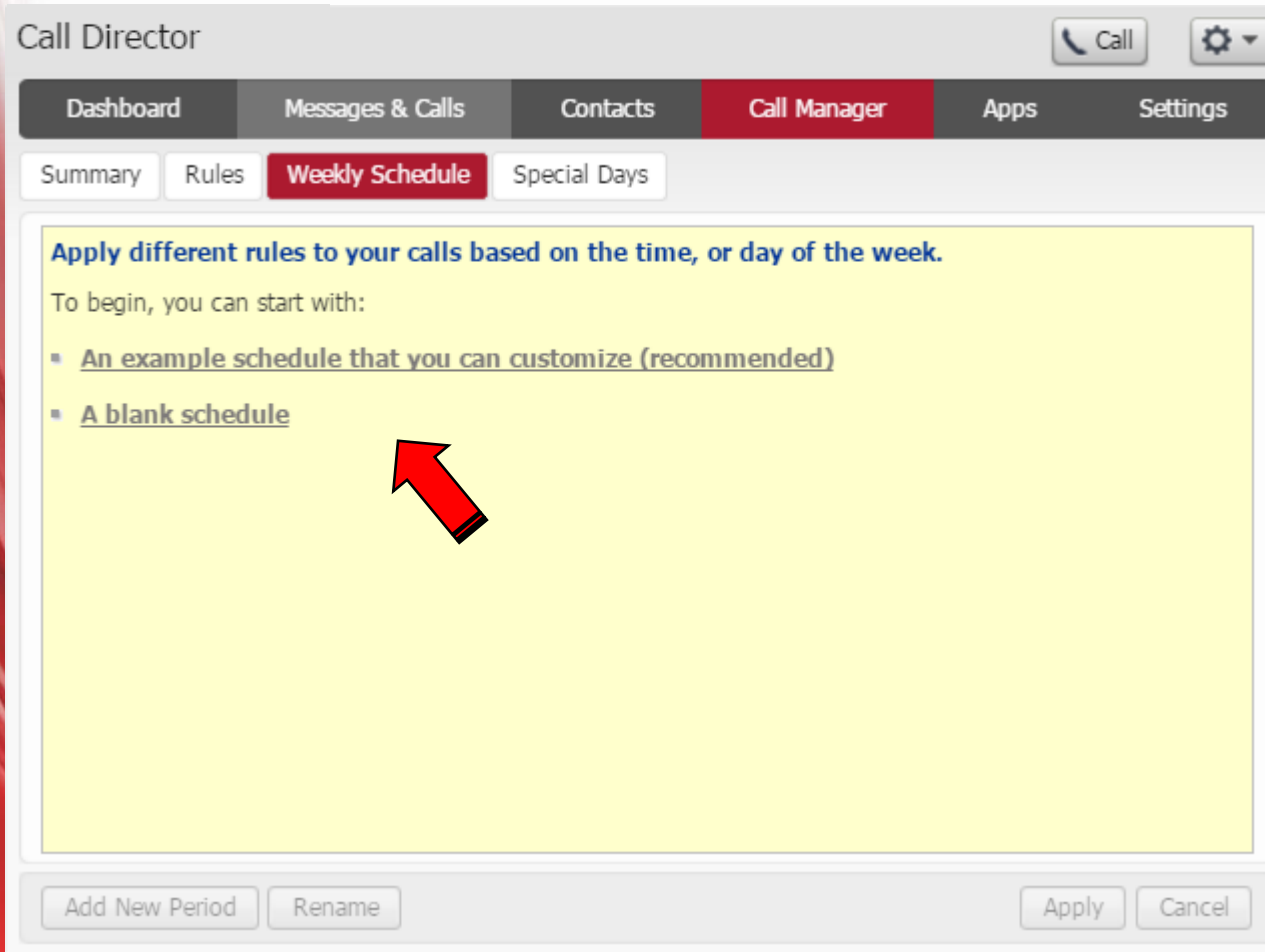
Click back on the Summary tab.

Place the radio button on Use my Rules.

Use the drop down boxes to configure which Rule you want to use

Click Apply to save changes

Call Manager – Weekly Schedule



The weekly schedule tab allows you apply different rules and handle calls based on a specific time period.

To Get Started Choose from:
An example schedule that you can customize
Or
A blank schedule

Call Manager – Weekly Schedule

Call Director

Dashboard Messages & Calls Contacts **Call Manager** Apps Settings

Summary Rules **Weekly Schedule** Special Days

Using your weekly schedule, you can apply different rules at different times of day.

Once you have set up your weekly schedule here, you can use the Summary tab to choose which rules apply during the periods you have defined.

Periods (max 3)

- Lunch
- Weekend**
- Working Hours

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							

Zoom In

Add New Period Rename

Apply Cancel

For our example we have chosen
(An example schedule that you can
customize)

To Make Changes to the Hours:

1. Click on the Period you want to activate.
2. Using your mouse, click & drag over the day and time you want that period active.
3. Click Apply to save changes

** Note: Periods are color coded to match the entries on the schedule. White spaces are considered all other times.*

Call Manager – Create New Period

Call Director

Dashboard Messages & Calls Contacts **Call Manager** Apps Groups Settings

Summary Rules **Weekly Schedule** Special Days

Using your weekly schedule, you can apply different rules at different times of day.

Once you have set up your weekly schedule here, you can use the Summary tab to choose which rules apply during the periods you have.

Periods (max 3)

Working Hours ✕

Choose a name for this new period.
For example, you might choose "Lunch" or "Working Hours".

Name:

OK Cancel

12 pm
1 pm
2 pm
3 pm
4 pm
5 pm
6 pm

Zoom In

1 Add New Period Rename **3** Apply Cancel

1. Click on **Add New Period**
2. Enter a Name for the Period
3. Click Apply

Call Manager – Applying the weekly Schedule

Call Director

Dashboard Messages & Calls Contacts **Call Manager** Apps Settings

Summary Rules Weekly Schedule Special Days

☐ Use my **Normal** rules (or [set up new rules](#))

1 ☒ **Handle depending on the time or day**

▪ On normal days use my **After Hours** rules during **Lunch**

use my **After Hours** rules during **Weekend**

2 use my **Normal** rules during **Working Hours**

use my **After Hours** rules at all other times

▪ On **Special Days** use my **After Hours** rules

▼ **Additional options**

These options apply in all cases where you've chosen to have your phone ring.

If I don't answer:


3 Apply Cancel

To apply the schedule go back to the summary Tab.

1. Please the radio button on (Handle depending on the time or day)
2. Use the drop down boxes to configure which Rule is used during that particular period.
3. Click Apply to save changes.

** Note: At all other times would be anything that is not colored in on the calendar and would be represented by a white space.*

Call Manager – Special Days

Call Director 

Dashboard Messages & Calls Contacts **Call Manager** Apps Groups Settings

Summary Rules Weekly Schedule **Special Days**

Special Days are exceptions to your normal weekly schedule.

For example, vacations or business trips are special days, when you may want to handle calls in a different way. You can use the Summary tab to choose a different rule which applies for the whole of these days.

Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.

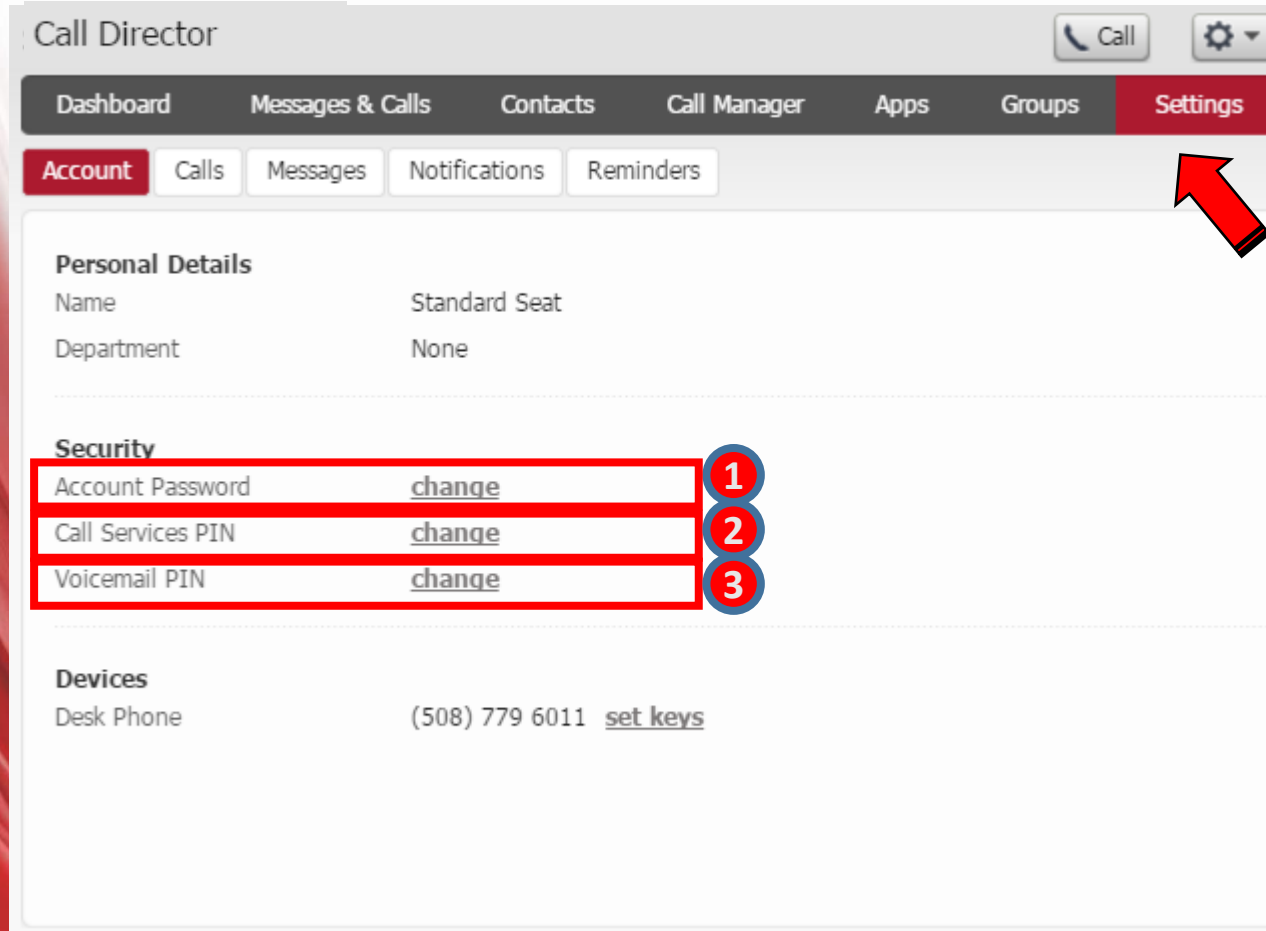
February 2016							March 2016							April 2016						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7		1	2	3	4	5	6					1	2	3
8	9	10	11	12	13	14	7	8	9	10	11	12	13	4	5	6	7	8	9	10
15	16	17	18	19	20	21	14	15	16	17	18	19	20	11	12	13	14	15	16	17
22	23	24	25	26	27	28	21	22	23	24	25	26	27	18	19	20	21	22	23	24
29							28	29	30	31				25	26	27	28	29	30	

Go To Today Clear All Add Public Holidays Apply Cancel

The **Special Days** tab allows you to define days on which you will not be following your normal daily schedule.

For example, you can configure a special day for the standard public holidays or on a vacation day.

Settings – Account Password



Call Director

Call [Settings]

Dashboard Messages & Calls Contacts Call Manager Apps Groups **Settings**

Account Calls Messages Notifications Reminders

Personal Details

Name	Standard Seat
Department	None

Security

Account Password	change	1
Call Services PIN	change	2
Voicemail PIN	change	3

Devices

Desk Phone	(508) 779 6011 set keys
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1. **Account Password:** Allows you to change your login password for the CommPortal.
2. **Call Services Pin:** Allows you to change your PIN for Remote Call Services.
3. **Voicemail Pin:** Allows you to change your PIN for Voicemail

Settings – Changing Passwords

Change Account Password

Current password:

New password:

Confirm new password:

1. Enter **Current Password**
2. Enter **New Password**
3. Confirm **New Password**
4. Click **Confirm** to save changes

Note: Password must be alphanumeric and contain at least one letter and one number. (8 to 20 characters)

Change Call Services PIN

New PIN:

1. Enter **New PIN**
2. Click **Confirm**

Note: Password must be 4 numbers long.

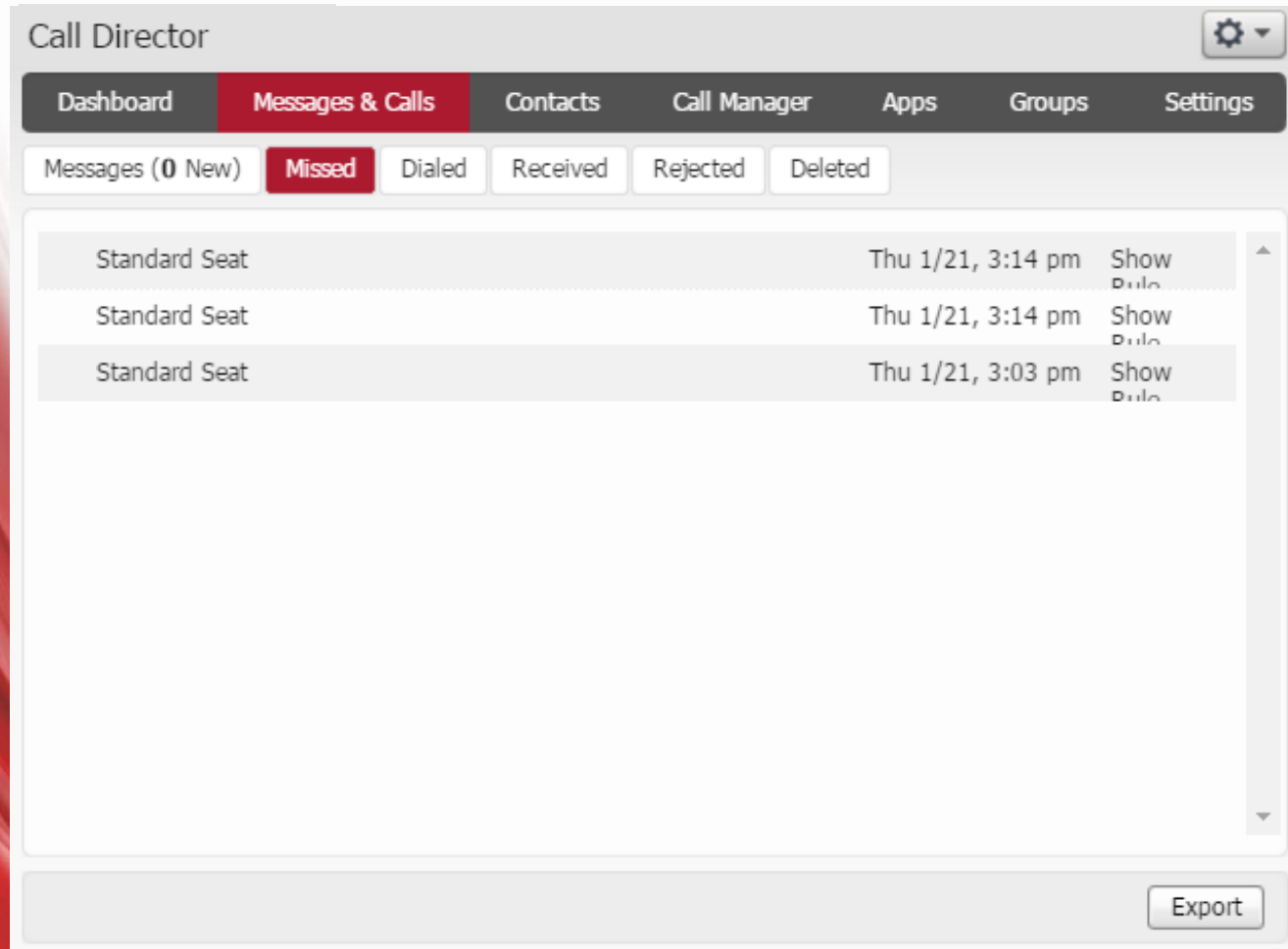
Change Voicemail PIN

New PIN:

1. Enter **New PIN**
2. Click **Confirm**

Note: Password must be 6-20 numbers long with no numbers in a sequence. It also cannot be the number of the line or contain a part of the number

Call History

The screenshot shows the 'Call Director' web interface. At the top, there's a navigation bar with tabs: 'Dashboard', 'Messages & Calls' (which is highlighted in red), 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Below the navigation bar, there's a sub-menu for 'Messages (0 New)' with buttons for 'Missed' (highlighted in red), 'Dialed', 'Received', 'Rejected', and 'Deleted'. The main content area displays a list of missed calls. Each entry shows the caller's name 'Standard Seat', the time 'Thu 1/21, 3:14 pm' or 'Thu 1/21, 3:03 pm', and a 'Show Details' link. At the bottom right of the interface, there is an 'Export' button.

Caller	Time	Action
Standard Seat	Thu 1/21, 3:14 pm	Show Details
Standard Seat	Thu 1/21, 3:14 pm	Show Details
Standard Seat	Thu 1/21, 3:03 pm	Show Details

Call History

The Call History Tab will show you call the calls that have come through the call router. As the call router does not actually answer the calls they will appear on the missed calls tab.



For any questions or additional help, visit

<http://www.nhcgrp.com/resources/>

- or -

Contact our Customer Care Specialists @

855-600-4NHC (4642)