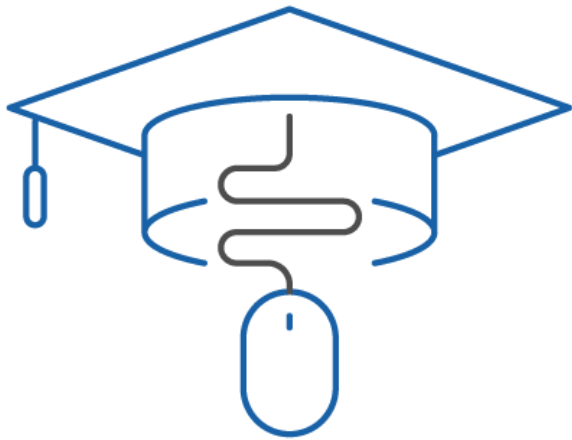




THE Communications STACK Provider™



NHC Academy Training Module

Hosted Voice Product Training Call Director

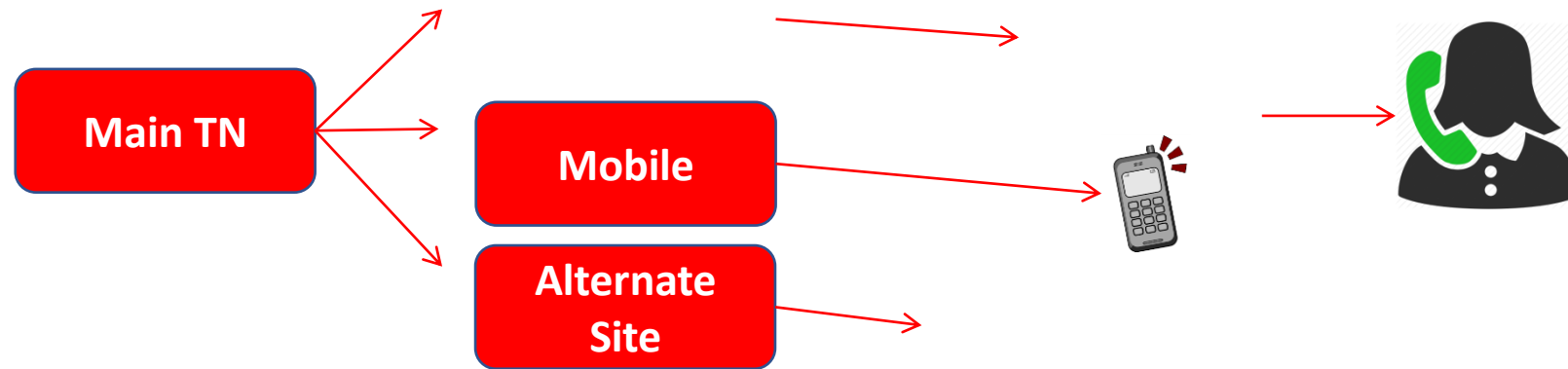
What you'll learn today.



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

What is a Call Director?

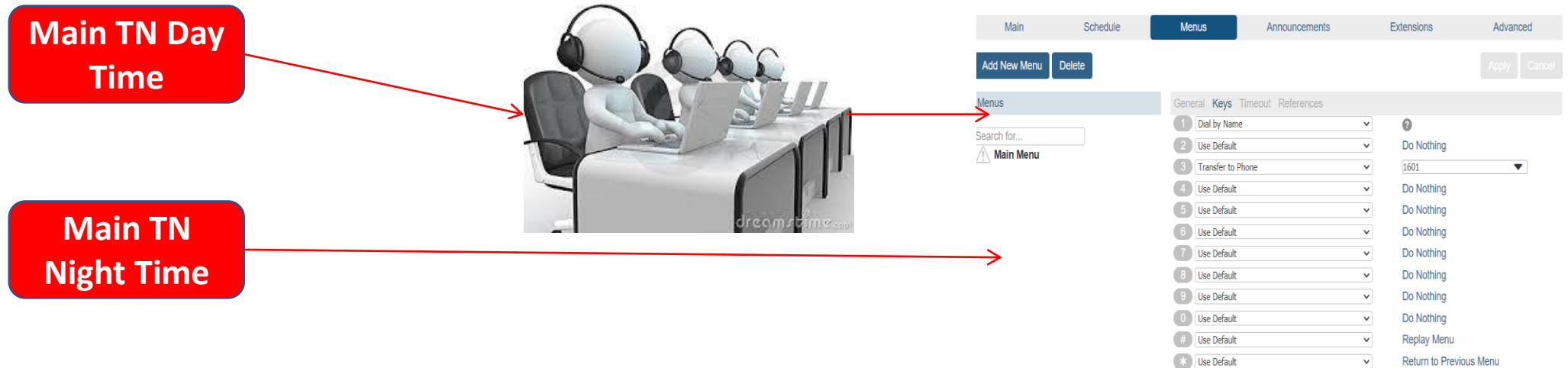


A Call Director gives you the ability to route calls from your main number to alternate destinations.

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?



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



CommPortal Web

Please log in below.

Number:

Password:

☐ Remember me on this computer.

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 Comm-portal Password



Home Messages and Calls Contacts

Start ▾

Butters Stotch ▾

Phone Status

Summary

Rules

Weekly Schedule

Special Days

Apply

Cancel

When I receive a call

☐ Ring my phone

☐ Forward to 1601 ▾

☐ 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.

From your “Home” screen, you have a number of choices on how Incoming calls can be handled.

- Ring my phone
- Forward to another number
- Send to Voicemail
- 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.*



Home Messages and Calls Contacts

Start ▾

Butter Stotch ▾

Phone Status

Summary

Rules

Weekly Schedule

Special Days

Add New Set of Rules

Rename

Apply

Cancel

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.](#)

The rules tab will give you a number of options to work with. A "Rule" defines an action or a set of actions to take place when the rule is active.

I.E. When someone dials your desk phone, a rule can be created to also ring your cell phone.

To get started with an Example set of rules Click start with an example set of rules.



[Home](#) [Messages and Calls](#) [Contacts](#) [Start](#) [Butter Stotch](#)

Phone Status


[Summary](#) [Rules](#) [Weekly Schedule](#) [Special Days](#)


[Add New Set of Rules](#) [Rename](#) [Apply](#) [Cancel](#)


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](#) [Screen Calls](#)

Normal

Reject Calls 

Screen Calls 

When I receive a call from an anonymous number, ask the caller to say their name before I accept the call 

Default: The call will ring your phone using the Standard Ringtone


[Move Up](#) [Move Down](#) [Edit](#) [Add New Rule](#)

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

[Add New Set of Rules](#)

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.

Rules



Home Messages and Calls Contacts Start Butter Stotch

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

☐ play a reject message and 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

Select the rule you wish to edit and click the Edit button.

Click a radio button to determine what happens when this Rule is applied.

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.

Rule: ring more than one phone at the same time or in a sequence



Home Messages and Calls Contacts Start Butter Stotch

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

☐ play a reject message and reject the call

1 ☒ 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

2 < Next >

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

My Phone (555) 867 5309 (555) 222 1234

3 Phone Number: My Phone Start: End: 30 Add 4

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

Phone Number: enter a number Start: 0 End: 60

Ring my phone using the Standard Ringtone

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

5

6 < Back Next > Finish Cancel

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
5. Choose an option for if the call is not answered
6. Click Finish

* Repeat for all additional phones

** Note: Each ring last approximately five seconds*

Rule: ring more than one phone at the same time or in a sequence Cont....



[Home](#) [Messages and Calls](#) [Contacts](#) [Start](#) [Butter Stotch](#)

Phone Status

[Summary](#) [Rules](#) [Weekly Schedule](#) [Special Days](#)

[Add New Set of Rules](#) [Rename](#) [Apply](#) [Cancel](#)

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](#) [Default: All calls will ring more than one phone](#)

[Move Up](#) [Move Down](#) [Edit](#) [Add New Rule](#)

1. Click **Apply** to activate the changes

ring more than one phone at the same time or in a sequence Cont....



Home Messages and Calls Contacts

Start ▾

Butter Stotch ▾

Phone Status

Summary

Rules

Weekly Schedule

Special Days

2

Apply

Cancel

When I receive a call

☐ Ring my phone

☐ Forward to

☐ Send to voicemail

☒ Use my 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.

Click back on the Summary tab.

1. Place the radio button on Use my Rules. (Use the drop-down box to configure which Rule you want to use)
2. Click Apply to save changes

Weekly Schedule



The screenshot shows the nhc application interface. At the top is a dark blue header with the nhc logo. Below the header is a navigation bar with links for 'Home', 'Messages and Calls', and 'Contacts'. To the right of these links are two buttons: 'Start' and 'Butter Stotch'. The main content area is titled 'Phone Status' and contains four tabs: 'Summary', 'Rules', 'Weekly Schedule' (which is selected and highlighted in dark blue), and 'Special Days'. Below the tabs are four buttons: 'Add New Period', 'Rename', 'Apply', and 'Cancel'. A text block below the buttons reads: 'Apply different rules to your calls based on the time, or day of the week. To begin, you can start with:'. A red arrow points to a list of two options: 'An example schedule that you can customize (recommended)' and 'A blank schedule'.

Home Messages and Calls Contacts Start Butter Stotch

Phone Status

Summary Rules Weekly Schedule Special Days

Add New Period Rename Apply Cancel

Apply different rules to your calls based on the time, or day of the week.

To begin, you can start with:

- An example schedule that you can customize (recommended)
- A blank 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

Weekly Schedule



Home Messages and Calls Contacts Start Butter Stotch

Phone Status

Summary Rules **Weekly Schedule** Special Days

Add New Period Rename Apply Cancel

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
1 am	Green					Green	Green
2 am	Green					Green	Green
3 am	Green					Green	Green
4 am	Green					Green	Green
5 am	Green					Green	Green
6 am	Green					Green	Green
7 am	Green					Green	Green
8 am	Green					Green	Green
9 am	Green					Green	Green
10 am	Purple	Purple	Purple	Purple	Purple	Green	Green
11 am	Purple	Purple	Purple	Purple	Purple	Green	Green
12 pm	Blue	Blue	Blue	Blue	Blue	Green	Green
1 pm	Purple	Purple	Purple	Purple	Purple	Green	Green
2 pm	Purple	Purple	Purple	Purple	Purple	Green	Green
3 pm	Purple	Purple	Purple	Purple	Purple	Green	Green
4 pm	Purple	Purple	Purple	Purple	Purple	Green	Green
5 pm	Purple	Purple	Purple	Purple	Purple	Green	Green
6 pm					Green	Green	Green
7 pm					Green	Green	Green
8 pm					Green	Green	Green
9 pm					Green	Green	Green
10 pm					Green	Green	Green
11 pm					Green	Green	Green

Zoom In

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.*

Weekly Schedule– Create New Period



The screenshot shows the nhc interface for creating a new weekly schedule period. The 'Weekly Schedule' tab is active. A red circle with the number '1' highlights the 'Add New Period' button. Below the tabs, a text box explains that users can apply different rules at different times of day. A list of existing periods, 'Weekend' and 'Working Hours', is shown on the left. The main area is a calendar grid with days of the week as columns and times from 1 am to 11 pm as rows. A new period is being created, highlighted in purple, spanning from 12 pm to 1 pm on Monday. A red circle with the number '2' highlights the 'Name' input field, which contains the text 'Lunch'. A text box prompts the user to 'Choose a name for this new period.' and provides an example: 'For example, you might choose "Lunch" or "Working Hours".' A red circle with the number '3' highlights the 'OK' button. The 'Cancel' button is also visible.

nhc.

Home Messages and Calls Contacts Start Butter Scotch

Phone Status

Summary Rules **Weekly Schedule** Special Days

1 Add New Period Rename Apply Cancel

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)

Weekend x

Working Hours x

Mon Tue Wed Thu Fri Sat Sun

1 am 2 am 3 am 4 am 5 am 6 am 7 am 8 am 9 am 10 am 11 am 12 pm 1 pm 2 pm 3 pm 4 pm 5 pm 6 pm 7 pm 8 pm 9 pm 10 pm 11 pm

Choose a name for this new period.

For example, you might choose "Lunch" or "Working Hours".


Name: Lunch

2 **3** OK Cancel

Zoom In

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

Applying the weekly Schedule



Home Messages and Calls Contacts Start Butter Stotch

Phone Status

Summary Rules Weekly Schedule Special Days

Apply Cancel

When I receive a call

☐ Ring my phone

☐ Forward to

☐ Send to voicemail

☐ Use my rules (or set up new rules)

1 ☒ Handle depending on the time or day

On normal days, use my:

rules during Weekend

2 rules during Working Hours (active now)

rules at all other times

Add New Weekly Period

On Special Days, use my:

rules

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.*

Special Days



[Home](#) [Messages and Calls](#) [Contacts](#) [Start](#) [Butter Stotch](#)

Phone Status

[Summary](#) [Rules](#) [Weekly Schedule](#) [Special Days](#)

[Go To Today](#) [Clear All](#) [Add Public Holidays](#) [Apply](#) [Cancel](#)

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.

September 2020

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

October 2020

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

November 2020

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

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.



THE Communications STACK Provider™

Thank you for learning with us today!

Have Questions? Visit nhcgrp.com/academy for more information.