Voice Portal Admin Guide

Updated October 2025

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Admin Voice Portal

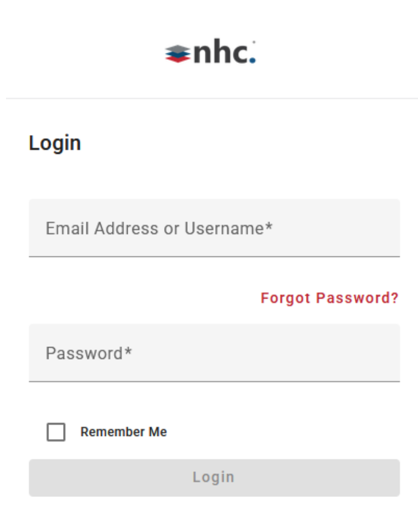
The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

As an Account Manager or Admin user, you have access to manage not only your own services but those of other users on the account. 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 for assistance.

Log In

When your account was created, an email was sent to you containing your username, a link to create your password, and the portal URL. Keep that email safe so you can refer to it later. If you haven't received it, contact Customer Support at 855-600-4NHC to get your login information.

1. Go to https://nhcgrp.user.alianza.com/login.
2. Enter your username or email address and password.
3. Check *Remember Me* to save your username and password.
4. Click [Login].

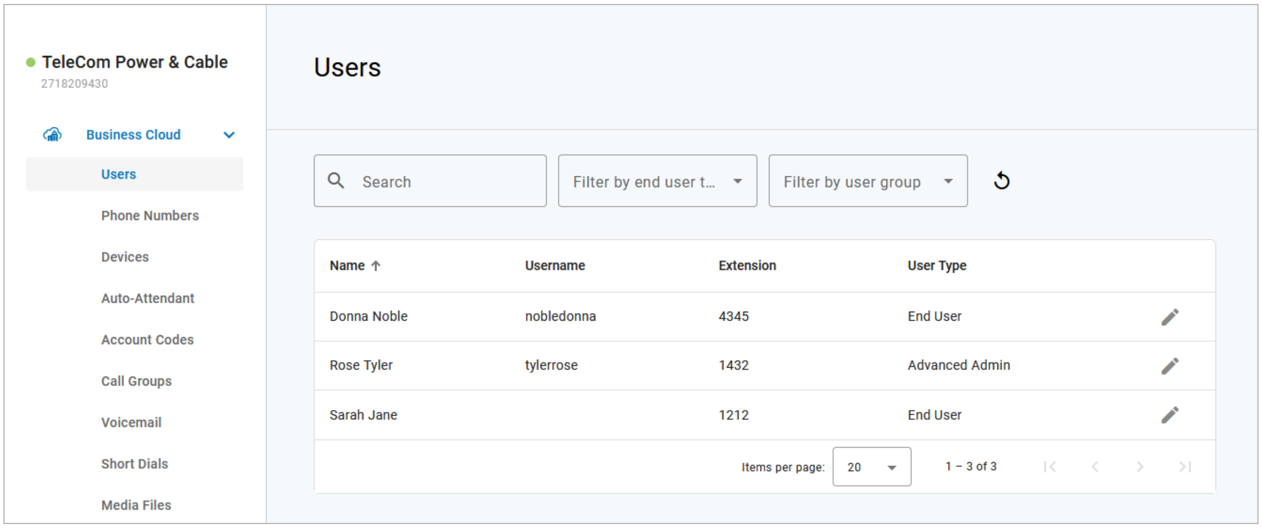


Forgot Password

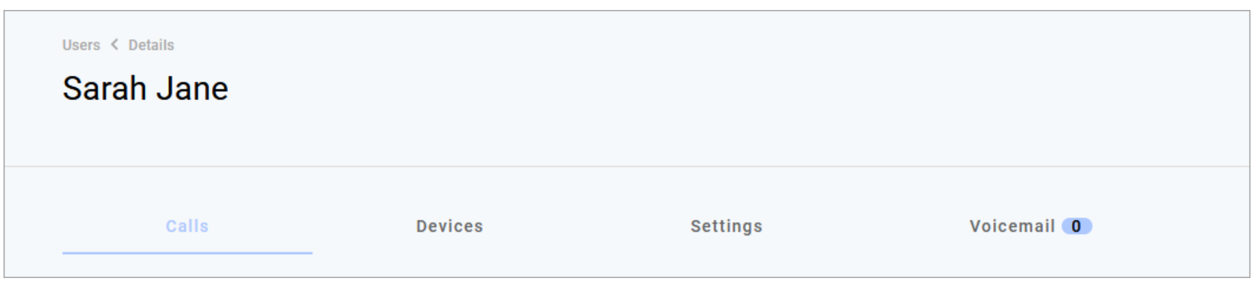
If you can't log in, click *Forgot Password?* and an email will be sent to you with a link to reset it. Your new password must be at least eight characters long and include at least one number and one special character (^ $ * . [ ] { } ( ) ? " ! @ # %& / \ ,> < ' : ; | _ ~ ` = + -).

Users

All users on the account are listed here. You can use the search bar to filter the list by username, first or last name, extension, device, MAC address, phone number, caller ID number, or user tag. Additionally, you can use the menu next to the search bar to filter by a specific user type or sort the table by heading.



To edit the settings for a specific user, hover over the user and click Edit on the right. For each user, there are four tabs that organize the user's settings: Calls, Devices, Settings, and Voicemail.

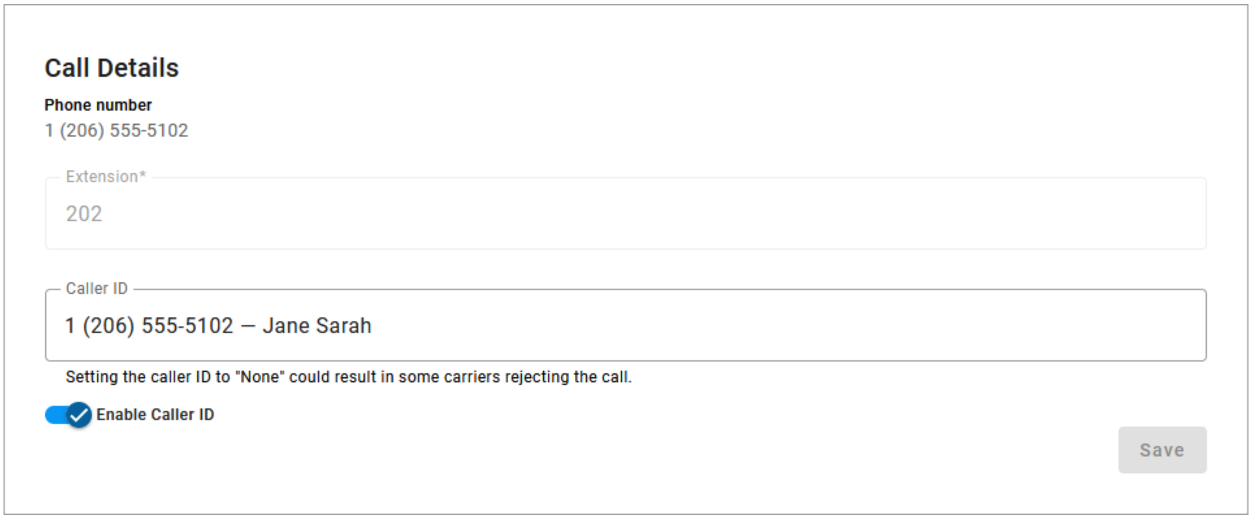


Calls

The Calls tab lists the user's phone number(s), caller ID, and the settings that control how incoming calls to this user are handled.

Call Details

All phone numbers pointing to this user are listed here. Incoming calls to these numbers will follow the user's Call Handling and Call Screening options as defined below. To add or remove a phone number, please contact Customer Support.



Feature	Description
Phone number	The phone number(s), if any, routed to this user. If a number has not yet been assigned, see Phone Number Route Management.
Extension	The dialable extension the user can be reached at on the account. This field is required.
Caller ID	The phone number and name sent with outbound calls from this user which is displayed on the phone of the person being called. Users can choose the main account number, their phone number, or choose *None* to not send out any caller ID at all. This field is required. It is important to choose a number here, even if you choose to disable caller ID (below). If this field is set to *None*, outbound calls—even to 911—will be sent out as *Anonymous*, and the carrier may reject the call.
Enable Caller ID	This toggle determines if the caller ID name is or is not sent with outbound calls. This setting can also be managed in the user's Voice Portal or via star codes. • On: Caller ID will be sent on all outbound calls. • Off: Caller ID will be sent as BLOCKED. The phone number selected in the *Caller ID* field will still be sent with calls to 911.

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?

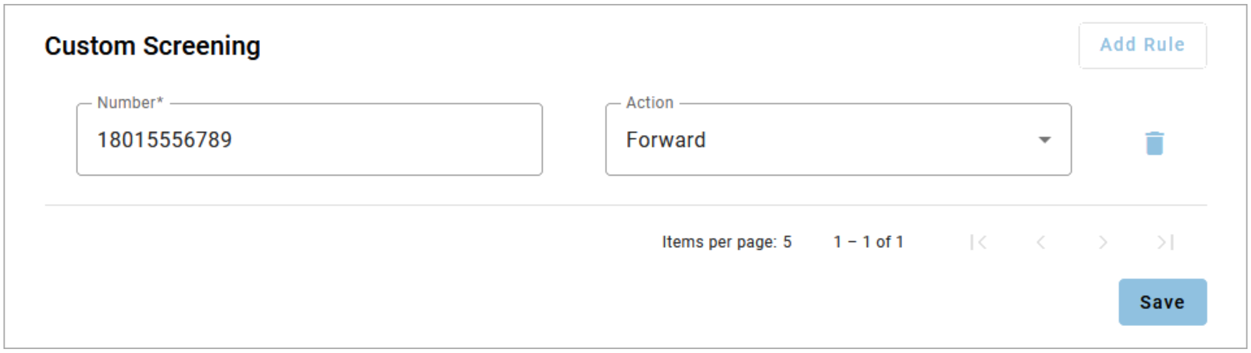
Choose how calls from anonymous numbers, toll-free numbers, and other callers will be handled. For each category, choose an action (behavior) from the menu. The options for each category are *Allow*, *Allow with priority ring*, *Block*, *Block with message*, *Forward*, and *Voicemail*.

Feature	Description
Screening forward number	Enter a destination phone number that will be used when a call screening category is set to *Forward*.
Anonymous callers	Choose what happens to incoming calls that don't send caller ID.
Toll-free callers	Choose what happens to incoming calls from a toll-free number.
All other callers	Choose what happens to all other incoming calls that are not otherwise defined by a custom screening rule.

Custom Screening

Custom screening rules define the call handling action for inbound calls from specific phone numbers. The screened phone numbers and associated action are listed here.

To add a custom rule, click [Add Rule], then enter the phone number and select an action, and click [Save] when you're done. To create a rule for a group of phone numbers with the same area code and/or prefix, enter the first few digits of the phone number instead.



Feature	Description
Number	Enter the phone number for which this custom rule will apply.
Action	Choose what happens to incoming calls from this number.

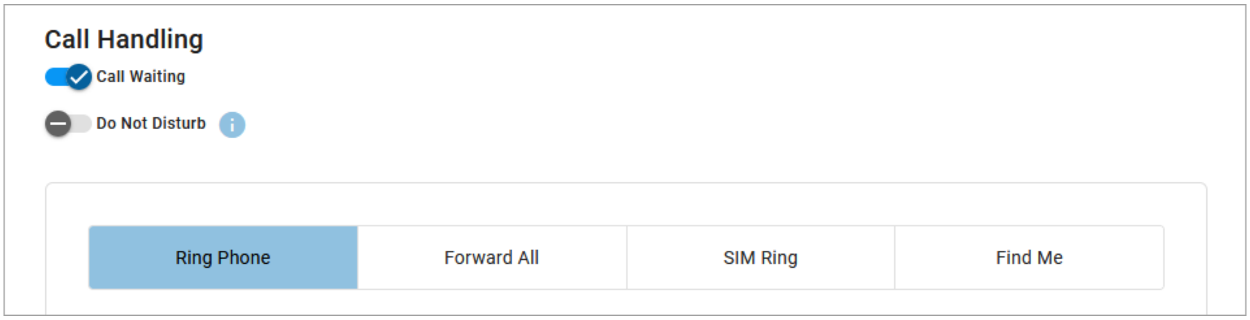
Call Screening Actions

For each category, choose a screening action from the 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: • 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 *Screening forward number* 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 Waiting and Do Not Disturb settings. Just below that, select and configure a ring strategy: Ring Phone, Forward All, Simultaneous Ring, and Find Me/Follow Me.



Call Waiting

Call Waiting allows a second call will be allowed to ring through while you are already on the phone.

- On: While on an active call, you will hear a tone that indicates a second caller is trying to reach you.
- Off: While you're on an active call, incoming calls hear a busy tone.

> **IP PHONES**
>
> If Call Waiting is enabled and the IP phone has multiple instances of the same line assigned to it, the first line will ring even if the line is on a call. If Call Waiting is disabled, the second device line will ring.

Do Not Disturb

This feature allows you to mute all incoming alerts and notifications.

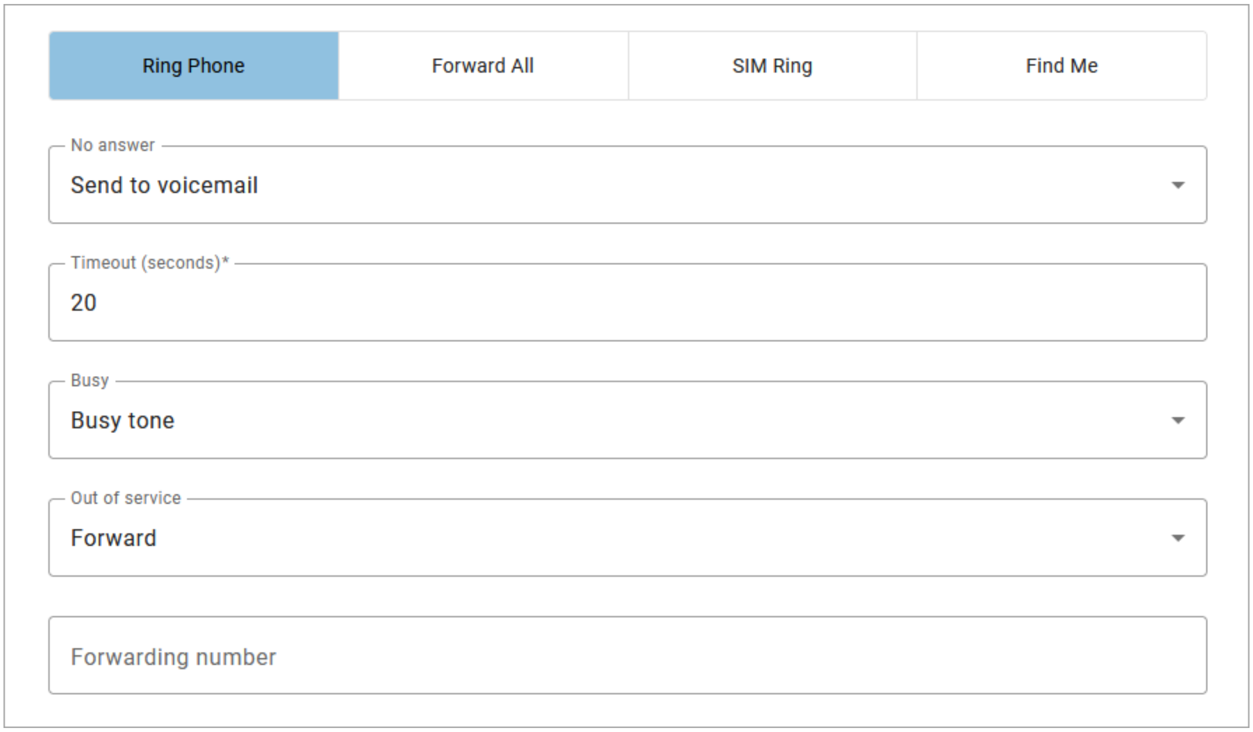
- On: Incoming calls are routed directly to the user's voicemail box.
- Off: Incoming calls follow the user's call handling settings.

> **VOICEMAIL BOX**
>
> If the user doesn't have a voicemail box, callers will hear a busy tone. If they 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.

For *Forward*, enter the phone number to which calls will be forwarded and an optional description.

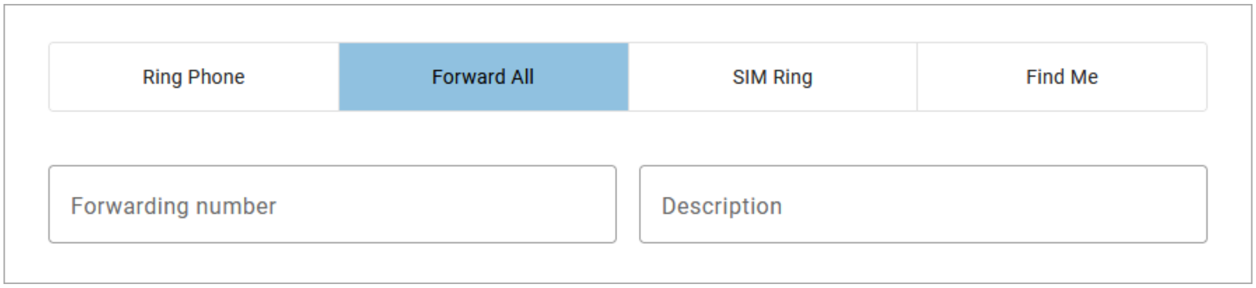


Feature	Description
No answer	Choose what happens to the call after it is unanswered after the number of seconds specified in the field below.
Timeout	The number of seconds a call will ring before it follows the *No answer* action.
Busy	Choose what happens to the call when the device is busy (already in use and Call Waiting is not enabled).
Out of service	Choose what happens to the call when the device is not registering on the voice server.

Forward All

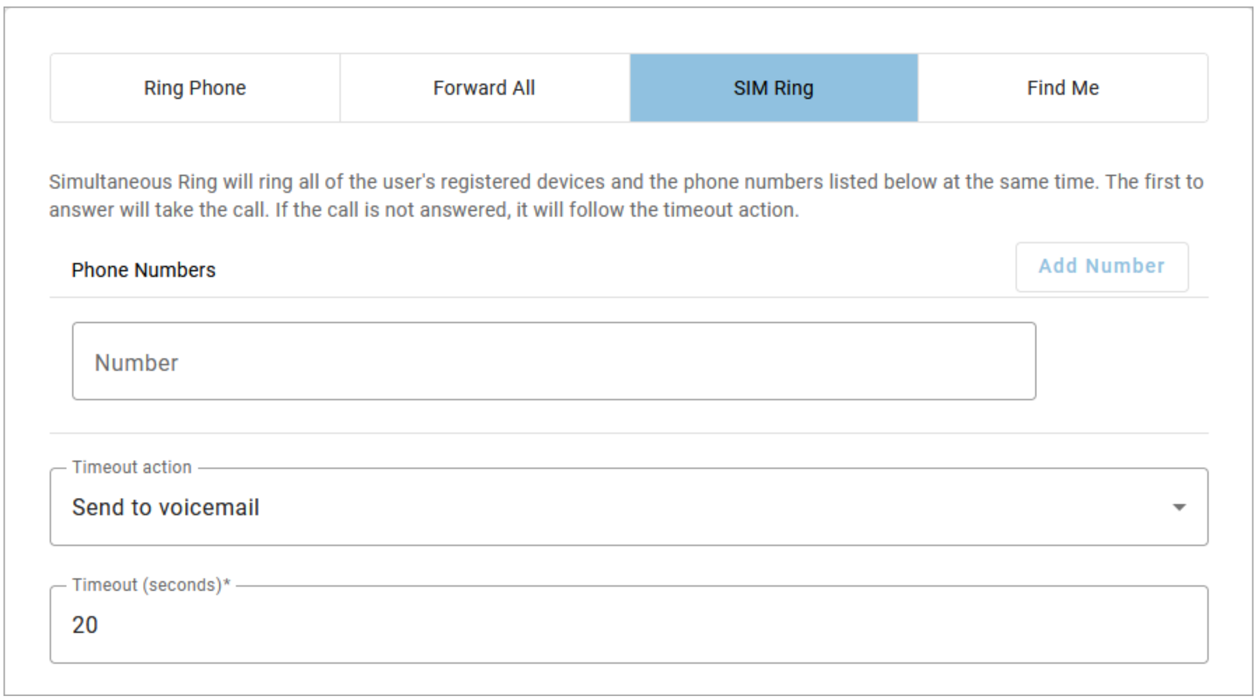
Working on the go and need all the calls that come into your desk phone to reach you? Do all incoming calls need to be redirected elsewhere? Forward All can do this by sending your callers to an alternative phone number that you enter here.

Once a forwarding phone number is saved, 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 at the same time until the call is answered or times out. The first phone number to pick up takes the call.



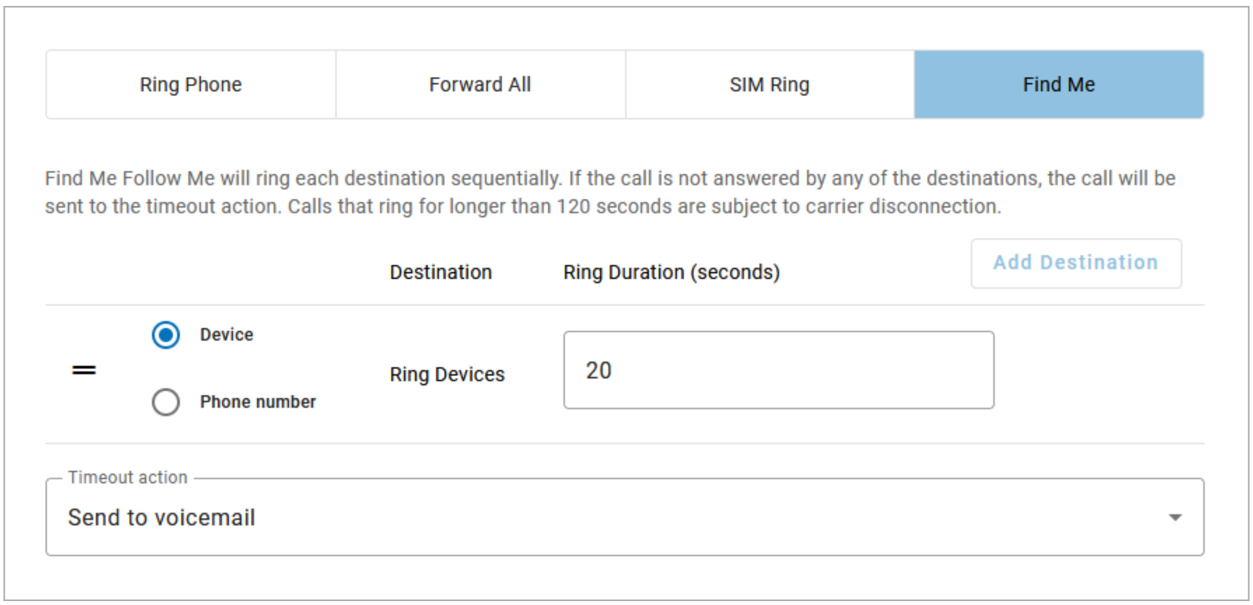
Feature	Description
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [Add Number].
No Answer	Choose what happens when the call is unanswered: • Busy tone • Forward to (add a forwarding number) • Ring forever

	• Send to voicemail
Timeout (seconds)	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.

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.

- Click [Add Destination] to add a device or phone number destination.
- Drag ═ to reorder a destination or click the trash icon to delete it.

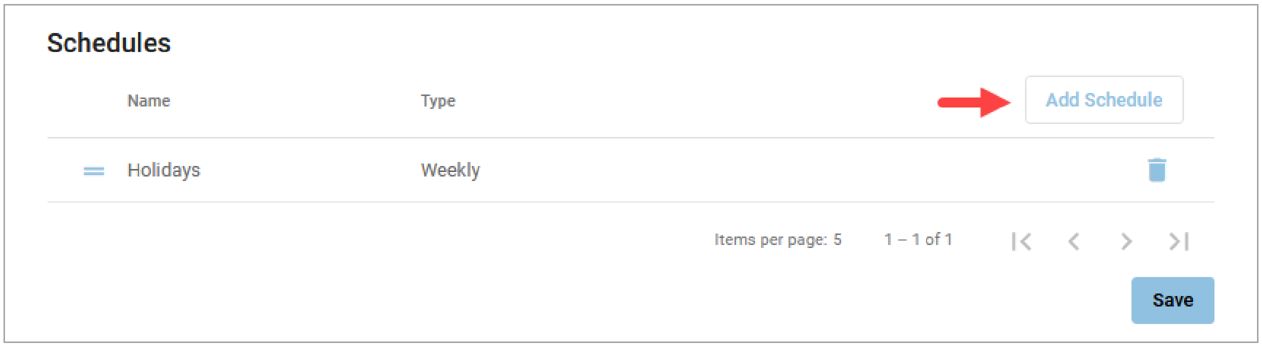


Feature	Description
Destination	Indicate if calls should ring to all the user's devices or a specific phone number. To add another one, click [Add Destination].
Devices	Enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.
Phone Number	Enter the phone number and number of seconds calls will ring on that number before progressing to the next destination.
Timeout Action	Choose what happens to the call after all destinations have timed out: • Busy tone • Send to voicemail

Schedules

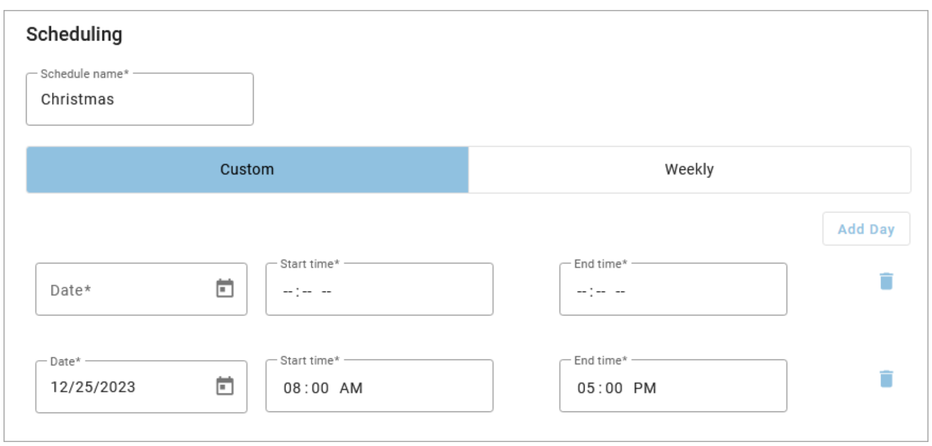
Schedules provide custom call handling for your callers based on when they call in, down to the very minute. Start and end times follow the account's default time zone. The user's primary Call Handling settings will take effect *outside* of these scheduled hours.

The user's schedules are listed here. To add a new one, click [Add Schedule]. To edit an existing schedule, click the row.

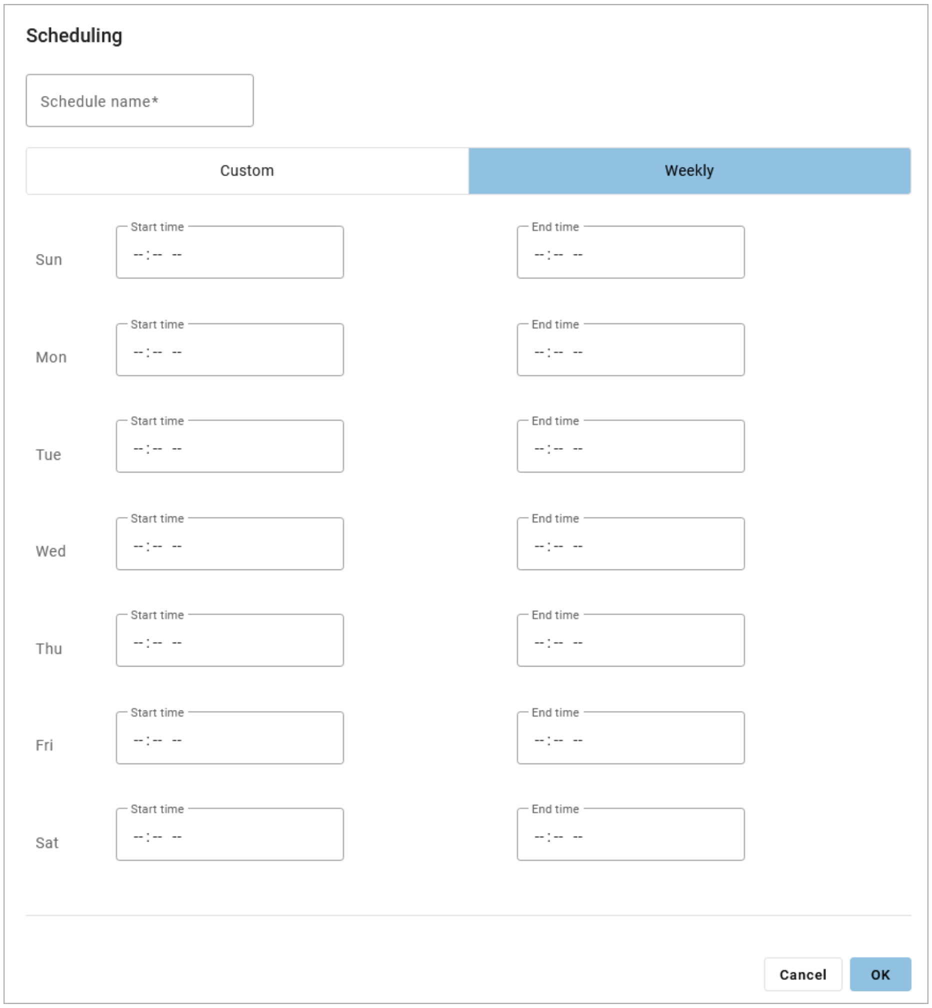


Add a Schedule

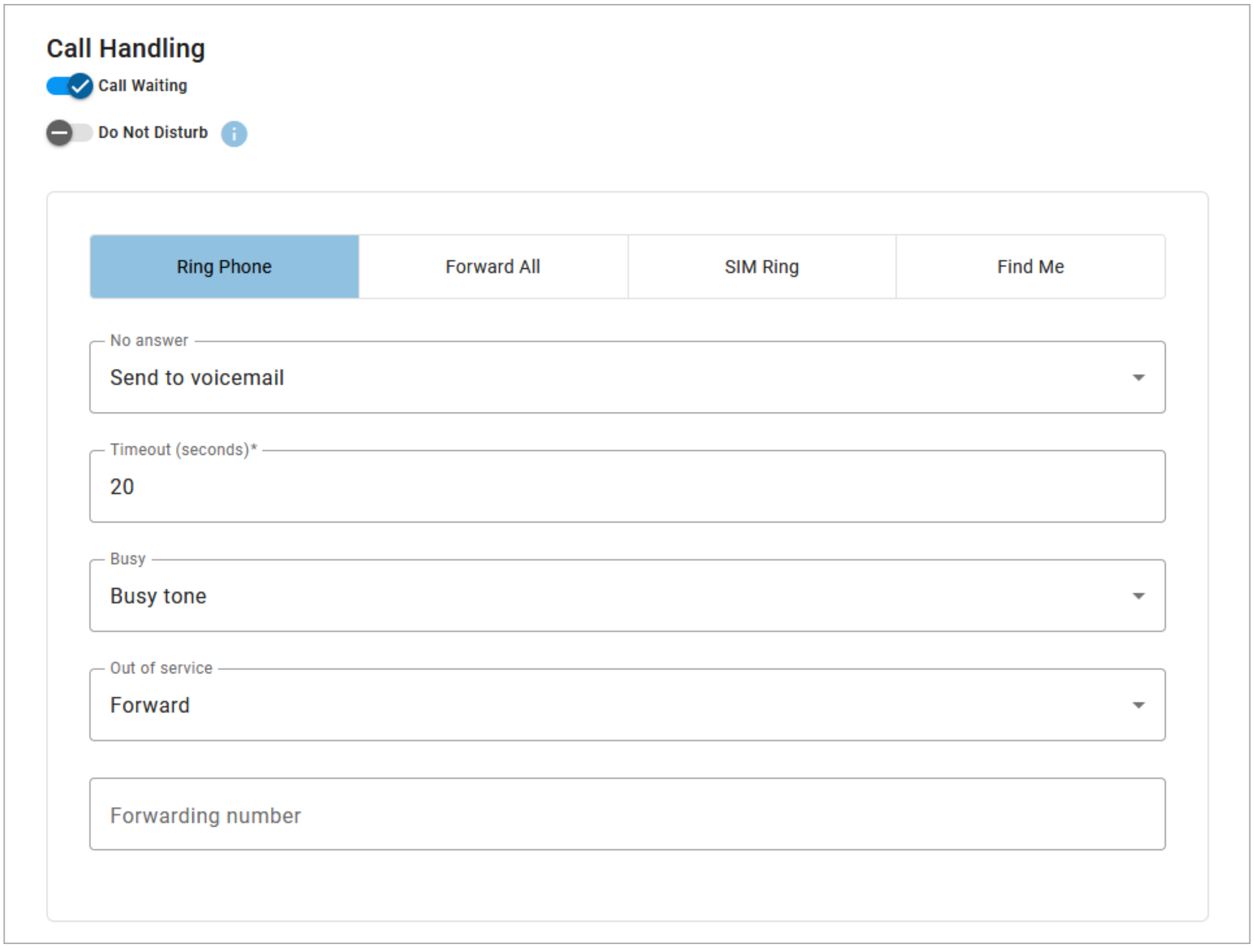
4. Click [Add Schedule]. The Scheduling window will open in a popup.
5. Enter the name of the schedule.
6. Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).
   - Custom (per day). Enter the date and time this schedule will be in effect. Click [Add Day] to add another one, or the trash icon to remove a day.



- Weekly (recurring). Enter the start and end times for each day of the week this schedule will be in effect.



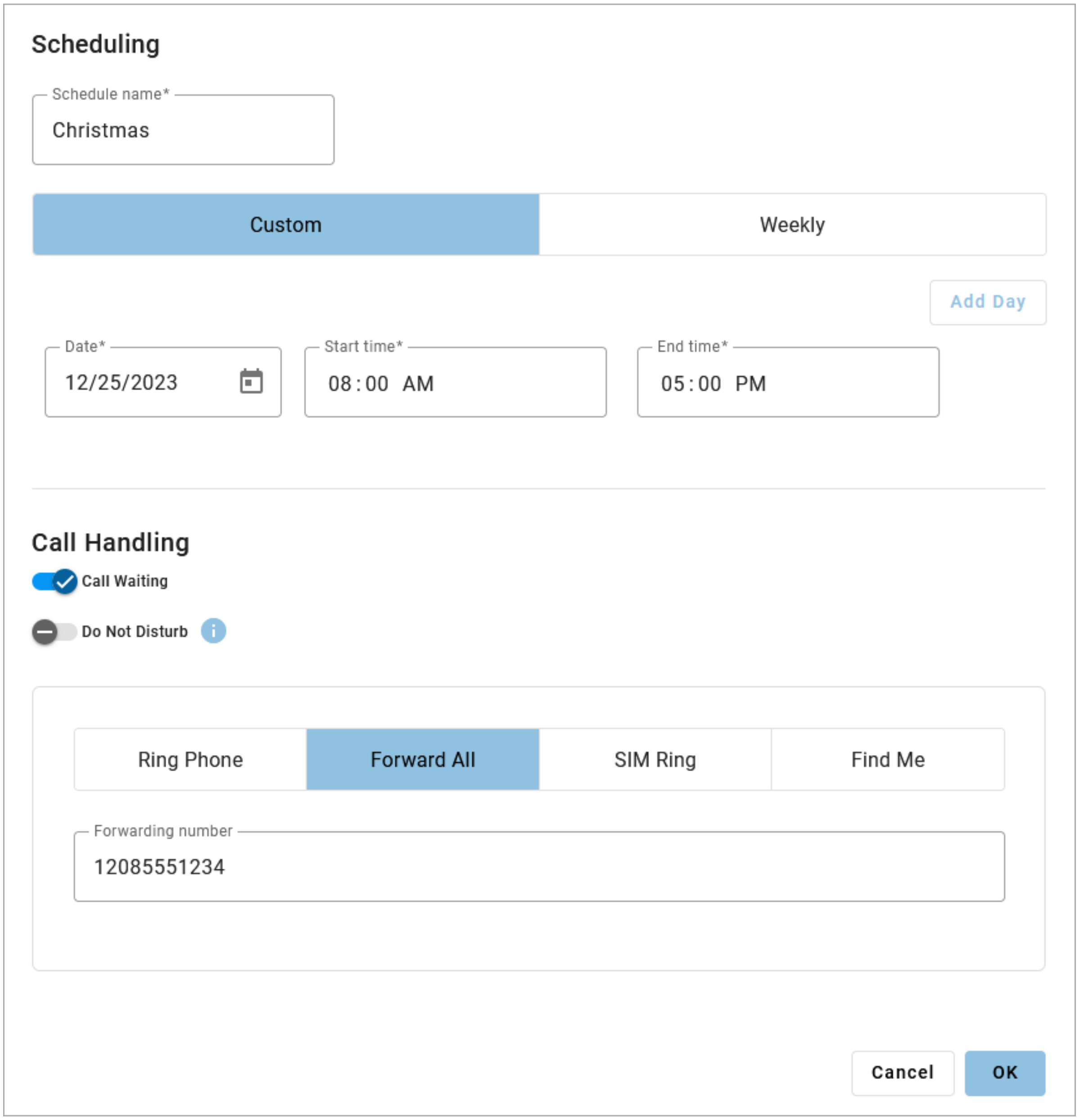
5. Call Handling: Scroll down and select the call handling actions that will occur *during* the specified times.



6. When you're done, click [Save].

Custom Schedule Example

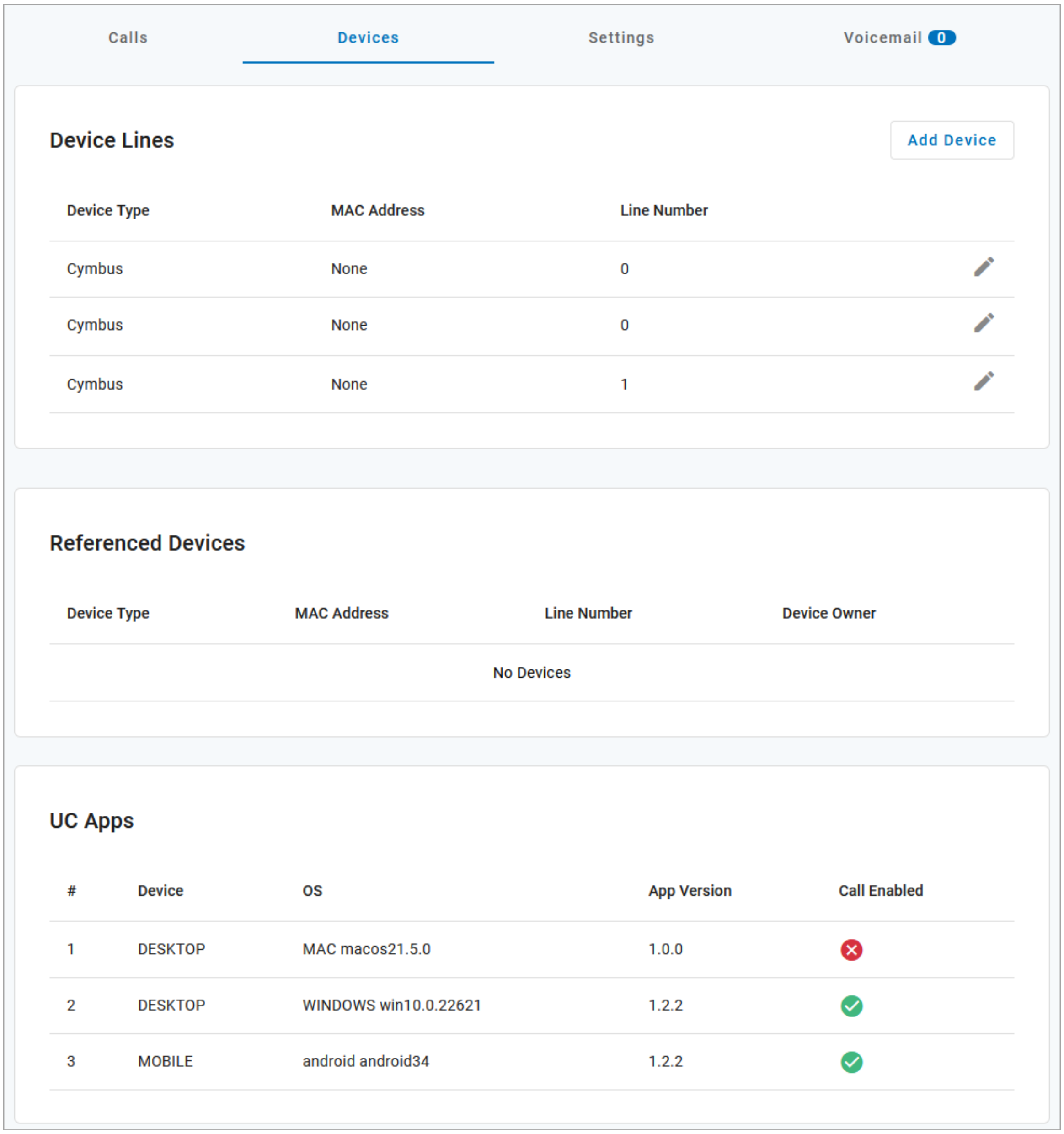
In the custom schedule example below, calls received between 8:00 AM and 5:00 PM on December 25, 2023, will be forwarded to 1-208-555-1234. Any call outside of that specific time will follow the user's primary call handling settings.



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.

The user's Cymbus apps are listed both under Device Lines and under UC Apps. The UC Apps section indicates the type of device (desktop or mobile), the operating system, app version, and whether it is currently able to receive calls. Apps which are logged out or otherwise not connected to the network show a red X.



Device Type	MAC Address	Line Number
Cymbus	None	0
Cymbus	None	0
Cymbus	None	1

Device Type	MAC Address	Line Number	Device Owner
No Devices			

#	Device	OS	App Version	Call Enabled
1	DESKTOP	MAC macos21.5.0	1.0.0	
2	DESKTOP	WINDOWS win10.0.22621	1.2.2	
3	MOBILE	android android34	1.2.2	

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:

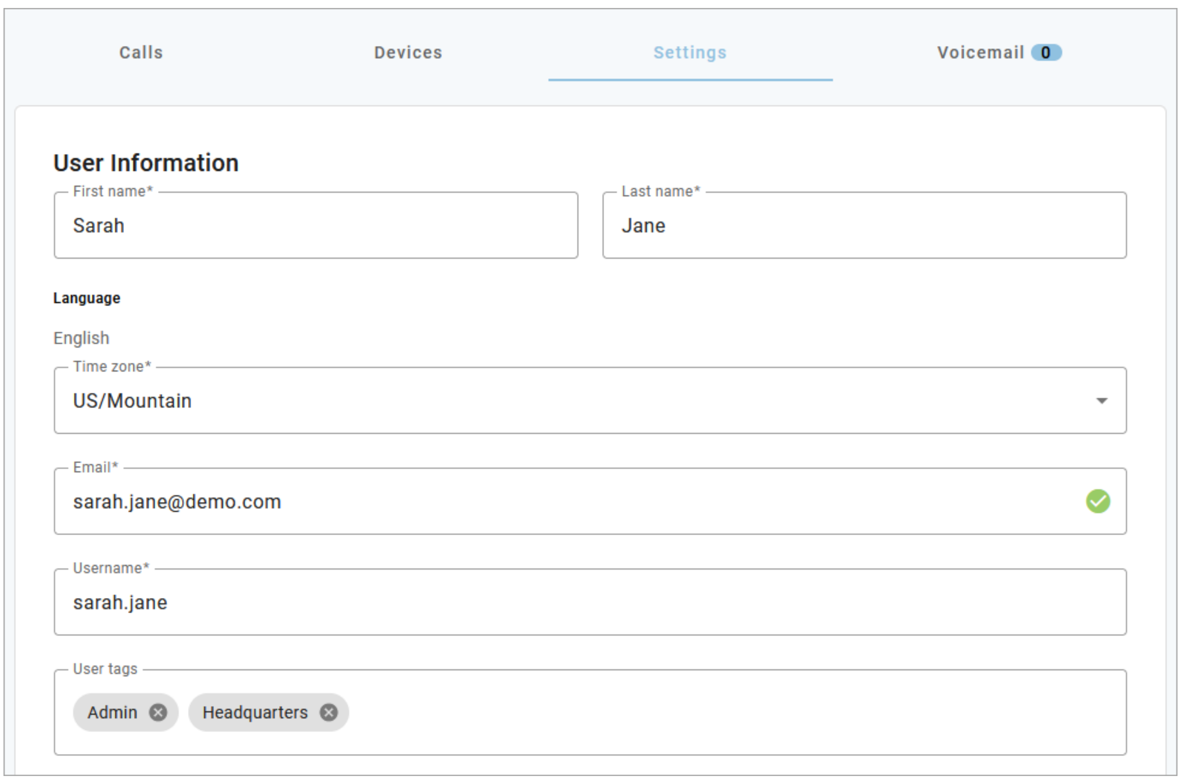
- Device Info: View the MAC Address, Device Type, and Configuration Status. There you can also Swap the device for a new one or upload a Bulk Configuration file.
- Line Configuration: On an IP phone, you can assign features to lines, including Call Park, Device Line, Paging Group, Presence/BLF, Shared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

Devices for detailed information about these features and settings.

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



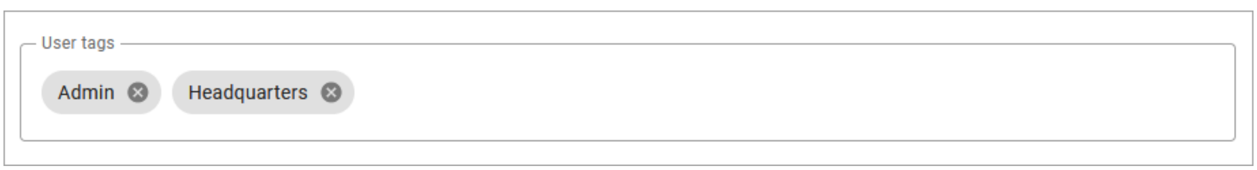
Feature	Description
Name	The first and last name of the user of the account.
Language	The language, English or French, heard in the telephone user interface (TUI) audio prompts for star codes and the IVR. This is separate from the language setting in a voicemail box.
Time zone	The time zone displayed on the user's device and call records.
Email	A valid email address is required for every user who has access to the Voice Portal. This is where their *Welcome* and *Forgot Password* emails are sent.
Username	A unique username which can be used to log in to the portal. Cannot be edited.
User tags	This is an optional mechanism to organize and search for users by one or more custom identifiers, such as department, location, or anything else. If it would be useful to search for this user by a particular term, enter it here.

User Tags

User Tags is an optional mechanism to organize and search for users by one or more custom identifiers, such as department, location, or anything else. If it would be useful to search for users by that term, enter it as a tag on the users it applies to.

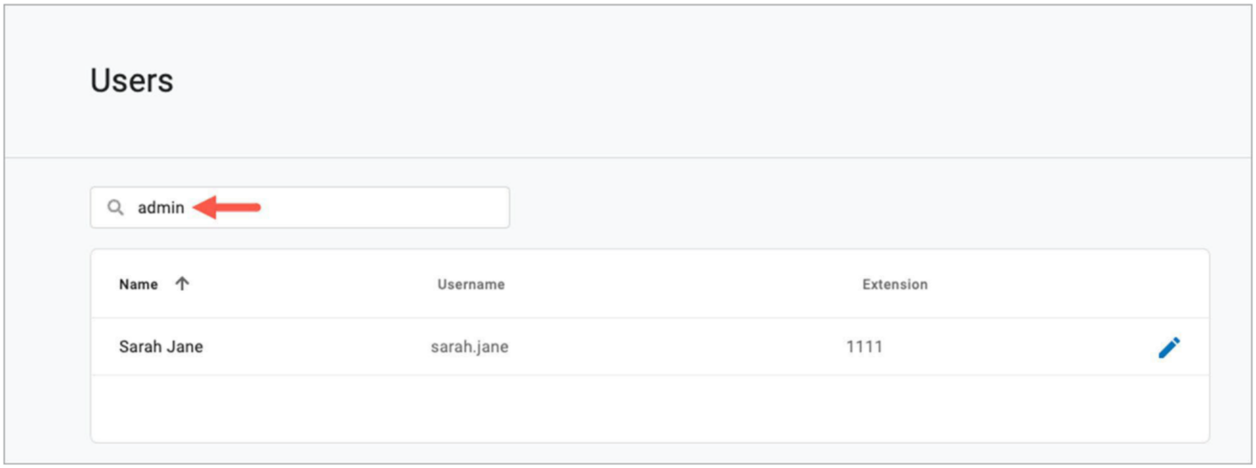
Add User Tags

1. Log in to the Admin Portal and go to Account > Users.
2. Select the user you want to edit.
3. In the Settings tab, enter one or more tags in the *User tags* field.
4. Scroll down and tap [Save].

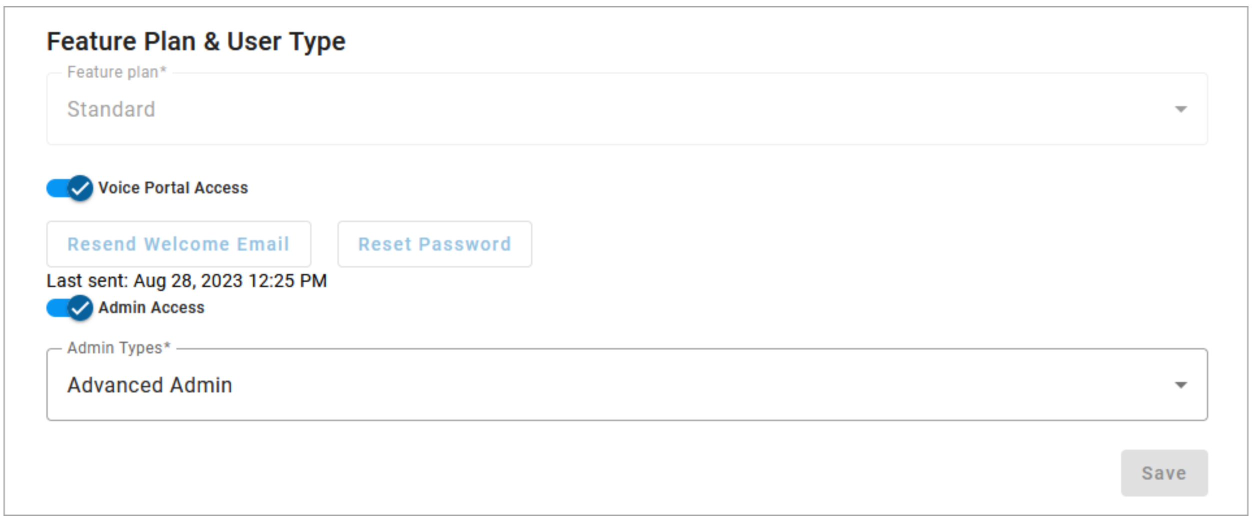


Search for Users by Tags

1. Go to Account > Users.
2. Enter a tag in the *Search users* field and hit enter. The matching users are displayed below.



Feature Plan & User Type



Feature Plan

The user's current feature plan determines what features they have access to:

- Standard: All basic voice features.
- Advanced: All standard features + the UC app with team messaging.
- Professional: All standard and advanced features + video meetings with whiteboarding and screen sharing.

> **Customer Support**
>
> To update a user's feature plan, contact Customer Support for assistance.

Voice Portal Access

The end user Voice Portal is where users log in to manage their accounts online. Voice Portal access is required and automatically enabled for users with Advanced or Professional feature plans. However, it is optional for users with a Standard feature plan.

Feature	Description
Voice Portal Access	For users with a Standard feature plan, choose whether to enable Voice Portal access: • Disabled: The user does not have access to the Voice Portal, and the *Email* field is optional. • Enabled: The user has access to the Voice Portal, and the *Email* and *Username* fields are required.
[Resend Welcome Email]	Resend the *Welcome* email with the Voice Portal URL, a link to create a password, and their UC app information (if applicable).
[Reset Password]	Send the user an email with a link to reset their password.

Admin Access

For users who need it, turn on Voice Portal Access and Admin Access, then select an Admin Type to determine the user's level of access:

- Super Admins: Create, edit, delete. They have full account-level permissions and can administer all other admin users.
- Advanced Admins: Create, edit, delete (modified). They have the same level of access as Super Admins but cannot manage Super Admin users.
- Standard Admins: Edit and view. They can manage most existing settings but cannot create anything new. Most of your admins will fit in this category.
- Basic Admins: View only. This is great for support representatives who need to see what's going on and can escalate to a higher-level admin if needed.

Account Managers have the same level of access as Super Admins, but because they do not have their own voice services, they are managed separately from users.

Call Recording

The Call Recording section displays the user's call recording settings. If this section is not displayed, contact your service provider to enable it on your account.

Call Recording is only available for users with Advanced and Professional feature plans, and it must be enabled for each user who wants it. Once enabled, the user can dial star codes to start, pause, resume, or stop a recording mid-call, depending on their configuration.

Enable Call Recording for a User

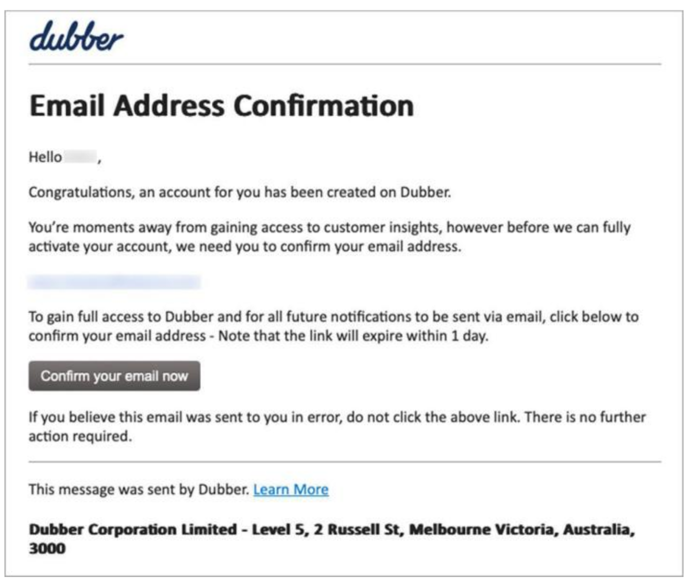
1. Log in to the Voice Portal and go to Business Cloud > Users.
2. Locate and select the user from the list.
3. Navigate to the Settings tab.
4. Under Feature Plan & User Type, confirm the user's feature plan is set to *Advanced* or *Professional*. Users with a Standard feature plan must upgrade if they want to use this feature.
5. Scroll down to Call Recording and toggle on *Enable call recording*.

6. From the Product menu, select a call recording product. If the preferred product is not available, please contact Customer Support.
   - BCC Call Recording is included in the Advanced and Professional feature plans. Users with this product can manage their own recordings in the Dubber Portal.
   - Dubber Recording, Dubber Unified Recording, and Dubber Insights may also be available. These products offer advanced call recording capabilities and the ability for a Dubber Administrator to manage the recordings for all users on the account. For more information about these packages, contact Customer Support.
7. Select a Recording Type:
   - Automatic. All calls to and from this user will be recorded automatically.
   - On Demand. The user must dial a star code mid-call to begin recording.

8. Customize the recording features (optional):

- Announce when call is being recorded. Plays the "Your call is being recorded" announcement to the caller whenever the Start or Resume star codes are dialed by the user. If enabled for the Automatic recording type, the message will automatically play at the beginning of each call.
  - The message will play only once, even if the call is transferred or forwarded to another party.
  - While this setting is optional, it is strongly recommended if users might make calls to areas that require two-party consent.
- Allow user to pause recording. Allows the user to pause or resume a recording by dialing a star code. This feature can be used while gathering sensitive information from the caller, like a credit card.
  - This checkbox only appears as an optional feature for the Automatic recording type; On Demand recordings offer this functionality by default.

9. Click [Save]. A *Welcome* email is sent to the user with a verification link to log in. The user must click the link and enter a password to access their new Dubber account.



Call Recording Star Codes

Each star code is designed to perform a specific recording function. However, the star codes available to each user depend on which recording type and optional features are configured. If a user attempts to dial a star code that is not compatible with their configuration, the star code will not register or function.

Automatic Star Codes

- The Automatic recording type begins recording as soon as the call connects and stops recording when the call disconnects, so the Start or Stop star codes are unnecessary.
- If *Allow user to pause recording* is enabled, the user can dial the Pause or Resume star codes to pause or resume the recording at any time.
- If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded" at beginning of the call and again whenever the user dials the Resume star code.

Star Code	Function
Pause Recording	Stops recording and keeps the recording file open. The user will hear “Recording paused.”
Resume Recording	Resumes recording on the open file. The user will hear “Recording resumed.” If *Announce when call is being recorded* is enabled, the caller will hear “Your call is being recorded.”

On Demand Star Codes

The On Demand recording type allows users to dial a star code mid-call to start, pause, resume, or stop a recording.

- If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded" whenever the user dials the Start or Resume star code.

Star Code	Function
Start Recording	Opens a new recording file and starts recording. The user will hear “Recording started.” If *Announce when call is being recorded* is enabled, the caller will hear “Your call is being recorded.”
Pause Recording	Stops recording and keeps the recording file open. The user will hear “Recording paused.”

Resume Recording	Resumes recording on the open file. The user will hear “Recording resumed.” If *Announce when call is being recorded* is enabled, the caller will hear “Your call is being recorded.”
Stop Recording	Stops recording and closes the recording file. The user will hear “Recording stopped.”

Manage Call Recordings

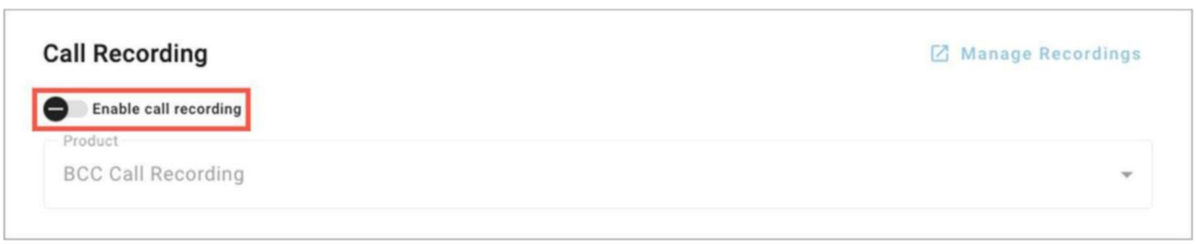
All call recording files are stored and managed in the Dubber Portal. Once recordings are available, they can be accessed by clicking Manage Recordings and entering your credentials on the Dubber login page. Recordings can only be managed by the user who owns them or by a Dubber Administrator (Dubber products only).

See [Call Recording Management]() for details about managing your recordings in the Dubber Portal.

Disable Call Recording for a User

In some cases, you may need to disable a user's call recording capabilities. This can be completed by navigating to the user's Settings tab and toggling off Call Recording.

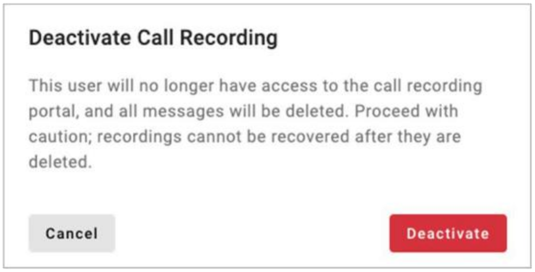
1. Log in to the Voice Portal and go to Business Cloud > Users.
2. Locate and select the user from the list.
3. Navigate to the Settings tab, then scroll down to Call Recording.
4. Toggle off *Enable call recording*. The feature will be greyed out.



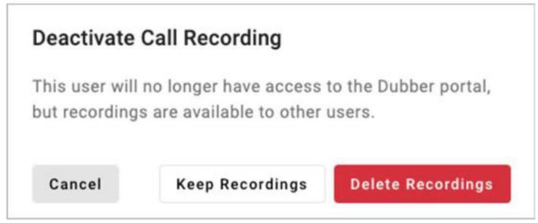
5. Click [Save].
6. In the Deactivate Call Recording modal, choose whether to keep or delete the user’s recordings. The options here may vary depending on which product is being disabled.
   - Keep Recordings (Dubber products). Select this option to delete the user from Dubber but keep their recordings in the Dubber Portal. The user’s recordings can only be accessed by a Dubber Administrator.
   - Deactivate/Delete Recordings. Depending on your product, select [Deactivate] or [Delete Recordings] to delete the user and all their recordings from the

Dubber Portal. Proceed with caution; recordings cannot be recovered after they are deleted.

NHC-BC Call Recording



Dubber Products



7. The user's Dubber account is deleted. They will no longer have access to the Dubber Portal.

RE-ENABLE CALL RECORDING

If call recording is disabled and then re-enabled, a brand-new account is created for the user in the Dubber Portal, and they will not have access to their old recordings unless they are a Dubber Administrator.

Calling Plans

Calling plans dictate where that user can call and if calls will be rated or use plan minutes. Multiple calling plans can be assigned to a user, and the most permissive settings will apply. A call will go through if any of their calling plans allows it. A call will be blocked if the location is blocked in all the user's calling plans.

The calling plan(s) assigned to the user and the number of minutes used on each plan are listed here. To add or modify the user's Calling Plan, including changes to permitted calling areas, please contact Customer Support.

Calling Plans

Calling Plan	Minutes Used	Total Minutes
Default	0	50000

Account Codes

Account codes are used to tag (classify) calls for billing and reporting purposes. For example, if an agency needs to keep track of billable client calls, they can dial the code that corresponds to the client, and the code will be tagged in the call history record. See Account Codes for details.

The default settings configured at the account level apply to all users who have Account Codes enabled. However, the settings can be customized here for individual users if needed. See Account Codes User Settings for more information.

Reassign Users

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.

When an end user account is reassigned, the current user is removed from the system and their account settings are reassigned to a new user. Not all settings will 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:

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

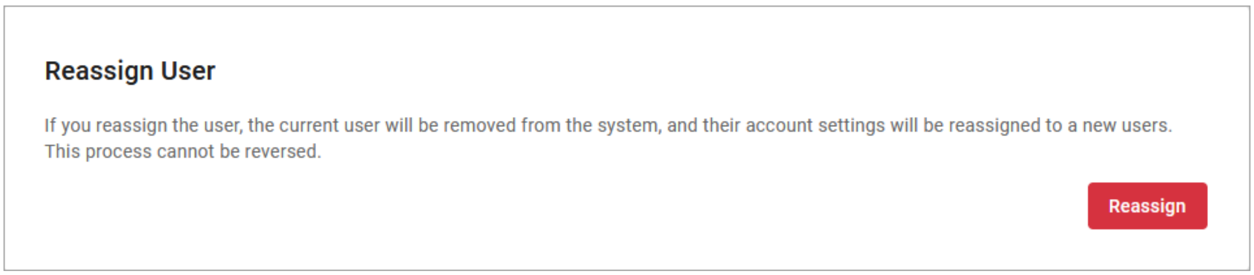
Features and Settings That Switch

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

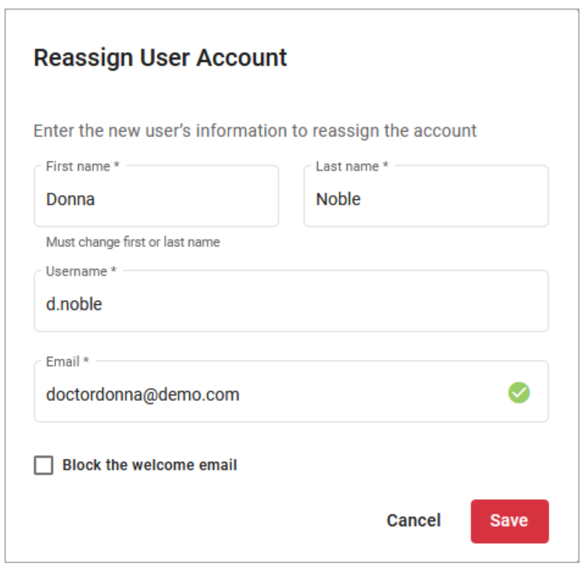
Steps to Reassign an End User Account

1. Go to Users and edit the user whose account you want to reassign.
2. In the user's Settings tab, scroll down to the bottom and click [Reassign].

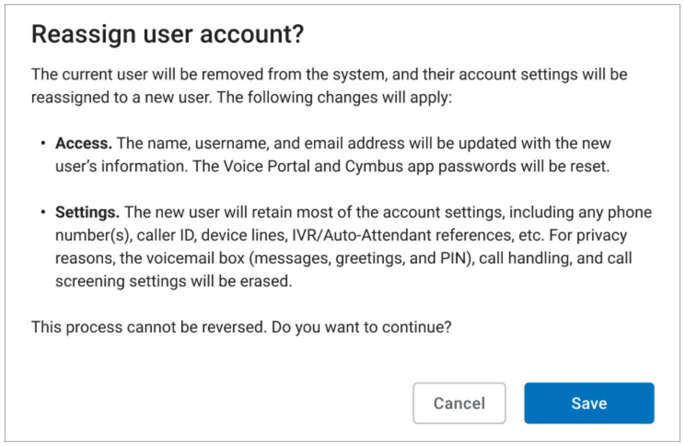
   - If you don't see this button, you may need additional permissions to use this feature. Please contact Customer Support for assistance.



3. Enter the new user's name, username, and email address. If you do not want the user to access their account yet, check *Block the welcome email*. Then click [Save].



4. 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].



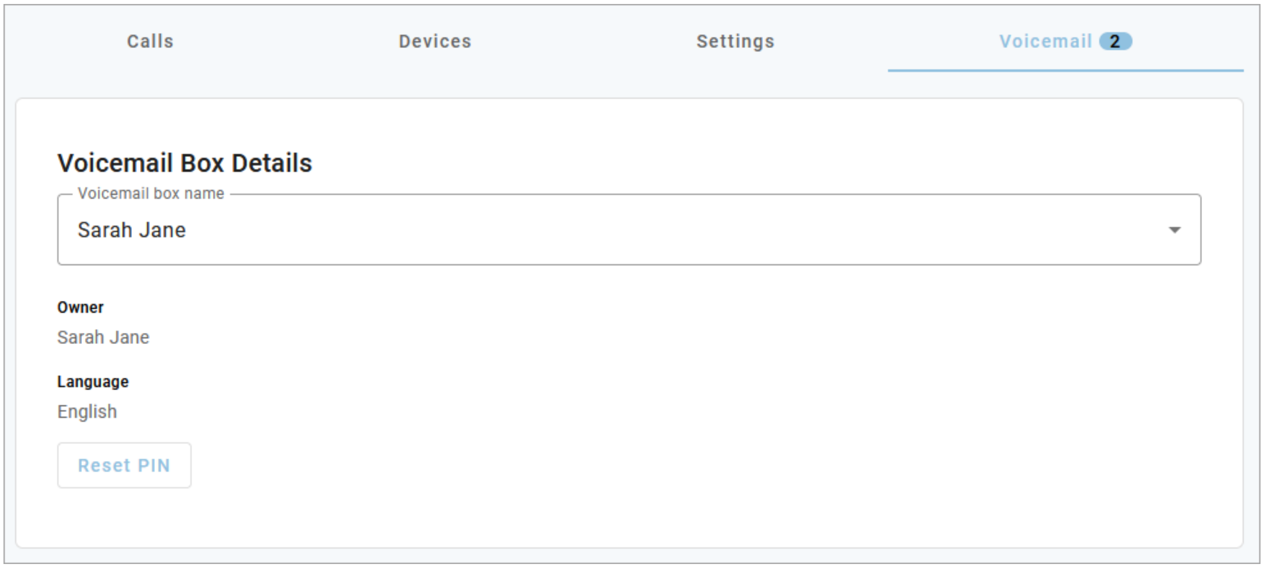
5. The previous user's account settings have been successfully reassigned to a new user. Unless the welcome email was blocked, the new user can click the link in that email to create a password and log in to the Voice Portal.

Voicemail

A voicemail box was assigned to each user with their Business Cloud Communication service. In the user's Voicemail tab, you can manage their voicemail greetings, messages, and message settings such as Voicemail to Email and Voicemail Transcription.

Please note, you can download only your own voicemail messages from the Voice Portal.

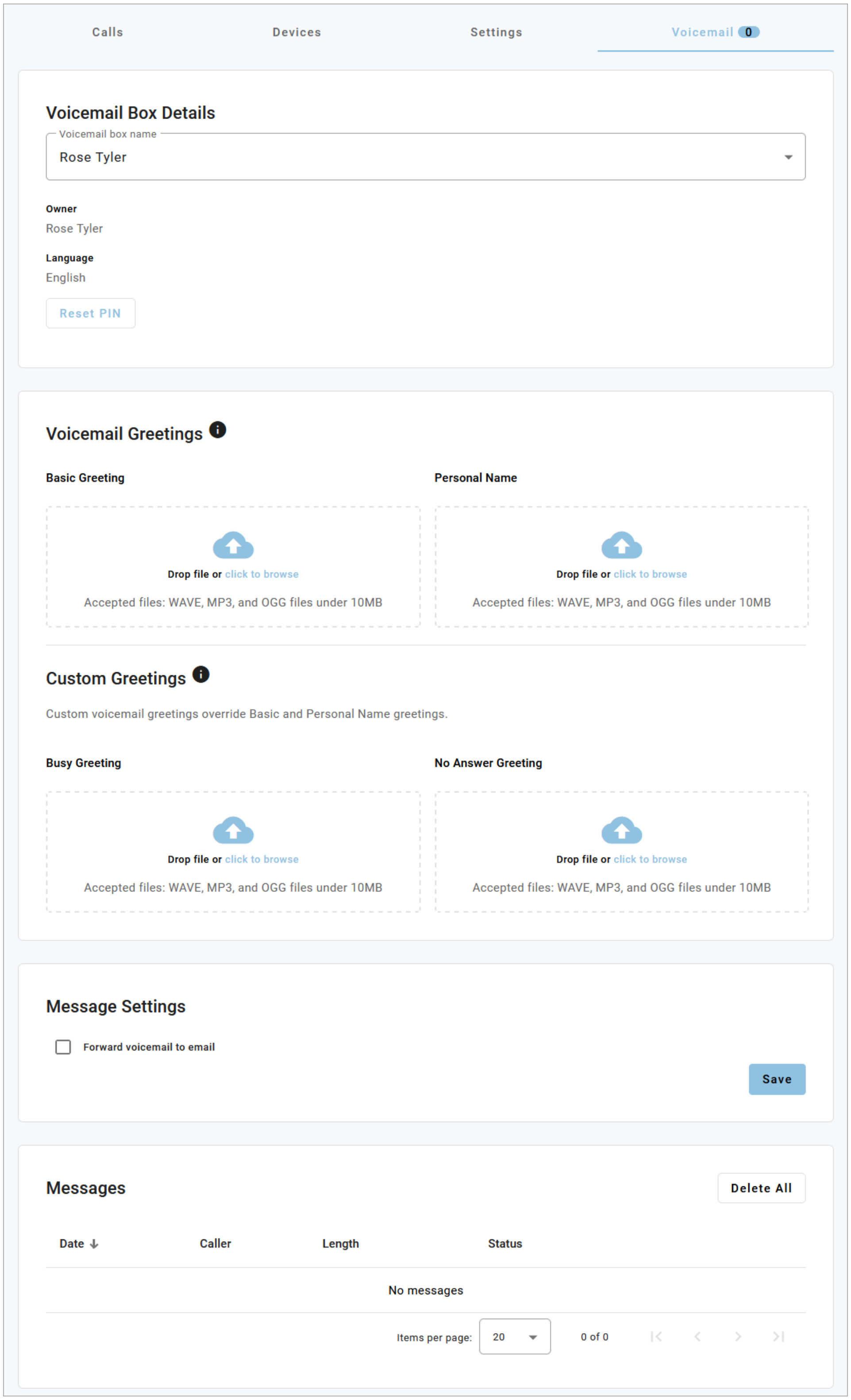
Voicemail Box Details



Feature	Description
Voicemail box name	The name of the voicemail box assigned to this user. To change the user's box, click the drop-down menu and select one from the list. To change the name of the voicemail box, go to Account > Voicemail and search for the box.
Owner	The name(s) of the user(s) this voicemail box is assigned to.
Reset PIN	If the user cannot remember their voicemail box PIN to sign in, click Reset PIN to reset it for them. The default PIN is 1234. The first time the user logs in to their voicemail box with the default PIN, they will be asked to set a new one.

Voicemail Management

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

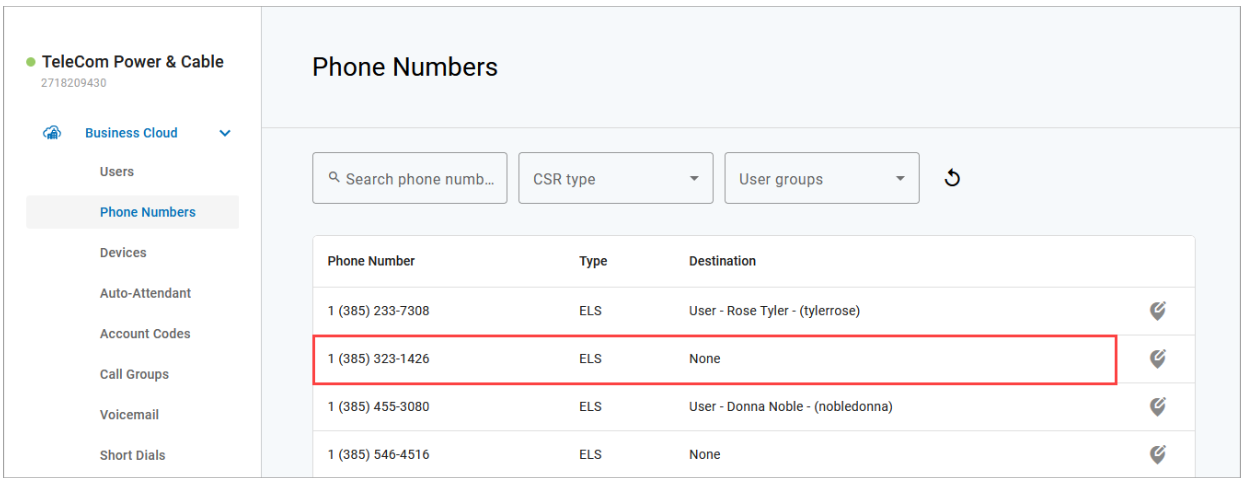

Calls
Devices
Settings
Voicemail 0
Voicemail Box Details
Voicemail box name
Rose Tyler
Owner
Rose Tyler
Language
English
Reset PIN
Voicemail Greetings
Basic Greeting
Personal Name
Drop file or click to browse
Accepted files: WAVE, MP3, and OGG files under 10MB
Drop file or click to browse
Accepted files: WAVE, MP3, and OGG files under 10MB
Custom Greetings
Custom voicemail greetings override Basic and Personal Name greetings.
Busy Greeting
No Answer Greeting
Drop file or click to browse
Accepted files: WAVE, MP3, and OGG files under 10MB
Drop file or click to browse
Accepted files: WAVE, MP3, and OGG files under 10MB
Message Settings
Forward voicemail to email
Save
Messages
Delete All
Date
Caller
Length
Status
No messages
Items per page:
20
0 of 0

Phone Numbers

In Phone Numbers, you can see and manage all the phone numbers on the account, including their routing destinations and caller ID. If you don't see Phone Numbers in the menu, please contact Customer Support.

Using the *Search* field, you can filter the results by phone number, destination, or address (including City, State, and Postal Code) associated with the Customer Service Record or E911 Record. As you type, the results of your search are displayed below.

Locate and select the phone number to view the Customer Service Record and edit the E911 record. Click the map icon on the right to edit the destination. If you cannot access these settings, contact Customer Support for assistance.



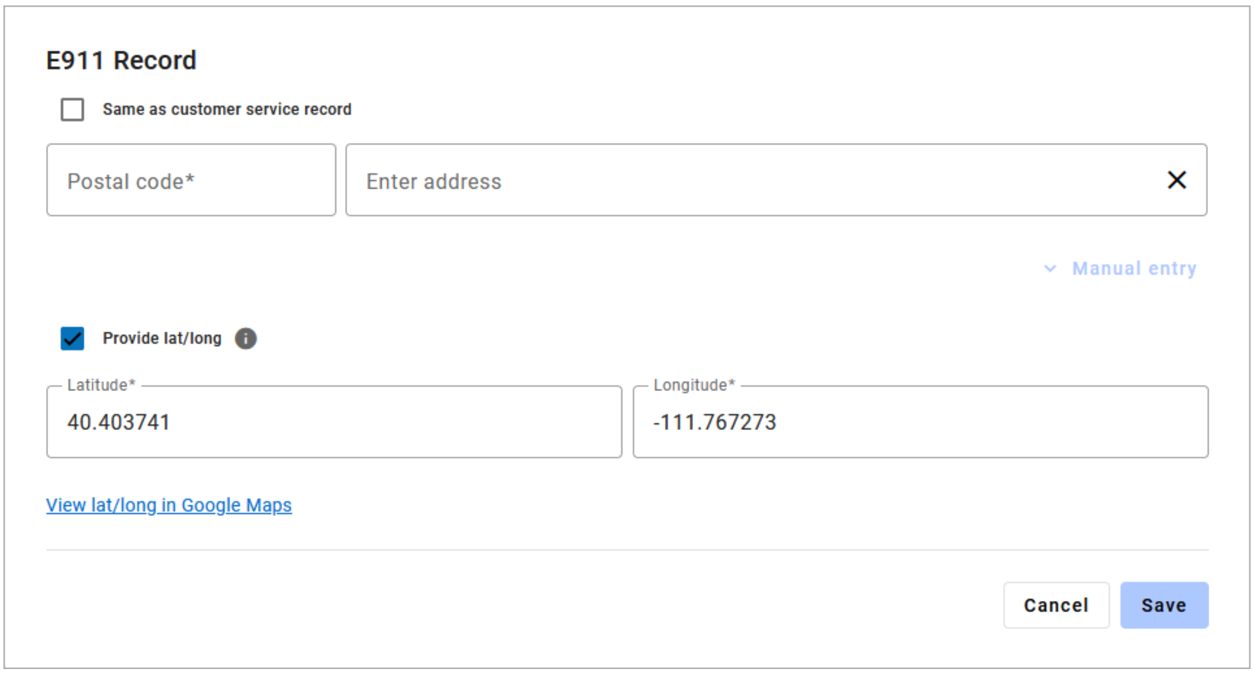
Customer Service Record

The customer service record (CSR) includes the person's or company's name, postal code, and street address. This information is entered when the phone number is added to the account and can only be changed by Customer Support.

E911 Record

An E911 address allows emergency services to determine the location of each phone or device in case they need to call 911. The registered address must be the physical address where the device is located and include any additional information (such as a suite, apartment, building, etc.) necessary to identify the caller's location.

If the E911 address is the same as the CSR, check the Same as CSR box. If not, uncheck the box and enter the correct information in the fields below. When you're done, click [Save]. It may take several hours for the changes to take effect.



Feature	Description
Postal code	The postal code of the address.
Enter address	The address associated with the phone number. Start typing an address and options will populate below. Select the correct address.
Manual entry	Enter the address manually. These fields will automatically populate with the existing information and are optional unless otherwise indicated. If the address is for a multi-unit building, you can add the Unit Type and Unit Number here.
Provide lat/long	Check this box to view and/or modify the latitude and longitude coordinates for the E911 address. These coordinates determine the PSAP responsible for receiving the 911 call, not the ambulance dispatch location. This additional information is useful for new addresses that haven't yet been registered with the Master Street Address Guide (MSAG).

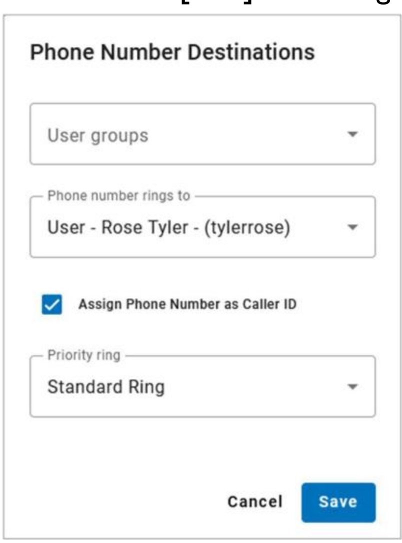
Phone Number Destination

When a phone number is added to the account, a destination is assigned so callers are directed to the right place. The destination can be changed at any time, such as when activating a new auto-attendant or to reassign a phone number from one user to another.

If you don't have access to the Phone Numbers page, please contact Customer Support for assistance.

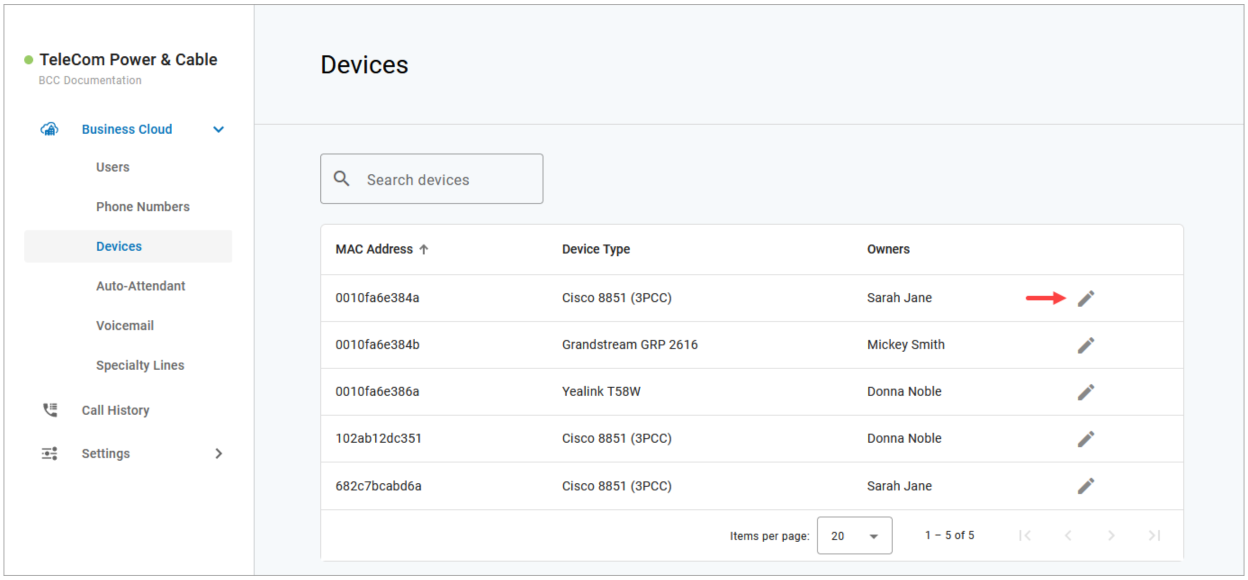
To change a phone number's destination

1. On the Phone Numbers page, locate the phone number you want to modify and click the map icon on the right to expand the destination settings.
2. In the Phone Number Destinations popup, fill out the following:
   - User Groups: Select a group to narrow the *Phone Number Rings To* options below to only those users (optional) or leave it blank to show all possible destinations.
   - Phone Number Rings To: Select a new destination, such as an auto-attendant, user, or virtual fax box.
   - Assign Phone Number as Caller ID: If the destination is to a user, choose whether to assign this phone number as the user's caller ID.
     - To assign a different number as the user's caller ID, go to the user's Calls tab and select a number from the Caller ID field.
   - Priority Ring: Select a priority ring tone (optional).
3. Click [Save]. The changes will be applied immediately.



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.



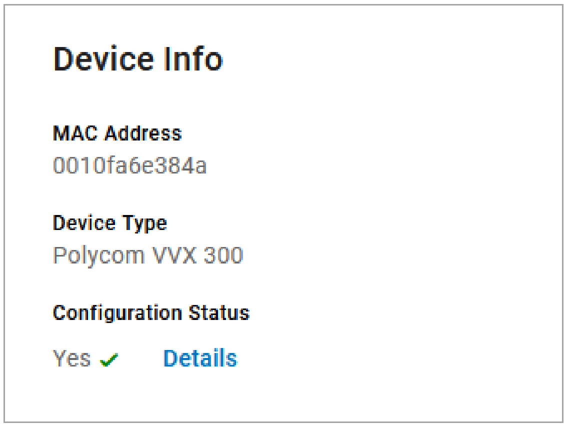
To view and manage device settings:

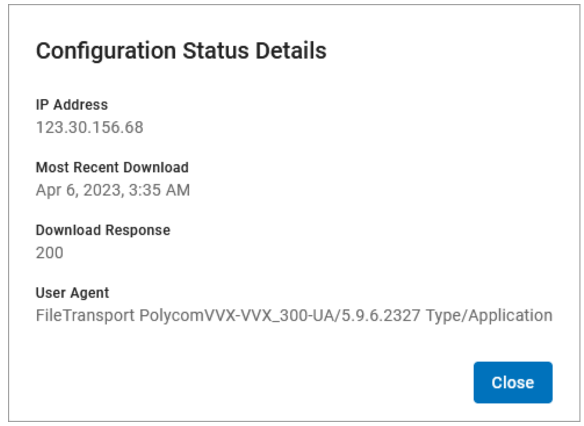
1. Go to either:
   - Account > Business Cloud > Users > Devices tab
   - Account > Business Cloud > Devices
2. Locate the device you want to manage and click Edit on the right.

The breadcrumbs at the top of the page include the name of the user assigned to the device, so you always know what you're working on.

Device Info

Here you can see the device's MAC address, device type (make and model), and configuration status.





Configuration Status

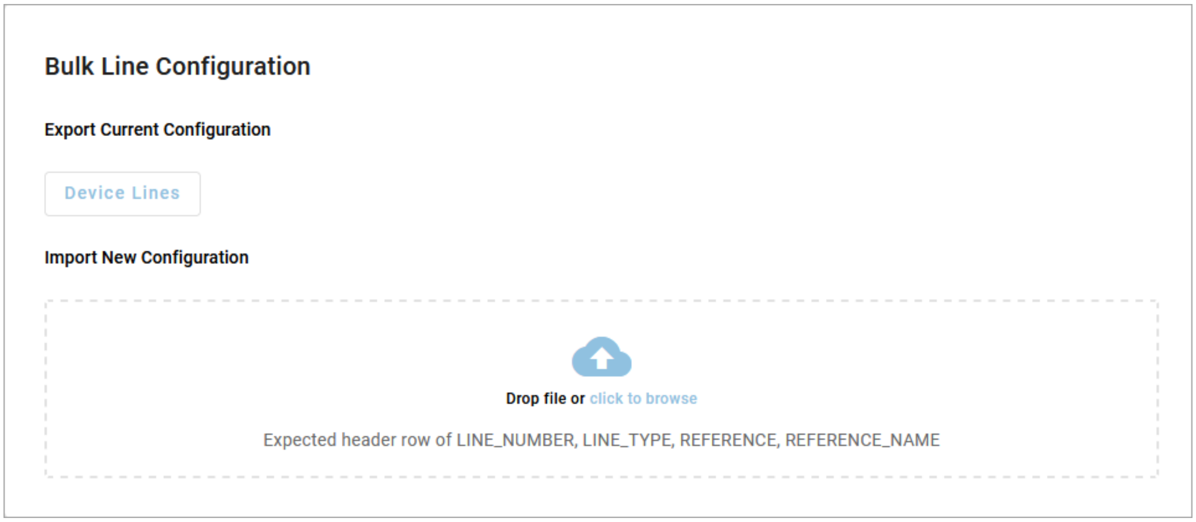
The Configuration Status indicates if the device is provisioned and registering on the voice server.

- Yes: The device is online and available for use. Click [Details] for more information.
- No: The device is not online. Make sure it is turned on and the MAC address is correct. If necessary, 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.



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	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: • Line: Device line assigned to the owner of the IP phone. - Line 1 <u>must</u> be set to *Line*. 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 a phone 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 *Deactivated*.
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 *Reference*. This field is listed on an export but is not required for an import.

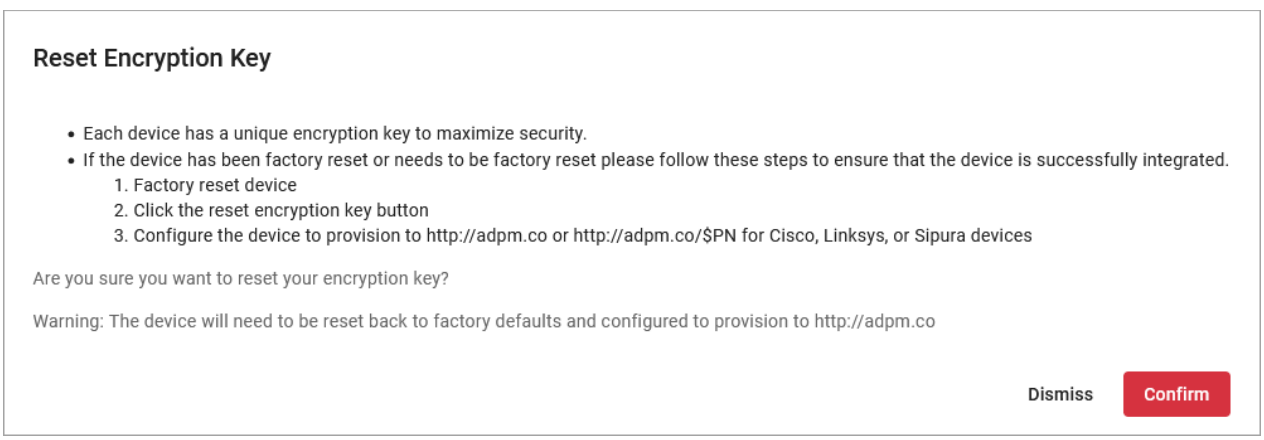
Example Import File

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

Device Security

Each device has a unique encryption key which is used for provisioning. If a device is factory reset or unable to decrypt its configuration file (troubleshooting), you will need to reset the encryption key to reprovision the device. Please note, this is not required for devices that use HTTPS provisioning.

1. Go to Devices > Edit.
2. Scroll down to Device Security and click [Reset Key].
3. Read the warning, then click [Confirm] if you want to continue.

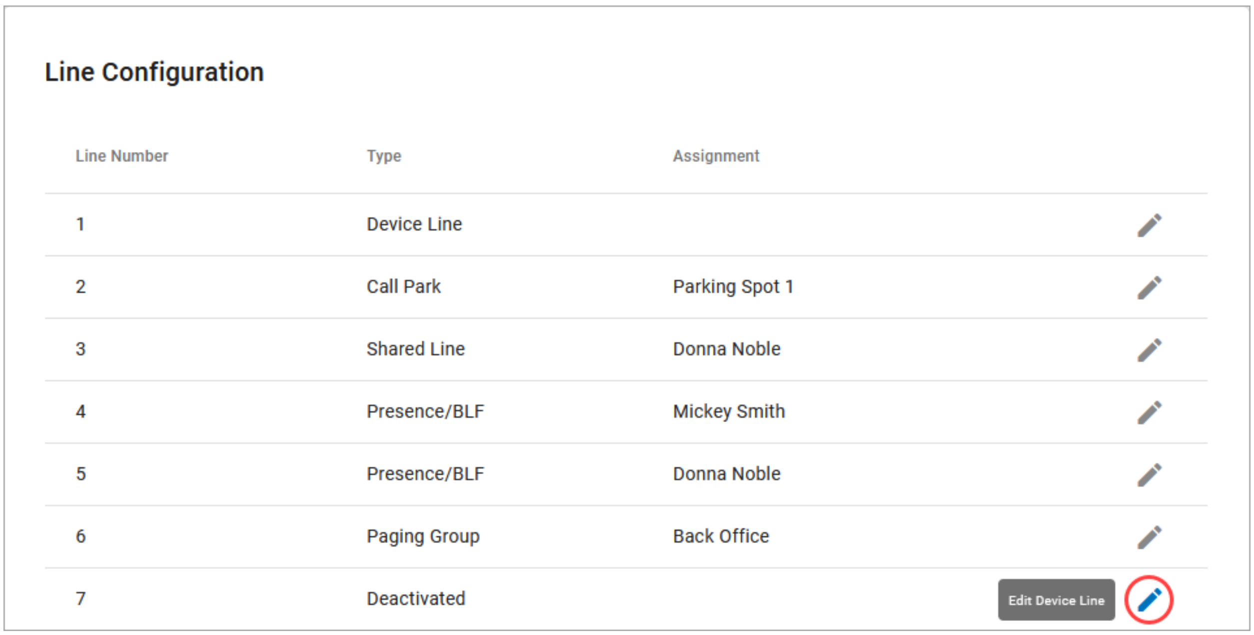


4. Configure the device to provision to http://adpm.co or, for Cisco, Linksys, or Sipura devices, http://adpm.co/$PN.

Line Key Features

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:

- Advanced Shared Line
- Call Park
- Device Line
- Intercom
- Paging Group
- Presence/BLF
- Shared Line
- Speed Dial


Line Configuration

Line Number	Type	Assignment
1	Device Line	
2	Call Park	Parking Spot 1
3	Shared Line	Donna Noble
4	Presence/BLF	Mickey Smith
5	Presence/BLF	Donna Noble
6	Paging Group	Back Office
7	Deactivated	

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

1. Go to either:
   - Account > Business Cloud > Devices
   - Account > Business Cloud > Users > Devices tab.
2. Locate and expand the device you want to configure.
3. Under Line Configuration, edit 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.

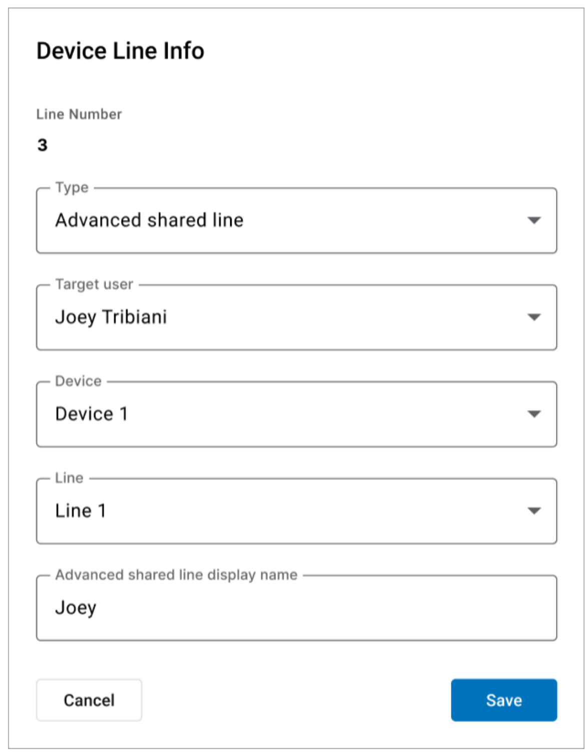
Advanced Shared Line

Advanced Shared Line enables a group of up to 35 IP phones to monitor and share the same target line. Any phone in the group can make and receive calls, hold and resume held calls, and park and retrieve parked calls using the shared line.

The line status is updated across all shared devices in real time. Incoming calls ring on all devices, and any user can answer. When the shared line is busy, it appears as busy on all devices, and no one else in the group can make or receive a call on that line. Additionally, if the target device line loses registration, incoming calls will still ring to the line on the shared devices.

One device can be assigned as many Advanced Shared Line references as needed, making it an especially useful feature for administrative assistants or receptionists who regularly handle calls for other users.

- Type: Advanced Shared Line
- Target User: Select the user whose line will be referenced on this device.
- Device: Select a device assigned to the target user.
- Line: Select an active line on the target user's device.
    - The target line must be configured as a *Device Line*.
- Display Name: Enter the name that will be displayed for the device key, such as the name of the monitored user.



Shared Line vs Advanced Shared Line

A Shared Line can be referenced on only one device and enables speed dialing between users, while an Advanced Shared Line can be referenced on and shared by up to 35 devices. Both types enable the user(s) with the referenced line to monitor the status of the target line.

Key System Emulation

The Advanced Shared Line feature can be used to emulate a key system in which all phones have the same lines instead of extensions.

On all devices, Line 1 is reserved for the device itself and cannot be assigned a feature. However, it can be referenced on another device as an Advanced Shared Line. The name displayed on the device for Line 1 is the username on their account; however, the name can be customized on each shared device when configuring the Advanced Shared Line.

In the example below, we have three phones, each of which has a shared line for the other two, and Line 4 is a shared parking spot which is owned by the first phone.

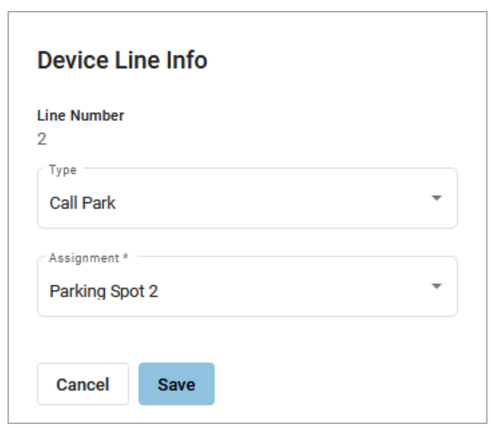
	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
Line 1	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
Line 2	Phone 2 — Rose	Phone 1 — Sarah	Phone 1 — Rose
Line 3	Phone 3 — Donna	Phone 3 — Donna	Phone 2 — Sarah
Line 4	Parking Spot (Target)	Parking Spot (ASL)	Parking Spot (ASL)

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.

- 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.

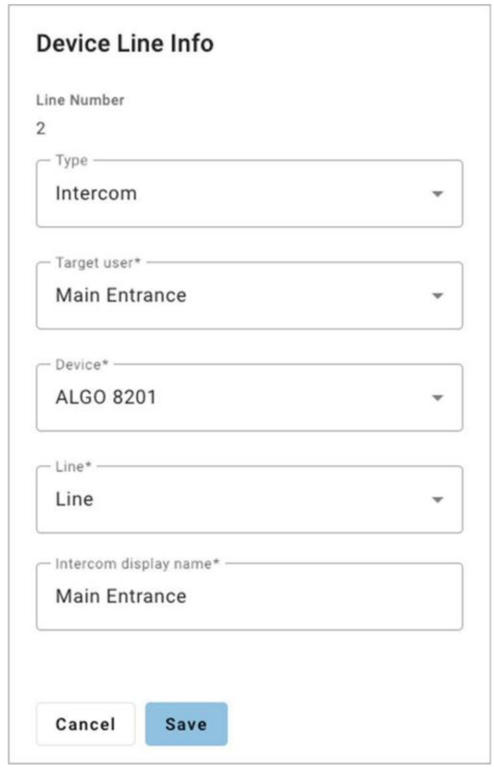
Line 1 is always set to Device Line; it cannot be changed. Th is the primary line belonging to the device's owner.

> **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.

Intercom

Intercom allows users to establish two-way communication between devices without requiring the recipient to manually answer the call. It is typically used in scenarios where immediate and hands-free communication is desired, such as door entry systems and office to classroom interactions.

An intercom feature key can be configured to dial only one user and one device, which is typically a line on another user's phone. However, it could be assigned to a dedicated doorphone or speaker device, such as those from Algo, to increase the reach of audio alerts and notifications in larger spaces where two-way communication is useful.



- Type: Intercom
- Target user: Select a user to dial from the list.
- Device: Select a device assigned to the target user.
- Line: Select a line to dial on the target user's device.
- Intercom display name: Enter the name of the intercom line that will display on the device, such as "Main Entrance" or "Mrs. Smith's Classroom."

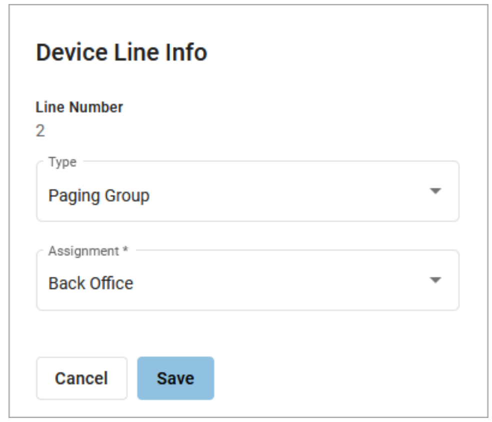
Use Intercom Feature Key

1. Press the line key assigned to dial the target user's device.
2. The target user's device beeps twice before automatically answering the call on speakerphone.
   - If the target user is on an active call or has Do Not Disturb enabled, the caller hears a busy signal.
3. When the call is finished, either party can end the call.

Paging Group

Paging Groups are used to make one-way announcements to one or more devices. To set up a Paging Group, please contact Customer Support.

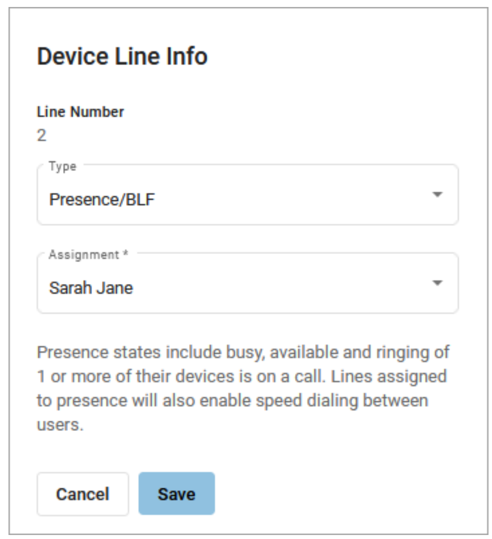
- Type: Paging Group
- Assignment: Select a group from the list



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.
Presence/BLF keys also enables speed dialing between the users.

- Type: Presence/BLF
- Assignment: Select a user from the list

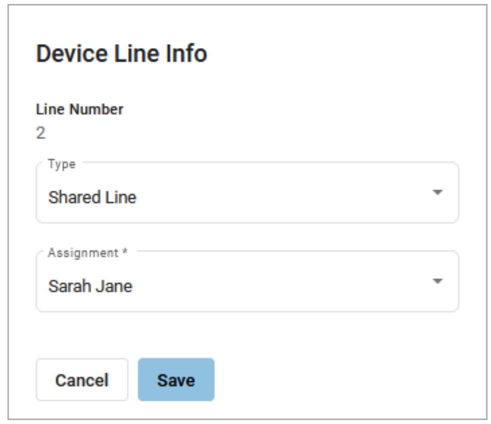


Shared Line

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

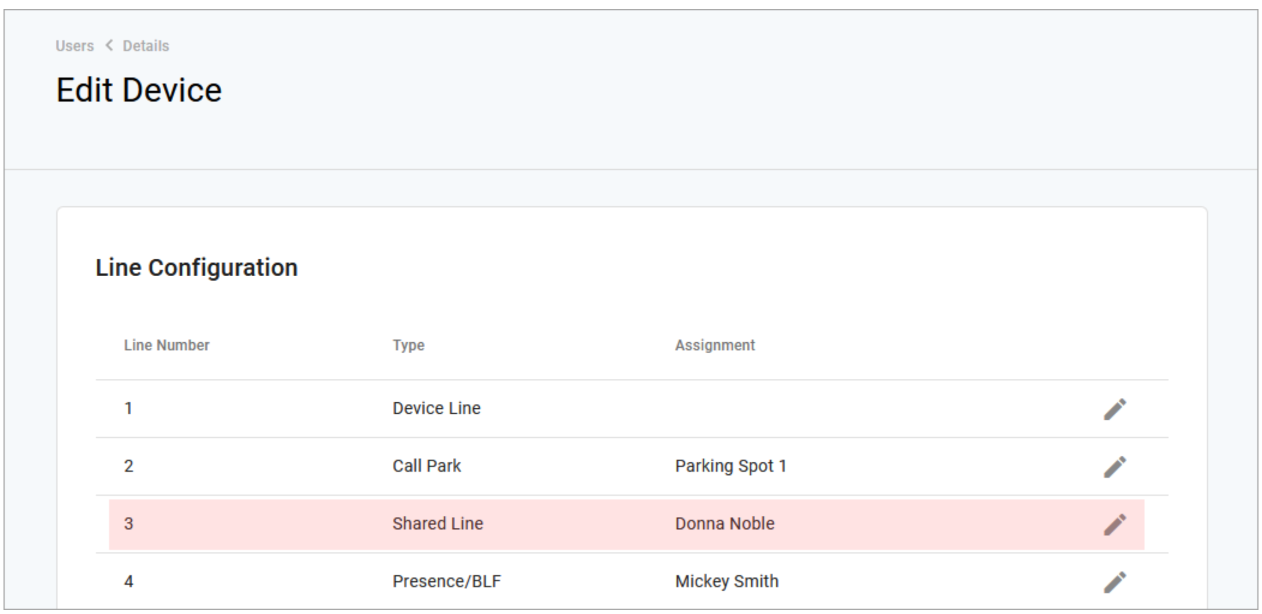
For users that have been assigned as a shared line on another device, that device will be listed in the user's Devices tab under Referenced Devices.

- Type: Shared Line
- Assignment: Select a user

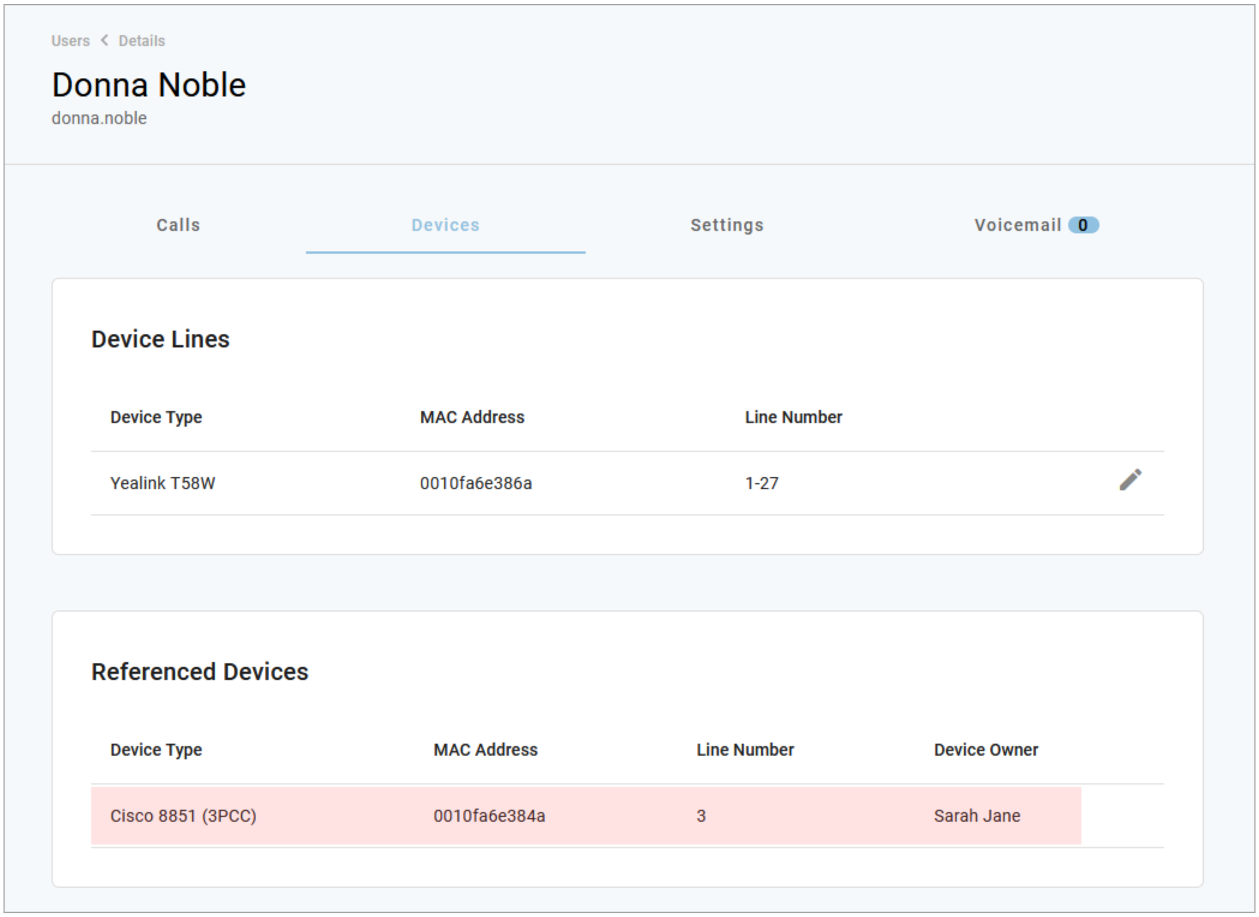


Example of a Shared Line

In the first image, when we edit Sarah Jane's device, we see that Line 3 is shared with Donna Noble.



In the second image, we see in Donna's Devices tab that the Cisco 8851 belonging to Sarah Jane is shown in the Referenced Devices section.



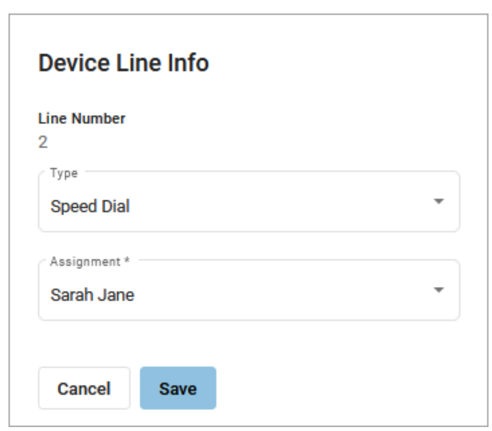
Speed Dial

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 line, or a star code, like a Pick Up Group.

Assigning a Speed Dial

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

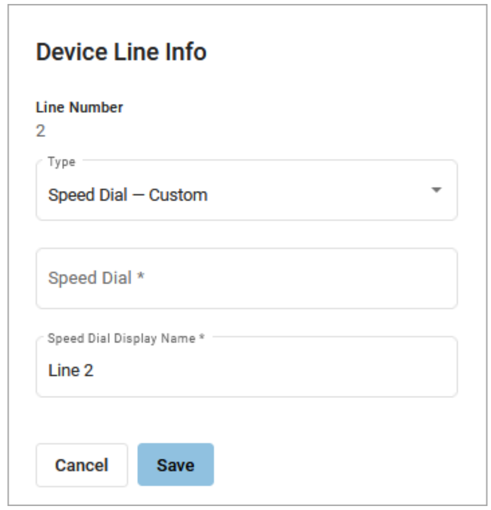
- Type: Speed Dial
- Assignment: Choose a user from the list



Assigning a Custom Speed Dial

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

- Type: Speed Dial
- Assignment: Custom Speed Dial
- Speed Dial: Enter a star code or a phone number or star code + phone number (*0018005551234). Up to 30 digits max.
- 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.

1. Edit an IP phone device and scroll down past Line Configuration to the Sidecar section.
2. Sidecar type: Select a sidecar type from the menu. This list will only display options that are compatible with the IP phone being managed.
3. Number of sidecars: Select the number of sidecars being added to the IP phone.
4. Click [Save]. The sidecar lines are displayed below.
5. To configure a line, click Edit and assign a feature to it as appropriate.

Line Number	Type	Assignment
Sidecar 1 Page 1 Line 1	Deactivated	
Sidecar 1 Page 1 Line 2	Deactivated	

Sidecar Bulk Edit

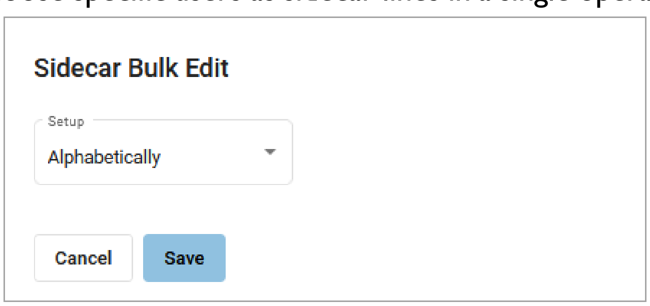
Use Sidecar Bulk Edit to automatically assign users (speed dial) to lines on the sidecar all at once. If there are more users than lines, some users may not be added.

Important

Any bulk setup operation will overwrite the current sidecar configuration. It cannot be undone!

1. To perform a sidecar bulk edit, click [Bulk Edit].

2. Select an option from the Setup menu, then click [Save] to implement it. There are three bulk sidecar setup options:
   - Alphabetically: Add all possible users in order by first name.
   - By Extension: Add all possible users in order by their extension number.
   - Custom: Choose specific users as sidecar lines in a single operation.



Alphabetically

Users are assigned to lines in alphabetical order.

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	Bob Johnson	
Sidecar 1 Page 1 Line 2	Speed Dial	Chris Jenson	
Sidecar 1 Page 1 Line 3	Speed Dial	Donna Noble	
Sidecar 1 Page 1 Line 4	Speed Dial	Jack Murphy	
Sidecar 1 Page 1 Line 5	Speed Dial	John Miller	
Sidecar 1 Page 1 Line 6	Speed Dial	Mickey Smith	
Sidecar 1 Page 1 Line 7	Speed Dial	Ron Williams	
Sidecar 1 Page 1 Line 8	Speed Dial	Timothy Lee	
Sidecar 1 Page 1 Line 9	Speed Dial	Zack Davis	

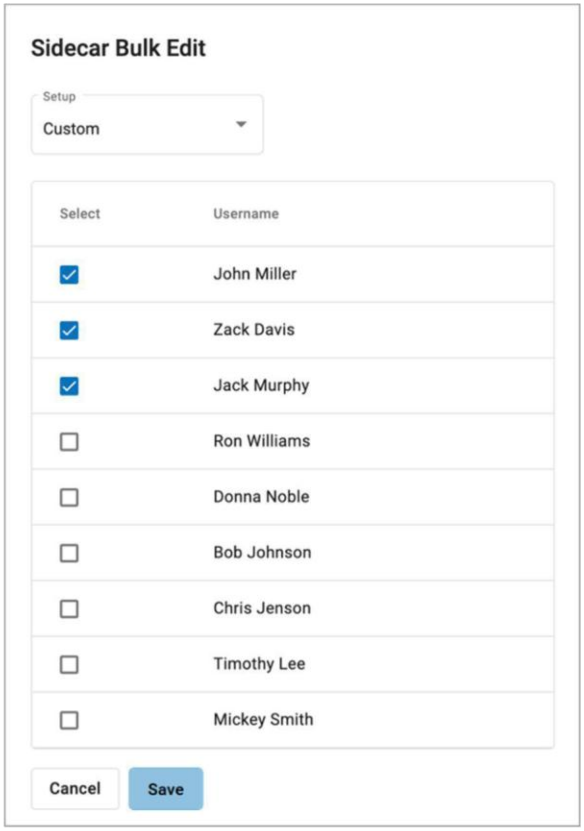
By Extension

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

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	Timothy Lee	
Sidecar 1 Page 1 Line 2	Speed Dial	Mickey Smith	
Sidecar 1 Page 1 Line 3	Speed Dial	Bob Johnson	
Sidecar 1 Page 1 Line 4	Speed Dial	Donna Noble	
Sidecar 1 Page 1 Line 5	Speed Dial	Jack Murphy	
Sidecar 1 Page 1 Line 6	Speed Dial	Chris Jenson	
Sidecar 1 Page 1 Line 7	Speed Dial	Zack Davis	
Sidecar 1 Page 1 Line 8	Speed Dial	John Miller	
Sidecar 1 Page 1 Line 9	Speed Dial	Ron Williams	

Custom

Use the checkboxes to add or remove users on the sidecar.

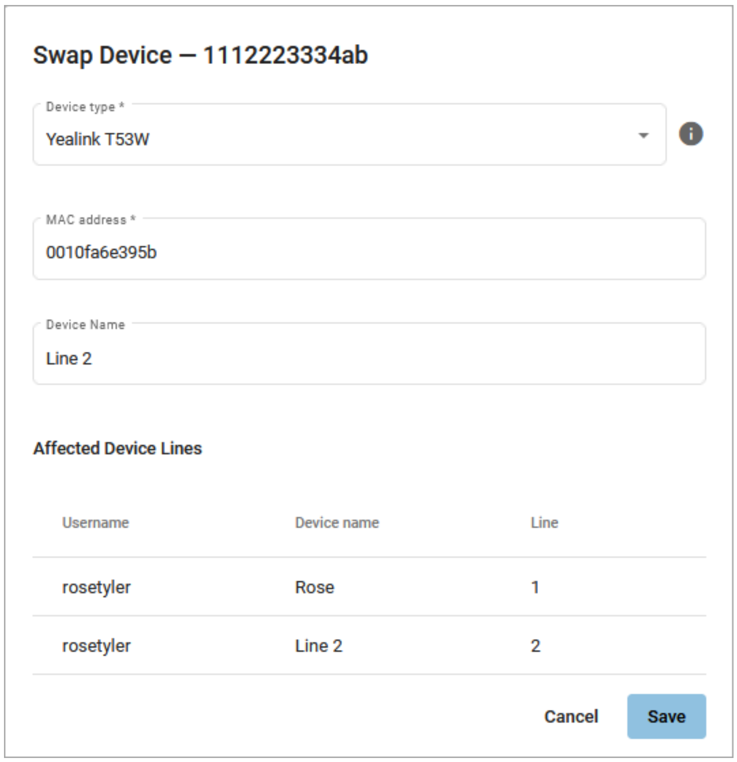


Line Number	Type	Assignment
Sidecar 1 Page 1 Line 1	Speed Dial	John Miller
Sidecar 1 Page 1 Line 2	Speed Dial	Zack Davis
Sidecar 1 Page 1 Line 3	Speed Dial	Jack Murphy
Sidecar 1 Page 1 Line 4	Deactivated	
Sidecar 1 Page 1 Line 5	Deactivated	
Sidecar 1 Page 1 Line 6	Deactivated	
Sidecar 1 Page 1 Line 7	Deactivated	
Sidecar 1 Page 1 Line 8	Deactivated	
Sidecar 1 Page 1 Line 9	Deactivated	

Swap Device

Got a user upgrading (or downgrading) from one device to another? Switching out the devices on the Voice Portal is fast and easy. The new device must have the same (or more) number of lines that are configured on the original device.

If a sidecar is currently enabled, disable it before switching the device, then set it up again after the switch.



1. Click [Swap].
2. Enter the information for the new device in the fields provided.
   - Device type: Select the new device type. If the device you're trying to use isn't listed here, please contact Support.
   - MAC address: Enter the device's MAC address.
   - Device name: Optionally, enter a name for the device.
3. Double-check the list of Affected Device Lines to make sure the swap won't break anything. Once the switch is complete, you may need to set up these lines again.
4. Click [Save] to complete the switch.
   - If there are already schedules set up on the account, the button will say [Manage Schedules].

Account Codes

Account codes are used to tag (classify) calls for billing and reporting purposes. Admin users can create specific codes that users can dial to associate call activity to a department, project, client account, and more.

For example, if an agency needs to keep track of billable client calls, they can dial the code that corresponds to the client, and the code will be tagged in the call detail record (CDR), Call History, and Account History. Later, the billing department can review the call records and bill each client appropriately.

How Account Codes Work

The general flow for using an account code on inbound and outbound calls is outlined below. However, it will change depending on which settings are enabled and disabled. See How to Use Account Codes for details.

- Outbound Calls: Dial a phone number. When prompted, enter an account code (for example, 123).
- Inbound Calls: Answer an inbound call, then dial the star code + the account code (for example, *50123).

Account Setup

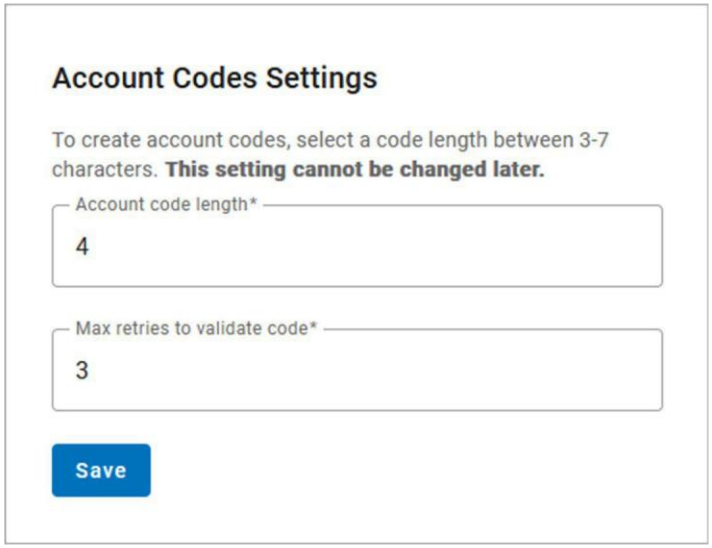
Account Codes is managed both at the account and user levels. Once it's enabled at the account level and the default settings are configured and saved, you can choose whether to enable Account Codes for all (current) users on the account. Then it can be enabled or disabled for individual users as needed.

- Enable Account Codes for the account.
- Add at least one code.
- Configure the default settings and enable Account Codes for users.
- Customize the settings for individual users as needed.

Enable Account Codes for Account

The following steps are only required the very first time Account Codes is enabled on an account.

1. Go to Business Cloud > Account Codes.
2. Fill out the following fields:
   - Account code length: Specify the number of digits (3–7) that will be required for all codes on this account. This setting cannot be changed later, so choose a length that will meet the account's needs in the long term.
   - Max retries to validate code: Specify how many times (1–9) a user can enter an incorrect account code. The industry average is 3–5 attempts.
2. Click [Save]. The page is refreshed and now Account Codes can be configured on the account.



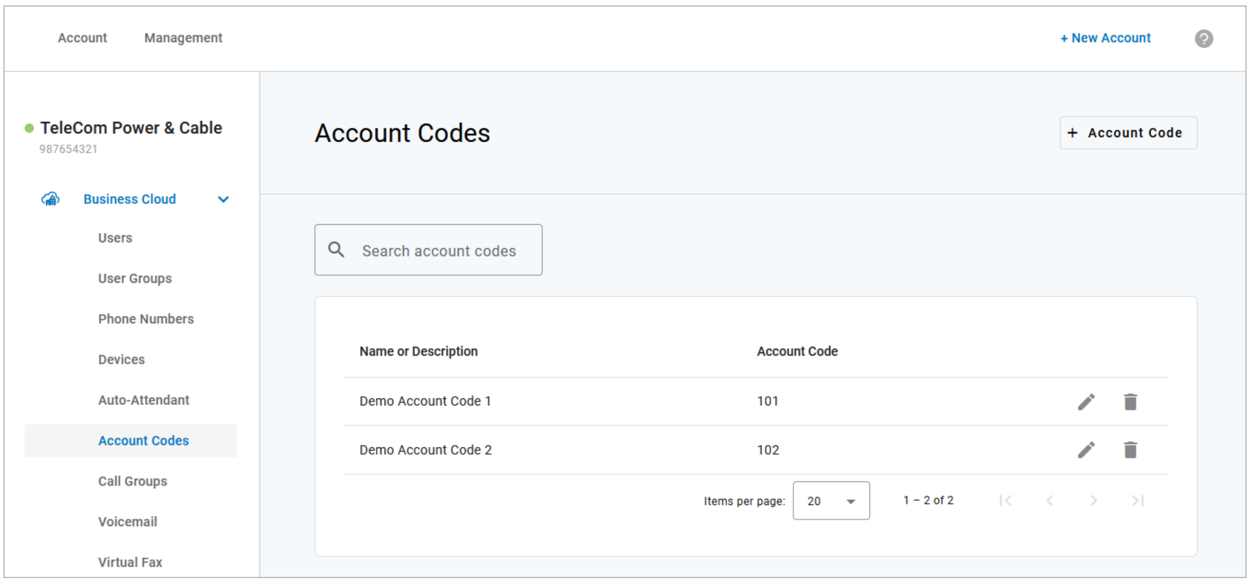
Next Steps

Account Codes is now enabled at the account level. However, before it can be enabled for users, you must add at least one account code and configure the default settings.

Manage Account Codes

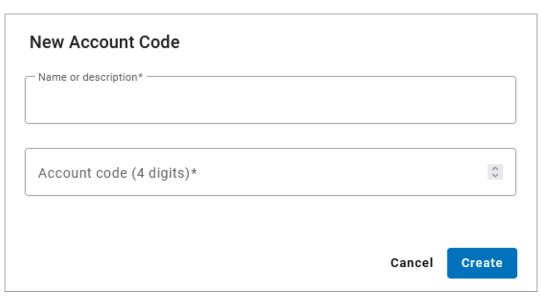
Account codes are used to tag (associate) calls with a specific department, project, client, etc. If the "Validate account codes when dialed" setting is enabled, the dialed code is checked against the codes on the account. At least one code must be added to the account to enable this setting; otherwise, users won't be able to place outbound calls.

We recommend creating at least one account code, such as 0000, that can be used as a default option.



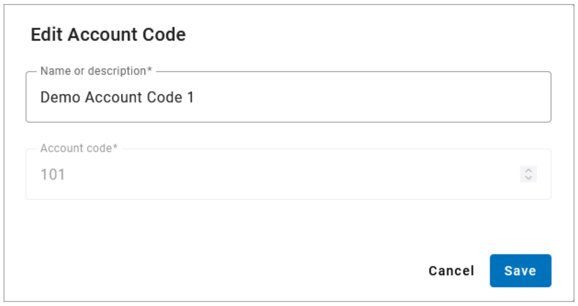
Add Account Code

1. Go to Business Cloud > Account Codes.
2. Click [+ Account Code] in the top right.
3. Enter a name or brief description to remember what the code is assigned for.
4. Enter the code that will be dialed.
5. Click [Create].
6. Repeat steps 2–5 for any additional codes.



Edit Account Code

Click the edit icon to update the name or description of an existing account code. To change the number, create a new one and then delete the old one.

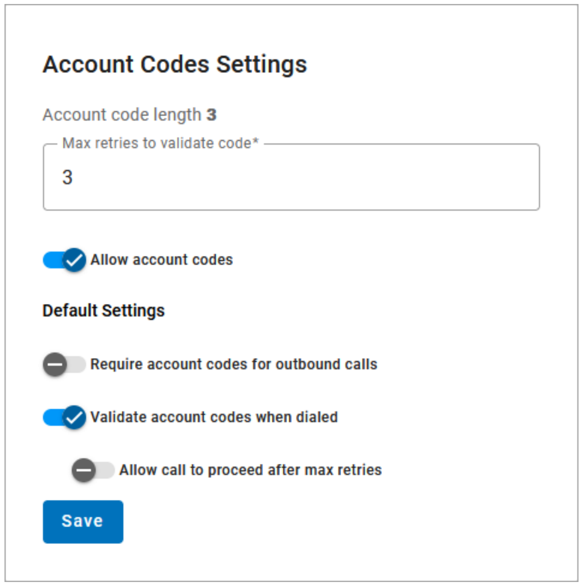


Account Codes Default Settings

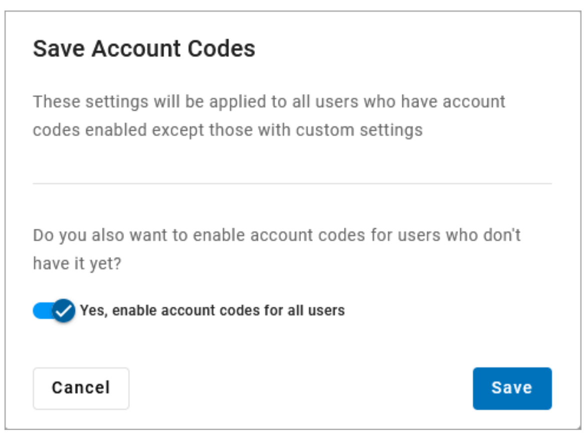
Once Account Codes is enabled on an account, the account-level settings must be configured before enabling it for users. These settings are applied to all users who have Account Codes enabled, except those with custom settings.

1. Go to Business Cloud > Account Codes.
2. Under Account Codes Settings, switch on *Allow account codes*. Once these settings are saved (see step 5), Account Codes can be enabled or disabled at the user level as needed.
3. Choose which default settings to enable (optional). To see how each of these settings changes the flow of a call, see How to Use Account Codes.
   - Require account codes for internal calls. If enabled, users will be prompted to dial an account code on every outbound call to other users on the account. If disabled, the user can dial a star code + account code during a call if they want to tag it.
   - Validate account codes when dialed. If enabled, the account code will be validated against the codes on the account. If disabled, the user can dial any number as an account code, as long as it's the right length. At least one account code must be added before enabling this option.
   - Allow call to proceed after max retries. If account codes are validated and the user enters multiple invalid codes, this setting determines whether the call will proceed as intended or end once the user reaches the max retry limit. This setting can only be customized at the user level if it's enabled at the account level first.

4. Click [Save].



5. Save Account Codes. A pop-up will appear stating that these settings will be applied to all users who have account codes enabled, except those with custom settings, and ask if you want to enable this feature for all users who don't have it yet.
   - Yes: Account Codes will be enabled for all existing users who don't have it yet. If Account Codes had been intentionally disabled for any users, it will have to be disabled for them again.
   - No: Account Codes will *not be* enabled for users who don't have it yet. Choose this option if you want to enable it manually for individual users, rather than enabling it for everyone all at once.
6. Click [Save] to apply the settings.



About User Settings

Account Codes is *not enabled by default* for new users added to the account after these settings are saved. There are two ways to enable it for users after this point:

1. Re-save the Account Codes Settings (even if you haven't changed any settings) and choose *Yes* to enable it for all users who don't have it yet.
2. After a new user is created, go to their Settings tab and turn it on.

Account Codes User Settings

The default settings configured at the account level apply to all users who have Account Codes enabled. However, the settings can be customized for individual users if needed.

Enable Account Codes for User

When Account Codes is enabled, the user is prompted to dial a code on every outbound call. Whether or not the code must be valid (preconfigured on the account) depends on their settings. See How to Use Account Codes for details.

The Account Codes feature *is not enabled automatically* for new users, so it must be enabled manually. To enable it for a user, follow the steps below:

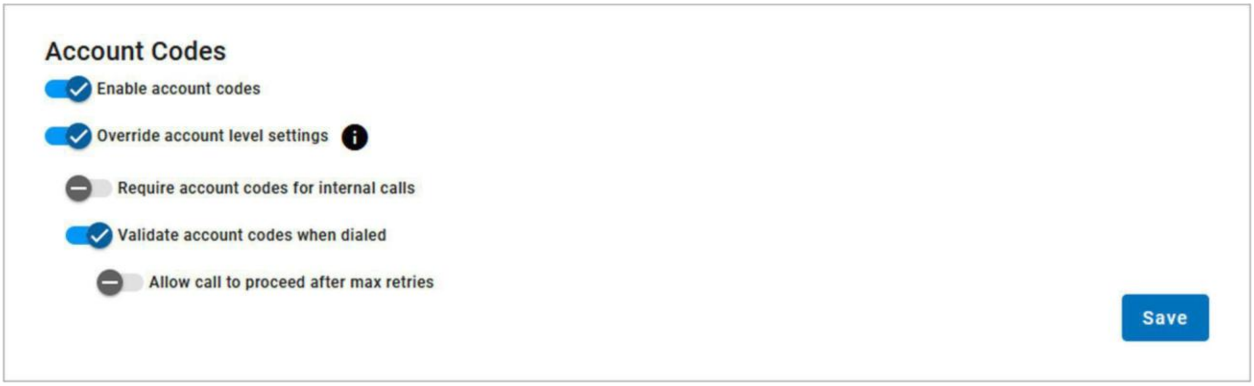
1. Go to the Users page and select the user whose settings you want to customize.
2. In the Settings tab, scroll down to Account Codes.
3. Switch *Enable account codes* on.
4. Click [Save]. Account Codes is now enabled with the default settings, which are greyed out below. If this user requires custom settings, see Override Account Settings.

Override Account Settings

In many organizations, especially larger ones, some teams may have different call tracking requirements, and some users may not need to track their calls at all. Follow these steps for each user who needs custom settings:

1. Go to the Users page and select the user whose settings you want to customize.
2. In the Settings tab, scroll down to Account Codes.

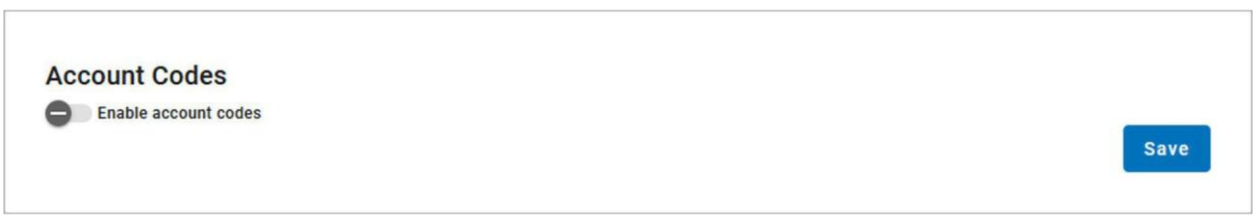
3. Toggle on *Override account level settings*. The account-default settings are displayed below.
4. Modify the settings as needed.
5. Click [Save]. If the default settings are ever updated, this user's settings will not be affected.



Disable Account Codes for User

If Account Codes is enabled for a user who doesn't need to track their calls, follow the steps below to disable it:

1. Go to the Users page and select the user whose settings you want to customize.
2. In the Settings tab, scroll down to Account Codes.
3. Switch *Enable account codes* on or off.
4. Click [Save].



ABOUT DISABLING ACCOUNT CODES

Because this is not an override setting, if the default settings are ever updated and Account Codes is enabled for all users who don't have it, it will also be enabled for users who previously had it disabled.

How to Use Account Codes

The general flow for using account codes on inbound and outbound calls is outlined below. However, it will change depending on which settings (detailed below) are enabled and disabled at the account and user levels.

- Outbound Calls: Dial a phone number. When prompted, enter an account code (for example, 123).
- Inbound Calls: Answer an inbound call, then dial the star code + the account code (for example, *50123).

> MID-CALL STAR CODE
> For calls in which an account code is not required, dial the star code + account code during the call. Just remember, the other party will hear the dial tones, so let them know what you're doing first.

Require Account Codes for Internal Calls

If this setting is enabled, users are prompted to enter a code on all outbound calls to other users on the account.

- Enabled (Required): The user dials a phone number or extension and hears, "Please enter a valid account code."
- Disabled (Optional): The user dials a phone number or extension. If they want to tag the call, the user can dial the **star code + account code** once the call is answered.

Validate Account Codes When Dialed

If this setting is enabled, outbound calls are not connected unless the caller enters a valid code. However, an inbound call will continue even if an incorrect code is entered to the max retry limit.

- Enabled (Validated): The code is checked against the codes on the account. Outbound calls are not connected unless the caller enters a valid code. Inbound calls, however, will continue even if the user enters invalid codes up to the max retry limit.
  - If the code is valid, the user hears a splash tone to indicate the account code was accepted. The call continues and the code is added to the call detail record (CDR).
  - If the code is not valid, the user hears, "Invalid entry. Please enter an X-digit account code."

- Disabled (Not Validated): The user can enter any code they want as long as it's the right length.
- If the code is valid, the user hears a splash tone to indicate the account code was accepted. The call continues and the code is added to the call detail record (CDR).
  - If the code is too long or too short, the caller will hear, "Account codes must be X digits. Please re-enter your X-digit account code."

Allow Call to Proceed After Max Retries

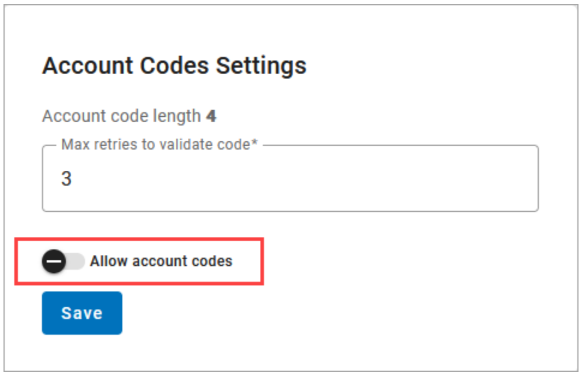
The max retry limit is set in Account Codes Settings. Once the user reaches this limit on an outbound call, they hear:

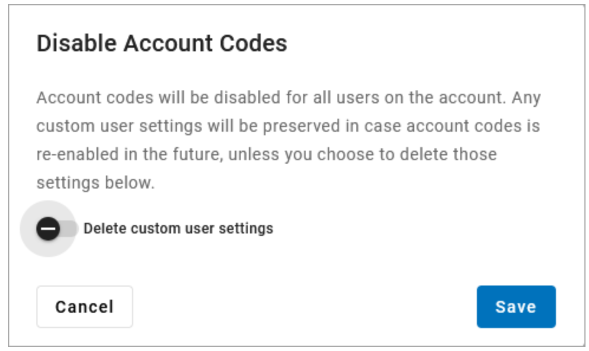
- Enabled (Allow): "You have reached the maximum number of attempts. No account code will be assigned to this call." And the call continues without an account code.
- Disabled: "You have reached the maximum number of attempts to enter a valid account code. Goodbye." The call is disconnected.

Disable Account Codes on Account

If Account Codes is disabled at the account level, it will be disabled for all users regardless of their previous settings.

1. Go to Business Cloud > Account Codes.
2. Under Account Codes Settings, toggle off *Allow account codes* and click [Save].
3. A pop-up will appear asking if you want to delete custom user settings.
   - Enabled. All user override settings will be deleted. If Account Codes are re- enabled in the future, all any custom settings will have to be set up again.
   - Disabled. All custom user settings will be preserved. If Account Codes are re-enabled in the future, users' previous custom settings will be restored.
4. Click [Save] to disable Account Codes for all users on the account. The account codes are preserved, so they can be used again if the feature is re-enabled later.





To disable Account Codes at the user level, see Account Codes User Settings.

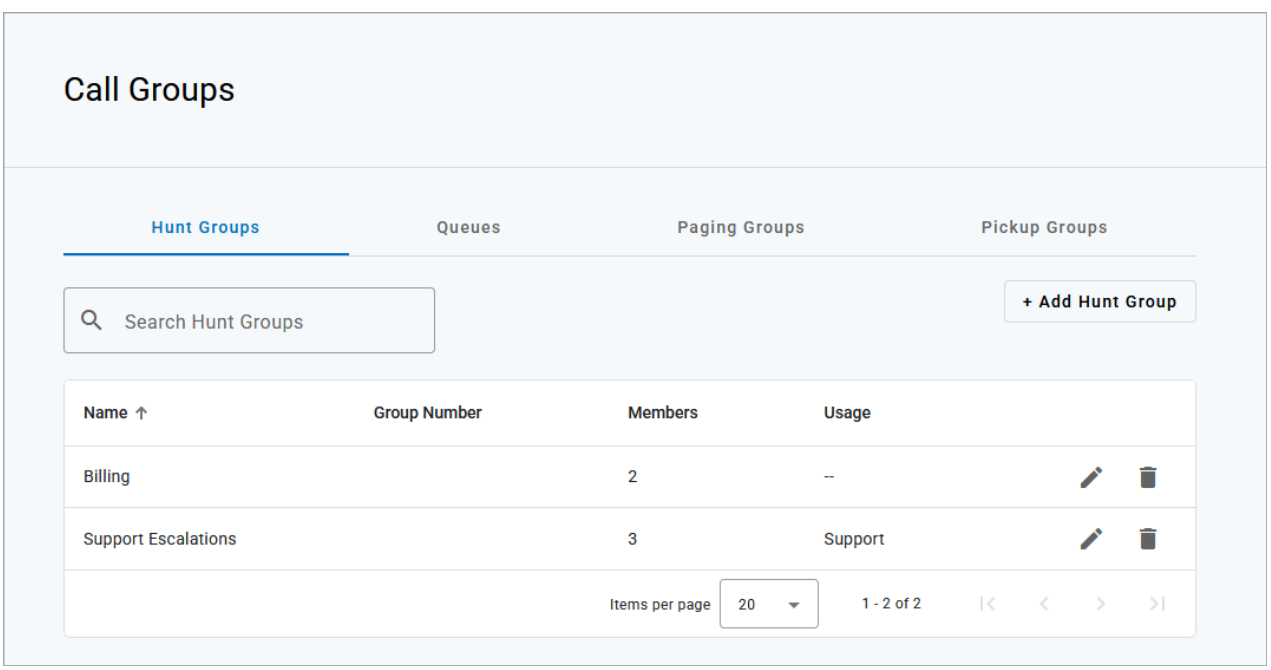
Call Groups

Groups allow you to reach multiple users simultaneously. Select a Pick Up or Paging Group to view and modify its settings. To create a new group, contact Customer Support for assistance.

Call groups are designed to efficiently distribute calls or make announcements to a group of users. There are four types of call groups:

- **Hunt Groups** distribute incoming calls among a group of users based on the group's ring strategy: Simultaneous, Sequential, Round Robin, or Longest Idle. The first user to answer takes the call. If no one answers, the call follows the group's failure route. Hunt groups are ideal for smaller teams that don't need queue management.
- **Queues** are similar to hunt groups but allow for more complex management of high call volumes. When all users are busy, callers are placed in a queue where they listen to announcements or hold music until an agent is available. Queues are ideal for larger teams that may have more callers than agents at any given time.
- **Pick Up Groups** allow incoming calls to be answered by any member in the assigned group by dialing a star code.
- **Paging Groups** are used to make one-way announcements to one or more devices — like the announcements over the loudspeakers at school. All users assigned to a paging group can be contacted at once via their device's speaker by dialing the group's extension.

Select the tab for the group type you want to view or modify. In each tab, search for a name to filter the list of groups displayed below. Click **Edit** to modify an existing group or click **[+ Add]** to create a new one.



Hunt Groups

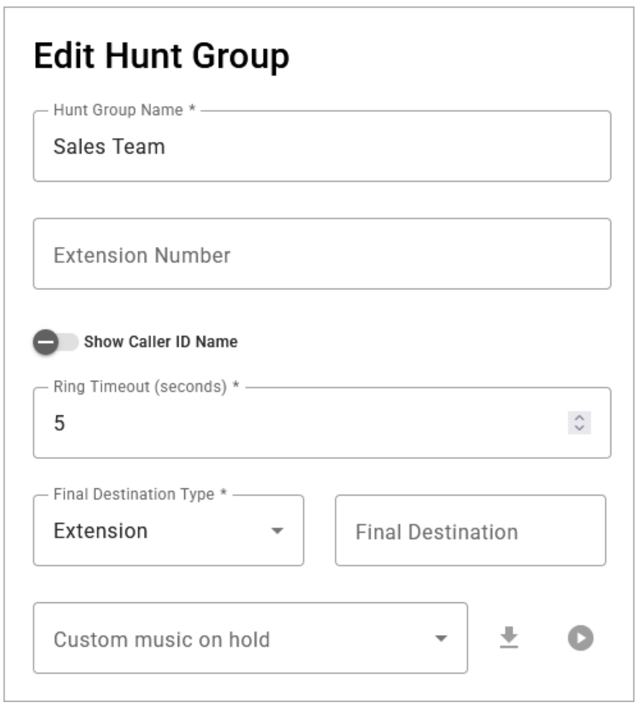
Hunt groups distribute incoming calls among a group of users based on predefined settings. Rather than following each user's call handling rules, the group follows its own User Ring Strategy to ensure calls are distributed as intended. The first user to answer takes the call. If no one is available or the timeout settings are reached, the call follows the group's failure route.

Hunt groups are ideal for resource groups that can answer calls as they come in. Groups with larger call volumes and/or limited staff may benefit from call queuing. See Queues for details.

Callers can reach a hunt group by dialing the assigned phone number or extension, or via an auto-attendant. Any auto-attendants it's assigned to are listed at the bottom of the group configuration. See Hunt Group & Queue Routes for details.

Add or Edit a Hunt Group

Hunt groups can be modified at any time, without duplicating or deactivating the auto-attendant(s) it's assigned to. That means you can change the Night Forwarding number, add or remove users, log users in or out, etc. as needed.



Follow these steps to create or modify a hunt group:

1. Go to **Call Groups** and select the **Hunt Groups** tab.
2. Click **[+ Add Hunt Group]** or select an existing group from the list.
3. In the popup window, enter the following information:

Setting	Description
Hunt Group Name	Enter a unique name for the group.
Extension Number	Assign a unique extension to the group (optional). The extension must not start with 0 or 911. **Note** Callers can reach the hunt group directly via an extension (entered here) or phone number. To assign a phone number to the hunt group, see Change Phone Number Destination.
Show Caller ID Name	Toggle on to show a name for this group in caller ID, then enter a custom name in the field below. It can, but does not have to be, the same as the group name. When the call is delivered to a user, the caller ID will show this name before the caller's name and phone number. For example: *Sales JANE SMITH 18015551234.* If the call is routed through multiple call groups, only the most recent group's name is displayed. There are no character limitations for the caller ID name, but a shorter name will allow more to be shown on the device screen.
Ring Timeout (seconds)	Enter the number of seconds a call will ring to a user or group before it is sent to the *Final Destination* or auto-attendant failure route (5–120). Keep this low to ensure calls are answered quickly. See User Ring Strategy for details.
Final Destination	Enter the failure route for calls that reach the group directly (via phone number or extension) and are not answered. Select *Phone Number* or *Extension*, then enter the number in the field to the right. Calls that reach this call group from an auto-attendant follow the auto-attendant's failure route, not the *Final Destination*.
Custom music on hold	Select a custom Music On Hold file from the Media Files library that will play when a call is answered and then placed on hold. If this is not configured, the caller will hear the hold music assigned to the user (if configured) or the account.

Setting	Description
Night Forwarding	Choose whether to allow users in the group to turn calls on and off via star code.
User Ring Strategy	Choose how incoming calls will ring to users in the group: Simultaneous, Sequential, Round Robin, or Longest Idle.
User Log In/Out	Choose if users in the group can log in and out via star code.

4. When you're done, click [Save].

See also: Route Calls to Hunt Group or Queue

Queues

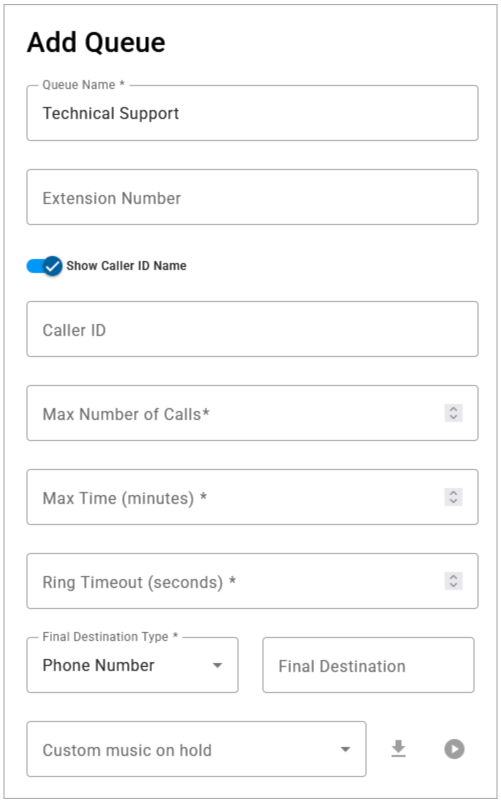
Long calling waits have an undeniably negative impact on your customer’s experience. For 66% of callers, two minutes on hold is their breaking point. Queues are fundamental in managing high call volumes to ensure no customer goes unattended. They offer the same call routing features as hunt groups but also allow incoming calls to wait in a virtual queue for the next available agent to take the call.

Queues offer a unique opportunity to provide informative greetings and announcements that keep callers engaged and help minimize missed or abandoned calls. Up to three Queue Announcements, which are managed in the Media Files library, can be assigned to a queue to fully customize the experience.

Callers can reach a queue by dialing the assigned phone number or extension, or via an auto-attendant. Any auto-attendants it's assigned to are listed at the bottom of the queue configuration. See Route Calls to a Hunt Group or Queue for details.

Add or Edit a Queue

Queues can be modified at any time, without duplicating or deactivating the auto-attendant it's assigned to. That means you can add or remove users, log users in or out, change the announcements, and more, as needed.



Follow these steps to create or modify a queue:

1. Go to **Call Groups** and select the **Queues** tab.
2. Click **[+ Add Queue]** or select an existing queue from the list.
3. In the popup window, enter the following information:

Setting	Description
Queue Name	Enter a unique name for the group.
Extension Number	Assign a unique extension to the group (optional). The extension must not start with 0 or 911. **Note** Callers can reach the queue directly via an extension (entered here) or phone number. To assign a phone number to the queue, see Change Phone Number Destination.

Setting	Description
Show Caller ID Name	Toggle on to show a name for this group in caller ID, then enter a custom name in the field below. It can, but does not have to be, the same as the group name. When the call is delivered to a user, the caller ID will show this name before the caller's name and phone number. For example: *Sales JANE SMITH 18015551234.* If the call is routed through multiple call groups, only the most recent group's name is displayed. There are no character limitations for the caller ID name, but a shorter name will allow more to be shown on the device screen.
Max Number 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 to be in the queue (1–360). Once the max time is reached, the call is sent to the *Final Destination* or auto-attendant failure route.
Ring Timeout (seconds)	Enter the number of seconds a call will ring to a user or group before it is pushed back to the front of the queue (5–120). Keep this low to ensure calls are answered quickly. See User Ring Strategy for details.
Final Destination	Enter the failure route for calls that reach the group directly (via phone number or extension) and are not answered. Select *Phone Number* or *Extension*, then enter the number in the field to the right. Calls that reach this call group from an auto-attendant follow the auto-attendant's failure route, not the *Final Destination*.
Custom music on hold	Select a custom Music On Hold file from the Media Files library that will play when a call is answered and then placed on hold. If this is not configured, the caller will hear the hold music assigned to the user (if configured) or the account.
Queue Announcement	Queue Announcements are a series of prompts and messages that callers hear when they reach the queue. To customize the caller experience, choose an Intro Prompt, Primary Message, and an Interrupt message from the Media Files library. Each prompt is optional, though a *Primary message* is recommended. If a *Primary message* is not selected, the caller will hear Music On Hold.

Setting	Description
Night Forwarding	Choose whether to allow users in the group to turn calls on and off via star code.
User Ring Strategy	Choose how incoming calls will ring to users in the group: Simultaneous, Sequential, Round Robin, or Longest Idle.
User Log In/Out	Choose if users in the group can log in and out via star code.

4. When you're done, click **[Save]**.

Queue Announcements

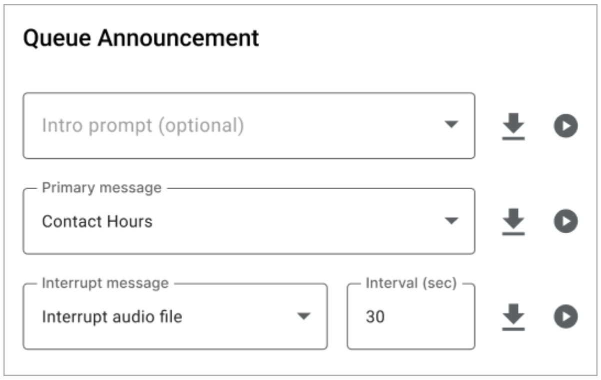
Queue Announcements are a series of prompts, messages, or music that callers hear when they reach a hunt group or queue. You can assign up to three custom announcements to each queue, allowing you to fully customize the caller experience. The right message, voice, and background music can turn an annoying experience into an engaging and informative one, and even help you build stronger relationships with your customers.

Every team has different needs, so each queue will need different messages. Before you record or upload a variety of prompts, consider how they will flow together and which messages might be switched out occasionally. For example, the message scripts might be different if the flow is team greetings > hold music > promotional message versus promotional message > team greetings > hold message.

When a call enters the queue, the Intro Prompt and Primary Message will play, then the call will ring an available user. If the user does not answer, the queue announcements are resumed

Queue Announcements must be added to the Media Files library before they can be assigned to queues. Admin end users can change the announcements assigned to a queue at any time.

1. Go to Call Groups > Queues.
2. Select the queue you want to modify or add a new one.
3. Under **Queue Announcements**, select the files you want to apply to this queue from the Media Files library. All prompts are optional, but we recommend assigning a *Primary message* at minimum.



Queue Announcement	Description and Examples
Intro prompt	This prompt is played immediately once the user enters the queue, before routing to a caller. If the *Intro prompt* isn't set, the primary message plays first. • **Team Greeting:** Thank you for calling the Billing department. • **Outage Notification:** We are currently experiencing high call volumes due to a service outage in the foothills. Our technicians are on site and expect service to be restored by 2:00 p.m.
Primary message	This message begins immediately after the intro prompt and plays on a loop until the call is answered. It is most often a brief message followed by standard hold music. If the *Primary message* is not set, callers hear the Music On Hold configured for the queue. • **Generic Hold:** Please hold while you are connected to the next available representative. Your call will be recorded for quality and training purposes. • **After-Hours:** The Billing department is currently closed. Please call back during regular business hours, which are 9 AM to 5 PM, Monday through Friday.

Queue Announcement	Description and Examples
Interrupt message	This message interrupts the primary message at specific intervals to help keep callers engaged while they wait. Use it to provide reassurance, educate on a particular topic, promote special offers, and more. • **Extended Hold:** Thank you for holding. All of our agents are busy assisting other customers. If your issue is urgent, please stay on the line. For general inquiries, please open at ticket on our website at www.company.com and we'll get back to you as soon as possible. • **Business Hours:** COMPANY is open Monday through Saturday from 11:00 a.m. to 8:00 p.m. Discount tickets are available on our website at www.company.com. • **Information:** Did you know you can manage your account online? Visit [website] for more information. • **Promotion:** Our summer sale is in full force! For a limited time, customers who set up an in-person demo will get 15% off their order. Ask us for details. • **Promotion:** While you wait, did you know we offer a variety of payment options, including credit cards, PayPal, and Apple Pay? Choose the one that works best for you.
Interval (seconds)	If an interrupt message is selected, enter the number of seconds after which the message will be played.

4. Click **[Save]**.

Night Forwarding

Night Forwarding, also known as Night Mode, allows users in a hunt group or queue to turn their calls on in the morning and off at night by dialing a star code.

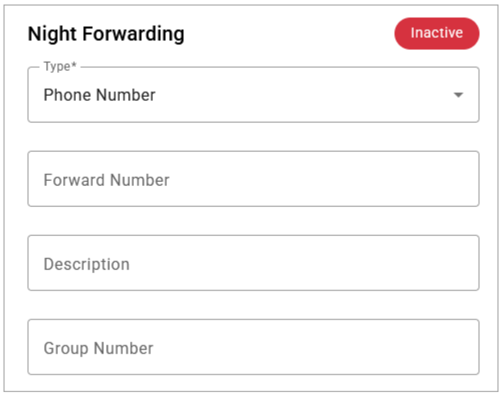
When enabled, incoming calls to the auto-attendant group are redirected to an on- or off-net phone number, extension, or short dial, which can be to another group, user, or an off-net number (like the night manager's cell phone). And because it's controlled by a star code, each group can manage it independently.

1. Log in to the portal and go to **Call Groups**.
2. Select an existing hunt group or queue (or create a new one).
3. Under **Night Forwarding**, enter the following:

- **Type:** Select whether this group will be forwarded to a phone number or an extension.
- **Forwarding number:** The phone number or extension (or short dial), as identified above, that calls will be routed to.

Be careful what you enter here — this field is not verified to ensure the number is valid.

- **Description:** A description to identify the forwarding location (optional).
- **Group number:** A three-digit identifier that will be used with the star code to enable or disable Night Forwarding for the associated group(s).



4. Scroll down and click **[Save]**. Now users assigned to the group can dial the star code to enable or disable forwarding to this group.

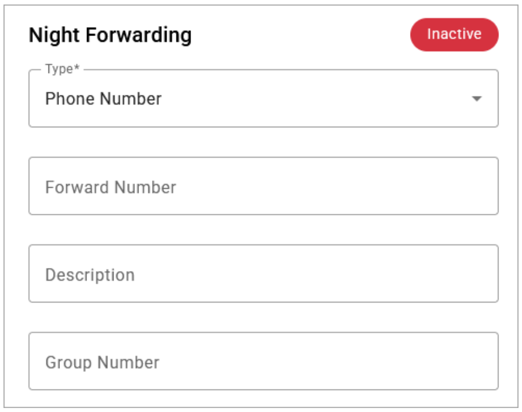
Change Forwarding Number

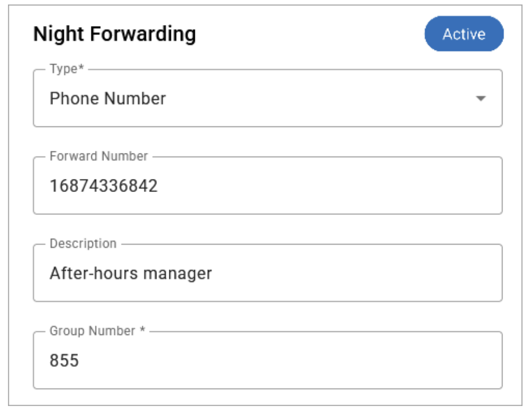
A user assigned to the hunt group or queue can change the forwarding number by dialing the star code and pressing 3. Alternatively, Admin users can change the forwarding number in the Voice Portal:

1. Go to Account > Call Groups.
2. Open the hunt group or queue you need to modify.
3. Scroll down to **Night Forwarding** and change the phone number or extension.
4. Click **[Save]** to apply the new number.

Check Forwarding Status

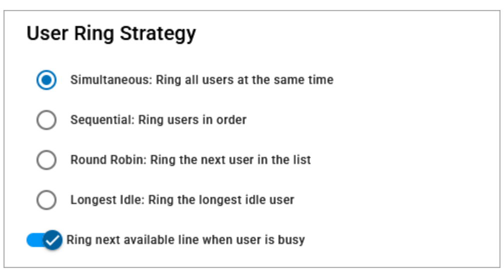
To find out if Night Forwarding is currently enabled (actively forwarding to the destination specified below), open the group and scroll down to Night Forwarding. The flag to the right of the heading will say either *Inactive* or *Active*.





User Ring Strategy

Choose how incoming calls will ring to users in the hunt group or queue:



- **Simultaneous:** Rings all devices for users in the group at the same time; the first user to answer gets it. Additional settings are required.
- **Sequential:** Rings one device in the group at a time in a specified order until the call is answered.
- **Round Robin:** Rings the next user in the group based on which user received the last call. This ensures that all users in the group receive an equal number of calls.
- **Longest Idle:** Rings the user who has been idle (not on a call) the longest, to evenly distribute incoming calls among users in the group.
- **Ring next available line when user is busy:** For the Simultaneous ring strategy only, toggle this setting on or off:
  - **Disabled:** Incoming calls to the group will *not* ring to users who are busy.
  - **Enabled:** Incoming calls will ring to all users, regardless of their status.
    - If the user has a single line with Call Waiting enabled, they will hear the Call Waiting tone for the

call on the same line as the existing call.

- If the user has multiple lines for their number and are busy, the call will ring on an idle line.

User Log In/Out

Enter your group users and specify whether they can log in or out of the group by dialing a star code.

Keep Users Logged In (or Don't)

Groups can function in two ways: keep users always logged in or allow users to log in and out as needed. Choose the option that works best for this group:

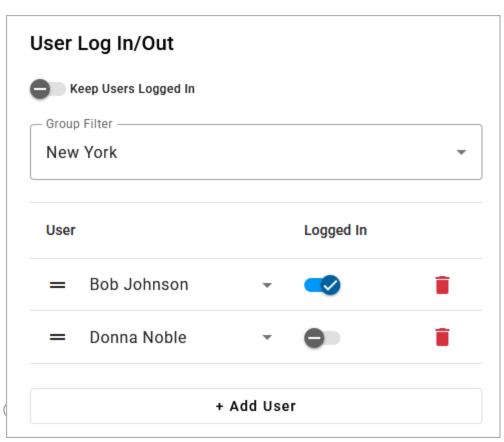
- **Enabled:** Users will remain logged in to the group and will receive calls according to the auto-attendant's schedule. They cannot use the star code to log out.
- **Disabled:** Users assigned to this group can log in and out by dialing the **Group Log In/Out** star code + group number from their device. Additionally, you can open the auto-attendant editor to see who's logged in or out and even change the user's status on their behalf.

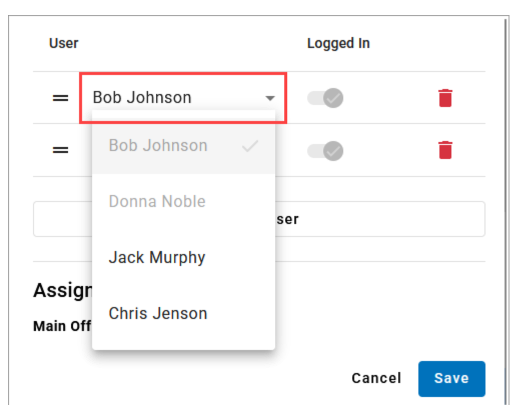
Star Code Required
Ask Customer Support about setting up a **Group Log In/Out** star code, so you can take advantage of this feature.

Add Users

To add a user to the group, click [+ Add User]. Users are added in the order they're listed on the account or user group, so you can keep clicking the button to add everyone quickly. To change the user, click their name and select another user. When you're done, click **[Save]**.

- **Group Filter.** To narrow the list of options to users in a specific User Group, select the group name in the filter above (optional).
- **Logged In.** The toggle indicates whether the user is or is not logged in to the queue.
- **Delete.** To remove a user from the list, click the trash icon on the right.





Route Calls to Hunt Group or Queue

Callers can reach a hunt group or queue in multiple ways:

- **Extension**: Assign a unique extension to the hunt group or queue configuration.

  An extension allows users to transfer calls directly to the group, bypassing the auto- attendant. The extension can also be set as the Night Forwarding destination for hunt groups and queues.

- **Phone Number**: Assign a phone number destination to the group.

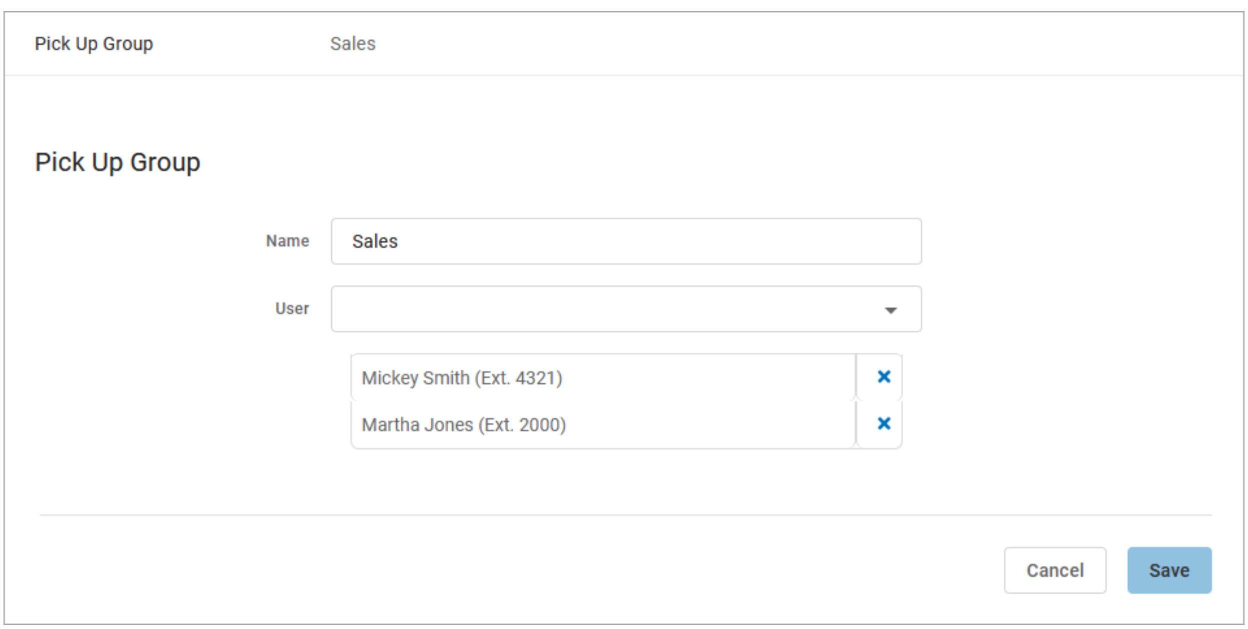
  The phone number can be set as the destination for *Forward to Phone Number* routes in an auto-attendant, Night Forwarding in hunt groups and queues, or simply as a failover destination for users.

- **Auto-Attendant**: Add a Hunt Group or Queue route to the auto-attendant, then assign a group to the route.

The group assigned to the route can be hot-swapped at any time, even while the auto- attendant is live and processing calls, allowing you to quickly update the call flow at a moment's notice. For example, if power goes out at the London office and the New York office needs to take over their call load temporarily, you can open the auto-attendant editor and switch the queue from one team to the other. Changes are saved immediately.

Pick Up Groups

A Pick Up group allows incoming calls to be answered by any member in the assigned group by dialing a star code.



Edit a Pick Up Group

Select a group to edit the name and assigned users.

1. Select the group to expand its settings.
2. Update the name, if needed.
3. To add a user to the list, select their name from the menu.
4. Click [Save].

Answer a Pick Up Group Call

When a user in the Pick Up Group hears a call ringing on another group member's phone, the user can answer the call on their own phone by dialing the Pick Up Group star code.

1. When you hear a call, pick up your phone and dial the Pick Up Group star code to answer it.
2. If multiple calls are ringing, the longest ringing will be answered.
3. If a user belongs to multiple groups, when they dial the Pick Up Group star code, it will answer the longest ringing call in any of their groups.

Answer with Speed Dial

To answer a call to a Pick Up Group on an IP phone with the press of a button, set a speed dial preset to the Pick Up Group star code. Follow these steps for each phone in the group:

1. Assign a new line on the device and choose or enter the following settings:
2. Type: Speed Dial
3. Assignment: Custom Speed Dial
4. Speed Dial: Enter your Pick Up Group star code.
5. Speed Dial Display Name: Enter a name for the Pick Up Group.
6. Click [Save].

Paging Groups

Paging Groups are used to make one-way announcements to one or more devices — like the announcements you remember over the loudspeakers at school. All users assigned to a Paging Group can be contacted at once via their device's speaker by dialing the group's extension.

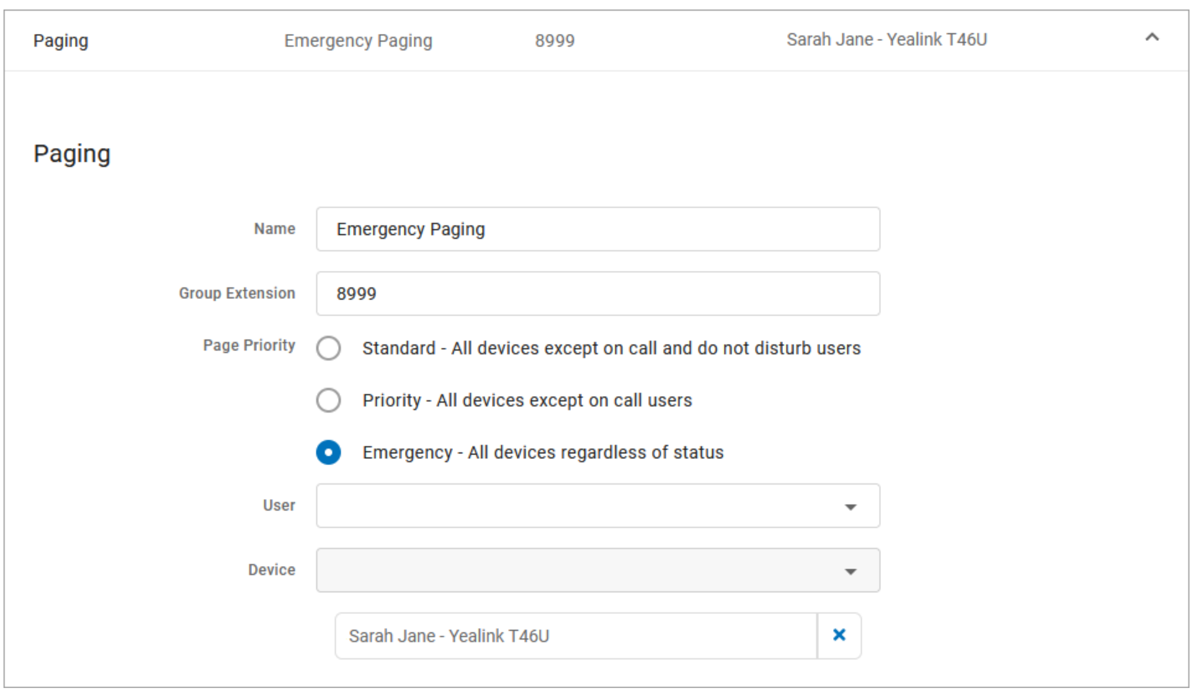
How Paging Groups Work

- Caller ID. The paging party must have their Caller ID enabled.
- Devices. Only certified devices capable of receiving a page will receive a page.
- If all devices are unregistered, offline, in DND, or unavailable, the paging party hears a busy tone.

- If a device has multiple lines and any line is busy, the user will not receive a Standard page.
- When swapping a device, you will see a warning if the new device does not support paging or have a valid Line 1 "Device Line" line type.
- Page Priority. The page priority determines which devices will receive the page.
- If a user belongs to more than one paging group and receives a page from both paging groups, the last page will have priority over the other pages.
- All devices within an Emergency Paging Group will receive the page, regardless of status. While an Emergency Page is in progress, incoming calls will not interrupt the page and Call Waiting will be disabled for users of the group.
- When paging a device that already has an active page elsewhere, the device will receive a busy tone or hang up.
- End Page. Users can end a page on their device by hanging up. This does not end the page for everyone else.

Edit a Paging Group

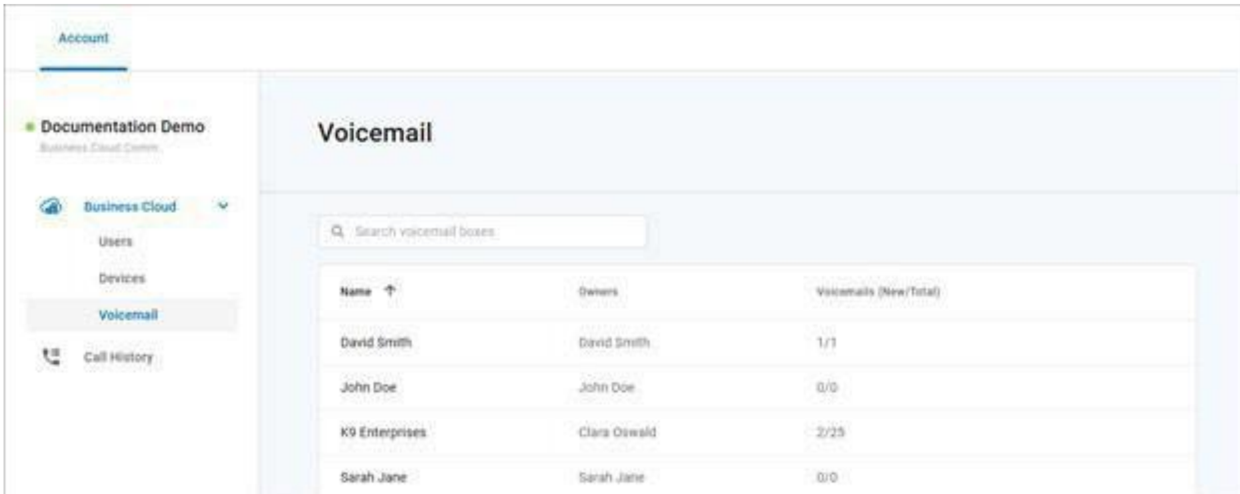
Select a Paging Group to view and edit its settings. When you're done, click [Save].



Field	Description
Name	Enter the name that will appear on devices assigned to this Paging Group.
Group Extension	Enter the extension that will be dialed to page the group.
Page Priority	Assign a priority to ensure proper handling of incoming pages as an attempt to not interrupt current calls unless deemed necessary by the paging party: • Standard: All devices except those that are on an active call or set to Do Not Disturb will receive the page. Only Priority and Emergency pages will override. • Priority: All devices except those on an active call will receive the page. It disregards DND status. Emergency pages will override. • Emergency: All devices, regardless of status, will receive the page. Calls in progress will be placed on hold while the page is active.
User & Device	To add a user to the group, select their name and device. Repeat for all users who will be included in this group.

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.

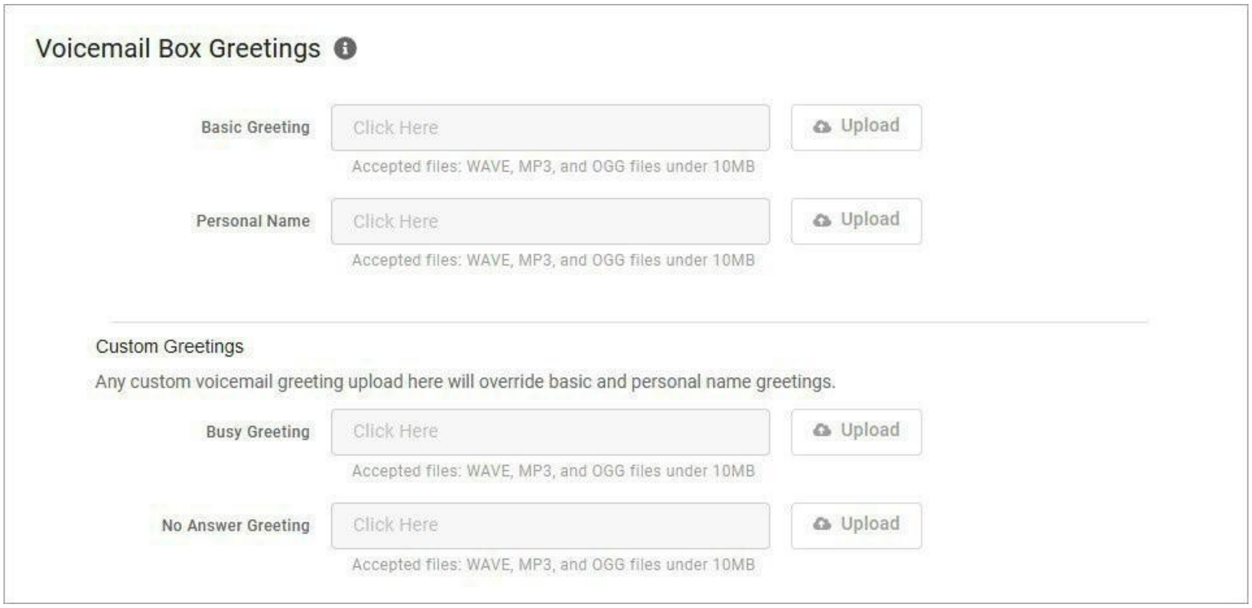


Voicemail Box Details

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

Voicemail Box Greetings

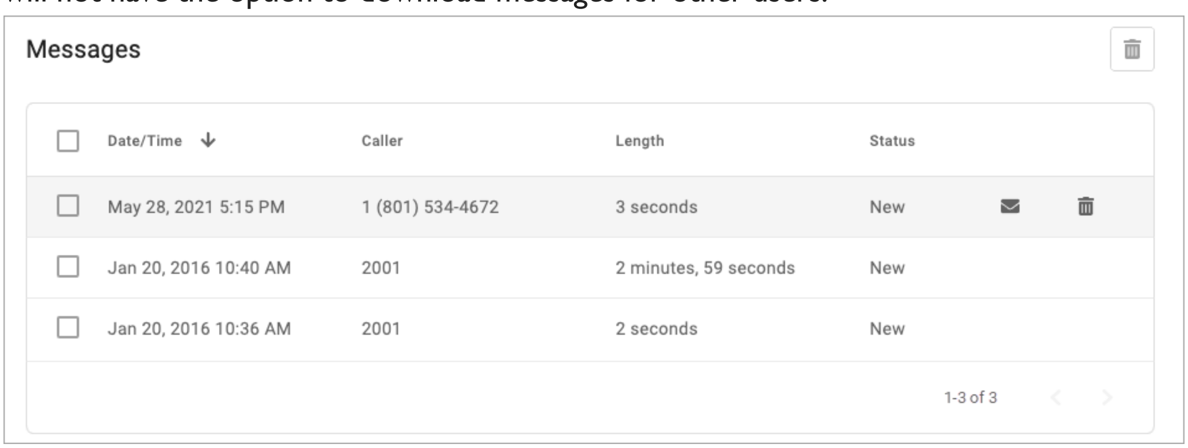
Users can upload their voicemail greetings (Basic, Busy, No Answer) and personal name recordings. Click the field to select a file from your computer, then click [Upload]. The upload will accept WAV, MP3, and OGG files that are less than 10MB.



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, you can download *your own* voicemail messages from the Voice Portal, but you will not have the option to download messages for other users.

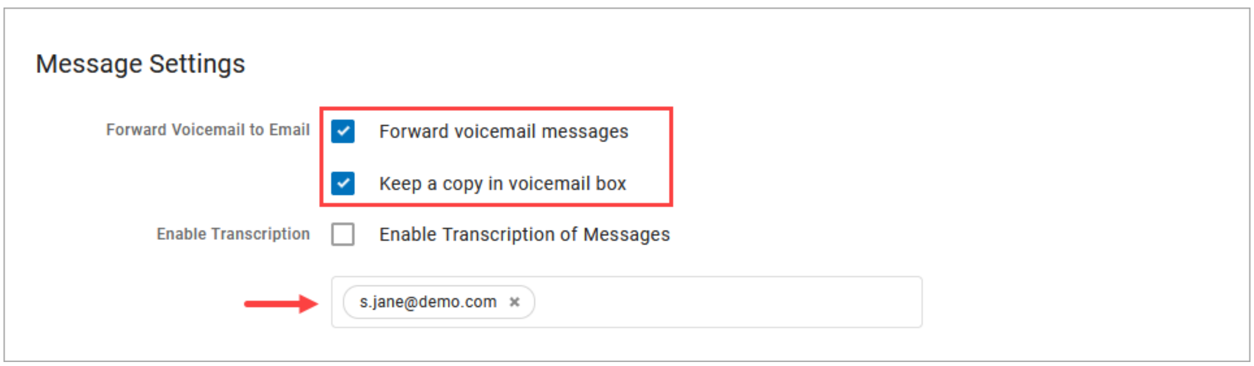


Field	Description
Save	Change the status of the message to *Saved*.
Delete	Delete this message from the box. To delete all or multiple messages at once, select the message on the left and then click the trash icon at the top right.

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



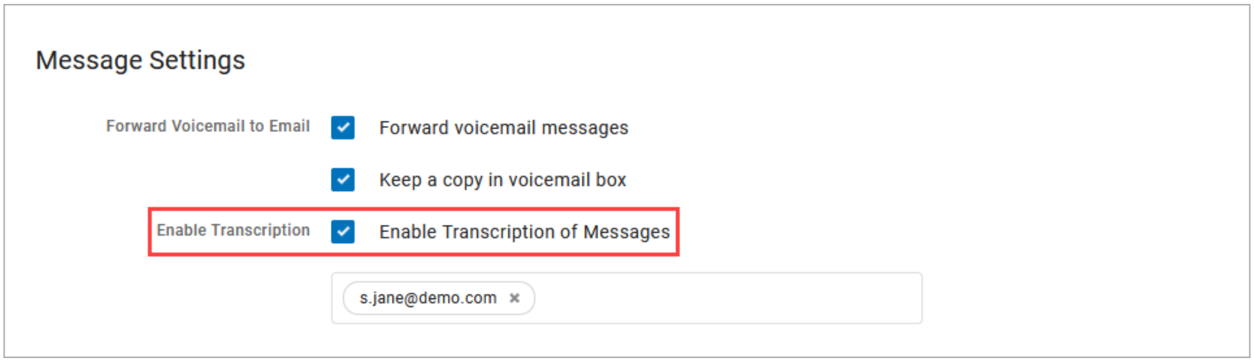
Forward Voicemail to Email

Messages left on the user's 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.*
   - When checked, the message waiting indicator (MWI) on the user's device will stay. on until they've listened to or deleted the message from their voicemail box.
3. Enter one or more email addresses, each separated by a comma.
4. At the bottom of the section, click [Save].

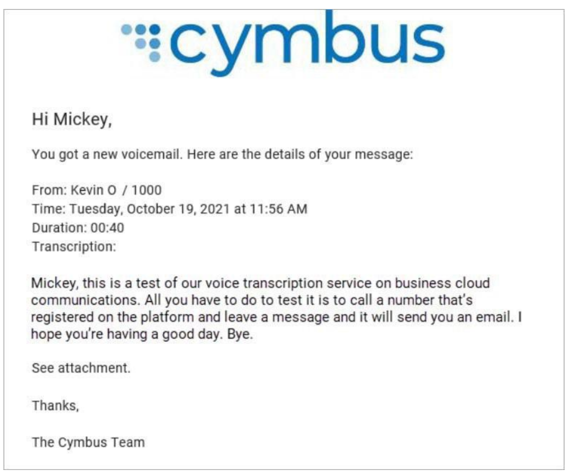
Enable Voicemail Transcription

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription 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 also have forwarding enabled).



1. Check the box for Enable Transcription.
2. Enter one or more email addresses in the field below separated by commas.
3. Click [Save].

Voicemail messages will be transcribed and sent to the email address(es) indicated here from *noreply@cymbus.com*. If "Forward Voicemail to Email" is also enabled, an MP3 of the message will be attached to the email. Here's an example of what that may look like:



US English

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."

Short Dials

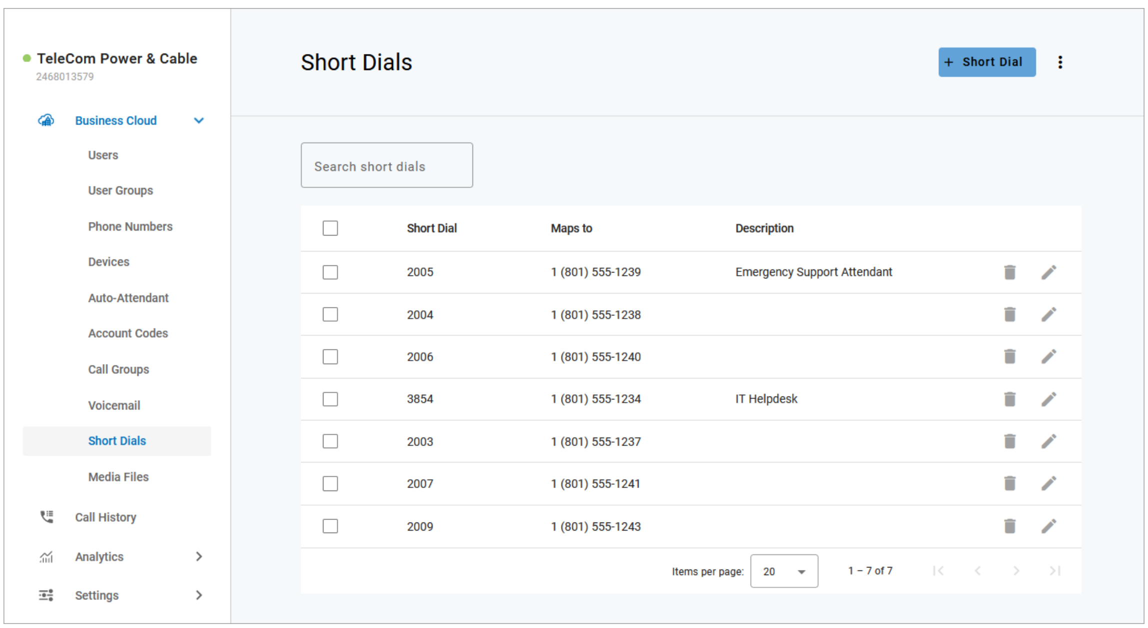
Short dials are an easy way for everyone on the account to access frequently used internal or external phone numbers. They're like account-wide speed dials or extensions, except short dials can be routed to any phone number that is allowed by the calling plan, even international numbers.

The account supports up to 10,000 short dials to meet the needs of any organization. Use short dials to create extension-like dialing to:

- An on-site PBX or an international branch.
- Match the last few digits of phone numbers in the directory.
- Make it easier to reach top customers, contractors, or partners.
- And more.

To use a short dial, pick up the phone and enter the number, no star code necessary.

Go to Business Cloud > Short Dials. Short dials can be added individually, to a range of sequential phone numbers, or by importing a CSV file.



WHAT'S THE DIFFERENCE BETWEEN SHORT DIALS AND SHORT CODES?

In the telecom industry, a short code is a five or six-digit number that businesses use for one-way SMS and MMS messaging. However, the use of the term isn't consistent everywhere. For example, Metaswitch has a Short Codes feature which is like Cymbus' Short Dials, in that it allows users to dial common numbers from their desktop phones.

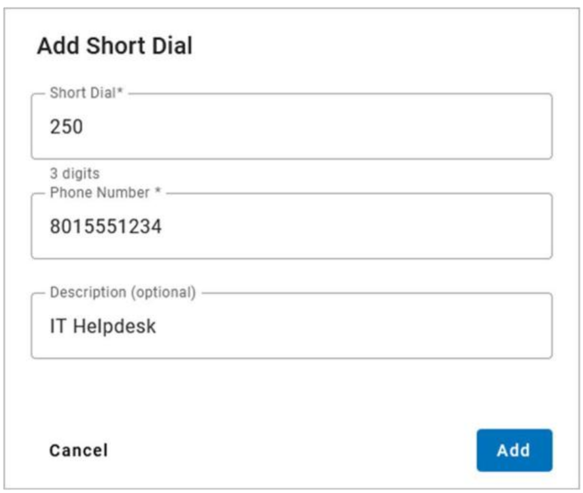
Add Short Dials

There are multiple ways to add Short Dials to the account: individually, to a range of sequential phone numbers, or by importing a CSV file.

Add Short Dials Individually

Follow the steps below to add a short dial to the account:

1. Go to Business Cloud > Short Dials.
2. Click [+ Short Dial] on the right.
3. In the Add Short Dial popup, enter the following information:



   - Short Dial: The number that will be dialed. It must be the same length as extensions on the account (3–6 digits), as indicated by text below the field.
   - Phone Number: The phone number the short dial will route to, without any spaces or special characters. For example, 18015551234.
   - Description: A brief description for the short dial, such as the name of the destination (optional). For example: IT Helpdesk.

4. Click [Add]. The short dial is added to the account.

Add Short Dial Range

A short dial range is used to assign short dials to sequential phone numbers. For example, if the starting number is (214) 555-8536, and the range is 2000 to 2004, five short dials will be set up as follows:

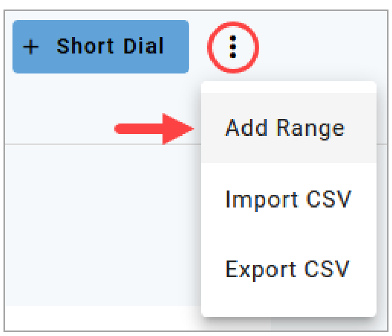
- (214) 555-8536: 2000
- (214) 555-8537: 2001
- (214) 555-8538: 2002
- (214) 555-8539: 2003
- (214) 555-8540: 2004

This is most frequently used to set up extension dialing to an on-site PBX. For example, if an account has a PBX with sequential phone numbers ending in 1000–1250, they can add a short dial range of 1000 to 1250 to match the last 4 digits of the phone numbers.

Short dials can be mapped to any on- or off-net phone number, so be sure that you own the complete range of sequential phone numbers to avoid routing calls to an unknown third party.

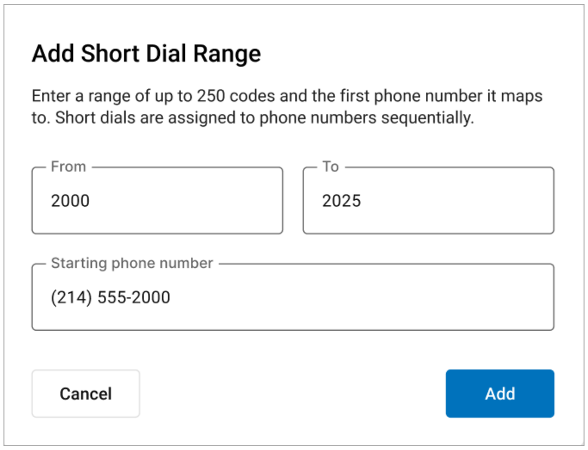
Follow the steps below to add a short dial range:

1. Go to Business Cloud > Short Dials.
2. Click the menu at the top right and select Add Range.



3. In the Add Short Dial Range popup, enter the starting and ending short dials. The range must have less than 250 numbers. In the example below, 25 short dials will be

created starting with 2000 and ending with 2025.



4. Enter the starting phone number.
5. Click [Add]. The short dials are added to the account.

Add a Description

To enter an optional description for any of these short dials, click the pencil icon on the right, enter a description, then click [Save]. See Manage Short Dials for details.

Import Short Dials

Rather than adding one at a time, you can migrate short dials from a previous account or provider using a CSV file.

Up to 250 short dial numbers can be imported to the account at a time. Imports are strictly additive; they cannot replace or edit short dials that are already on the account.

Create CSV

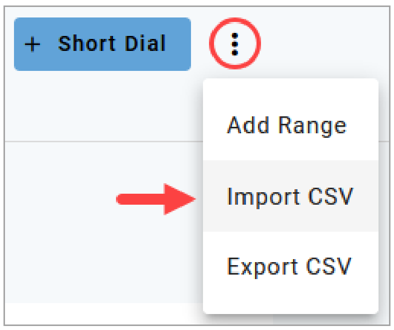
1. Create a CSV file with columns in the following order: Short Dial, Maps to, Destination, and Description.
   - Alternatively, export a list (CSV) of your current short dial numbers to use as a template. Remember to remove all existing numbers before importing it to the account.
2. Fill out the fields for every short dial you want to add, then save the file.
   - Short Dial: The code that will be dialed. It must be the same length as extensions on the account (3–6 digits).
   - Maps to: PHONE_NUMBER

- Destination: The phone number this code will route to, without any spaces or special characters. For example, 18015551234.
- Description: A brief description or name for the Short Dial, such as the name of the destination. For example: IT Helpdesk. This field is optional.

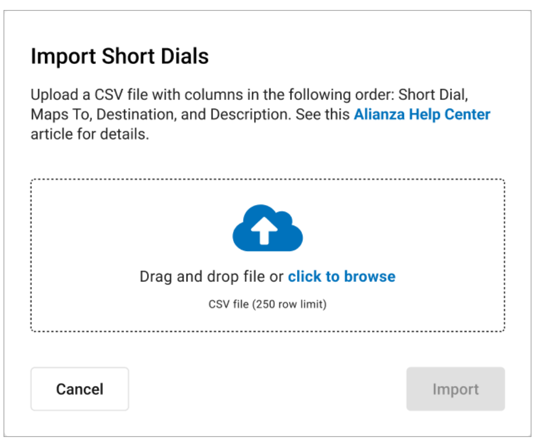
	A	B	C	D
1	Short Dial	Maps To	Destination	Description
2	485	PHONE_NUMBER	18018678487	Emergency Support Attendant
3	484	PHONE_NUMBER	18015559821	Night Manager's Cell Phone

Import File

1. Go to Account > Short Dials.
2. Click the ⋮ menu on the right and select Import CSV.



3. Drag and drop the file into the upload area or click the link and select the file from your computer.
4. Click [Import] to apply the changes to the account.



Troubleshooting

Multiple safeguards are in place to prevent short dials from interfering with other features on the account. If you get an error when adding a short dial, the error message should tell you the problem to correct. Once you fix it, try adding the short dial(s) again.

The most common errors include:

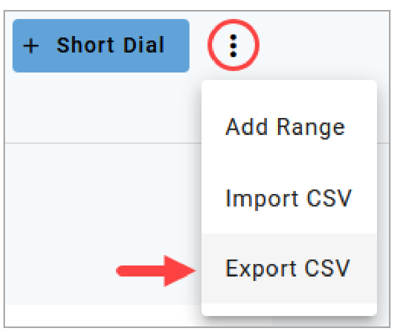
- Short dial overlaps with an existing short dial or extension.
- Short dial begins with an N11 service number, such as 311, 411, 911, etc.
- Short dial numbers are too long or too short; they must be the same length as extensions on the account.

Export Short Dial List

No matter how you use them, short dials make it easier for account users to reach frequently dialed phone numbers, inside or outside of the organization. But they won't do any good if users don't know which numbers are available to use.

The short dial list isn't available to end users, but you can export the list to a CSV file and share it with your organization.

1. Go to Business Cloud > Short Dials.
2. Click the ⋮ menu on the right and select Export CSV.



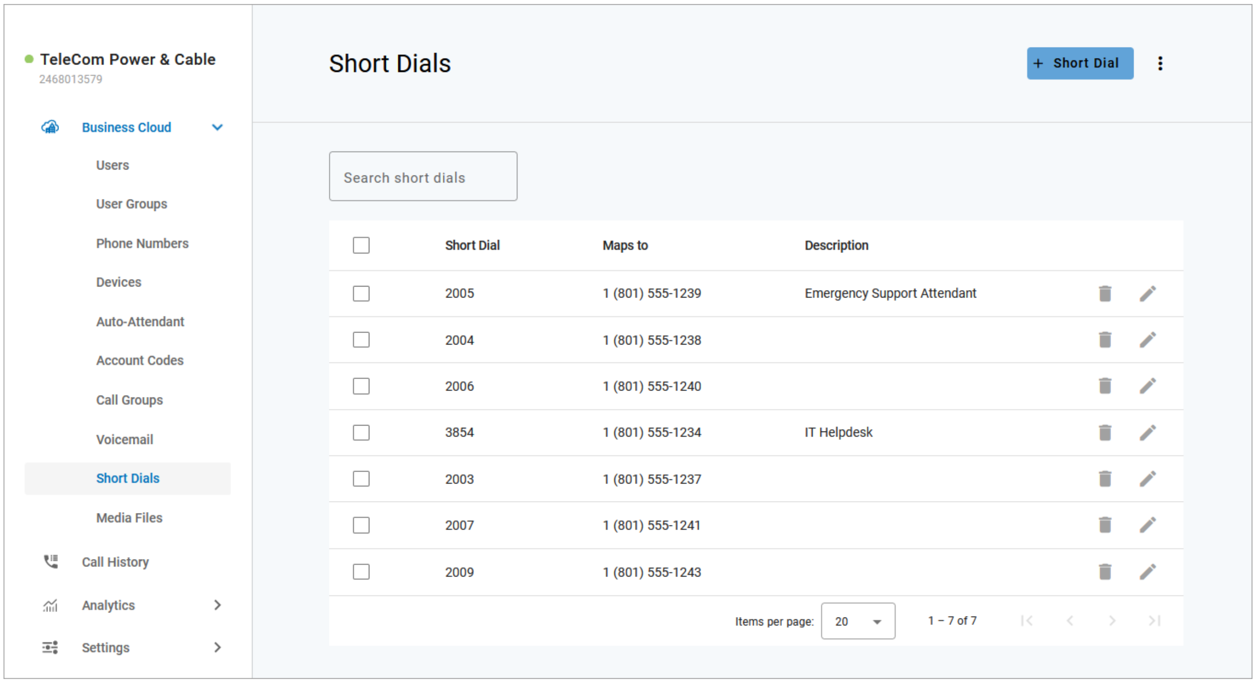
3. The CSV file is downloaded to your computer.

Info
If you choose to use this file as a template to import new short dials, remove the existing short dials first. Imports are strictly additive and cannot be used to edit or remove existing numbers.

Manage Short Dials

To view and manage the short dials on the account, go to Business Cloud > Short Dials. From here, you can add new ones, edit, or delete existing ones, or export a list to share with account users. Read the information in the tabs below for details.

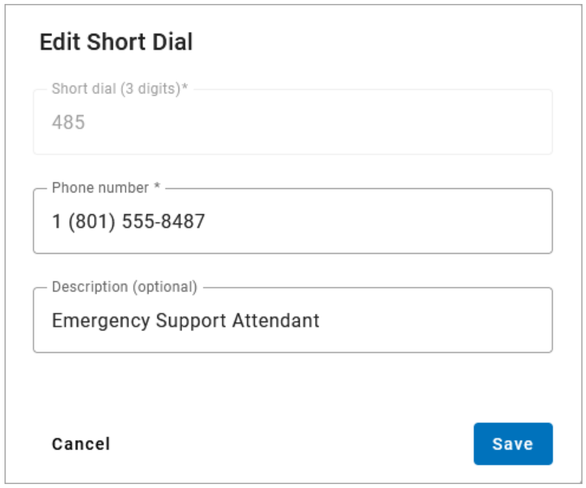
There are multiple ways to add short dials to the account. See Add Short Dials for details.



Edit Short Dial

To update the name or description of an existing short dial, go to Business Cloud > Short Dials, then locate the short dial you want to edit and click the edit icon on the right.

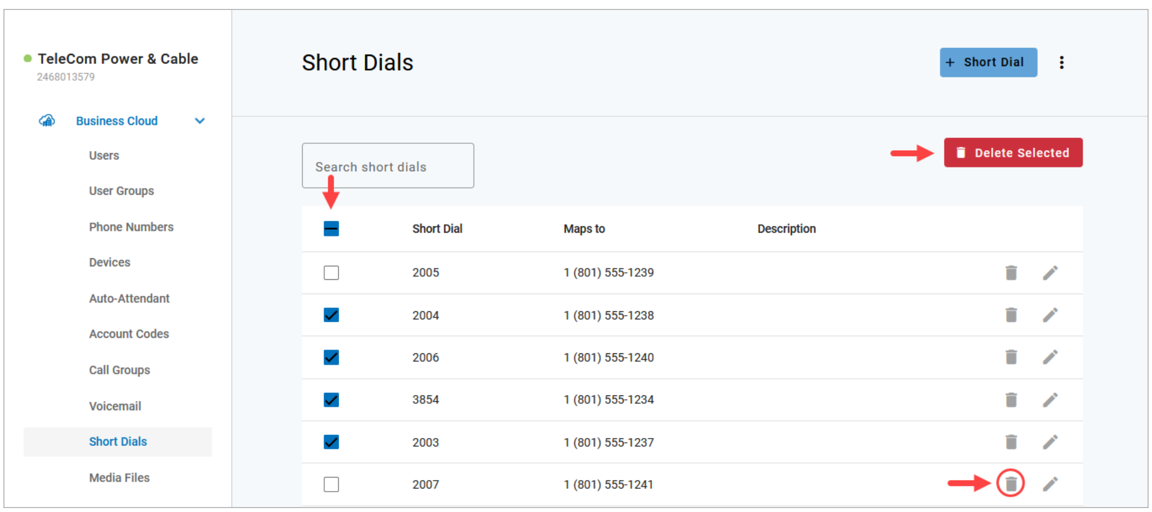
The short dial number cannot be edited. However, multiple short dials can be routed to the same phone number. If you need to change a short dial number, create a new one and then delete the old one, or keep both to give users more options.



Delete Short Dials

There are two ways to delete short dial numbers that aren't needed anymore:

- Delete One: Locate the short dial, then click the trash icon on the right.
- Delete Multiple: Check the box on the left for each short dial you want to delete (or check the top box to select them all), then click [Delete Selected].



Media Files

Media Files is a library of audio files stored on the account that can be reused throughout the Admin Portal. Rather than uploading a new prompt or message for each route, the user will select an existing audio file from the library. New audio files can be uploaded to the account or recorded directly from a browser, making it easier than ever to provide customized experiences for callers.

- Store up to 1,000 media files on the account.
- Play audio files in the browser to confirm you have the right one.
- Download media files to store a copy offline.
- Reuse a single file as many times as needed.
- Keep track of where each file is being used.

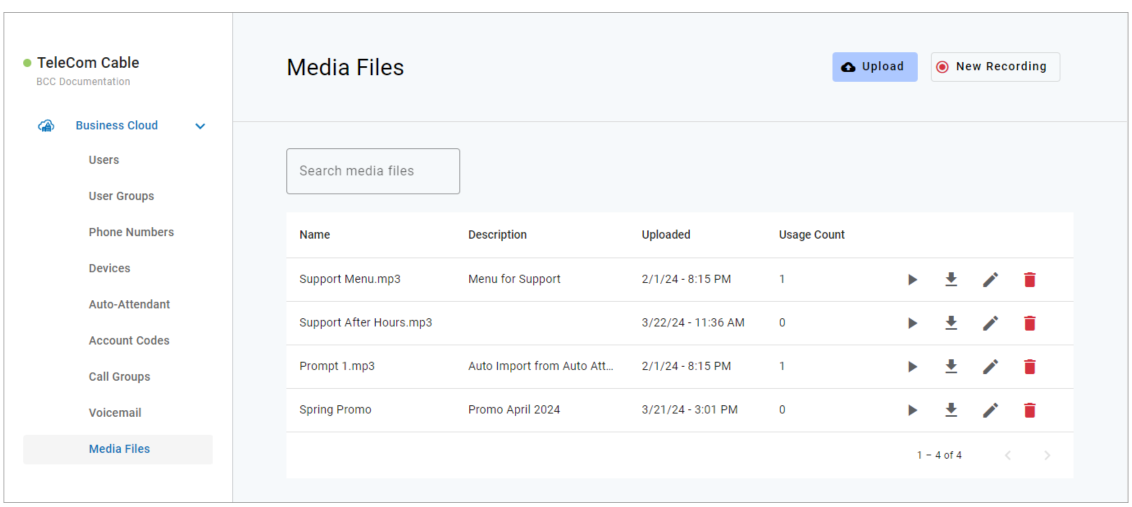
Add Media Files

There are two ways to add media files to the library:

1. Upload one or more MP3 or WAV files.
2. Record new prompts and messages.

Manage Media Files

Go to Business Cloud > Media Files. Files are listed alphabetically, each with a name, description, upload date, and usage count. Search by file name and description or click the column headers to sort the table. The buttons on the right can be used to play, download, edit (view), and delete each file.



Auto-Import

Audio files that were previously uploaded to an Auto-Attendant have been automatically added to the Media Files library with the description "Auto Import from" Auto-Attendant or Music On Hold. Edit each file to update the name and description as needed.

Prompt 1.mp3	Auto Import from Auto Att...	2/1/24 - 8:15 PM	1

Play Audio

To listen to the audio file in your browser, click Play. The length of the file is listed on the bottom right.

Name	Description	Uploaded	Usage Count
Support Menu.mp3	Main menu for Support	2/1/24 - 8:15 PM	1
Prompt 1.mp3	Auto Import from Auto Atten...	2/1/24 - 8:15 PM	1

01:03 / 03:30

1 – 2 of 2

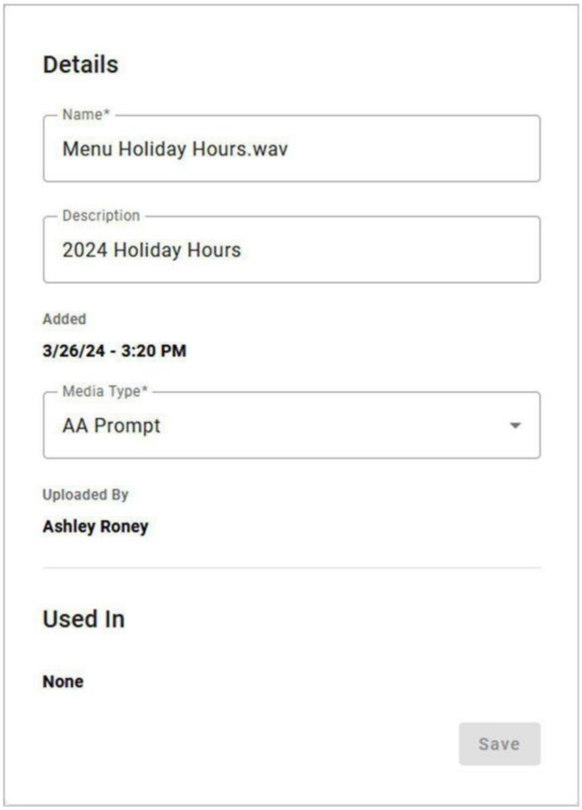
Download File

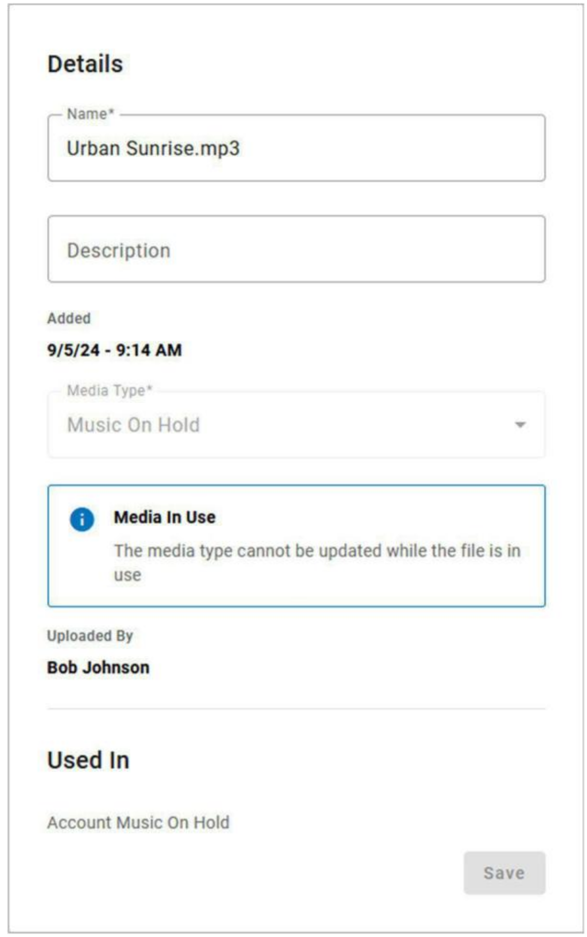
To save a copy of the file to your computer, click Download.

Edit Details

To view and edit the details of a media file, click Edit on the right. Here you can update the *Name*, *Description,* and *Media Type* fields and view the file details, including when it was added to the account, who added it, and where the file is being used.

The Media Type cannot be updated while the file is in use.





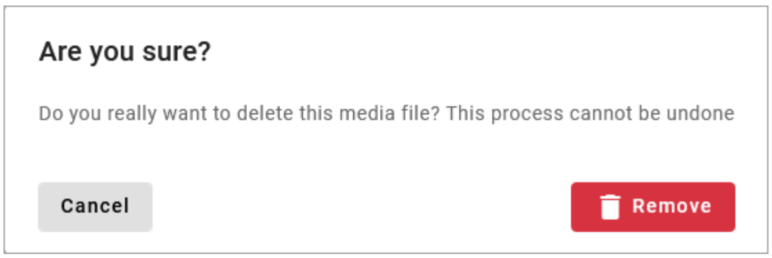
Field	Description
Name	The file name which is displayed on the Media Files page and in the prompt selection menus throughout the auto-attendant editor. The name must be unique and can include the file type.
Description	An explanation of file contents or search terms to help identify the audience, language, etc. The description is displayed on the Media Files page and included in the search results (up to 1,024 characters).
Added	The date and time the file was added to the account.
Media Type	Where the file can be used in the Admin Portal: • Music On Hold • AA Prompt (Auto-Attendant)
Uploaded By	The name of the person who added the file to the account. If the file was automatically imported from an existing auto-attendant, it will say "Unknown."
Used In	The name of the auto-attendant(s) the prompt is used in.

Delete Media File

Before you delete a media file from the account, there are a few things you should know:

- Deleting a media file is permanent. If there's any chance the file may be needed later, download a copy of it first.
- A media file cannot be deleted while in use. Check to see if it's being used anywhere, then update the location to use a different media file if needed.

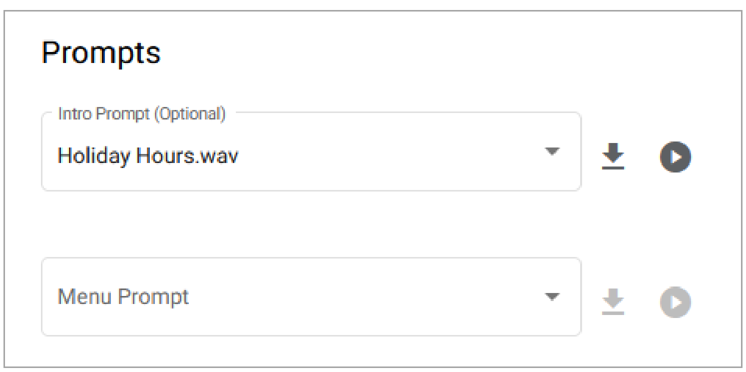
To delete a media file, locate the file and click the trash icon on the right. When asked if you're sure you want to delete it, click [Remove] to confirm.



Assign File to Auto-Attendant

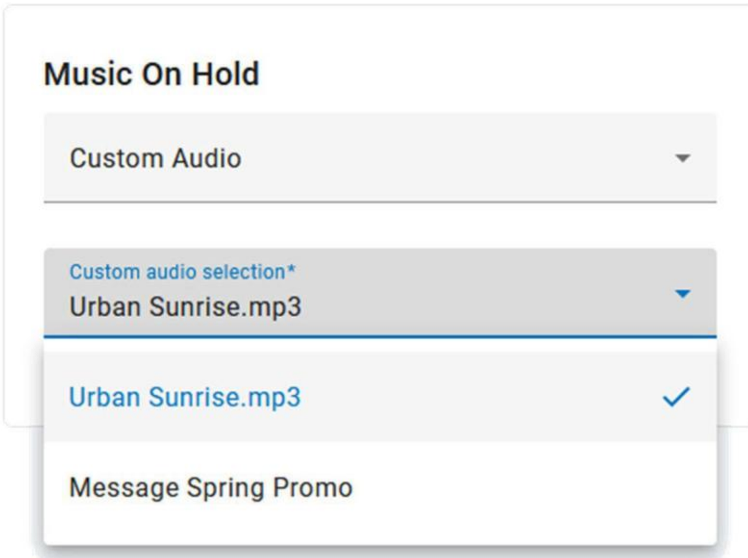
Media files set as AA Prompt can be used in the Menu, Message, and Directory routes in an auto-attendant. For each prompt, click the drop-down menu and select a media file from the list. To be sure you've got the right file, click Play on the right.

Live auto-attendants must be duplicated or deactivated before the prompts can be updated. See Edit an Auto-Attendant for details.



Assign File to Music On Hold

Media files set as Music On Hold can be configured on the account in Account > Settings > Calls. See Music On Hold for details.



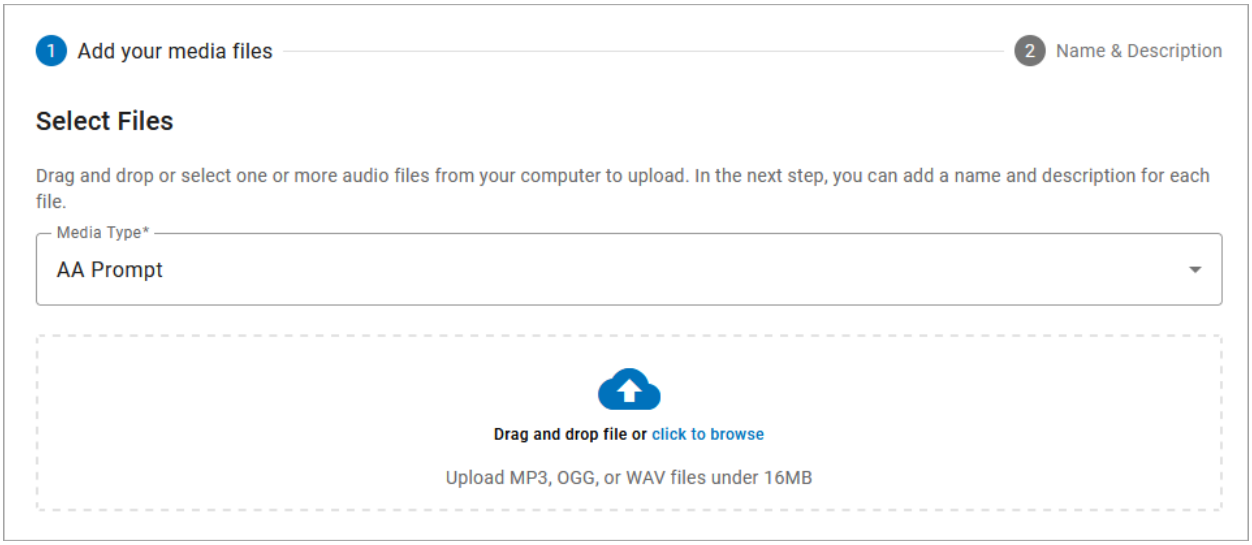
Upload Media Files

Media Files supports MP3 and WAV files under 10 MB each. Up to 50 audio files can be uploaded at a time.

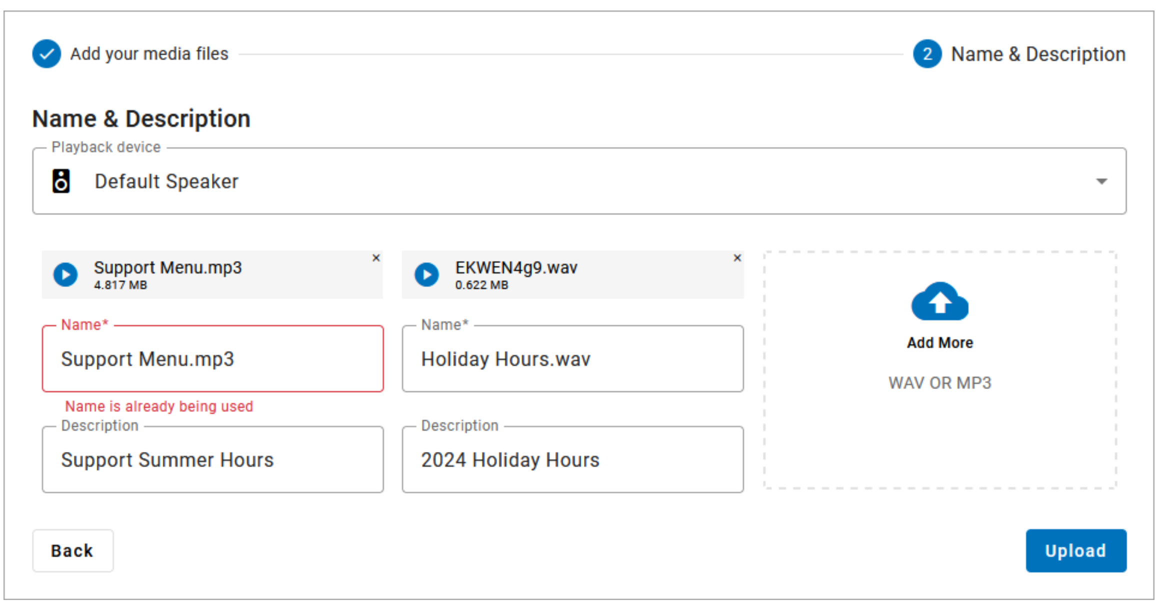
1. Go to Business Cloud > Media Files.
2. Click [Upload] in the top right of the page.

3. Click the Media Type menu and select how the file will be used:
   - AA Prompts can be used in auto-attendant Menu, Message, and Directory routes. See Edit an Auto-Attendant for details.
   - Music On Hold files can be assigned to the account in Account > Settings > Calls. See Music on Hold for details.

4. Add Media Files. Drag and drop up to 50 MP3 or WAV files into the upload area or click the link to select the file(s) from your computer.



5. Name and Description. Before uploading the file(s) to the account, edit the file name and add a description to make it easier to identify later (optional). Each file name must be unique.
   - Click Play to listen to the file. If needed, click X to remove it.
   - To add files to the upload, drag and drop them into the upload area.
6. When you're ready to add these files to the library, click [Upload]. The files will be added to the library shortly; small files will take a few seconds, while large files may take a few minutes. Do not retry the upload during this time.



Once the upload is processed, the audio files are added to the Media Files library.

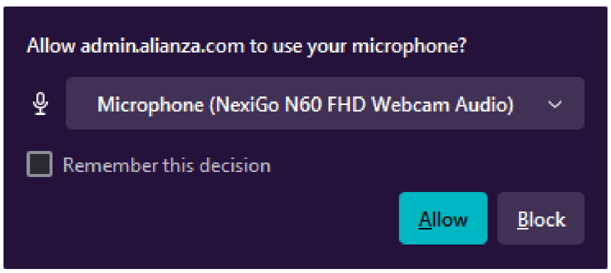
Music On Hold

Music On Hold files are 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.

Record New Media File

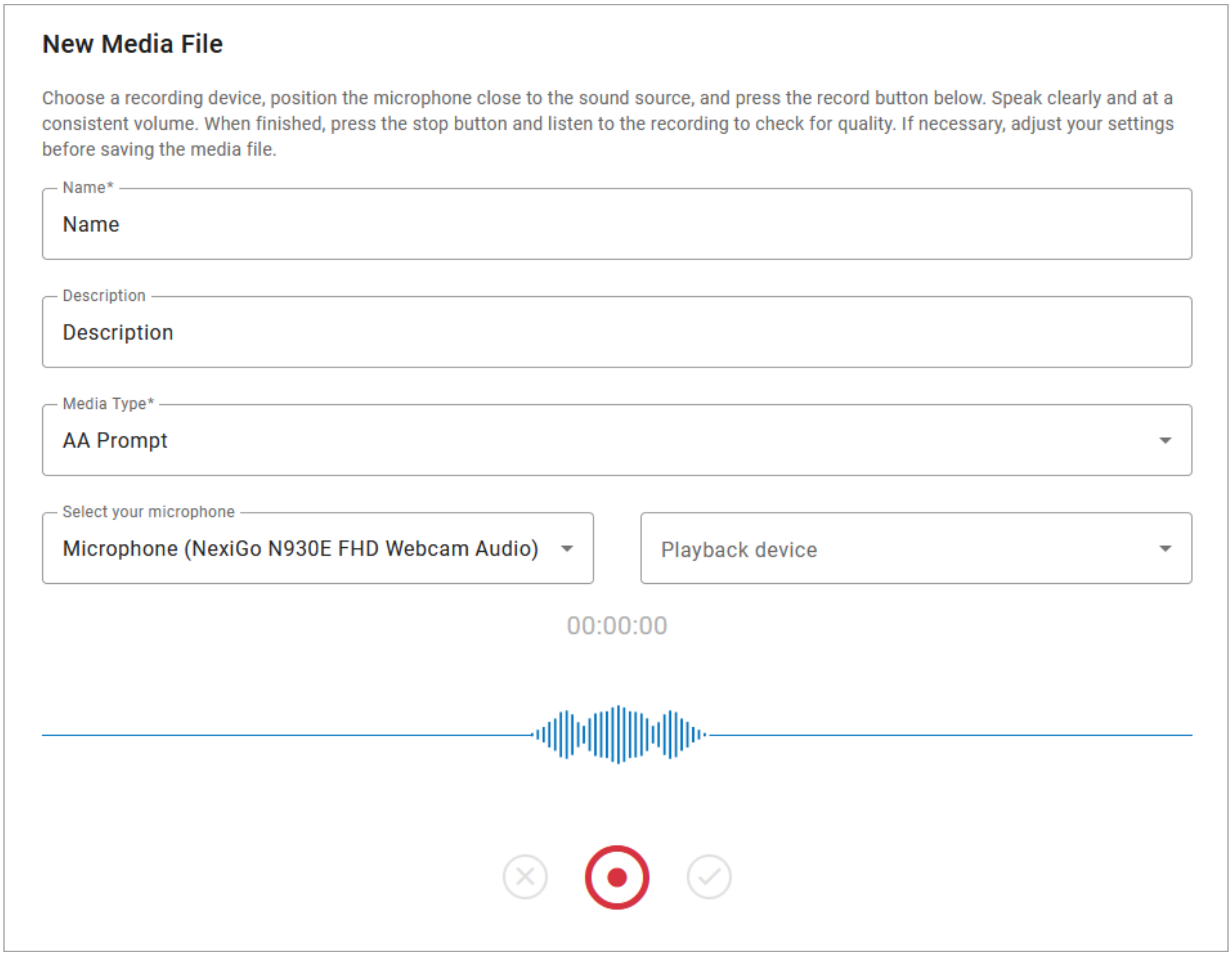
Record a media file directly in your browser for use wherever Media Files are supported. For the best results, sit in a quiet room and speak into the microphone clearly and at a consistent volume. There is no time limit; however, final recordings must be less than 10 MB.

1. Go to Business Cloud > Media Files.
2. Click [New Recording] in the top right.
3. If prompted, allow the browser to use your microphone.

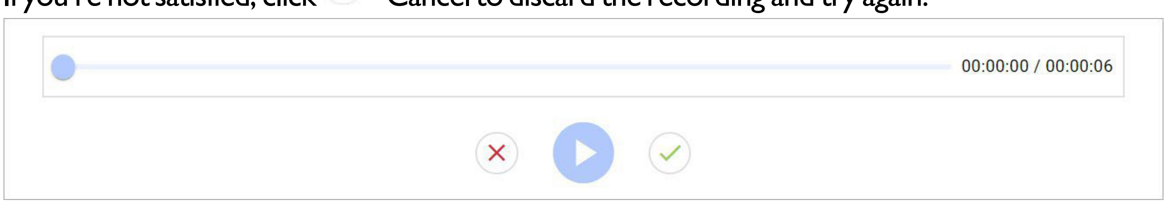


4. Enter a name and description for this recording. The file name must be unique.
5. Click the Media Type menu and select how the recording will be used:
   - AA Prompts can be used in auto-attendant Menu, Message, and Directory routes. See Edit an Auto-Attendant for details.
   - Music On Hold files can be assigned to the account in Account > Settings > Calls. See Music on Hold for details.

6. Select a microphone and playback device.



7. When you're ready, click the Record button, then dictate your prompt into the computer's microphone.
8. When you're done, click Stop to complete the recording.
9. Click Play to listen to the recording.
   - If you're satisfied, click Save to add it to the library.
   - If you're not satisfied, click Cancel to discard the recording and try again.

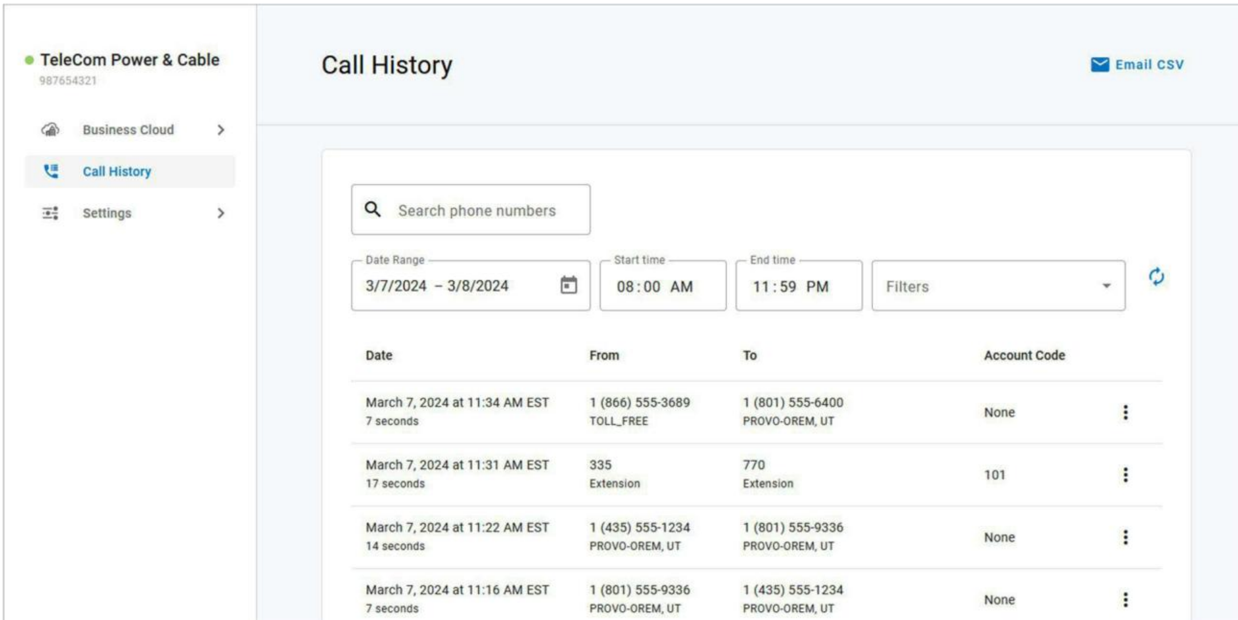


Once the recording is processed, the audio file is added to the Media Files library.

Call History

Call History holds the records of all calls made and received on the account. Calls are listed in chronological order with the most recent call at the top. Call data is organized into columns that show the date and time of the call, where the call originated (From), and where the call terminated (To).

At the top right of the page, the current record list can be emailed as a CSV file.

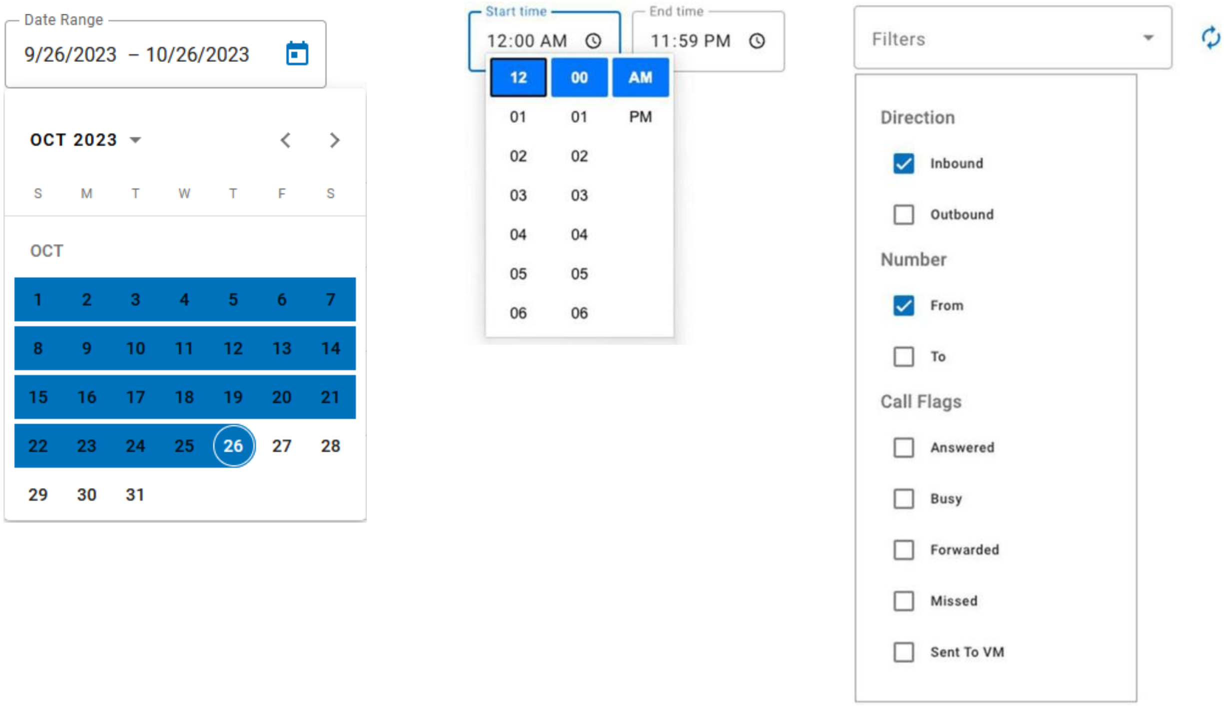


Filters

Apply call filters to locate specific call records. Once your parameters are set, the matching call records are displayed below.

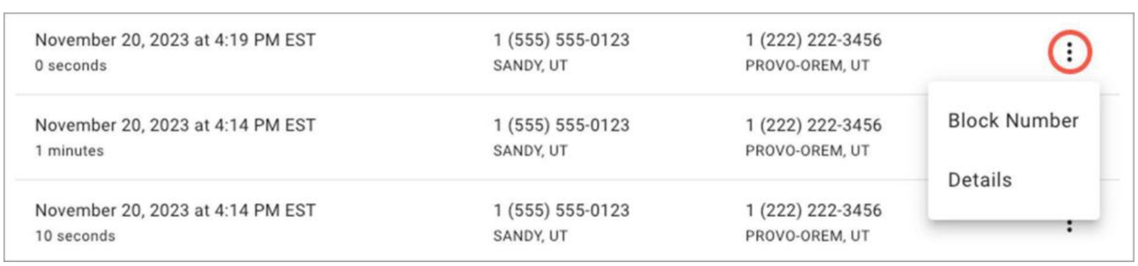
- Search: Enter a number in the *Search phone numbers* field to search for a specific phone number or extension. Results automatically populate after the first three digits are entered.
- Date/Time: Modify the date and time ranges or delete them entirely to gather the data you need. By default, the last 30 days of call records are shown that occurred between 12:00 AM and 11:59 PM, based on the account's time zone settings.
- Filters: Click [Filters] to filter the call records by Direction, Number, and/or Call Flags.

- Reset: When you're finished with your search, click Reset Filters to remove any parameters and display all calls.

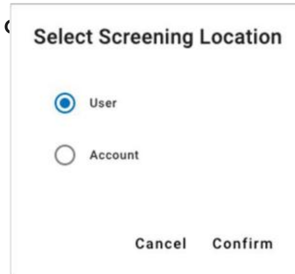


Call Options

To view a call's details, click the ⋮ menu on the right. The option to block the number is also available for inbound calls.



Block Number



If necessary, you can block an inbound caller from making additional calls t either the user or the account.

1. Click [Block Number].
2. Select whether the number should be blocked on the user or the account.
3. Click [Confirm] to add the inbound phone number to the blocked caller list (in Call Screening).

Details

Call details include the date, time, and length of the call, as well as the cost, origination, dialed, and termination information.

Field	Description
Time and Length	When the call started, connected, and ended, what duration of the call was billed, and the actual length of the call.
Cost	The cost of the call, if the call was within the calling plan, and the rate per minute from the plan.
Origination	The number and location of the originating call, and if the call came from on or off the network.
Dialed	The number that was originally dialed by the caller.
Termination	The number and location of the call recipient user that received the call, and if they were on or off the network.

Email a Call History Report

Once you've applied the appropriate filters to locate the data you need, you can export the data into a CSV file.

1. At the top right of the Call History page, click Email CSV. A banner is displayed on the page to indicate that your report is being generated.
2. When the file is ready, an email is sent with a link to download the report. The link expires in 7 days and can only be used once. Here's an example of what the email looks like:

Hi John,

Your Call History report is ready to download. Here are the details:

Account Name: TeleCom Power & Cable
Account Number: 123456789
Dates: Sep 25 - Oct 25, 2023
Types: Any
Call Flags: Any

Download the report

The link will expire in 5 days. If you did not initiate this request, please contact support.

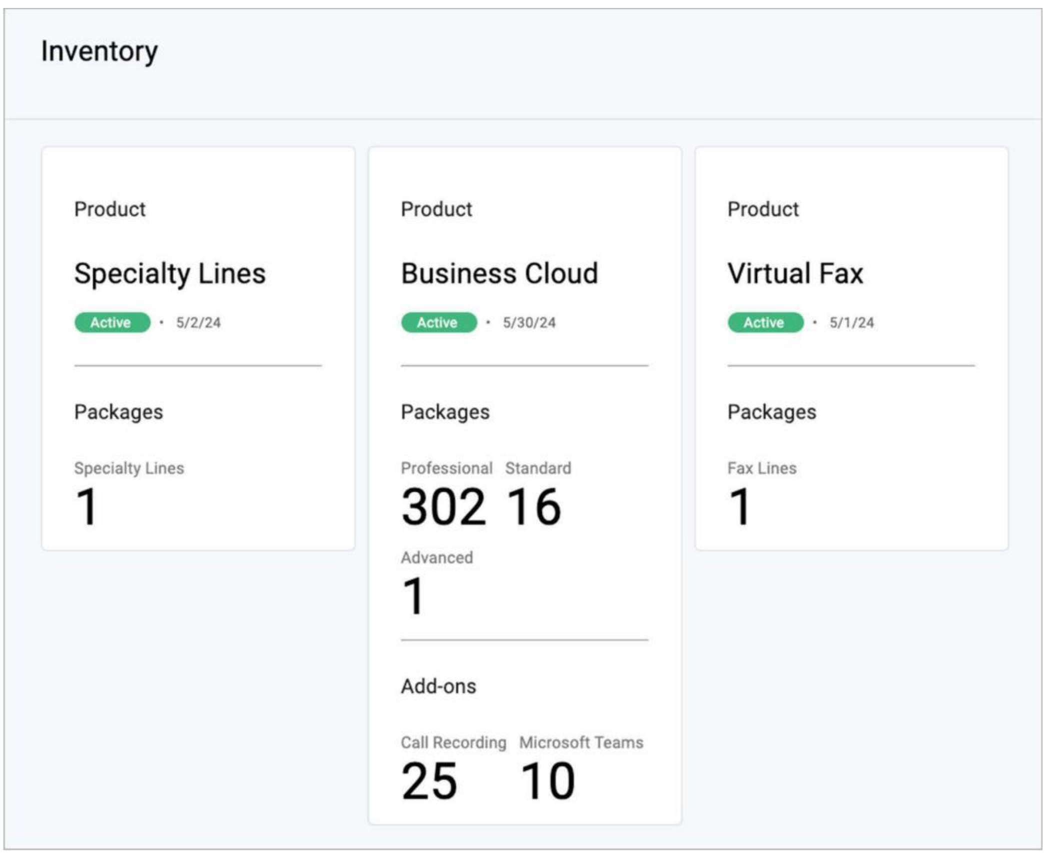
Analytics

Inventory

The inventory dashboard displays a read-only view of all the products, packages, and add- ons in an account. Visible only to Account Managers and Super Admins, this page can be used to quickly determine which products are in the account and whether any packages or add-ons have been added.

Each product is organized by name, the account status (Active, Suspended, or Disabled), the date the status was last updated, and any packages and/or add-ons that are included. Listed below each package or add-on is the number of associated users or lines.

For example, if an account has the Business Cloud Communications product, the packages indicate how many users have Standard, Advanced, or Professional feature plans, while integrations like Call Recording or Microsoft Teams are displayed as add-ons.



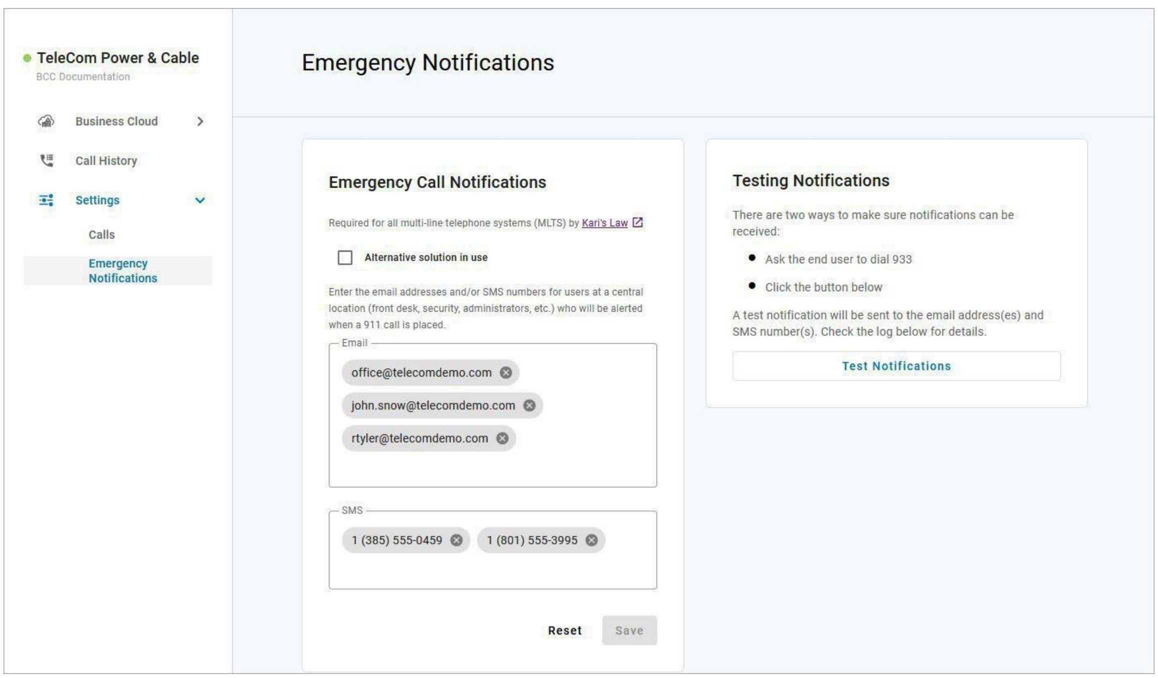
Settings

Most settings that apply to the entire account can only be managed by your service provider, but the settings you can manage are available here.

Emergency Call Notifications

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.

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 end user's responsibility to keep this information up to date, but they may need a reminder.



Alternative Solution

Emergency Call Notifications are *required* for any and all MLTS manufactured, imported, sold, leased, or installed after February 16, 2020. If your account already meets this requirement with an on-premises solution, select *Alternative solution in use.*

Configure Notifications

It is important that you choose to notify a central location where someone will see or hear the notification, such as a managed distribution list of on-site personnel (front desk, security office, administrators, etc.), rather than an individual who may or may not be at the location 100% of the time. While there isn't a limit on how many contacts can be entered here, make sure the number is reasonable for your organization.

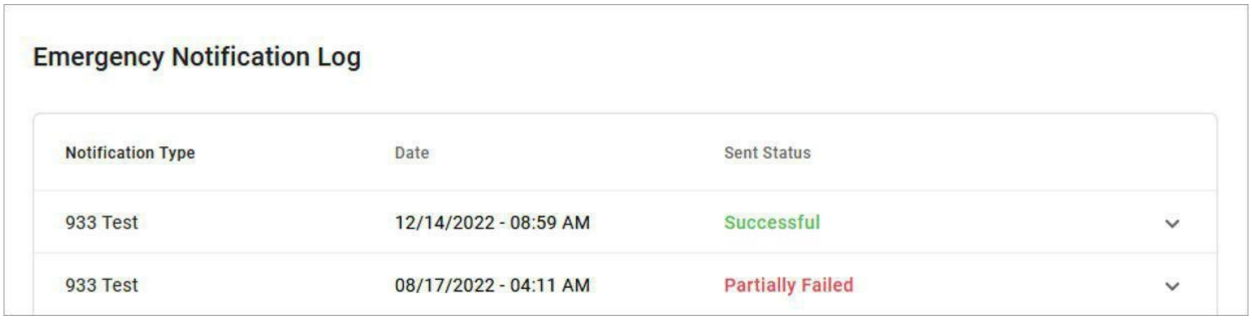
1. Go to Settings > Emergency Notifications.
2. Identify the email address(es) and SMS-capable phone number(s) that will be notified when an emergency call is placed from a number on the account. Enter those email addresses and phone numbers in the portal, then click [Save].
3. Click [Test Notifications] to send a test to make sure it's working.
   - Alternatively, you can ask the end user to dial 933 to verify their emergency call record with their E911 provider. The call will be connected to an automated 911 verification service, which will play back the dialing phone number and its associated address and send a test notification to the ENS recipients.
4. Confirm with the recipients they have received the test notification, and they understand what it's for.

Now, when someone on your account dials 9-1-1, the emergency call is processed and a notification is sent to the recipients configured in the portal, so they are made aware of the situation and can assist emergency responders upon arrival. SMS text messages are sent from 1-833-210-3911 (toll-free).

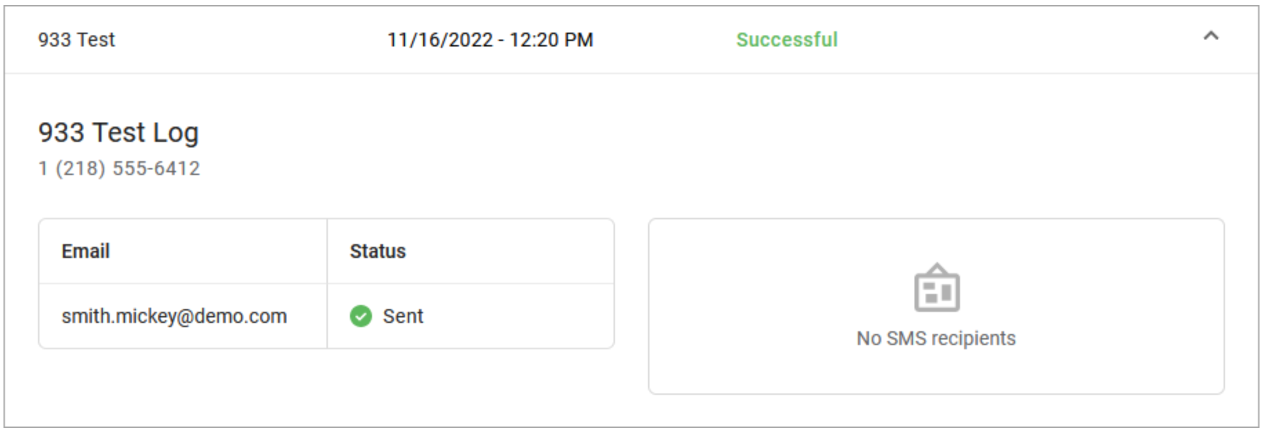
Emergency Notification Log

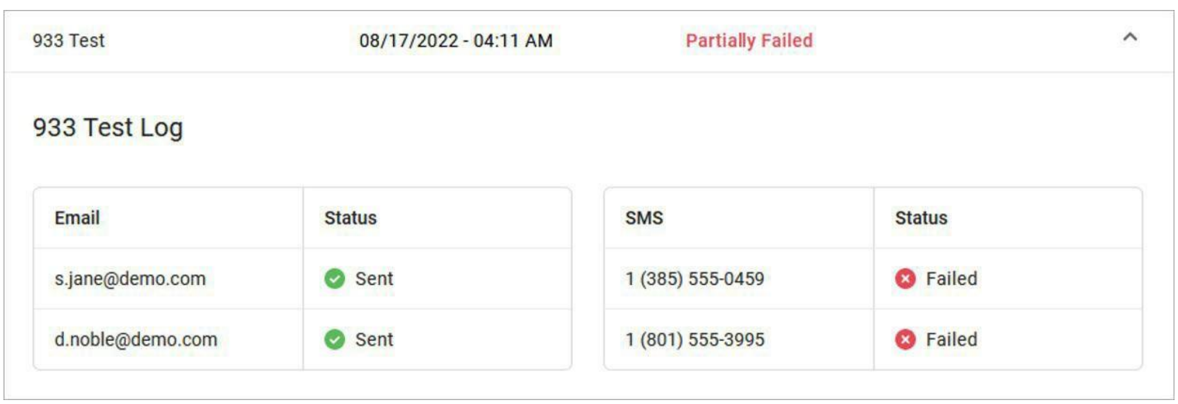
The Emergency Notification Log contains a complete history of all test and emergency call notifications sent from this account. The notification type is identified on the left, followed by the date, time, and sent status:

- 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.

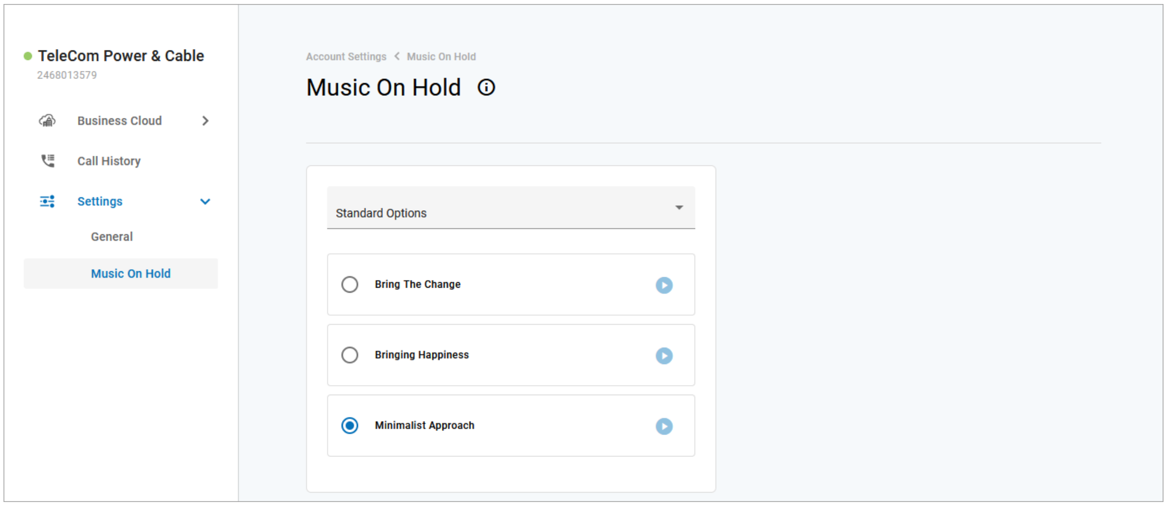




Music On Hold

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, have a positive mood, and not churn.

1. Go to Settings > Music On Hold.



2. Select a setting:
   - None (Intermittent Beep): The caller will hear two short beeps every 15 seconds.
   - Standard Options: Choose one of three looped, copyright-free audio files.
   - Custom Audio: Select a Music On Hold file from the [Media Files](#) library.
3. The new setting will be applied to the account immediately — no saving necessary.

Listen to Audio Files in Your Browser

Music On Hold files are 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 to play it in your browser, or call a phone number on your account and ask to be placed on hold.