



# Business Cloud Communications

## Admin User Guide

October 2025



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# Welcome to Business Cloud Communications

Business Cloud Communications (BCC for short) is a robust, flexible, and expanding full-stack communications solution that is purpose-built with mobility and unified communications in mind. It is compatible with an extensive and growing list of IP phones and the Cymbus UC app.

## Licenses

Business Cloud Communications offers three tiers of service, all of which include a variety of voice features like auto-attendant, extension-to-extension dialing, and other advanced call handling features. Advanced and Professional licenses also include the Cymbus app, which enables you to access your voice services and collaboration tools—including messaging, video conferencing, and screen sharing—from your smartphones and desktops.

Here's a closer look at the features in each license:

Feature	Standard	Advanced	Professional
Auto-Attendants <ul style="list-style-type: none"> <li>• Call Groups and Queues</li> <li>• Group Night Forwarding</li> </ul>	Yes	Yes	Yes
Cloud PBX	Yes	Yes	Yes
Call Park	Yes	Yes	Yes
Extension Dialing	Yes	Yes	Yes
Find Me/Follow Me	Yes	Yes	Yes
Hold Music	Yes	Yes	Yes
Presence	Yes	Yes	Yes
Voicemail	Yes	Yes	Yes
UC Apps (Mobile & Desktop)		Yes	Yes
Team Messaging		Yes	Yes
Screen Sharing			Yes



Feature	Standard	Advanced	Professional
Video Conferencing			Yes



# Social & Public Services

The following N11 codes provide quick three-digit dialing access to special services in the United States and Canada, based on the caller's address, without the need for an area code.

Code	Description
<b>211</b>	<b>Essential Community Services</b> Access to community information and referral services, such as essential needs, crisis, and disaster assistance. Visit <a href="http://www.211.org/">http://www.211.org/</a> to learn about services in your area.
<b>411</b>	<b>Directory Assistance</b> Phone service used to look up a published telephone number and/or address listing.
<b>511</b>	<b>Traveler Information (US)</b> Local hotline for real-time information regarding traffic and road conditions. Not available in all states.
<b>611</b>	<b>Customer Service</b> Dials Customer Service.
<b>711</b>	<b>Telecommunications Relay Service</b> TRS uses operators to facilitate phone calls between people with hearing and speech disabilities and other individuals. A TRS call may be initiated by a person with or without a disability. Visit <a href="http://www.fcc.gov/">http://www.fcc.gov/</a> to learn more.
<b>811</b>	<b>Utility Location Services (US)</b> "Call Before You Dig" routes the caller to their local utility location services. Call a few days before beginning an excavation project to find out the location of underground utilities and reduce the risk of serious damage.
<b>811</b>	<b>Canadian Health Services (CAN)</b> Call to speak to a local health care professional about medical advice, mental health, healthy eating, and more.
<b>911</b>	<b>Emergency Services</b> Calls to 911 (US or CAN) are sent to the nearest Public Safety Answering Point (PSAP) based on the registered address. The callback number and address are available to the PSAP on each call.
<b>933</b>	<b>Emergency Services Validation</b>



Code	Description
	Calls to 933 are sent to the caller's emergency services provider, who will then connect the call to their automated 911 verification service. The service will play back the dialing phone number and the address associated with it.
<b>988</b>	<b>Suicide Prevention Hotline</b> Contact the National Suicide Prevention Lifeline (US) or Talk Suicide Hotline (CA) to speak with a trained crisis counselor who will listen, offer support, and get them the help they need.



### Canadian Support

Not all Canadian rate centers support all N11 service codes. If you are unable to call a particular service, it may not be available in your area.

## 911 Emergency Services

When you call 911, the address associated with your phone number is used to direct the call to the correct local emergency response units, known as Public Safety Access Points (PSAPs). The PSAP, in turn, uses that address to direct the emergency response units to your location.

To ensure rapid response times, 911 addresses are standardized so that they are accurate and unambiguous for the emergency response units. The PSAPs are responsible for standardizing all addresses in their jurisdiction. That record of standardized addresses is known as the MSAG (Master Street Address Guide).

## Address Validation

When activating a number, we require an address to be associated with it. Sometimes the address provided initially isn't in a standard format (referring to a street by a nickname versus the official name, omitting the directional, outdated street name, etc.), which can cause confusion with and delay response times for emergency services, or worse.

To best serve you, we validate every address back to the MSAG. If the address cannot be validated, we will contact you to correct it.

If an address is not validated, calls to 911 will not only be charged a fee but will also add a delay to the routing process while the national call center agents ask the address. In worst-case scenarios, if the caller is unable to communicate clearly, the call could not get routed at all, which could result in **death** and **legal action**. It is important to address rejections in a timely manner and to ensure your address recorded with us is the correct address.



## 911 for Remote Office Users

Each phone is set with a 911 callback number and an associated location address. This allows remote users to be part of the company phone system and still send their remote office address and direct callback number to the 911 operator if they dial 911.



### Warning

If there is a power or internet outage, your phone may not be able to place a 911 call.

## 988 Suicide & Crisis Lifeline

Rapid access to suicide prevention and mental health crisis intervention services has never been more critical, which is why the US and Canada have designated 988 as the number to reach the suicide prevention and mental health crisis hotline.

When a user dials 988 from a phone number originating in the US or Canada, they will be connected to a trained crisis counselor who will listen, offer support, and get them the help they need.

- **United States:** [National Suicide & Crisis Lifeline](#) (1-800-273-8255)
- **Canada:** [Suicide Crisis Helpline](#) (1-833-456-4566)

These hotlines are a national network of local crisis centers that provides free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week. They are committed to improving crisis services and advancing suicide prevention by empowering individuals, advancing professional best practices, and building awareness.

Calls to 988 are free, dialed with no post dial delay, cannot be blocked by calling plans, and will still go through even if an account is disabled or suspended. For accounts that require a 9 to dial out, the user will need to dial 9+988.



# Star Code Features

Dial these codes to activate and deactivate certain features on your account. Codes with + require dialing additional information to complete the action, such as a parking slot, an extension, voicemail PIN, and/or phone number.

Call Handling		Call Screening	
*62	Call Park	*74	All Other Callers: Allow
*66	Call Park Retrieve	*64	All Other Callers: Block
*--	Call Pull	*87	Anonymous Callers: Allow
*70 +	Call Waiting: Disable Next Call	*77	Anonymous Callers: Block
*44	Call Waiting: Disable	*97	Anonymous Callers: Disable Block with Message
*43	Call Waiting: Enable	*95	Anonymous Callers: Enable Block with Message
*68	Caller ID: All Calls	*59 +	Custom Caller: Allow
*67 +	Caller ID: Disable Next Call	*58 +	Custom Caller: Block with Message
*65 +	Caller ID: Enable Next Call	*60 +	Custom Caller: Block
*00 +	Direct to Voicemail	*63 +	Custom Callers: Forward
** +	Directed Call Pickup	*79	Do Not Disturb: Disable
*89	Group Log In/Out	*78	Do Not Disturb: Enable
*69	Last Call Return (Call Back)		
*40	Pick Up Group		
*98	Voicemail Management		
		Social & Public Services	
*72	Call Forward: All Calls	211	Essential Community Services
*90	Call Forward: Busy	411	Directory Assistance
*92	Call Forward: No Answer	511	Traveler Information (US)
*94	Call Forward: Out of Service	611	Customer Service
*28	Auto-Attendant Group Forwarding	711	Telecommunications Relay Service
		811	Utility Location Services (US)
		811	Canadian Health Services (CAN)
		911	Emergency Services
		933	Emergency Services Validation
		988	Suicide Prevention Hotline
*21	Call Recording: Start		
*22	Call Recording: Pause		
*23	Call Recording: Resume		
*24	Call Recording: Stop		



## Caller ID

Caller ID, the calling name (CNAM) and phone number (CLID) sent with outbound calls, is a setting on each phone number. You can choose to send out the main company number, a number assigned to the line, or no caller ID at all. If the name on your caller ID is incorrect, please contact Customer Support to update it.

When calling another user on your account, your name and extension are used for caller ID.



### Caller ID for Mobile Phones

Most mobile phone carriers do not send the CNAM because mobile phones look up the calling phone number in the device's contact list. Also, calls to 911 will always send the 911 callback number set on the device, regardless of your caller ID settings.

## Caller ID Settings

Use the following star codes or log in to the portal to manage your caller ID settings.

Star Code	Instructions
*65	<p><b>Caller ID: Enable Next Call</b></p> <p>If caller ID is blocked on the line, this star code will enable caller ID for the current call. Future calls will not be affected. If caller ID was already enabled, it will continue to be enabled.</p> <ol style="list-style-type: none"> <li>Dial the star code + the number for the party you're trying to reach. <ul style="list-style-type: none"> <li>For example: *658015552134</li> </ul> </li> <li>Caller ID will be displayed to the party on this call.</li> </ol>
*67	<p><b>Caller ID: Disable Next Call</b></p> <p>If caller ID is enabled on the line, this star code will block caller ID on the current call. Future calls will not be affected. If caller ID was already blocked, it will continue to be blocked.</p> <ol style="list-style-type: none"> <li>Dial the star code + the number for the party you're trying to reach. <ul style="list-style-type: none"> <li>For example: *678012265555</li> </ul> </li> <li>Caller ID will be displayed as "BLOCKED" to the party on this call.</li> </ol>



Star Code	Instructions
*68	<p><b>Caller ID: All Calls</b></p> <p>Enable or disable caller ID for all outbound calls.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your 4-digit PIN, followed by #.</li> <li>3. Choose from the following options: <ul style="list-style-type: none"> <li>• Press 1 to enable caller ID on all calls.</li> <li>• Press 2 to disable caller ID on all calls.</li> </ul> </li> </ol>

## Call Forwarding

When you aren't available to answer calls on your phone, you can forward your calls somewhere else. Call Forwarding can be set up in the voice portal or by star codes. In the Voice Portal, you can set up a schedule to forward calls during certain hours, like your lunch break.

Call Forwarding can be configured in the portal or via star code. These star codes are applied to the line. For each Call Forwarding star code, the call handling options are *Forward* and *Send to Voicemail*.

Star Code	Instructions
*72	<p><b>Call Forward: All Calls</b></p> <p>When enabled, all incoming calls will be forwarded to a specified phone number, extension, or <b>short dial</b>. Also known as Unconditional Forwarding.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your 4-digit PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>• <b>Enable:</b> Press 1 and enter the destination's 11-digit phone number, extension, or short dial.</li> <li>• <b>Disable:</b> Press 2 to disable forwarding and allow calls to ring to your line.</li> </ul> </li> </ol>





Star Code	Instructions
*90	<p><b>Call Forward: Busy</b></p> <p>Choose how calls will be handled when you're on another call.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>• Press 1 to enter the destination's 11-digit phone number.</li> <li>• Press 2 to have calls sent to voicemail.</li> </ul> </li> </ol>
*92	<p><b>Call Forward: No Answer</b></p> <p>Choose how calls will be handled when the line isn't answered.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>• Press 1 to forward calls. Enter the destination's 11-digit phone number followed by #. You will hear, <i>"All calls will be forwarded when not answered. Goodbye."</i></li> <li>• Press 2 to send calls to voicemail. You will hear, <i>"Calls will be sent to voicemail when not answered. Goodbye."</i></li> </ul> </li> </ol>
*94	<p><b>Call Forward: Out of Service</b></p> <p>Choose how calls will be handled when the line is out of service or not registered.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>• Press 1 to enter a forwarding number followed by #. You will hear, <i>"All calls will be forwarded when your line is out of service, goodbye."</i></li> <li>• Press 2 to send calls to voicemail.</li> </ul> </li> </ol>



Star Code	Instructions
*00 +	<p><b>Direct to Voicemail</b></p> <p>Forward an incoming call directly to another user's voicemail box.</p> <ol style="list-style-type: none"> <li>1. Place the caller on hold. The caller will hear hold music.</li> <li>2. Dial the star code + the user's extension. <ul style="list-style-type: none"> <li>• For example: *00456</li> </ul> </li> <li>3. Press Dial &gt; More &gt; Join.</li> <li>4. Hang up. The caller will be in the other user's voicemail box.</li> </ol>
*28	<p><b>Group Night Forwarding (On/Off)</b></p> <p>When enabled, calls to the auto-attendant group are redirected to an on- or off-net phone number, which can be for another group, voicemail box, user, etc. Also known as Night Forwarding.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>• Press 1 to enter the destination's 11-digit phone number followed by #.</li> <li>• Press 2 to send calls to voicemail.</li> </ul> </li> </ol> <p>Available only on Business Cloud Communications.</p>



## Remote Forwarding

When you're away from your phone but still want to receive calls, you don't need to get back to your phone to set things up. Unconditional call forwarding, or forwarding of all calls, is available remotely using the voicemail system. Remote Forwarding will continue to function even if there is a power outage, internet outage, or device failure.

1. From a phone not connected to your account, dial your 11-digit phone number.
2. When you hear your voicemail greeting, press #.
3. Enter your voicemail PIN followed by #.
4. Press 8 for personal options.
5. Press 5 to access the Call Forwarding menu.
  - Press 1 to forward all calls. Enter forwarding destination number followed by #. You will hear, *"All calls will be forwarded."*
  - Press 2 to send all calls to your line. You will hear, *"Calls will ring your line, goodbye."*

## Call Park

Call Park combines the elements of transferring a call and placing it on hold. Rather than asking a caller to call back later or sending them to voicemail, the user can transfer the call to a virtual parking spot where the caller will remain on hold until the called party is available.

To create parking spots on the account, see [Manage Parking Spots](#).

## Call Park via Feature Key

When a parking spot is assigned to a line on your phone, you can park and retrieve calls with the click of a button. Directed Call Park is only available for use on certified IP phones. Please contact Customer Support to set it up on your device.

Feature	Instructions
<b>Call Park</b>	<p><b>Place a call in a parking spot.</b></p> <ol style="list-style-type: none"> <li>1. While on a call, press the line key assigned to the parking spot.</li> <li>2. The call will be placed in that parking spot.</li> </ol>



Feature	Instructions
<b>Call Park Retrieval</b>	<p><b>Retrieve a parked call from a parking spot.</b></p> <ol style="list-style-type: none"> <li>1. Press the line key on the phone for the parking spot the call has been placed in.</li> <li>2. You will be connected to the parked caller.</li> </ol> <p>When a parked call is retrieved, the caller ID displays the original calling name and number. If caller ID is not available, it is presented as <i>Not Available</i> or <i>Anonymous</i>.</p>

## Call Park via Star Codes

When parking calls using star codes, you will be automatically assigned a call a numbered parking spot, and the call can be retrieved by anyone who knows the parking spot number.

If **Auto Ringback** is enabled and the call isn't answered after a period of time (typically 180 seconds), the call will be returned (call back) to the user who parked it, following the user's call handling settings. This feature is optional and managed by Customer Support.

Star Code	Instructions
*62	<p><b>Call Park</b></p> <p>Place a call in a parking spot.</p> <ol style="list-style-type: none"> <li>1. While on a call, press <b>[Transfer]</b> and dial the star code.</li> <li>2. The system indicates the parking spot the call has been placed in. For example, "Call parked at location 01."</li> <li>3. Hang up.</li> </ol>
*66	<p><b>Call Park Retrieve</b></p> <p>Retrieve a call from a parking spot.</p> <ol style="list-style-type: none"> <li>1. Dial the star code + the parking spot the call was placed in.</li> <li>2. You are now connected to the parked caller.</li> <li>2. When a parked call is retrieved, the caller ID displays the original calling name and number. If caller ID is not available, it is presented as <i>Not Available</i> or <i>Anonymous</i>.</li> </ol>



## Call Pick Up

Directed Call Pickup and Pick Up Groups have similar functionalities. Directed Call Pickup allows a user to answer a call ringing at a specific extension, while Pick Up Groups allow a user to answer a call ringing to anyone in the group. To create a Pick Up Group, please contact Customer Support.

- **Directed Call Pick Up** allows you to answer a call ringing at a specific extension. It's great when you need to answer a call for someone in your office.
- **Pick Up Groups** allow incoming calls to be answered by another member of the group. Calls to a group can be answered via star code (below) or by pressing a speed dial button on your phone assigned to the group. See [Pick Up Groups](#) for details.

Star Code	Instructions
**	<b>Directed Call Pickup</b> Pick up a ringing extension for another user. <ol style="list-style-type: none"> <li>1. When you hear the call ringing, pick up your phone and dial <b>** +</b> the extension the call is ringing to.               <ul style="list-style-type: none"> <li>• For example, <b>**4848</b></li> </ul> </li> <li>2. The call is transferred to your phone.</li> </ol>
*40	<b>Pick Up Group</b> Pick up a ringing extension for another user in the same Pick Up Group. <ul style="list-style-type: none"> <li>• When you hear a call ringing on another group member's phone, pick up your phone and dial the group's star code.               <ul style="list-style-type: none"> <li>• If multiple calls are ringing, the call that has been ringing the longest will be answered.</li> </ul> </li> <li>• If you belong to multiple groups, the longest ringing call in any of your groups will be answered.</li> </ul>

## Call Pull

Call Pull allows you seamlessly move a live call from between your BCC devices by dialing a star code.

For example, imagine you take a call on your desk phone right as you're heading out for lunch. It's an important call that you don't want to disrupt, but you're really hungry. So instead of asking them to call back later, you can open the Cymbus app on your device, dial the Call Pull star code, and continue the conversation without skipping a beat.



It also works in the other direction. So, you could answer or place a call on the Cymbus UC app while on your way to work, then pull it to your desk phone once you get to the office. The caller won't hear the star code being dialed or even know the call was moved, and a call can be moved multiple times without any issues.

Call Pull works for any live (answered) call on any of your BCC devices — including the Cymbus app. As long as you only have one call on your lines, that call will be seamlessly transferred to the new device once the star code is dialed.

Star Code	Instructions
*__	<b>Call Pull</b> Seamlessly move a live call from one device to another. <ol style="list-style-type: none"> <li>1. While on an active call, pick up the device you want the call moved to and dial the Call Pull star code.</li> <li>2. The platform will pull the call to this device so you can continue your conversation.               <ul style="list-style-type: none"> <li>• If there isn't a call to pull, you will hear a fast busy signal.</li> <li>• If you have multiple calls across your devices, you will hear <i>"You cannot use Call Pull when you have more than one active call."</i></li> </ul> </li> </ol>

## Call Screening

You have control to ensure you receive important calls. You can limit the callers that ring your phone, filter callers, or forward important callers to another number.

Calls from anonymous callers, or other callers, can be given special treatment, such as being blocked, sent directly to voicemail, forwarded to another phone number (like your mobile), or having a custom ring pattern assigned. These settings can be configured via star code (below) or in the portal.



## All Other Callers

If you don't want to receive calls from anyone, use this feature to block all callers and then enable only custom (specific) callers to reach you.

Star Code	Instructions
*74	<b>All Other Callers: Allow</b> All other calls (not otherwise specified) will be allowed. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your selective call accept service has been deactivated."</li> </ol>
*64	<b>All Other Callers: Block</b> All other calls (not otherwise specified) will be blocked. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your selective call accept service has been activated."</li> </ol>

## Anonymous Callers

Calls from anonymous callers (without caller ID) can waste your time and distract you from other calls you want to take. Block them from even ringing your phone.

Star Code	Instructions
*87	<b>Anonymous Callers: Allow</b> Calls without caller ID will be allowed. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line."</li> </ol>
*77	<b>Anonymous Callers: Block</b> Calls without caller ID will be blocked. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your anonymous call rejection service has been deactivated."</li> </ol>



Star Code	Instructions
*95	<b>Anonymous Callers: Enable Block with Message</b> Calls without caller ID will be blocked with a message. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, <i>"Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line."</i></li> <li>3. Callers will hear a message indicating anonymous callers are not allowed.</li> </ol>
*97	<b>Anonymous Callers: Disable Block with Message</b> Calls without caller ID will no longer be blocked with a message. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, <i>"Your anonymous call rejection service has been deactivated."</i></li> </ol>

## Custom Callers

Use this feature to control who can call your phone and what happens when they do.

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.

Star Code	Instructions
*59	<b>Custom Caller: Allow</b> Calls from the number specified will be allowed. Use this feature if you are currently blocking all callers and want to allow a specific phone number, or if you would like to allow a specific caller that you've blocked in the past. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your 4-digit voicemail PIN followed by #.</li> <li>3. Enter the 11-digit phone number followed by #.               <ul style="list-style-type: none"> <li>• For example: 18005551212#</li> </ul> </li> <li>4. You will hear, <i>"Calls from [phone number you entered] will be allowed."</i></li> </ol>





Star Code	Instructions
*60	<p><b>Custom Caller: Block</b></p> <p>Calls from the number specified will be blocked. The caller will hear a busy tone.</p> <p>Use this feature if you have allowed all callers but want to block a specific caller. Using this star code, the blocked caller will hear a busy signal instead of ringing through to your line.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the 11-digit number followed by #. <ul style="list-style-type: none"> <li>• You will hear a prompt saying, <i>"Calls from [phone number] will be blocked."</i></li> </ul> </li> </ol>
*58	<p><b>Custom Caller: Block with Message</b></p> <p>Calls from the number specified will be blocked with a message.</p> <ol style="list-style-type: none"> <li>1. Dial the star code designated to block specific numbers and to play a message when done.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the 10-digit number to be blocked followed by #. <ul style="list-style-type: none"> <li>• You will hear, <i>"Calls from [phone number you entered] will be blocked."</i></li> <li>• The caller will hear, <i>"The number you have dialed is not accepting calls at this time. Please try again later."</i></li> </ul> </li> </ol>
*63	<p><b>Custom Caller: Forward</b></p> <p>Calls from the number specified will be forwarded.</p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the forwarding number followed by #.</li> <li>4. You will hear a prompt saying, <i>"Calls from [phone number you entered] will be forwarded."</i></li> </ol>

**Notice** A screening forward number **must** be set up in the portal; otherwise, forwarded calls will fail over to the *All Other Callers* setting.



## Nomorobo Call Blocking

Nomorobo is a free service for end users in the United States and Canada that will block the telephone numbers of known telemarketers and robocallers. Basically, Nomorobo intercepts your calls and screens them for you. If the call is legitimate, it will ring through to your number, but if the call from a robocaller or known telemarketer, Nomorobo hangs up for you.

Learn more about it at <https://www.nomorobo.com/>.

## Nomorobo Setup

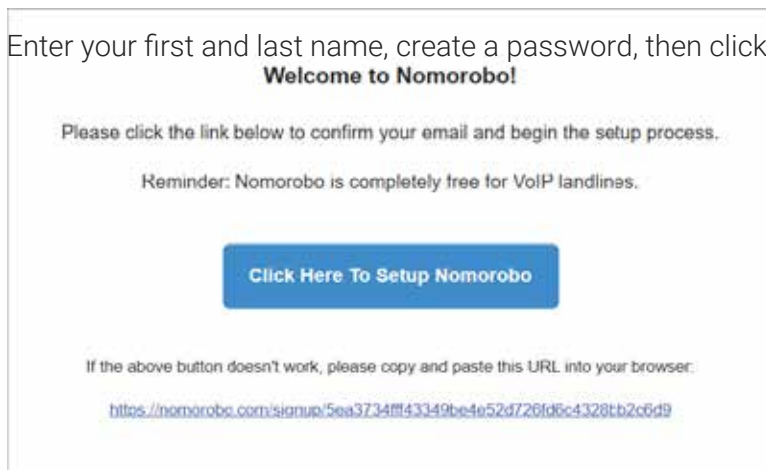
### 1. Sign Up for Nomorobo

To get started, you first need to create a free account with Nomorobo.

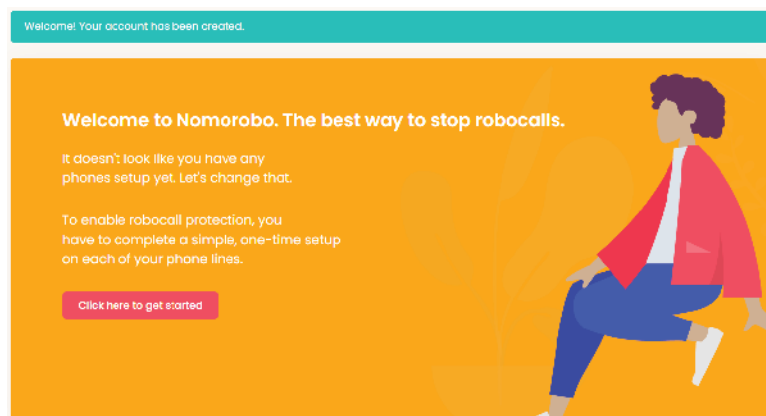
1. Go to <https://www.nomorobo.com/> and click **[Get Started]** in the navigation menu.
2. For phone type, select *Internet/VoIP Landline*.
3. Select your service provider.
4. Click **[Continue]**.
5. Enter your email address and click **[Sign Up]**.

### 2. Account Setup

1. Check your email and open the Welcome to Nomorobo! message. Click the link to begin the setup process.
2. Enter your first and last name, create a password, then click **[Create Account]**.



1. Your account has been created! Click the button to set up your phone.



### 3. Phone Setup

1. Enter the following information:
  - **Phone Type:** Landline/VoIP
  - **Carrier:** Choose your service provider
  - **Phone Number:** Enter your phone number
2. Click **[Next]**.



**1 Phone**  
Set up your phone

**2 Carrier Setup**  
Set up your carrier

**3 Verify**  
Check service

Please enter some information about your phone

Phone Type: -- Choose --

Carrier: -- Choose --

If 'Other' Carrier:

Phone Number: 1-

Description (optional):

PREVIOUS NEXT

## 4. Carrier Setup

1. Log in to the portal and go to your Call Handling settings.
2. Next, choose your preferred call handling type: Sim Ring or Find Me.



### Tip

While Nomorobo is traditionally set up with Sim Ring, we recommend **Find Me/Follow Me** so you don't hear the phone ring every time a call is blocked. Choose the option that works best for you.

### SIM RING

Nomorobo is traditionally set up to work with Sim Ring, which enables a call to ring to multiple lines and/or phone numbers simultaneously. When a call comes in, Nomorobo is the first to intercept it. Legitimate calls continue to ring to your number, but if the call is from a robocaller or known telemarketer, Nomorobo hangs up for you. Your phone will ring once to let you know the robocall has been answered and stopped.



Ring Phone	Forward All	<b>SIM Ring</b>	Find Me
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Simultaneous Ring will ring all of the user's registered devices and the phone numbers listed below at the same time. The first to answer will take the call. If the call is not answered, it will follow the timeout action.

Phone Numbers Add Number

Number **Enter the Nomorobo number here**

1. Choose **Sim Ring**.
2. In the *Phone Numbers* field, enter the Nomorobo number for your carrier, shown on the Nomorobo page.
3. Click **Save**.



### Phantom Ring Workaround

With Sim Ring, your phone will ring once to let you know the robocall has been answered and stopped. While this does have some benefits, this "phantom" ring may also be confusing and frustrating, especially when it shows up as a missed call in your call history. Nomorobo says the **ring cannot be eliminated**, but we've found that **Find Me/Follow Me** has all the same call screening features *without* the first ring.

## FIND ME/FOLLOW ME

Find Me/Follow Me will ring each destination sequentially. When the first destination is set to Nomorobo, they will field the call and allow legitimate calls to ring the next destination. You will not hear the call come through, nor will you be notified that a call was intercepted and blocked. If you are looking to get rid of the single "phantom" ring when calls are blocked, this is the way to go.

Ring Phone	Forward All	SIM Ring	<b>Find Me</b>
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Find Me Follow Me will ring each destination sequentially. If the call is not answered by any of the destinations, the call will be sent to the timeout action. Calls that ring for longer than 120 seconds are subject to carrier disconnection.

	Destination	Ring Duration (seconds)
=	<input type="radio"/> Device <input checked="" type="radio"/> Phone number	<b>Enter the Nomorobo number here</b> Phone number 18005551234
		20

Add Destination

1. Choose **Find Me**.



1. Set the first destination to the phone number for Nomorobo. Subsequent destinations should follow your call preferences.
3. For each destination, choose how long the call should ring before moving to the next one. It doesn't matter how long you set for the Nomorobo destination — Nomorobo will pick up or reject the call within 1–2 seconds. To callers, it will feel like a normal post-dial delay.
4. Choose a timeout action: Send to Voicemail or Busy.
5. Click **Save**.

## 5. Verify

1. Go back to your Nomorobo account.
2. On Step 3 Verify, click **[I'm Ready. Call Me Now.]**

1 Phone  
Set up your phone

2 Carrier Setup  
Set up your carrier

3 Verify  
Check service

### Verify Robocall Protection

Nomorobo will now call (801) 318-9821 to make sure that robocall protection is enabled.  
Please pick up the phone after the status bar on the next page changes color.

PREVIOUS

I'M READY. CALL ME NOW.

3. You will immediately receive a call letting you know if everything is set up correctly. Please answer the phone after the third ring.

That's it! The phone number is now listed as "Protected."



## Call Recording

The following information is only for users who have users Advanced and Professional plans.

Call Recording utilizes a set of four unique star codes to **start**, **pause**, **resume**, or **stop** a recording. If you don't know which star codes were assigned to these functions, contact Customer Support for assistance.

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

- **Automatic.** All your inbound and outbound calls are recorded automatically.
- **On Demand.** You can start, pause, resume, or stop recording the call by dialing a star code.

Recording Type

Automatic

On Demand

☐ Allow user to pause recording

☐ Announce when call is being recorded

Recording Type

Automatic

On Demand

☐ Announce when call is being recorded

## 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, you can dial the Pause or Resume star codes at any time.
- If *Announce when call is being recorded* is enabled, callers will hear "Your call is being recorded" at the beginning of each call and again whenever you dial the Resume star code.

Star Code	Function
*22	<b>Pause Recording</b> Stops recording and keeps the recording file open. You will hear "Recording paused."
*23	<b>Resume Recording</b> Resumes recording on the open file. You will hear "Recording resumed." If <i>Announce when call is being recorded</i> is enabled, the caller will hear "Your call is being recorded."



## On Demand Star Codes

The **On Demand** recording type allows you 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
*21	<b>Start Recording</b> Opens a new recording file and starts recording. You will hear "Recording started." If <i>Announce when call is being recorded</i> is enabled, the caller will hear "Your call is being recorded."
*22	<b>Pause Recording</b> Stops recording and keeps the recording file open. You will hear "Recording paused."
*23	<b>Resume Recording</b> Resumes recording on the open file. You will hear "Recording resumed." If <i>Announce when call is being recorded</i> is enabled, the caller will hear "Your call is being recorded."
*24	<b>Stop Recording</b> Stops recording and closes the recording file. You will hear "Recording stopped."

**See also:** [Call Recording](#) and [Enable Call Recording for a User](#)





## Call Trace

Call Trace allows you to mark a harassing or threatening phone call in the Call History. If necessary, you must take additional actions to establish a case with your local law enforcement agency.

Star Code	Instructions
*57	<p><b>Call Trace</b></p> <p>Mark a call for a trace in your Call History. Used for troubleshooting.</p> <p>Call Trace does not initiate any law enforcement or actions against the caller. You must take additional actions to establish a case with your local law enforcement agency.</p> <ol style="list-style-type: none"> <li>1. After ending the call, dial the <b>Call Trace</b> star code.</li> <li>2. You will hear, <i>"The previous call will be marked in your call history."</i></li> <li>3. A new line for the trace will be entered in Call History.</li> </ol>

## Call Trace Example

In this example, Amy received a phone call at 10:39 and dialed the Call Trace star code immediately after ending the call. There are now two records in Call History:

4/27/2020 10:39 AM MDT 4 seconds	1 (801) [REDACTED]-8545 PROVO-OREM, UT	*03 CallTrace	4.5
4/27/2020 10:39 AM MDT 4 seconds	1 (801) [REDACTED]-7052 SALT LAKE CITY, UT	1 (801) [REDACTED]-8545 PROVO-OREM, UT	4.5

When the Call Trace record is expanded, it shows the CDR details from the call it traced:



4/27/2020 10:36 AM MDT  
11 seconds

1 (801) 8545  
PROVO-OREM, UT

\*03  
Call from

0



## Time and Length

Start Time 04/27/2020 10:36:34 AM MDT  
Connected Time 04/27/2020 10:36:35 AM MDT  
End Time 04/27/2020 10:36:39 AM MDT  
Billed Length 0 seconds  
Actual Length 3 seconds

## Cost

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

## Origination

Number 1 (801) 8545  
Location PROVO-OREM, UT  
Category On Network



## Call Waiting

While on a call, if a second call comes in, you'll hear the Call Waiting tone. To answer that call, place the current call on hold and pick up the incoming call. Additionally, you can temporarily or completely enable or disable Call Waiting from your phone or in the portal.

See [Call Handling](#) for how to enable and disable Call Waiting in the portal.

Star Code	Instructions
*43	<b>Call Waiting: Enable</b> Enables call waiting for ALL calls to the user. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear a message indicating the call waiting service has been activated.</li> </ol>
*44	<b>Call Waiting: Disable</b> Disables call waiting for ALL calls to the user. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear a message indicating the call waiting service has been deactivated.</li> </ol>
*70 +	<b>Call Waiting: Disable Next Call</b> If call waiting is enabled on the line, this star code will disable caller ID on the current call. Future calls will not be affected. <ol style="list-style-type: none"> <li>1. Dial the star code + the phone number of the party you're trying to reach.               <ul style="list-style-type: none"> <li>• For example: <b>*70</b>8015553284</li> </ul> </li> <li>2. During this call, incoming calls will follow the "busy" call behavior.</li> </ol>

## Switching Calls

When Call Waiting is enabled on your phone, you can switch between your current call and a new incoming call:

- When notified of a second incoming call, press the line button on your phone.
- Your first call will be placed on hold, and your second call will be active.
- You can switch between the two calls by pressing the line button for the call you want to switch to.



## Do Not Disturb

When you don't want your phone to ring, activate Do Not Disturb to send all incoming calls directly to your voicemail box.

Star Code	Instructions
*78	<b>Do Not Disturb: Enable</b> Turns on DND. All calls will be sent to voicemail. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, <i>"Do not disturb enabled."</i></li> <li>3. Incoming calls are sent directly to your voicemail box.</li> </ol>
*79	<b>Do Not Disturb: Disable</b> Turns off DND. <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, <i>"Do not disturb disabled."</i></li> <li>3. Incoming calls follow your Call Handling settings.</li> </ol>

## Group Log In/Out

Star Code	Instructions
*89	Users can log in or out of an auto-attendant group they are assigned to. <ol style="list-style-type: none"> <li>1. Dial the Group Log In/Out star code + the group number.</li> <li>2. Do one of the following:               <ul style="list-style-type: none"> <li>• Press 1 to log in.</li> <li>• Press 2 to log out.</li> </ul> </li> <li>3. When prompted, dial the group number.</li> <li>4. You will be logged in or out of the group.</li> </ol>



## Last Call Return

Star Code	Instructions
*69	<b>Last Call Return</b> Dial the last caller ID number that rang the line (not the last <i>outbound</i> call). <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will be connected to the last number that called you.</li> </ol>

## Voicemail Access

Your voicemail box can be accessed remotely or from a phone connected to the line it's assigned to. To manage your voicemail box online, see [Voicemail Management](#).



### Bypass Voicemail PIN

When *Bypass Voicemail PIN* is enabled, users accessing their voicemail box from their own phone number are automatically authenticated—no PIN required. For the security of all users, a PIN is always required to access a voicemail box from an external phone number and to change the PIN from the voicemail menu.

To enable this feature for the account, go to **Account > Voicemail** and toggle on *Bypass Voicemail PIN*. If you don't have access to this setting, contact a higher-level admin for assistance.

## Direct Access

Star Code	Instructions
*98	<b>Voicemail Management</b> Access the voicemail box assigned to the phone number. <ol style="list-style-type: none"> <li>1. From a phone number assigned to the voicemail box, dial the Voicemail Management star code.</li> <li>2. If prompted, enter the PIN and press #.</li> </ol>

## Remote Access

1. From a phone number that is not connected to your account, dial the 10-digit phone number.
2. When the voicemail greeting plays, press #.
3. Enter the voicemail PIN and press #.



**Note**

**The default PIN is 1234.** The first time you access your voicemail box, you will be prompted to set a new PIN which must be 4-digits or longer.

## Voicemail Menu Options

### Listen to Messages

Log in to the voicemail box and **press 1** to listen to your messages. Use the following to navigate the menu:

- Press 1 to skip a message.
- Press 2 to save a message.
- Press 3 to erase a message.
- Press 9 to repeat the message.
- Press 0 to exit the menu.

### Personal Options

Access the voicemail box and **press 8** for personal options. Use the following to navigate the menu:

- Press 1 to change the PIN.
- Press 2 to personalize your greeting.
- Press 3 to record your name.
- Press 5 for call forwarding (then enter forwarding destination number).
- Press 6 to enter a call screening forwarding number.
- Press 9 to repeat the personal options.
- Press 0 to exit the menu.

### Change PIN

For security reasons, the PIN can only be changed when calling the voicemail box from a registered phone number.

1. Access the voicemail box and press 8.
2. Press 1 to change the PIN.
3. If prompted, enter the current PIN.
4. Enter a new PIN that is at least 4-digits long, then press #.



1. Hang up or press 0 to go back to the main menu.

## Record Greetings

1. Access the voicemail box and press 8.
  - Press 1 to change the default greeting.
  - Press 2 to change the "busy" greeting.
  - Press 3 to change the "no answer" greeting.
3. Hang up or press 0 to go back to the main menu.

## Reset Voicemail PIN

Each user has their own PIN to access their voicemail box. If the user forgets their PIN, follow these steps to reset it:

1. Go to **Account > Users**.
2. Locate the user and click **Edit**.
3. In the Voicemail tab under Voicemail Box Details, click **[Reset PIN]**.

The voicemail box PIN will be reset to **1234**. The next time the user **accesses their voicemail box**, they will log in using 1234 and be prompted to set a new PIN.

For security reasons, the PIN can only be created or changed when accessing the voicemail box from the phone number assigned to it.

The screenshot shows a web interface with four tabs: Calls, Devices, Settings, and Voicemail (which is active and highlighted in blue). Below the tabs is a section titled 'Voicemail Box Details'. This section contains a dropdown menu for 'Voicemail box name' with 'Donna Noble' selected. Below this are two fields: 'Owner' with the value 'Donna Noble' and 'Language' with the value 'English'. At the bottom of this section is a button labeled 'Reset PIN'. A red arrow points to this button.

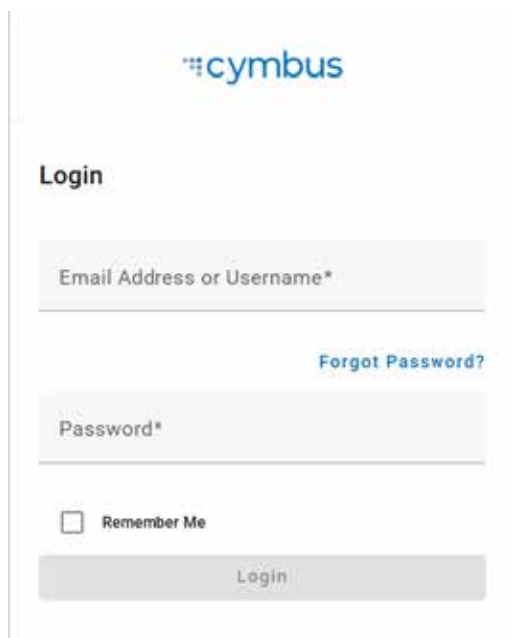


# Access the Voice Portal

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 be managed via star codes, but some things are easier to manage online. As an Account Manager or Admin user, you have access to manage not only your own services but also those of other users on the account.

When your account was created, you were sent an email that contains 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, or if you don't have an email address on your account yet, please contact Customer Support.

1. Go to <https://user.cymbus.com/>.
2. Enter your username (not email) and password.
3. Check *Remember Me* if you want to save your username and password.
4. Click **Login**.

A screenshot of the Cymbus login page. At the top is the Cymbus logo. Below it is a 'Login' section. The first input field is labeled 'Email Address or Username\*'. To the right of this field is a link that says 'Forgot Password?'. Below the first field is a second input field labeled 'Password\*'. Below the password field is a checkbox labeled 'Remember Me'. At the bottom of the login section is a 'Login' button.

## Password Requirements

Your password must be at least eight characters long and include at least one number and one special character, such as ^ \$ \* . [ ] { } ( ) ? " ! @ # % & / \ , > < ' : ; | \_ ~ ` = + - . It cannot contain any part of your username.





## Reset Your Password

If you can't log in, you can reset your password without contacting Customer Support.

1. On the login screen, click the *Forgot Password?* link.
2. Enter the email address associated with your account, then click **[Reset Password]**. If you don't have an email address on your account yet, please contact Customer Support for assistance.
3. Open the email and click the link. If it opens on the login screen, click the link again to go to the right place.
4. Enter a new password that is at least 8 characters long and includes at least one number and one special character, such as (^ \$ % & \* . [ ] { } ( ) ? " ' ! @ # % & / \ , < > ' : ; | \_ ~ ` = + -).

5. Click **[Save]**. A confirmation email will be sent to your email address.

## Language Setting

Experience the Alianza platform in English, Canadian French, or Spanish, seamlessly integrated across audio prompts, system-generated emails, and more.

All users can change the language for their current session from the menu in the top right corner of the screen. Additionally, Admin end users can also set a default language for the account and each user. The language setting for each voicemail box is separate from the user's setting, so be sure to change both.

## Change Session Language

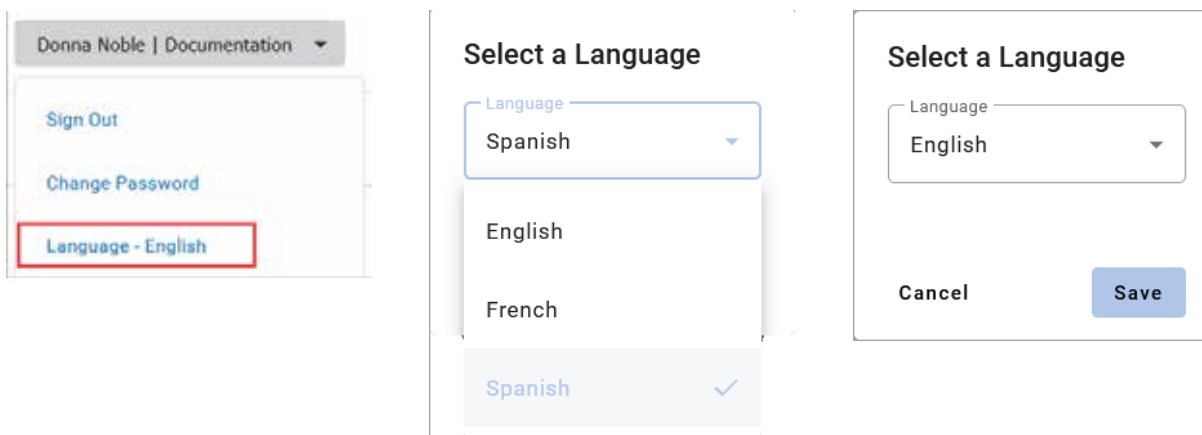
Follow the steps below to change the language used in the web portal for your active session:

1. Log in to the Voice Portal.



1. In the top right corner of the page, expand the menu with your name and select **Language**.
3. Choose a language: English, French, or Spanish.
4. Click **[Save]**. The portal will refresh to update with the selected language.

The portal will revert to your default language once you log out.



## Change Default Language

A language can be set in the following locations:

- **Account Managers and End Users.** The user's language setting applies to the web portal, IP phone (if the phone supports the language), telephone user interface (TUI) audio prompts, and system-generated emails. It does not affect the user's voicemail box, which is configured separately.
- **Voicemail Box.** The language for a voicemail box applies to the voicemail menu audio prompts and forwarded **Voicemail-to-Email** messages. This is separate from the language set for a user. See [Manage a User's Voicemail](#).
- **UC App.** The language displayed in the UC app is controlled by end users in the app itself. By default, the app displays the language set on the user's device (desktop or cell phone), and it can be changed manually in the app settings.



# Auto-Attendant

The following information is for Admin users only. See [End User Feature Access](#) to learn more.

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

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

## Manage Auto-Attendants

In **Business Cloud > Auto Attendant**, you can see all the auto-attendants on the account, including the assigned phone number(s), extension, last modified date, and status. You can build and keep as many auto-attendants as needed.

While auto-attendants that are live and processing calls cannot be modified, you can open the editor to see how it's been set up (view-only) or duplicate the auto-attendant to modify the route, then activate the new one when you're ready. See [Edit Auto-Attendants](#) for details.

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



## Auto-Attendant

+ Add Auto-Attendant

Search Auto-Attendant

**i** Groups and Queues can be edited while the Auto-Attendant is active. To add or edit other routes, do one of the following:






- Duplicate it and make changes to the copy
- Remove any assigned phone numbers and deactivate it to allow editing

Name	Assigned Phone Number	Extension	Modified Date	Status	
Emergency Support	1 (801) 367-8487	None	12/13/2023, 3:30:44 PM	Live	
London Office	---	307	3/21/2025, 12:28:44 PM	Incomplete	
Main Office	1 (801) 367-8602	101	8/21/2025, 12:25:26 PM	Live	
Sales		None	12/14/2023, 1:12:05 PM	Incomplete	
Sales Team	---	None	3/7/2025, 11:57:10 AM	Incomplete	

Items per page: 10 1 of 5

Field	Description
<b>[+ Add Auto-Attendant]</b>	Start creating a new auto-attendant. The builder will open in a new window, so you can look back at the auto-attendant list if you need to reference it. See <a href="#">Auto-Attendant Setup</a> for details.
<b>Name</b>	The name of the auto-attendant. If a name wasn't saved, it will be named "untitled auto-attendant" by default.
<b>Assigned Phone Number</b>	The phone number(s) directed to this auto-attendant. A phone number must be assigned before calls can be directed through the auto-attendant. If this is blank, contact Customer Support for assistance.
<b>Extension</b>	<p>The unique extension (optional) assigned to the auto-attendant, which allows users to transfer calls back to the main menu to reach a different department.</p> <p>Click this field to add or modify the extension.</p>
<b>Modified Date</b>	The last date the auto-attendant was modified: month, day, year, time.




Field	Description
<b>Status</b>	<ul style="list-style-type: none"> <li>• <b>Incomplete:</b> There are open routes that need to be closed before the auto-attendant can be launched.</li> <li>• <b>Ready to Activate:</b> All routes are closed and it's ready to be launched (activated).</li> <li>• <b>Activated:</b> The route has been launched and it can now be assigned to a phone number.</li> <li>• <b>Live:</b> A phone number is assigned, the auto-attendant is receiving calls.</li> </ul>
<b>Tools</b>	<p>The tools available are different for each status. For example, an incomplete auto-attendant cannot be launched, and a live auto-attendant cannot be deleted.</p> <ul style="list-style-type: none"> <li>•  <b>Duplicate.</b> Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one.</li> <li>• Extensions cannot be duplicated. The extension must be removed from the original before it can be assigned to the duplicate. See <a href="#">Edit Auto-Attendants</a> for details.</li> <li>•  <b>Deactivate.</b> Deactivate the auto-attendant and downgrade the status to <i>Ready to Activate</i>. To deactivate a <i>Live</i> auto-attendant, unassign the phone number first; the status will be downgraded to <i>Activated, Assign TN</i>.</li> <li>•  <b>Activate.</b> When the status is <i>Ready to Activate</i>, click the <i>Activate</i> icon to make the auto-attendant available as a destination in the Phone Number menu. Then go to <a href="#">Phone Numbers &gt; Edit</a> to assign a number to this auto-attendant.</li> <li>•  <b>Edit.</b> Open the editor to make changes to an inactive auto-attendant in <i>Incomplete</i> or <i>Ready to Activate</i> status. <i>Activated</i> and <i>Live</i> auto-attendants are view only.</li> <li>•  <b>Delete.</b> Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.</li> </ul>



# Auto-Attendant Setup Guide

## Building Basics



- **Build.** As routes are added to the builder, they are arranged in neat rows and columns so you can see how it all fits together. They can be easily found, moved around, and connected as the auto-attendant is built.
- **Save.** When you're done configuring a route, click **[Save]**, and it will be added to the AutoAttendant builder canvas. Each route that has an  **Add** icon after it requires an additional route.
- **Edit.** To edit a route, click on the primary card to open the editor for that route on the right side of your window.



### Tip

For best results, open the Auto-Attendant builder in Chrome or Firefox.

## 1. Add an Auto-Attendant

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

The auto-attendant saves automatically. When you're done, go back to the Auto-Attendant tab and refresh the screen to see it.




### Editing an Auto-Attendant




While an auto-attendant is live and processing calls, you can open the builder to see how it's set up, but nearly all routes are view-only to avoid disconnecting calls or otherwise breaking it. The only exceptions to this rule are [Hunt Group and Queue routes](#), which can be swapped while the auto-attendant is live. See [Edit an Auto-Attendant](#) for details.



## 2. Activate an Auto-Attendant

When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to *Ready to Activate*. At this point, you click to  **Activate** it.

The auto-attendant won't be live until a phone number is assigned.

Name ↑	Assigned Phone Number	Extension	Modified Date	Status	
London Office	---	None	12/11/2024, 9:45:1...	Incomplete	
Main Office	<a href="#">Assign Phone Number</a>	1000	12/11/2024, 9:44:5...	Activated, As...	
Sales	---	None	12/11/2024, 9:46:5...	Ready to Act...	   
Vancouver Office	1 (385) 323-5832	5832	12/11/2024, 9:49:2...	Live	

1-4 of 4

## 3. Assign an Extension (Optional)

Assign an extension to an auto-attendant, so users can transfer callers back to the main menu to reach a different department.

1. For the auto-attendant you want to modify, click the extension field (None or an extension) to open the editor.
2. Enter a unique extension in the field.
3. Click **[Save]**.

**Name**

Main Office

Extension

1000

**Assigned Phone Number**

---

**Modified Date**

12/11/2024, 9:44:57 AM

**Status**

Activated, Assign TN

Cancel Save

## 4. Assign Phone Number

Once the auto-attendant is activated, a phone number needs to be assigned to it so calls to that number can be directed through the auto-attendant.


If the auto-attendant is activated but you do not see the *Assign Phone Number* link or have access to the Phone Numbers page, please contact Customer Support for assistance.

1. Click *Assign Phone Number* to go to the Phone Numbers page.



Name ↑	Assigned Phone Number	Extension	Modified Date	Status	
London Office	---	None	12/11/2024, 9:45:1...	Incomplete	
Main Office	<a href="#">Assign Phone Number</a>	1000	12/11/2024, 9:44:5...	Activated, As...	   
Sales	---	None	12/11/2024, 9:46:5...	Ready to Act...	
Vancouver Office	1 (385) 323-5832	5832	12/11/2024, 9:49:2...	Live	

1-4 of 4  

1. Locate the phone number this Auto-Attendant is for and click the  **map** icon on the right.
3. Update the *Phone Number Rings To:* field to the active Auto-Attendant and click **[Save]**. If the auto-attendant you're looking for isn't listed, make sure it has been activated.

### Phone Number Destinations

Phone number rings to

Vancouver Office - Auto Attendant ▼

Priority ring

Standard Ring ▼

Cancel Save

The auto-attendant's status is updated to **LIVE**, and it is now active on the phone number.

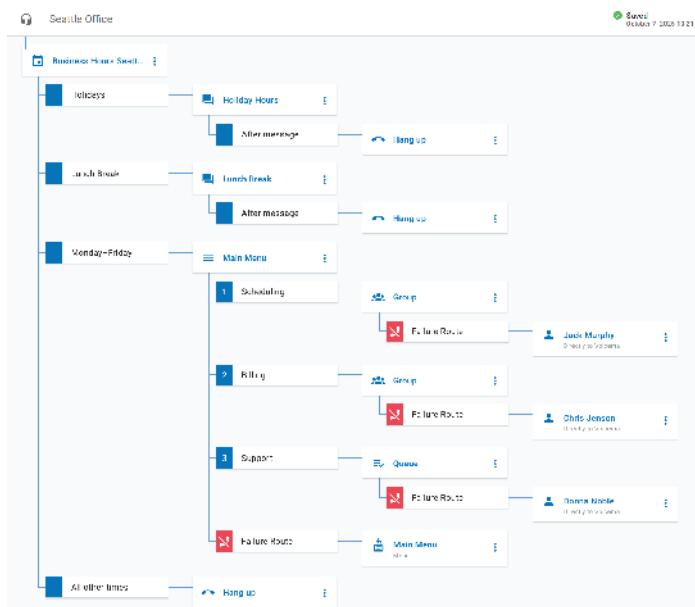




## Routes Guide

Routes are the key components of an auto-attendant and play an important role in the caller's experience. When used correctly, they can guide the caller to their destination and provide alternative options if the destination is not available. Review each route below to learn more.

- [Schedule Route](#)
- [Menu Route](#)
- [Message Route](#)
- [Group Route](#)
- [User Route](#)
- [Forward to Phone Number Route](#)
- [Directory Route](#)
- [Hang Up Route](#)
- [Reference Route](#)

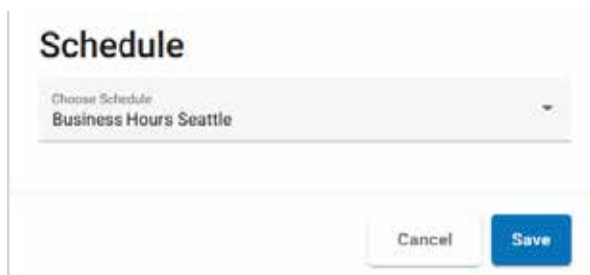


## Schedule Route

The **Schedule** route allows users to set their phone system to direct incoming calls to different destinations depending on when they call in, such as business hours, lunch hours, holidays, after-hours, etc. The Schedule route can be added at the beginning of the call flow or following a Schedule, Menu, or Failover route.

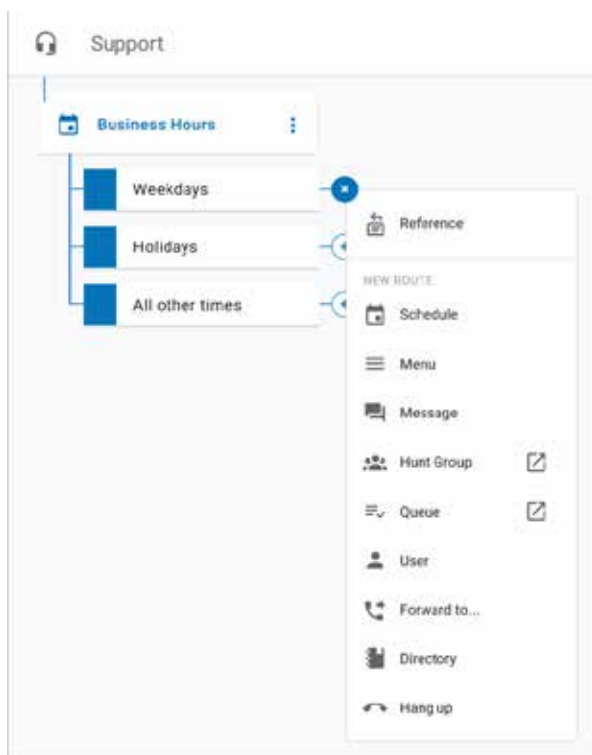
Schedules are configured separately in the **Auto-Attendant > Schedules** tab and are assigned to auto-attendants as needed. One schedule can be assigned to multiple auto-attendants or multiple schedules can be configured in a single auto-attendant.

1. In the auto-attendant builder, click **Add** and select the **Schedule** route.
2. Select a schedule from the list, then click **[Save]**. The schedule and each



of its rules are added to the auto-attendant. By default, an *All other times* rule is also added to identify where calls are routed during times that are set to *Unavailable all day* or are not specified by a rule.

1. For each rule, click  **Add** and select the next route to continue the call path.



The following example shows a completed auto-attendant that begins with a Schedule route.





Seattle Office



Business Hours Section



Holiday



Multi-Media



Vendor Team



Holiday Hours



Multi-Media



Multi-Media



Multi-Media



Multi-Media



Scheduling



Scheduling





### Change Schedule

To avoid breaking the call flow, the schedule assigned to a route can be changed only if the routes assigned to each rule are removed first. You can, however, modify existing rules in the schedule. See [Schedules](#) for details.

## Menu Route

A **Menu** route directs the caller to a message and DTMF touchtone options for call routing based on the key dialed.

### Menu Name

First, enter a name for the menu, then continue to upload your prompts.

#### Menu

Menu Name

### Prompts

Prompts are the recorded audio files that callers hear upon entering the menu.

- The **Intro Prompt** plays right before the Menu prompt. Because it's a separate audio file, it can be easily switched out for various circumstances, such as announcing seasonal sales or temporary business hours. This prompt is optional.
- The **Menu Prompt** tells callers how to navigate the menu options. For example: *"Thank you for calling Acme Corp. Press 1 for Sales, 2 for Support, or 3 for Billing."* This prompt is required.

For each prompt, click the menu and select a media file from the library.

- To confirm you have the right one, you can play the file in your browser or download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in [Media Files](#).



**Prompts**

Intro Prompt (Optional) [Download] [Play]

Menu Prompt [Download] [Play]

Allow Barge-in ☐

Allow Extension Dialing ☐

### Allow Barge-In

Toggle on to allow callers to interrupt the Intro prompt by dialing an option (DTMF input) before they hear it.

### Allow Extension Dialing

Toggle on to allow callers to dial their party's extension while the menu options are still playing. After dialing, there is a two second delay before the call is routed.

If "Allow Barge-in" is also enabled, callers can interrupt the Intro prompt as well. Because an extension may start with the same number as a menu option, there is a two second delay after a number is dialed before the call is transferred. If the dialed extension is invalid, the caller will hear "invalid extension," and the call will end.

## Menu Options

Add DTMF (touchtone) options (0–9, \*, #). Each option will need a name and a completed route.

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

**Menu Options**

1 Sales [Trash]

2 Support [Trash]

3 Billing [Trash]

+ Add Option



## Failure Routing

### Failure Routing

Menu Timeout (Seconds)

Number of Seconds (1-999)

Timeout value is required.

Max Invalid Selections

5

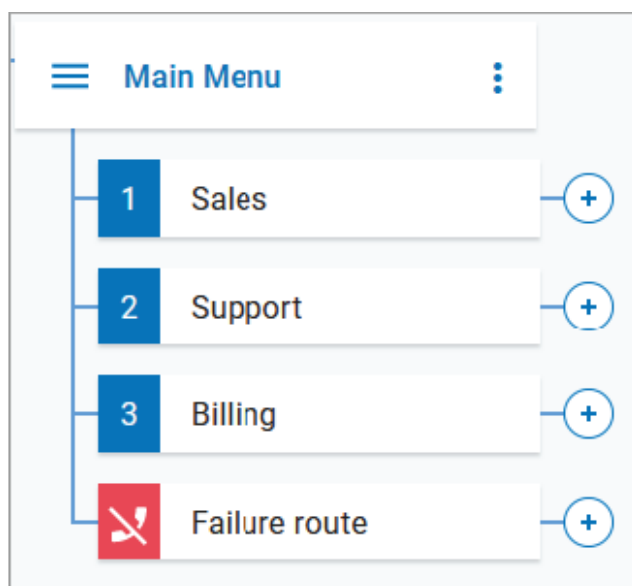
Invalid Prompt (Optional)

+ Choose File

Field	Description
<b>Menu Timeout</b>	Set the delay time (1–999 seconds) before the menu times out and an invalid selection is registered. If the timeout occurs, the call will loop back to the menu. Once the maximum number of invalid selections is reached, the call will be routed to the failure destination.
<b>Max Invalid Selections</b>	Enter the number of invalid selections or menu timeouts that will be allowed prior to directing the call into the failure route.
<b>Invalid Prompt</b>	Upload a .wav or .mp3 file under 5 MB that the caller will hear after dialing an invalid option (required).  For example: <i>"The number you entered was invalid. Please try again."</i>

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

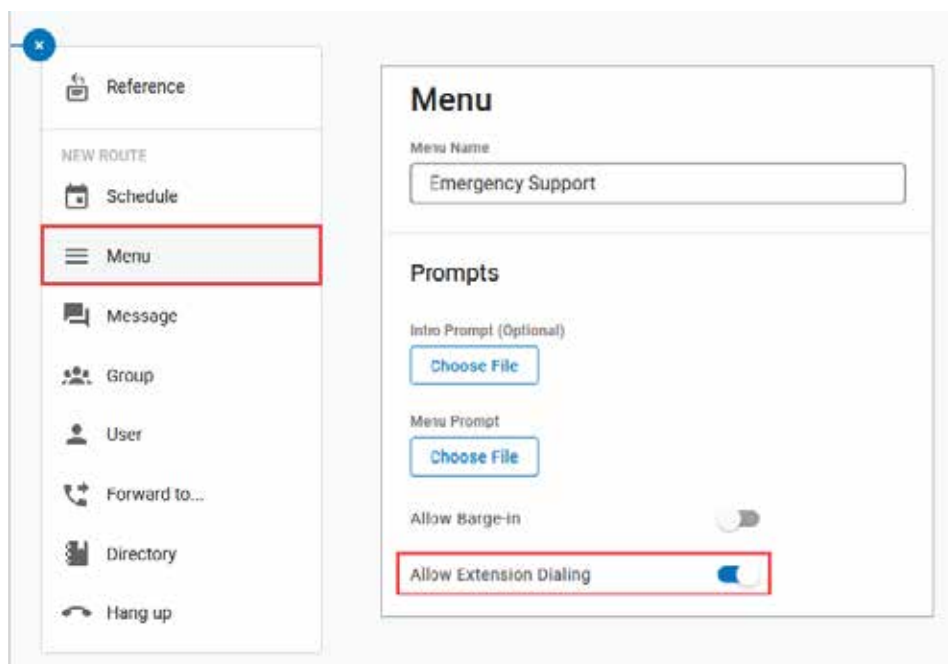




## Dial By Extension

Dial by Extension, or Extension Dialing, allows a caller to interrupt an auto-attendant's Menu Prompt by dialing their party's extension, which means callers don't need to wait for the menu to stop playing before they can make a selection.

This feature can be enabled in the Menu route by toggling on "Allow Extension Dialing." Additionally, if "Allow Barge-In" is enabled, callers will also be able to interrupt the intro prompt.



Once an extension is dialed, the call will be directed to that extension and will follow the call handling rules for that user.



Because an extension can start with the same number as a menu option (for example, 2001), there is a 2-second delay after a number is dialed before the system will apply the selection. However, if the caller dials the maximum number of digits allowed for an extension on that account, the call will be sent immediately.



## Invalid Selections

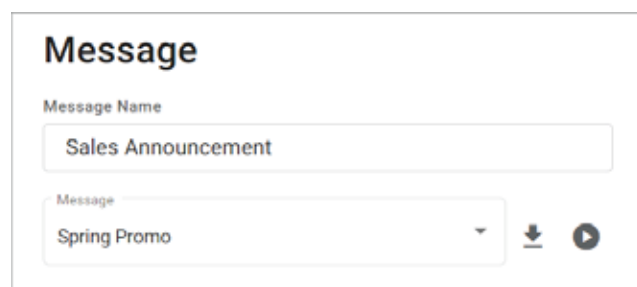
- If the caller dials an invalid extension, they will hear "invalid extension", then the call will be disconnected.
- If the caller dials more than one digit but less than an extension, they will hear the "Invalid Prompt" message and the menu will repeat.
- Once the caller reaches the "Max Invalid Selections" limit, the call will be disconnected.

## Message Route

Using the **Message** route, the caller will hear a prerecorded message.

Enter a name or description for the message that will be displayed in the auto-attendant editor, then click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can  play the file in your browser or  download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in [Media Files](#).





**Message**

Message Name

Sales Announcement

Message

Spring Promo

## Hunt Group & Queue Routes

Hunt Group and Queue routes distribute calls to a group of users based on predefined settings. Rather than following each user's call handling rules, calls follow the group's ring strategy to ensure calls are distributed properly. The first user to answer takes the call. If no one answers, the call follows the auto-attendant's failure route.

The type of call group you need depends on the needs of the users assigned to it:

- **Hunt Groups** distribute calls among a group of users based on a predefined call distribution strategy. If a call isn't answered, the system will "hunt" the next available agent with the same





consideration. Supported features include Music On Hold, Night Forwarding, User Ring Strategy, and User Log In/Out.

- **Queues** are similar to Hunt Groups in supported features and call distribution methods but also 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. **Queue Announcements** can be added to provide a more engaging experience and help minimize missed or abandoned calls.

Hunt groups and queues are created and managed in **Call Groups** and can be assigned to one or more auto-attendants as needed. In the auto-attendant builder, add a **Hunt Group** or **Queue** route to the call flow, then select an existing group from the menu and click **[Save]**.

### Group

Hunt Group

Escalations

Scheduling

Front Desk

Road Crew

### Queue

Queue

Billing

Customer Support

Technical Support

Escalations




### Modify Group Settings

Because hunt groups and queues are managed in Call Groups and aren't built within the auto-attendant itself, the configurations can be modified at any time. This means you can change the queue announcements, update the Night Forwarding number, log users in or out, and change any other setting within the group as needed, without breaking the call flow for the auto-attendant(s) it's assigned to. See [Hunt Groups](#) and [Queues](#) for details.

## Swap Hunt Group or Queue

As a rule, an auto-attendant cannot be edited while it is live and processing calls. However, there is an exception: the Hunt Group or Queue assigned to an auto-attendant route can be swapped in the editor at any time, so you can quickly update a call flow to route to a different team or department as needed. See [Hunt Groups](#) and [Queues](#) for details.

1. Go to the **Auto-Attendant** page.
2. Locate the auto-attendant you want to modify and click  **Edit** to open the builder.
3. Open the Hunt Group or Queue route you want to swap out.
4. Select a new group from the menu.
5. Click **[Save]**. The change is applied immediately.



## User Route

The **User** route directs calls to a single user, whose personal call handling settings will then apply as normal (unless "Send calls directly to voicemail" is selected).

### User

Bob Johnson

Send calls directly to user's voicemail
☒

Field	Description
<b>User menu</b>	Choose which user the incoming call will be directed to.
<b>Send calls directly to user's voicemail</b>	Toggle on to bypass the user's call handling rules and routes the call directly to the user's assigned voicemail box.

## Forward to Phone Number Route

The **Forward to Phone Number** route directs calls to an on- or off-net phone number. Select the country code from the menu on the left, then enter the phone number and a description (optional) in the fields to the right.

### Forward to Phone Number

Forward Number

+1
201-555-3214

Description

(optional)

## Directory Route

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

### Dial by...

Choose if callers will dial by the user's last name or first name.





### Directory

Dial by...

☒ Last Name
 ☐ First Name



## Custom Audio



Optionally, select custom audio prompts to give callers custom guidance in the directory. For **Intro Prompt** and/or **Invalid Selection**, click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can  play the file in your browser or  download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in [Media Files](#).

If custom audio is not used, the caller will hear the default "Dial by" prompts.

### Custom Audio

Intro Prompt (Optional)



Invalid Selection (Optional)



## Failure Routing

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

### Failure Routing

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

Timeout (Seconds)

Number of Seconds (5-30)

Timeout value is required.

Max Invalid Selections

Number of Invalid Selections (1-10)

Max invalid selections is required.



Field	Description
<b>Timeout (Seconds)</b>	Enter the number of seconds the call can be in the directory. (5– 30)
<b>Max Invalid Selections</b>	Enter the number of invalid selections the caller can try before the call is redirected to the failure route. (1–10)

## Hang Up Route

The **Hang Up** route terminates any call that reaches this point. Remember to click **[Save]** to keep this route.

### Hang up

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

## Reference Route

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

Choose which route a caller will be redirected to once they reach this point in the route, then click **[Save]**.

### Reference

When the the caller gets to this point, they will be redirected to the beginning of the referenced route.

Group	Sales Team
Menu	Main Menu
Message	Please leave a message
Schedule	Weekly Schedule
User	Chris Jenson
	Donna Noble
	Jack Murphy



## Schedules

### Business Cloud Communications > Auto-Attendant > Schedules

Schedules route incoming calls to different destinations based on the time and date the call comes in. Schedules can have one or more rules, each of which can have one or more date and time ranges to accommodate a wide range of use cases.

Once a schedule is assigned to an auto-attendant, the call flow is configured separately for each rule. For example, you can have a weekly rule for standard business hours that routes calls to individual departments, and a custom rule with dates and times for company holidays during which the business is closed for all or part of the day.

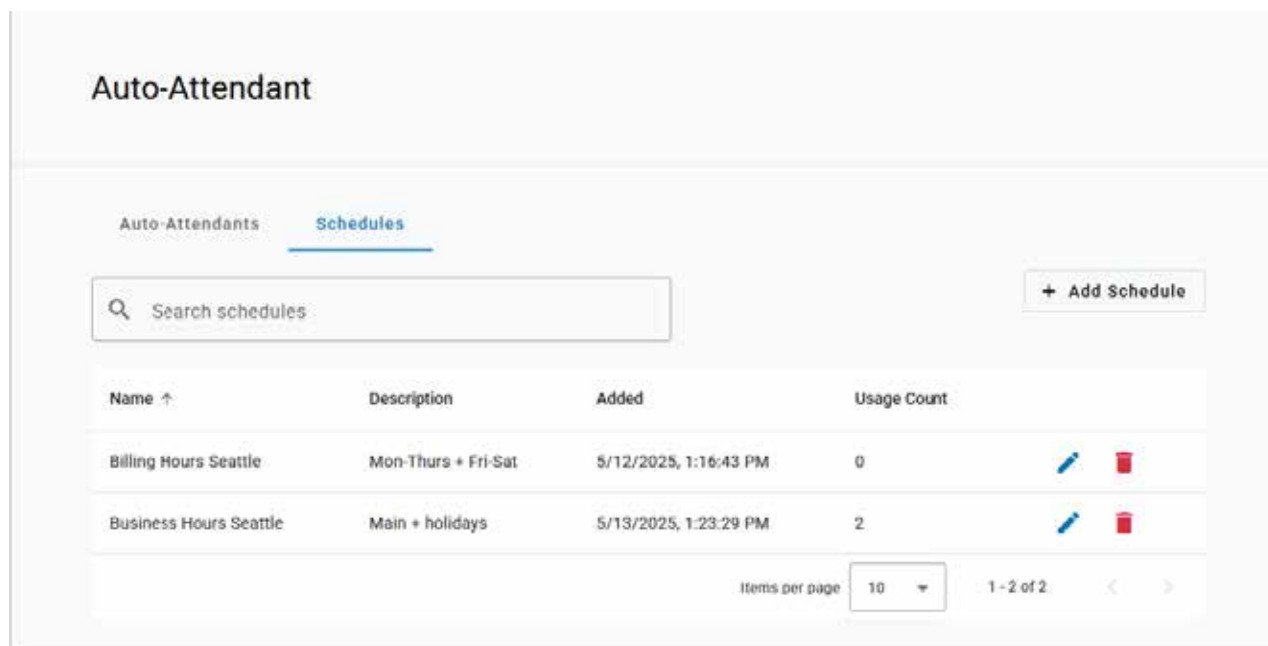
Schedules can be added to the beginning of an auto-attendant or following a Menu, Schedule, or Failure Route. One schedule can be assigned to multiple auto-attendants, and multiple schedules can be assigned to a single auto-attendant. See [Schedule Route](#) for details.

## Manage Schedules

To view and manage schedules, go to **Business Cloud Communications > Auto-Attendant** and select the **Schedules** tab.

Schedules are listed by name, description, date and time it was created, and the number of times it's used in auto-attendants. To locate a particular schedule, sort the table by field headers or use the *Search schedules* field to filter the list by name or description.





Select an existing schedule to [modify it](#) or click [\[+ Add Schedule\]](#) to create a new one.



**Auto-Attendant**

Auto-Attendants **Schedules**

Search schedules [+ Add Schedule](#)

Name ↑	Description	Added	Usage Count	
Billing Hours Seattle	Mon-Thurs + Fri-Sat	5/12/2025, 1:16:43 PM	0	 
Business Hours Seattle	Main + holidays	5/13/2025, 1:23:29 PM	2	 


Items per page: 10 1 - 2 of 2



## Add Schedule

1. In the portal, go to **Business Cloud Communications > Auto-Attendant**.
2. Select the **Schedules** tab.
3. Click **[+ Add Schedule]** on the right.
4. Enter or modify the following as needed:
  - **Name:** Enter a name, such as *London Business Hours*, to identify the schedule. While multiple schedules can have the same name, a unique name will make it easier for users to differentiate in a list.
  - **Description:** Enter a description for the schedule (optional). The description is displayed on the Schedules page and included in the search results.
  - **Time zone:** Select which time zone will be applied to the rules.
5. **Rules.** Rules specify when calls in an auto-attendant will follow a particular path. There are two types of rules:
  - **Weekly** rules repeat on specific days and times throughout the week. See [Configure Weekly Rules](#) for details.
  - **Custom** rules are created for specific dates that occur once or repeat on a daily, weekly, monthly, or yearly basis. These are often exceptions to weekly rules, such as holidays in which you are closed for all or part of the day. See [Configure Custom Rules](#) for details.

Once the schedule is assigned to an auto-attendant, call routes are configured for each rule. A schedule can have multiple rules, and each rule can have multiple date and time ranges. For example, you may have a weekly rule for standard business hours that routes calls to individual departments, and a custom rule with dates and times for company holidays during which the business is closed.


Select a rule type, then configure one or more date and time ranges below. When you're done configuring a rule, click the  checkmark in the bottom right to collapse it, then continue to add rules as needed.

6. When you're done, click **[Create Schedule]** to save it, then assign it to one or more autoattendants and configure the call flows. See [Schedule Route](#) for details



### Priority Order

When a schedule is assigned to an auto-attendant, calls are routed to the first rule that matches the time of the incoming call, based on the order in which the rules are defined in the schedule. This means rules for holidays and other non-standard hours **MUST BE FIRST** to ensure calls go through those checks first.

To change the order of your rules, click the  icon to the right of the rule and drag it to the correct position.





### Best Practices

Because you cannot create additional rules to a schedule that's in use, it's best practice to always include a holiday rule to all of your schedules. If the holidays don't need to be active, set the custom date and time in the past.

Once a schedule is assigned to an auto-attendant, rules cannot be added, removed, or rearranged, since those changes would break the auto-attendant's call flow. However, you can modify individual *Date & Time* periods for each rule.

To give you the most flexibility in the future, we recommend *always* including a Holiday route in your schedules, so you can add dates and times as needed. To configure specific dates and times for which calls need to be routed to a specific location. If you anticipate ever needing to and maybe even an extra route, just in case you need to

In case you might need to route calls on a specific date/time to

we recommend creating an extra rule, just in case you need to use it later. Since you don't need it now, create it for a date in the past and then assign the route to a

## Configure Weekly Rules

Weekly rules repeat on specific days and times throughout the week. Select which days the rule will apply, then specify the "on" time range(s) below. Hours not specified are considered "off" and will follow the *All other times* route in an auto-attendant. Add additional time ranges as needed.

Create separate rules to account for different times on different days. For example, if an office closes early every Friday, create one rule for Mondays–Thursdays and another rule for Fridays.

Rule name\*  
Monday - Thursday

Weekly Custom

Sun Mon Tues Wed Thur Fri Sat

08:00 AM 05:00 PM

+ Add Time Range

✓

Rule name\*  
Friday

Weekly Custom

Sun Mon Tues Wed Thur Fri Sat

08:00 AM 03:00 PM

+ Add Time Range

✓



### Tip

Rules that occur every week can be configured as either Weekly or Custom:

- Select Weekly to choose which days of the week.
- Set Custom to set a recurrence pattern, such as every other day or every three weeks.



## Configure Custom Rules

Custom rules are created for specific dates that occur once or repeat on a daily, weekly, monthly, or yearly basis. These are typically exceptions to weekly rules, such as holidays in which you are closed for all or part of the day.

To configure a custom rule, select the **Custom** tab and fill out the first *Date & Time* period:

- **Description:** Enter a description to identify the date.
- **Date:** Enter the date it will occur. If the rule will repeat (below), this is the start date.
- **Time Range:** Enter the start and end time. Add additional time ranges as needed. To specify the entire day, toggle on *Unavailable all day* below.
- **Unavailable all day.** When enabled, the entire date (12:00 a.m. to 11:59 p.m.) is considered off-hours, and calls will be routed to the *All other times* route configured in the autoattendant. When disabled, a time range (above) is required.
- **Repeat.** When disabled, the event will occur once. Toggle on to configure the rule to repeat on a daily, weekly, monthly, or yearly basis. See [Recurring Schedules](#) for details.
- **Add Custom Date.** Click to add another date to the rule.
- **Add Holidays.** Add multiple US or Canadian holidays at once. See [Add Holidays](#) for details.

Rule Name\*

Closed Holidays

Weekly Custom

Date & Time

Description

Summer Party

Date\*

6/21/2025

06:00 AM 02:00 PM

+ Add Time Range

☐ Unavailable all day

☐ Repeat

+ Add Custom Date + Add Holidays





## Recurring Schedules

Custom rules can repeat on a daily, weekly, monthly, or yearly basis, starting on the date entered above. The recurrence pattern specifies how often the rule applies and for how long it will continue. The settings for each interval type vary.

1. **Type.** Select the interval type (Day, Week, Month, or Year).
2. **On.** Specify how often it will recur.
  - **Daily:** Repeat every X days. Enter 1 for every day, 2 for every other day, etc.
  - **Weekly:** Repeat every X weeks. Specify the number of weeks between each occurrence and the day(s) it will repeat.
  - **Monthly:** Repeat every X months. Specify the number of months between each occurrence and on which day or week of the month it occurs. For example, Day 10 or Second Tuesday.
  - **Yearly:** Repeat every X years. Specify the number of years between each occurrence and on which day or week of the month. For example, September 30 or Last Tuesday in September.
3. **Ends.** Choose when the recurrence pattern will end:
  - A specific date
  - A number of occurrences
  - Never



## Daily

☒ Repeat

Every  day

Occurs **every day** starting Saturday, July 12, 2025.

Ends

☐ Date

☐ After occurrences

☒ Never

## Weekly

☒ Repeat

Every  weeks

On

Occurs **every 2 weeks on Sunday and Saturday** starting Monday, July 28, 2025.

Ends

☒ Date

☐ After occurrences

☐ Never

## Monthly

☒ Repeat

Every  month

On

☒ Day 14
   
☐ Second Monday

Occurs **the 14 day of every month** starting Monday, July 14, 2025.

Ends

☐ Date

☒ After occurrences

☐ Never

## Yearly

☒ Repeat

Every  year

On

☒ July 24
   
☐ Fourth Thursday in July

Occurs **every year on the 24 day of July** starting Thursday, July 24, 2025.

Ends

☐ Date

☐ After occurrences

☒ Never



## Add Holidays

Holidays are specific days and times during which the company is closed that are separate from normal business hours. Most company-wide holidays recur every year on the same fixed or variable date. Rather than entering each holiday individually, save time by adding either 10 US holidays or 14 Canadian holidays at once, including:

### US Holidays

- New Year's Day
- Martin Luther King Jr. Day
- Presidents' Day
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Christmas Day

### Canadian Holidays

- New Year's Day
- Family Day
- St. Patrick's Day (NL)
- Good Friday
- Easter Monday
- Victoria Day
- Canada Day
- Civic Holiday
- Labour Day
- National Day for Truth and Reconciliation
- Thanksgiving Day
- Remembrance Day
- Christmas Day
- Boxing Day

1. At the bottom of a custom rule, click **[+ Add Holidays]**, then select either **US Holidays** or **Canadian Holidays**. The dates for each holiday are automatically generated for the current calendar year (even if those dates have already passed), default to *Unavailable all day*, and do not repeat.

The image shows two parts of the 'Add Holidays' interface. On the left is a scrollable list of US holidays, each with a dropdown arrow: New Year's Day, Martin Luther King Jr. Day, Presidents' Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Veterans Day, Thanksgiving Day, and Christmas Day. On the right is a 'Date & Time' configuration panel for 'New Year's Day'. It includes a 'Description\*' field with 'New Year's Day', a 'Date\*' field with '01 / 01 / 2025', a checked 'Unavailable all day' option, an unchecked 'Repeat' option, and a red 'Remove Date & Time Range' button.

1. Expand each holiday entry and customize the settings as needed. To collapse a holiday, click the checkmark in the bottom right.



- **Date.** The date is generated for the current year only. If the organization observes the holiday on a different date, enter it here.
  - **Availability.** Each holiday defaults to *Unavailable all day*, which means calls will be routed to the *All other times* rule configured in the auto-attendant. To route calls to the flow configured for this rule during specific hours, toggle this off and enter the start and end times in the fields above.
  - **Repeat.** Holidays are one-time dates by default. If the holiday will be observed every year, toggle this on and configure the recurrence pattern below.
  - **Delete.** If a specific holiday isn't required, click **[Remove Date & Time Range]** or update it to a date you need.
1. To add custom holidays, scroll to the bottom of the rule and click **[+ Add Custom Date]**, then configure it as needed.
  4. After creating all necessary rules, arrange them in order of priority, ensuring that the Holiday rule appears first. Because incoming calls are routed based on the first rule that matches their time, placing the Holiday rule at the top ensures that holiday checks are performed before calls are routed according to standard business hours.



## Schedule

Name\*

Business Hours

Description

Time zone\*

US/Mountain

## Rules

=

Holidays **Must be first**

=

Monday–Friday



=

Saturday

[+ Add Rule](#)**Cancel****Create Schedule**

### Review Holiday Dates Yearly


Whether you've set your holidays to repeat every year or not, remember to review the schedule at the beginning of every year to ensure the dates match the company calendar. While most national holidays recur yearly on the same date or day of the week, some holidays will change and your organization may observe different dates.

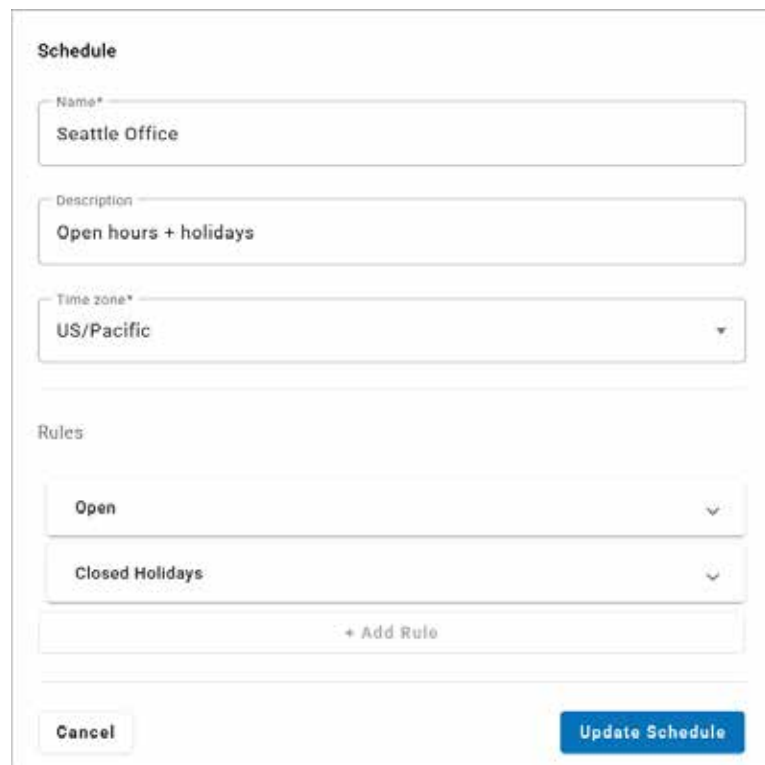


## Modify Schedules

Schedules can be modified at any time, but there are limitations: Once a schedule is assigned to an auto-attendant, rules cannot be added, removed, or rearranged, since those changes would break the auto-attendant's call flow. However, you can modify the *Date & Time* periods for individual rules.

For example, if your schedule has a custom rule for holidays (or dates in which you are closed), and this year the company is closing early for a party, you can add a new *Date & Time* period to account for it. Or if the party was on June 16 last year, but it's planned for July 12 this year, you can update the date.

1. In the **Schedules** tab, select an existing schedule to modify.
2. Expand a rule and make any changes as needed. To collapse the rule again, click the  checkmark in the bottom right.
3. When you're done, click **[Update Schedule]** to apply your changes.



**Schedule**

Name\*  
Seattle Office

Description  
Open hours + holidays

Time zone\*  
US/Pacific

**Rules**

Open

Closed Holidays

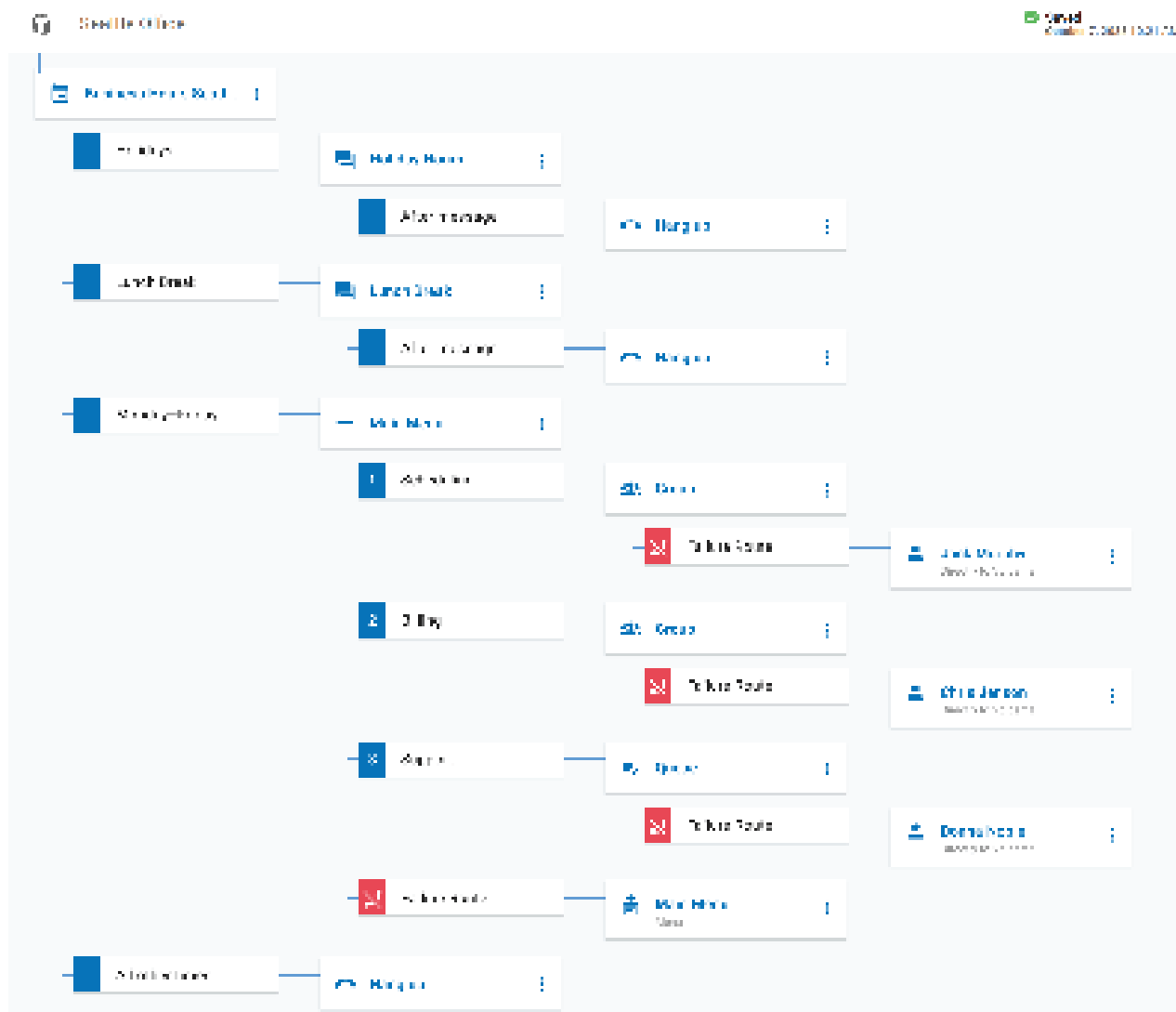
+ Add Rule

Cancel Update Schedule

## Assign Schedule to Auto-Attendant

Once a schedule is saved, assign it to one or more auto-attendants. In the auto-attendant builder, add a **Schedule** route, select the schedule you want to apply at that point in the call flow, then configure the call flow for each route. See [Schedule Route](#) for details.





### Priority Order

Because calls will always route to the first matching rule, holidays and other rules with non-standard hours **MUST BE FIRST** to ensure they are used correctly. If a holiday rule is last, it will never be used.

## Use Cases & Examples

### Schedule 1: Doctor's Office

A doctor's office is open weekdays from 8:30 AM to 5:00 PM and every other Saturday from 10:00 AM to 2:00 PM. They're closed on all federal holidays and work half days every other Friday, New Years Eve, and Christmas Eve.

- **Schedule:** Main Hours
  - **Weekly** Rule: Weekdays



- Monday–Friday from 8:30 AM to 5:00 PM
- **Custom Rule:** Weekly
  - Every 2 weeks on Saturdays from 10:00 AM to 2:00 PM
- **Custom Rule:** Holidays
  - US Holidays: *Unavailable all day*
  - New Years Eve: 8:00 AM to 2:00 PM
  - Day After Thanksgiving: *Unavailable all day*
  - Christmas Eve: 8:00 AM to 2:00 PM

## Schedule 2: Middle School

A middle school's office hours vary depending on the time of year. A separate rule is created for the summer hours, since not all staff will be available.

- **Schedule:** Office Hours
  - **Custom Rule:** School Hours Weekly, Monday - Friday from 7:30 AM to 3:30 PM. Starts August 1 and repeats every week until May 25.
  - **Custom Rule:** Summer Hours Weekly, Monday–Friday 8:00 AM to 12:00 PM. Starts May 26 and repeats every week until July 31.
  - **Custom Rule:** Holidays
    - All school holidays: *Unavailable all day*

## Edit Auto-Attendants

While an auto-attendant is live and processing calls, you can open the builder to see how it's set up, but nearly all routes are view-only to avoid disconnecting calls or otherwise breaking it. The only exceptions to this rule are [Hunt Group and Queue routes](#), which can be swapped while the auto-attendant is live.

Here's what you can do:

- [Change the call flow](#)
- [Change an extension](#)
- [Remap migrated Hunt Groups or Queues](#)









**Note**

If you don't have access to the Auto-Attendant or Phone Numbers pages, please contact Customer Support for assistance.

## Change the Call Flow



If you need to make changes to the Schedule, Menu, Message, User, Forward to, Directory, Hang Up, or Reference routes, you have a few options:

### Option 1: Duplicate, Edit, Switch

1. In the portal, go to the **Auto-Attendant** page. Locate the one you want to modify and click  **Duplicate**.
2. Click  **Edit** to open the builder and make any necessary changes.
3. Go back to the **Auto-Attendant** page, find the one you just modified, and click  **Activate**.
4. When you're ready for the new version to go live, go to the **Phone Numbers** page and locate the phone number assigned to the original auto-attendant. Click the destination on the right and change it to the new auto-attendant. Click **[Save]**.
5. Extensions cannot be duplicated. If the auto-attendant had an extension, remove the extension from the original and assign it to the new one.
  - Click the extension field on the original auto-attendant. In the pop-up, delete the extension, then click **[Save]**.
  - Click the extension field on the duplicated auto-attendant. In the pop-up window, enter the extension, then click **[Save]**.
6. Go to the **Auto-Attendant** page, locate the original, and click  **Deactivate**.
7. Delete or rename the old version, so users don't confuse them.

### Option 2: Deactivate, Edit, Reactivate

To avoid breaking an active call flow, make these changes after hours when you're sure calls aren't coming in for as long as it will take to make changes.

1. In the portal, go to the **Phone Numbers** page and locate the phone number assigned to the auto-attendant you want to modify.
2. Click the phone number destination on the right and change it to "None" or another viable option (like a temporary auto-attendant).
3. Go to the **Auto-Attendant** page and locate the one you want to modify. Click  **Deactivate**.
4. Now click  **Edit** to open the builder and make any necessary changes.



5. When you're done, go back to the **Auto-Attendant** page, locate the auto-attendant you just modified, and click ► **Activate**.
5. Click the Assign Phone Number link to go to the **Phone Numbers** page.
6. Locate the phone number you want to assign, then click the destination on the right and change it back to the auto-attendant.
5. Click **[Save]**. Calls to that phone number will now be directed through the auto-attendant.

## Change Extension

The extension assigned to an auto-attendant can be updated at any time:

1. Go to the Auto-Attendant page.
2. From the list of auto-attendants, locate the one you're looking for and click the Extension field.
5. Add, change, or remove the extension, then click **[Save]**.

The screenshot shows a configuration form for an auto-attendant. It includes the following elements:

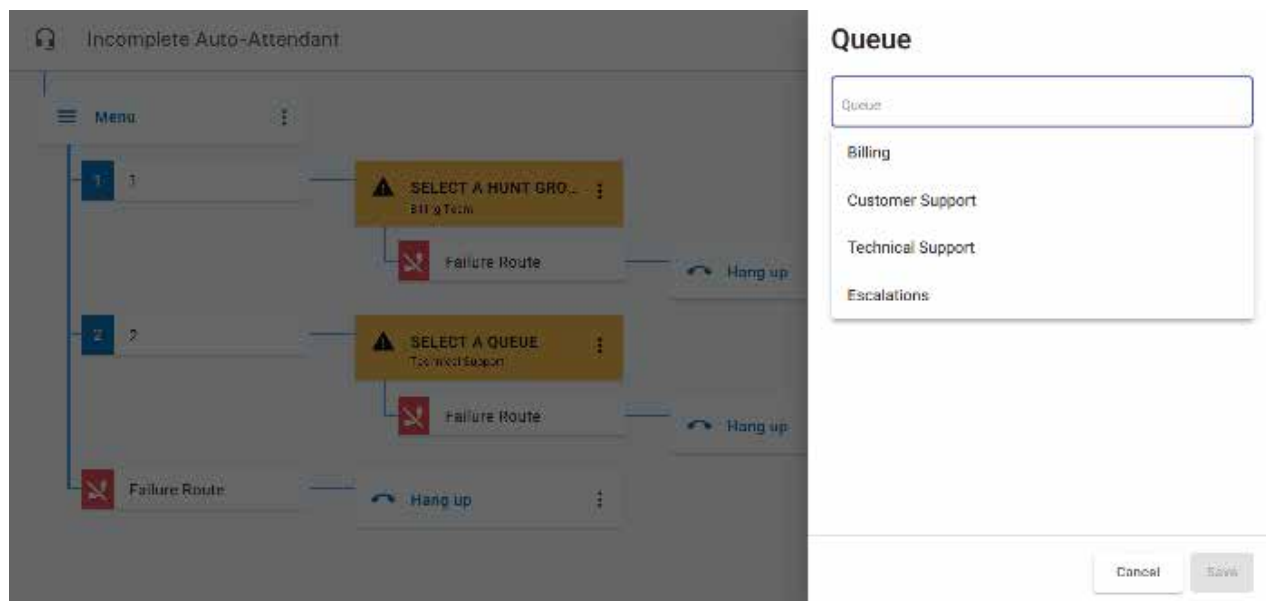
- Name:** New Auto-Attendant
- Extension:** A text input field.
- Assigned Phone Number:** A field with a dropdown arrow.
- Modified Date:** 6/11/2024, 4:07:42 PM
- Status:** Incomplete
- Buttons:** Cancel and Save.

## Remap Migrated Hunt Groups or Queues

In April 2025, hunt groups and queues were split out of the auto-attendant and rebuilt as stand-alone objects in Call Groups. At that time, groups in Activated or Live auto-attendants were automatically migrated to Call Groups to not disrupt the call flows. However, hunt groups and queues assigned to Incomplete and Ready to Activate auto-attendants could not be migrated. Those groups must be rebuilt before they can be assigned to the auto-attendant.

1. First, go to **Call Groups** and create a new hunt group or queue.
2. Next, go to Auto-Attendant and select the one you want to modify to open the builder.

1. A yellow alert is displayed where a hunt group or queue configuration used to be. Click that box and select a hunt group or queue from the list.
4. Click **[Save]** to assign the call group to the route.



# Call Groups

**Only Account Manager, Super Admin, and Advanced Admin users can create new call groups.**

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.

## Call Groups

[Hunt Groups](#)
[Queues](#)
[Paging Groups](#)
[Pickup Groups](#)

[+ Add Hunt Group](#)

Name ↑	Group Number	Members	Usage	
Billing		2	--	
Support Escalations		3	Support	

Items per page: 
1 - 2 of 2





### Route to Auto-Attendants

Hunt groups and queues can be assigned to one or more auto-attendant routes. See [Hunt Groups and Queue Routes](#) for details.

## 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.

### Edit Hunt Group

Hunt Group Name \*  
 Sales Team

Extension Number

☐ Show Caller ID Name

Ring Timeout (seconds) \*  
 5

Final Destination Type \*  
 Extension


Final Destination

Custom music on hold

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:

	Description
<b>Hunt Group Name</b>	Enter a unique name for the group.
<b>Extension Number</b>	<p>Assign a unique extension to the group (optional). The extension must not start with 0 or 911.</p> <div>  <b>Note</b>            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 <a href="#">Change Phone Number Destination</a>.         </div>
<b>Show Caller ID Name</b>	<p>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.</p> <p>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: <i>Sales JANE SMITH 18015551234</i>.</p> <p>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.</p>
<b>Ring Timeout (seconds)</b>	Enter the number of seconds a call will ring to a user or group before it is sent to the <i>Final Destination</i> or auto-attendant failure route (5–120). Keep this low to ensure calls are answered quickly. See <a href="#">User Ring Strategy</a> for details.
<b>Final Destination</b>	<p>Enter the failure route for calls that reach the group directly (via phone number or extension) and are not answered. Select <i>Phone Number</i> or <i>Extension</i>, then enter the number in the field to the right.</p> <p>Calls that reach this call group from an auto-attendant follow the auto-attendant's failure route, not the <i>Final Destination</i>.</p>
<b>Custom music on hold</b>	Select a custom Music On Hold file from the <a href="#">Media Files</a> 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.



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

1. 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 autoattendant. 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.



Add Queue

Queue Name \*

Technical Support

Extension Number

Show Caller ID Name

Caller ID

Max Number of Calls\*

Max Time (minutes) \*

Ring Timeout (seconds) \*

Final Destination Type \*


Phone Number

Final Destination

Custom music on hold

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. <div><div><b>Note</b> Callers can reach the queue directly via an extension (entered here) or phone number. To assign a phone number to the queue, see <a href="#">Change Phone Number Destination</a>.</div></div>





Setting	Description
<b>Show Caller ID Name</b>	<p>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.</p> <p>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: <i>Sales JANE SMITH 18015551234</i>.</p> <p>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.</p>
<b>Max Number of Calls</b>	Enter the number of calls that can be in the queue at one time (1–50).
<b>Max Time (minutes)</b>	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 <i>Final Destination</i> or auto-attendant failure route.
<b>Ring Timeout (seconds)</b>	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 <a href="#">User Ring Strategy</a> for details.
<b>Final Destination</b>	<p>Enter the failure route for calls that reach the group directly (via phone number or extension) and are not answered. Select <i>Phone Number</i> or <i>Extension</i>, then enter the number in the field to the right.</p> <p>Calls that reach this call group from an auto-attendant follow the auto-attendant's failure route, not the <i>Final Destination</i>.</p>
<b>Custom music on hold</b>	Select a custom Music On Hold file from the <a href="#">Media Files</a> 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.
<b>Queue Announcement</b>	<p>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 <a href="#">Media Files</a> library.</p> <p>Each prompt is optional, though a <i>Primary message</i> is recommended. If a <i>Primary message</i> is not selected, the caller will hear Music On Hold.</p>



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

- 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.

- Go to [Call Groups > Queues](#).
- Select the queue you want to modify or add a new one.
- 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

Intro prompt (optional)

↓

▶

Primary message

Contact Hours

↓

▶

Interrupt message

Interrupt audio file

Interval (sec)

30

↓

▶

	Description and Examples
Intro prompt	<p>This prompt is played immediately once the user enters the queue, before routing to a caller. If the <i>Intro prompt</i> isn't set, the primary message plays first.</p> <ul style="list-style-type: none"><li><b>Team Greeting:</b> Thank you for calling the Billing department.</li><li><b>Outage Notification:</b> 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.</li></ul>
Primary message	<p>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 <i>Primary message</i> is not set, callers hear the Music On Hold configured for the queue.</p> <ul style="list-style-type: none"><li><b>Generic Hold:</b> Please hold while you are connected to the next available representative. Your call will be recorded for quality and training purposes.</li><li><b>After-Hours:</b> The Billing department is currently closed. Please call back during regular business hours, which are 9 AM to 5 PM, Monday through Friday.</li></ul>



Queue Announcement	Description and Examples
<b>Interrupt message</b>	<p>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.</p> <ul style="list-style-type: none"> <li>• <b>Extended Hold:</b> 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 a ticket on our website at <a href="http://www.company.com">www.company.com</a> and we'll get back to you as soon as possible.</li> <li>• <b>Business Hours:</b> COMPANY is open Monday through Saturday from 11:00 a.m. to 8:00 p.m. Discount tickets are available on our website at <a href="http://www.company.com">www.company.com</a>.</li> <li>• <b>Information:</b> Did you know you can manage your account online? Visit [website] for more information.</li> <li>• <b>Promotion:</b> 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.</li> <li>• <b>Promotion:</b> 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.</li> </ul>
<b>Interval (seconds)</b>	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).

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

## Shared Group Numbers

The group number does not have to be unique. When the same number is assigned to multiple groups, enabling/disabling Night Forwarding for one will enable/disable it for them all. This strategy is useful when multiple teams are on the same schedule, or when one team is assigned to answer calls for multiple groups. However, to allow each group to manage their Night Forwarding setting independently, they must have unique group numbers.

## Enable or Disable Forwarding

Only a user assigned to the auto-attendant group can enable or disable Night Forwarding for that group. However, if multiple groups are assigned the same group number, the user who enables/disables it only has to belong to one of the groups.

1. A user in the auto-attendant group will dial the Group Forwarding star code + the group number.
  - For example, if the star code is 65 and the group number is 102, the user will dial \*65102.
2. Follow the audio prompts:
  - *Press 1 to turn on Night Forwarding.*



- Press 2 to turn off Night Forwarding.
- Press 3 to set the Night Forwarding number.



### Call Queuing

If calls are in the queue when Night Forwarding is enabled, those calls will remain in the queue until answered, and all new calls to the queue will be forwarded.

## 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*.

**Night Forwarding** Inactive

Type\*  
Phone Number

Forward Number

Description

Group Number

**Night Forwarding** Active

Type\*  
Phone Number

Forward Number  
16874336842

Description  
After-hours manager

Group Number \*  
855

## User Ring Strategy

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



User Ring Strategy

☒ Simultaneous: Ring all users at the same time
   
☐ Sequential: Ring users in order
   
☐ Round Robin: Ring the next user in the list
   
☐ Longest Idle: Ring the longest idle user
   
☒ Ring next available line when user is busy

- **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.






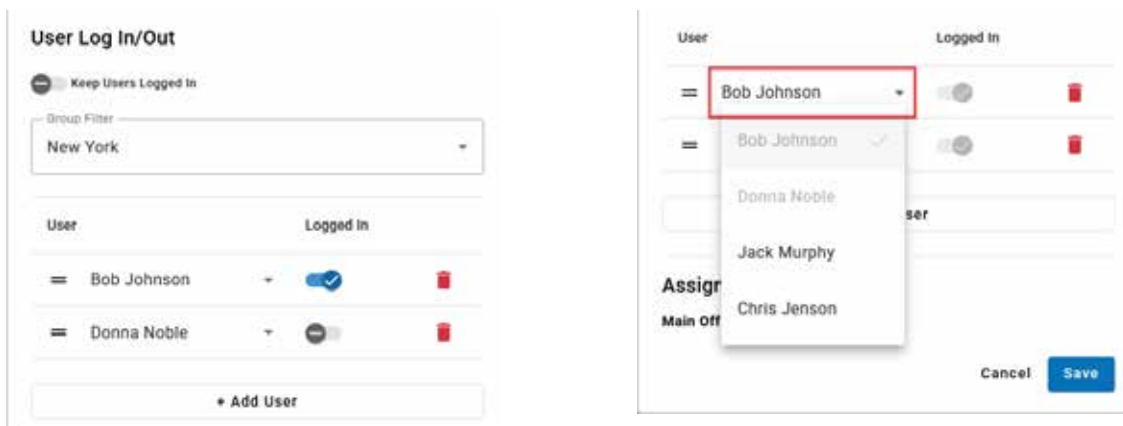
### Star Code Required

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 autoattendant. 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.

## 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.

## Add or Edit Paging Group

Go to Call Groups and select a Paging Group to view and edit its settings. When you're done, click **[Save]**.

Paging

Emergency Paging

8999

Sarah Jane - Yealink T46U

^

Paging

Name

Emergency Paging

Group Extension

8999

Page Priority

☐ Standard - All devices except on call and do not disturb users
 ☐ Priority - All devices except on call users
 ☒ Emergency - All devices regardless of status

User

Device

Sarah Jane - Yealink T46U

x

Field	Description
<b>Name</b>	Enter a name for this group. This name will appear on devices that are assigned to this Paging Group.
<b>Group Extension</b>	Enter the extension that will be dialed to page the group.



Field	Description
<b>Page Priority</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• <b>Standard:</b> 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.</li> <li>• <b>Priority:</b> All devices except those on an active call will receive the page. It disregards DND status. Emergency pages will override.</li> <li>• <b>Emergency:</b> All devices, regardless of status, will receive the page. Calls in progress will be placed on hold while the page is active.</li> </ul>
<b>User &amp; Device</b>	To add a user to the group, select their name and device. Repeat for all users who will be included in this group.

## Assign Paging Group to Device Line

To add a Speed Dial line key to an IP phone, follow these steps for each device:

1. Go to **Business Cloud > User > Edit > Devices** tab.
2. Expand your device and then expand the line you want to add the paging group to.
3. Enter the following settings:
  - **Type:** Paging Group
  - **Assignment:** Choose the paging group
4. Click **[Save]**.



2	Paging Group	Back Office	^
---	--------------	-------------	---

---

**Device Line Info**

Type

Assignment

---

## Make an Announcement

1. Press the line key assigned to the paging group or dial the group's extension.
2. You are now connected to all users in the paging group. Make your announcement and then hang up.

## 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.

Pick Up Group	Sales
---------------	-------

---

**Pick Up Group**

Name

User

---



## Edit a Pick Up Group

Select a group to edit the name and assigned users.

1. Go to **Business Cloud > Call Groups**.
2. Select a Pick Up Group to expand its settings.
3. Update the name, if needed.
4. To add a user to the list, select their name from the menu.
5. 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.

- When you hear a call ringing on another group member's phone, pick up your phone and dial the group's star code.
  - If multiple calls are ringing, the call that has been ringing the longest will be answered.
  - If you belong to multiple groups, the longest ringing call in any of your groups will be answered.

## Answer with Speed Dial

To answer a Pickup Group call 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:
  - **Type:** Speed Dial
  - **Assignment:** Custom Speed Dial
  - **Speed Dial:** Enter your custom Pick Up Group star code.
  - **Speed Dial Display Name:** Enter a name for the Pick Up Group.
2. Click **[Save]**.

See [Feature Key Configuration](#) for details.



# Call Recording

**Call Recording is available only for users with Advanced and Professional licenses.**

Recording conversations in every communication channel is crucial for compliance monitoring, legal proceedings, internal employee reviews, and more. We have partnered with Dubber, the world's leading provider of cloud-based call recording, to provide a high quality, compliant, networkbased recording solution, so you can capture your own calls from any of your devices while ensuring compliance with call recording laws and regulations.

To access a user's BCC Call Recording settings, go to **Users > Settings**.

## Call Recording

[Manage Recordings](#)

☒ Enable call recording

Product\*

BCC Call Recording

Recording Type

Automatic

On Demand

☒ Allow user to pause recording

☒ Announce when call is being recorded

Save

## Product

Displays the Call Recording product you're using. BCC Call Recording is included in the Advanced and Professional licenses and allows you to [manage your own recordings](#) in the Dubber Portal.

Additional products, including Dubber Recording, Dubber Unified Recording, and Dubber Insights, may also be available. These products offer advanced call recording capabilities including the ability for a Dubber Administrator user to manage the recordings for all users on the account. For more information about these packages, contact Customer Support.

## Recording Type

The recording type selected determines the level of input required to initiate a call recording. There are two recording types available:



- **Automatic.** All your inbound and outbound calls are recorded automatically.
- **On Demand.** The user can choose to start or stop recording the call by dialing a star code.

**See also:** [Call Recording Star Codes](#)

## Recording Features

For each call recording type, optional features can be enabled, including the ability to pause or resume a recording and automatically announce to the caller that the call is being recorded.

- **Allow user to pause recording.** When checked, you can pause or resume the recording by dialing a star code. This feature can be used while gathering sensitive information from the caller, like a credit card.
  - This setting is only available for the Automatic recording type; On Demand includes this functionality by default.
- **Announce when call is being recorded.** Announces “Your call is being recorded” to the caller whenever you dial the Start or Resume star codes. 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 you might make calls to areas that require two-party consent.

**See also:** [Manage Call Recordings](#)

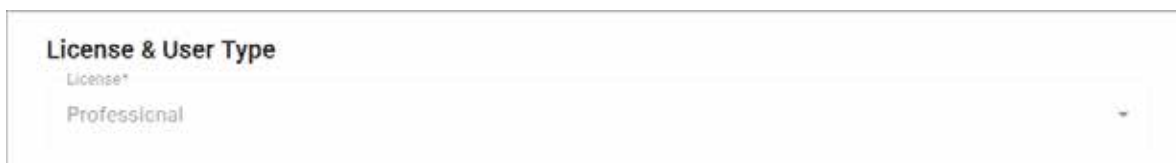
## Enable Call Recording for User

The following information is for Admin users only. See [End User Feature Access](#) to learn more.

Admin users can enable Call Recording for individual users with Advanced or Professional licenses. If the feature does not appear in the user's Settings tab, contact Customer Support assistance.

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 **License & User Type**, confirm the user's license is set to *Advanced* or *Professional*. Users with a Standard license must upgrade if they want to use this feature.





**License & User Type**

License\*

Professional

5. Scroll down to **Call Recording** and toggle on *Enable call recording*.



**Call Recording** [Manage Recordings](#)

☒ Enable call recording

Product

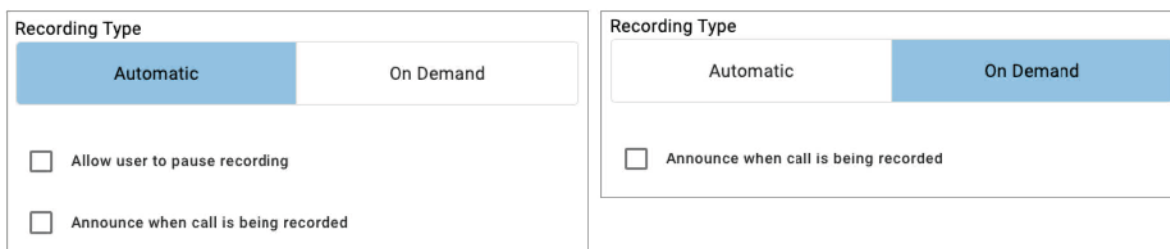
BCC Call Recording

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 licenses. 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):



**Recording Type**

Automatic On Demand

☐ Allow user to pause recording

☐ Announce when call is being recorded

**Recording Type**

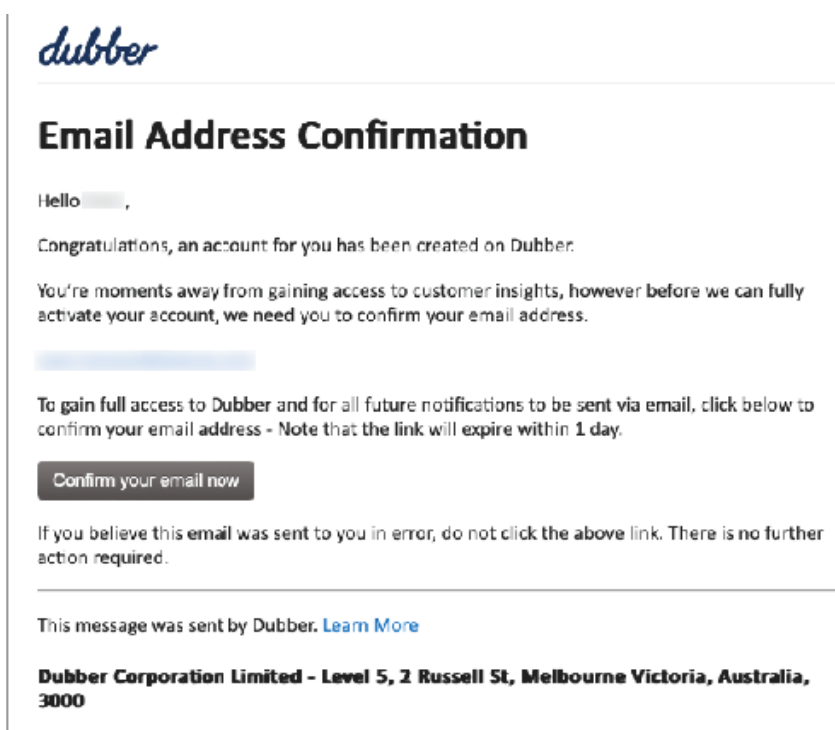
Automatic On Demand

☐ Announce when call is being recorded

- Announce when call is being recorded.** The caller hears "This call is being recorded for quality and training purposes" at the beginning of each call for Automatic recording, or when the user dials the [Start or Resume star codes](#) Start or Resume star codes for On Demand recording.
  - 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.
1. Click **[Save]**. A *Welcome* email is sent to the user with a verification link to confirm their email address. Once confirmed, the user will be prompted to create a password to access their new Dubber account.



## Disable Call Recording for User

The following information is for Admin users only. See **End User Feature Access** to learn more.

Admin users can disable a user's call recording capabilities, if needed. 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.



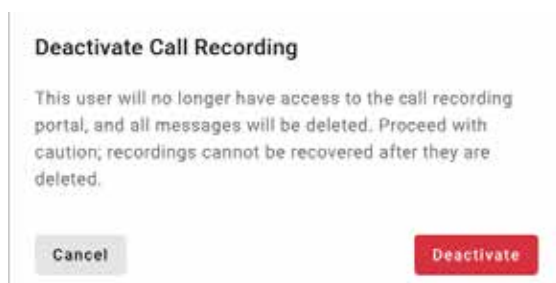


1. Navigate to the **Settings** tab, then scroll down to **Call Recording**.
4. Toggle off *Enable call recording*. The feature will be greyed out.

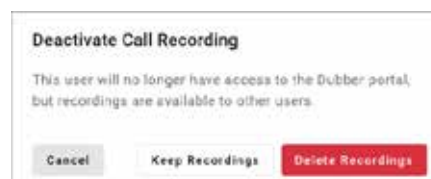


5. Click **[Save]**.
6. In the **Deactivate Call Recording** modal, choose whether to keep or delete the user's recordings. The options here may vary depending on which product is being disabled.
  - **Keep Recordings (Dubber products).** Select this option to delete the user from Dubber but keep their 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.

#### BCC Call Recording



#### Dubber Products



7. The user's Dubber account is deleted. They will no longer have access to the [Dubber Portal](#).



#### Note

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 access their old recordings unless they are a [Dubber Administrator](#).

**See also:** [Enable Call Recording](#)



## User Types & Video Tutorials

Call Recording has two primary user types: **Standard Users** and **Dubber Administrators**. All users who have BCC Call Recording are Standard Users, while users with Dubber Recording, Dubber Unified Recording, or Dubber Insights products can be either Standard Users or **Dubber Administrators**.

### Standard Users

Standard Users can access the Dubber Portal to **manage their own recordings**. After Call Recording is **enabled**, they can listen to, tag, share, download, or favorite a recording as soon as it's available in Dubber. Additionally, Standard Users with Dubber Recording, Dubber Unified Recording, or Dubber Insights products can be **assigned to a Team**, allowing them to contribute to their team's recordings and listen to the recordings of other team members.

The videos below, provided by our call recording partner Dubber, include how-to instructions for Standard Users navigating the **Dubber Portal**.

Video Tutorial	Description
How to log in to your account	Setting up your password and logging in with your new password and email address.
How to manage your account profile	Manage your own account from the Dubber web application to update your profile information.
How to change your language settings	Changing your language settings from the login page.
How to change your password	Change your password from your profile page.
How to organize and search your recordings	Keep your recordings organized and quickly find recordings by tagging and searching your recordings.
How to filter recordings	Managing your recordings and finding specific calls with a series of filter options.
How to interact with recordings	View all the recordings you have access to by searching for recorded content by quickly filtering the recordings.
How to tag recordings	Tag recordings to make them easier to find.
How to star favorite recordings	Highlight important calls by using the star function, making it easy to filter and quickly to retrieve calls.
How to search for recordings	Search for calls to find any criteria used in the metadata, including advanced searches to further narrow your search query.



Video Tutorial	Description
<a href="#">How to manage recordings</a>	Icons that show you additional metadata recording information, share and tag recordings, download and delete recordings.
<a href="#">How to securely share recordings</a>	Securely share a recording that doesn't require users to download a file.
<a href="#">How to download recordings</a>	Download your recordings to your computer.

## Dubber Administrators

**Not available in BCC Call Recording.**

Exclusive to Dubber products, Dubber Administrators are advanced users in Dubber with additional privileges. In addition to managing their own recordings, Dubber Administrators have the ability to update certain account settings and manage the recordings of all users within the account.

The videos below, provided by our call recording partner Dubber, include how-to instructions for Dubber Administrators navigating the [Dubber Portal](#).

Video Tutorial	Description
<a href="#">How to administer your account</a>	Manage teams, users, and permissions within your account.
<a href="#">How to create a new user</a>	View and create new users and modify settings.
<a href="#">How to manage account users</a>	Add, view, modify and delete users in the account page.
<a href="#">How to update an account user</a>	Update a user's account information and access level.
<a href="#">How to reset a user's password</a>	Resetting a user's password.
<a href="#">How to update account information</a>	View and modify account level information.
<a href="#">How to create and manage teams</a>	Assign permissions to users, add users to teams as listeners and/or contributors.
<a href="#">How to delete recordings</a>	Learn how to delete a recording from the system.
<a href="#">How to download recordings</a>	Download your recordings to your computer.



### Note

Some of the features demonstrated in the videos above may not be available. To learn more about managing an account in Dubber, see [Dubber Administrators](#) for details.



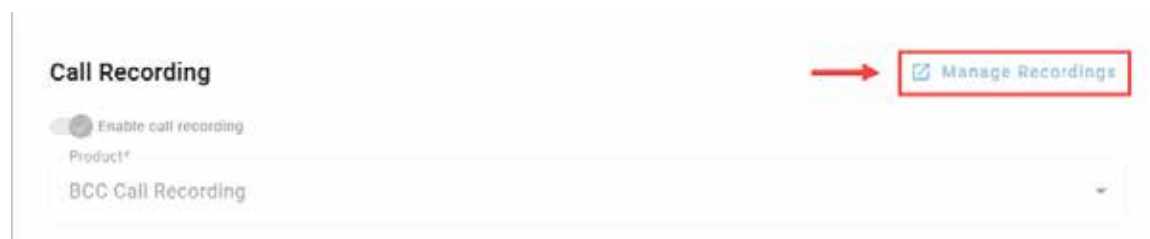
**See also:** [Manage Call Recordings](#) and [Dubber Administrators](#)

## Manage Recordings

All users who have BCC Call Recording can manage their own recordings. However, only a Dubber Administrator (not available with the BCC Call Recording plan) can manage the recordings for other users on the account.

## Access the Dubber Portal

All call recording files are stored in the Dubber Portal. Once you have recordings available, they can be managed by clicking **Manage Recordings** and entering your credentials on the Dubber login page.



### Info

Call Recording is disabled for all users with a Standard license. If you are a Dubber Administrator without call recording capabilities, the Dubber Portal can be accessed by navigating to another user with Call Recording enabled or by bookmarking the URL from the original Dubber *Welcome* email.

## Manage Recordings

The **Call Recording** page in the [Dubber Portal](#) displays all your available recordings and several management tools allowing you to listen to your recordings, add tags, favorite them, share them via email, or even download a copy of the .mp3 file.



### Dubber Portal

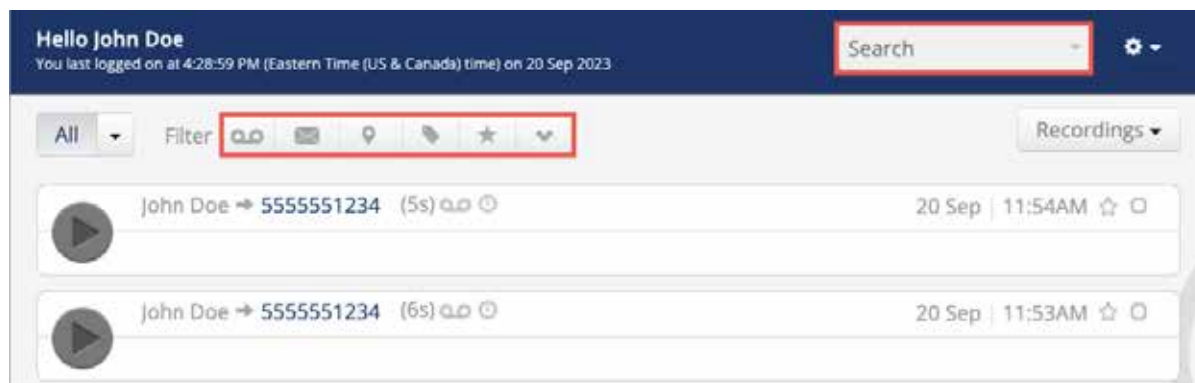
The Dubber Portal is subject to change and may appear differently from how it is documented here.

## Search

Use the search bar located in the top-right corner of the page to quickly search through your recordings. Additional filters can be applied by clicking the arrow and selecting or entering your search preferences. Click **[Search]** to populate your results.

The filter bar can also be used to filter your recordings. Click **Show tagged** to display your tagged recordings or click **Show Starred** to display your favorites. Please note, the integration does not support the **Show Voicemail** or **Show Meetings** tabs, so those will be empty.





## Listen

To listen to a recording, locate the recording from the list and click **Play**. The recording will begin playing and expand to display the audio's waveform. New UI elements will also appear, providing additional playback options. Click to skip **forward 15 seconds** or click to go **back 15 seconds**.

You can also adjust the playback speed by clicking **1.0x** **Set playback speed** and selecting an option from the menu. Options include 0.5x, 1.0x (default), 1.5x, and 2.0x speed.



## Share

Within the Dubber platform, your recordings can be shared with a colleague or team member via email.

1. Locate the recording you want to share and click **Share** on the right.




2. In the **Share this recording** modal, enter the recipient's email address.
3. Optionally, edit the Subject and Message fields. By default, these fields are pre-populated with generic text.
4. Check *Do you understand you're sharing this recording?* to accept the terms and conditions.



Share this recording

To




Subject

Message


Hi,

A call has been recorded using our call recording platform and I think you should listen to it.

Thanks,  
Admin

John Smith → 18005550730 (15s)  07 Nov | 01:04PM

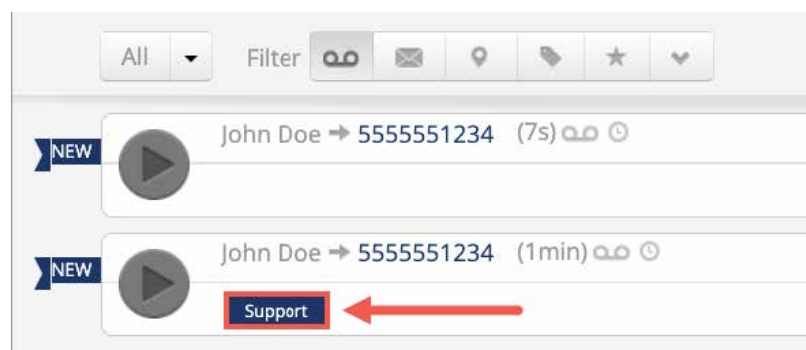
☐ Do you understand you're sharing this recording? Yes, tick the box. [Learn More](#)



1. Click **[Share]**. The recipient will receive an email containing a link to the audio file. The recording will be available for 24 hours or 50 plays, whichever comes first.

## Tag

Tags add an extra layer of discoverability by attaching a searchable label to the recording file. Use tags to categorize recordings by department, team, or call type for example. After a tag has been added, it will display at the bottom of the recording.

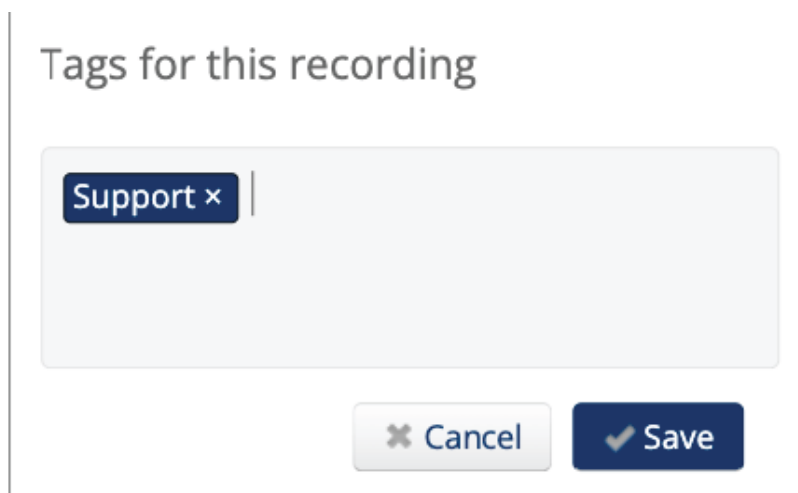


1. Locate the recording you want to tag and click  **Tags** on the right.





2. In the **Tags for this recording** modal, enter a name for the tag. The tag can be alphanumeric, up to 25 characters. To enter multiple tags, press the enter key after each entry or separate them with a comma.



3. Click **[Save]**.

## Download

You can download an .mp3 copy of your recordings within 30 days.


1. Locate the recording you want to download and click **Download** on the right.
2. In the **Download Recording** modal, click **[Download]** to begin downloading the .mp3 file to your device. The link is only valid for 60 seconds. If the link expires, close the modal and try again.



## Favorite

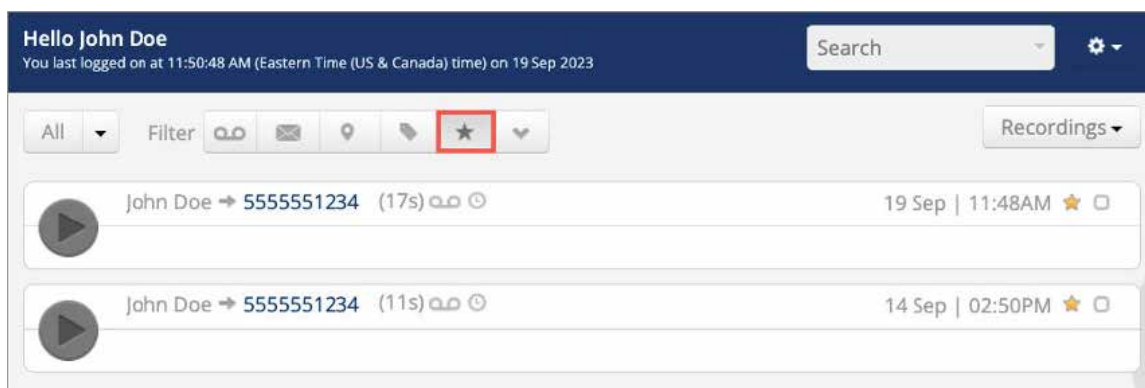
In some cases, you may need to save or refer to a recording later. This can be accomplished by favoriting (or "starring") the recording. Favorite as many recordings as you'd like.



1. Locate the recording you want to favorite and click the  **Star** icon on the right. The icon will change color to indicate the recording has been added successfully.



2. Once you've added the recording to your favorites, it can be accessed by clicking the **Show Starred** tab in the filter bar.



For more information, refer to [Call Recording Page](#) in the [Dubber Support Center](#).

**See also:** [Disable Call Recording](#) (Admins only)





## Dubber Administrators

Dubber Administrators are users who have additional privileges to update certain account settings and manage the recordings of other users within the Dubber Portal. At least one Administrator was assigned when Call Recording was enabled on the account.

The following information applies only to **Dubber Administrator** users with Dubber partner products, such as Dubber Recording, Dubber Unified Recording, and Dubber Insights. If you don't know who your Dubber Administrators are or want to become one, please contact Customer Support for assistance.




### Proceed with Caution

This integration is designed to sync your voice services to Dubber, but not the other way around. We do not recommend performing any action in Dubber outside of what is described below. Your changes will not sync.

## Search for Recordings

After logging in to the [Dubber Portal](#), Dubber Administrators are directed to the **Call Recording** page which contains the recordings of all users in the account. Recordings are organized newest to oldest.

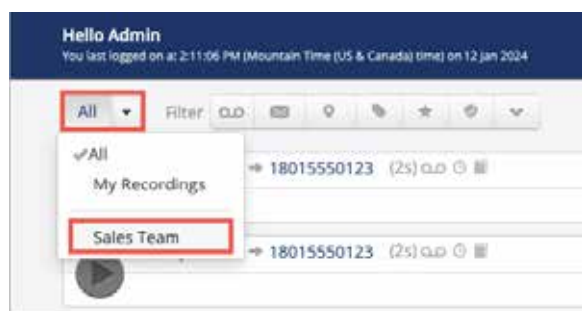
### Search by User

To search for recordings from a specific user, enter the user's name in the search bar located in the top-right corner of the page or click the  **Restrict to dub.point** tab from the filter bar and select the user from the menu.

### Search by Team

To search for recordings by team, click  **All** to the left of the filter bar and select a team from the menu. Teams are listed below **My Recordings**.





For more information, refer to [Search Your Recordings](#) in the Dubber Support Center.

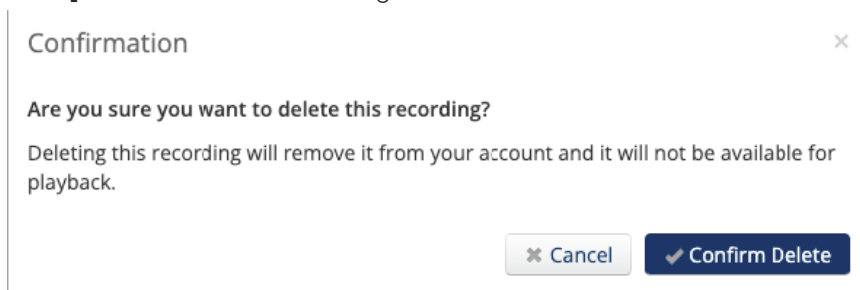
## Delete Recording

Dubber automatically deletes recordings from the platform based on the retention period defined by your call recording product. Although not typically recommended, Dubber Administrators have the ability to permanently delete recordings via the Dubber Portal. Once a recording is deleted, it cannot be recovered.

1. To delete a recording, hover over the recording and click **Delete**.



2. A confirmation modal appears, asking if you want to delete the recording. Click **[Confirm Delete]** to remove the recording from the account.



## User Management

Because data updated in Dubber is not synced with your voice services, it's important that you do NOT add, edit, or delete users in the Dubber Portal. Nearly all user management functions should be performed in your voice services account instead.

However, if a user forgets their Dubber password and is unable to reset it on their own, you can reset it for them via the **People** tab in the account settings.



Role Standard User

Username bob.johnson@alianza.co Change

Password ☒ Reset password  
Click 'Save Changes' to send user an email with directions to reset password.

\* Name Bob Johnson

Mobile

\* Language English (United States)

Cancel Save Changes

For more information, refer to [Reset User Password](#) in the Dubber Support Center.

## Manage Teams

In Dubber, you can organize existing users into groups, otherwise known as Teams. Teams are an effective way to manage how users can access call recordings. Teams are composed of Contributors — users who can contribute their own recordings, and Listeners — users who can listen to the recordings of other team members.

General People **Teams** API AI

+ Add Team

All	#7715	Everything in the account	
Sales Team	#9796		<span>⚙️</span> <span>🗑️</span>
Technical Support	#1070		<span>⚙️</span> <span>🗑️</span>

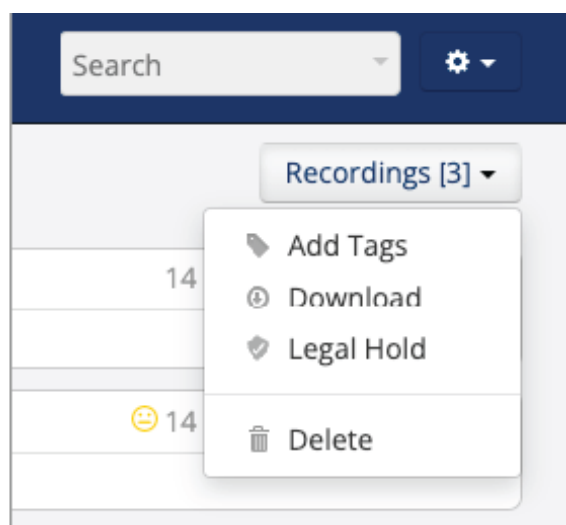
For more information, refer to [Teams](#) in the Dubber Support Center.



## Bulk Actions

Although Standard Users can tag multiple recordings at a time, Dubber Administrators can also  **Download**, apply a  **Legal Hold**, or even  **Delete** recordings in bulk.




To complete a bulk action, select the applicable recordings from the Call Recording page, then choose an option from the **[Recordings]** menu.



For more information, refer to [Multi Download](#) and [Multi Delete](#) in the Dubber Support Center.

## Dubber Insights



**The following information is for Dubber Administrator users who have Dubber Insights.**

Dubber Insights — the latest and greatest call recording product from Dubber — includes call transcription capabilities and sentiment analysis — a powerful AI tool that rates the overall tone of the call as either  Positive,  Negative, or  Neutral.

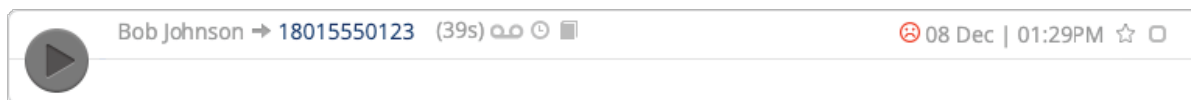
Users who have Dubber Insights enabled can utilize these enhanced features to quickly identify, capture, and analyze key moments in their own recordings. For [Dubber Administrators](#), an Insights dashboard is also available, offering improved visibility over users or teams within the account.

## Call Transcription and Sentiment Analysis

Dubber uses artificial intelligence (AI) to analyze voice data, transcribe calls, and provide insights such as sentiment, tone, and keywords. Follow these steps to review call recording data.

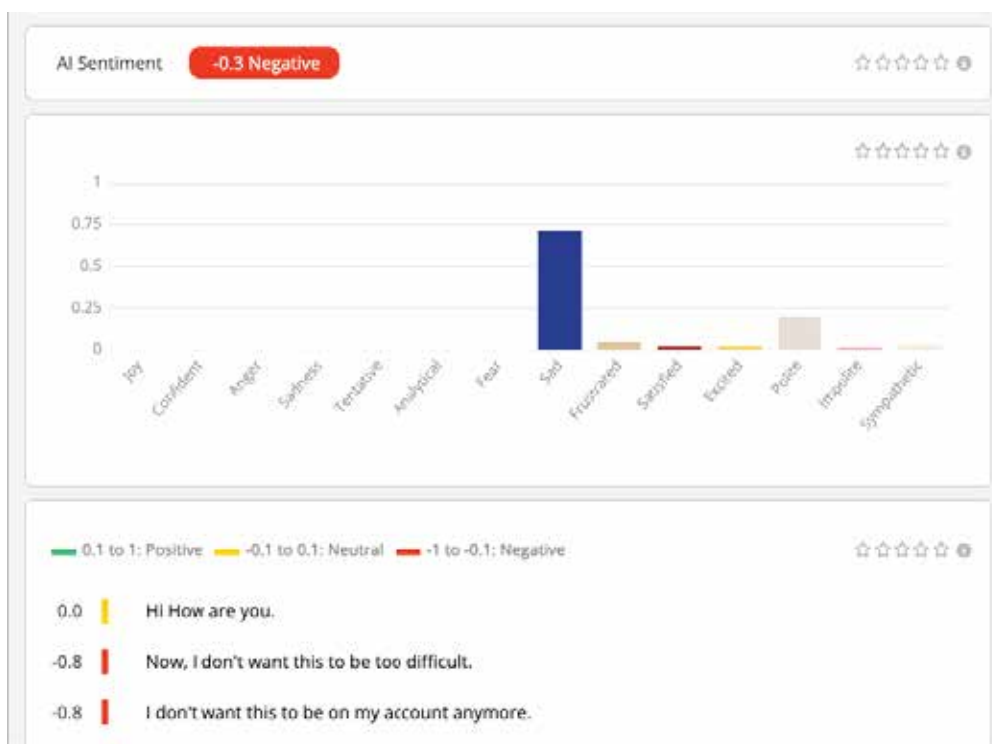
1. Log in to the [Dubber Portal](#).
2. On the Call Recording page, locate the recording from the list and click the  **Book** or  **Sentiment** icon.



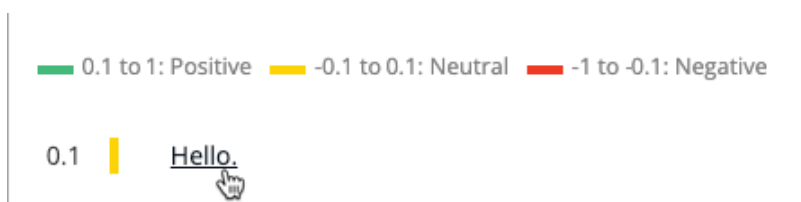


3. On the following page, recording data is organized into the following sections:

- **AI Sentiment.** Displays an overall score or rating for the recording.
- **Tone.** Displays tones that were detected on the call in the form of a graph.
- **Call Transcription.** Displays the full text conversion of the audio recording.



4. To search for a word or phrase within the recording, press **CTRL + F** on your keyboard, then enter the term you are searching for. Once located, click the text within the transcription to navigate to that point in the call.

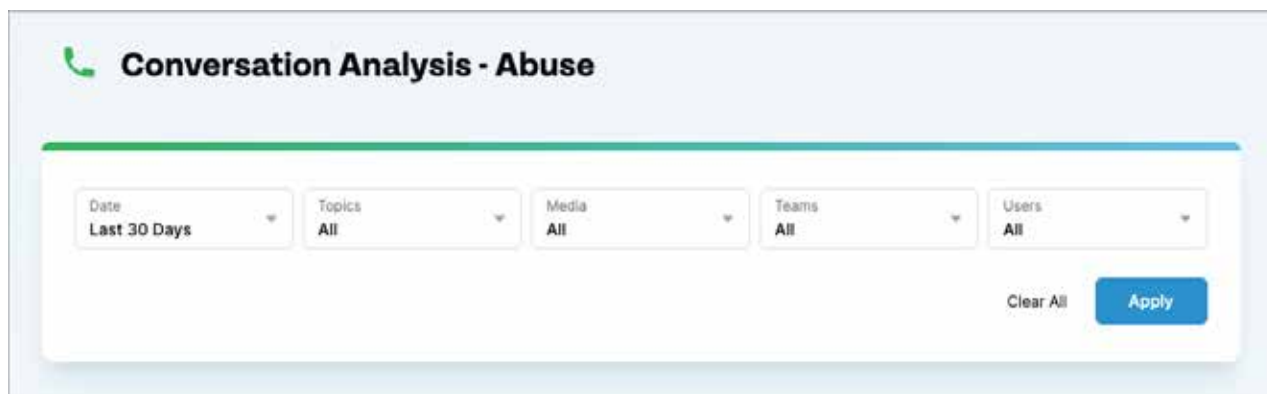


5. When you're finished, click **[Back to all recordings]** in the upper-left corner to return to your recordings.



## Insights Dashboard

The Insights dashboard is a powerful conversation analysis tool that breaks down recording data into separate views based on whether moments of abuse, complaints, or sales engagement were detected. Use these insights to make data-driven decisions.



The screenshot shows a dashboard titled "Conversation Analysis - Abuse" with a green phone icon. Below the title is a horizontal bar with a green-to-blue gradient. Underneath this bar is a white filter box containing five dropdown menus: "Date" (set to "Last 30 Days"), "Topics" (set to "All"), "Media" (set to "All"), "Teams" (set to "All"), and "Users" (set to "All"). Each dropdown has a small downward arrow. To the right of these filters are two buttons: "Clear All" and a blue "Apply" button.

For more information, refer to [Viewing and Navigating Dubber Insights](#) in the Dubber Support Center.



# Device Management

The Devices 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.

MAC Address	Device Type	Owners
0010face084e	Cisco 8851 (SPOC)	Sarah Jane
0010face084b	Grandstream GXP 2616	Mickey Smith
0010face080a	Yealink T58W	Donna Noble
102ab12dc35f	Cisco 8851 (SPOC)	Donna Noble
682c7bcab00a	Cisco 8851 (SPOC)	Sarah Jane




## Note

Only physical devices are listed here. Users with Advanced or Professional licenses may also have UC apps, which are listed in the user's Devices tab.

## Edit a Device

To view and manage device settings:

- Go to either:
  - Account > Users > Devices tab
  - Account > Devices
- Locate the device you want to manage and click the  **Edit** icon 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.

### Device Info

**MAC Address**  
0010fa6e384a

**Device Type**  
Polycom VVX 300

**Configuration Status**  
Yes ✓ [Details](#)

### Configuration Status Details

**IP Address**  
123.30.156.68

**Most Recent Download**  
Apr 6, 2023, 3:35 AM

**Download Response**  
200

**User Agent**  
FileTransport PolycomVVX-VVX\_300-UA/5.9.6.2327 Type/Application

[Close](#)

Feature	Description
<b>MAC Address</b>	A unique identifier for the device on your system.
<b>Device Type</b>	The make and model of the device in use.
<b>Configuration Status</b>	<p>Indicates if the device is configured and registered on the voice server.</p> <ul style="list-style-type: none"> <li><b>Yes.</b> The device is online and available for use. Click <b>[Details]</b> for more information.</li> <li><b>No.</b> 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.</li> </ul>

## Other Features

The additional features and settings displayed for each device depends on the device type, status, and other factors. For more information, see:

- [Line Key Features](#)
- [Bulk Line Configuration](#)
- [Sidecar Management](#)
- [Swap Devices](#)





## 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 export (download) the current line configuration.


To configure multiple IP phones in basically the same way, upload a single .csv file with the standard configuration 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.

### Bulk Line Configuration

**Export Current Configuration**

[Device Lines](#)

**Import New Configuration**



Drop file or [click to browse](#)

Expected header row of LINE\_NUMBER, LINE\_TYPE, REFERENCE, REFERENCE\_NAME

To configure lines in bulk:

- Go to either:
  - Account > Users > Devices tab**
  - Account > Devices**
- Locate the device you want to manage and click **Edit** on the right.
- Under **Device Line Info**, expand **Bulk Line Configuration**.
  - Export:** Download a .csv file of the current configuration.
  - Import:** Upload a .csv file with a new configuration. The file must follow the format below.

## Import File Format

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



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

## Example Import File

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



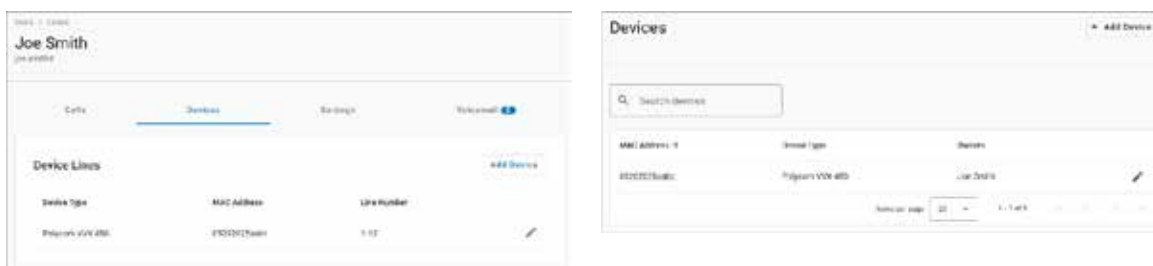
## Line Configuration



IP phones include feature keys that are programmable buttons to customize the actions performed. Line Configuration is how you program the feature keys on the device. Line 1 is the device owner's main line and is always a *Device Line* type; it cannot be changed. All other lines are set to *Deactivated* by default, but another feature can be assigned from here, including Call Park, Device Line, Paging Group, Presence/BLF, Shared Line, and Speed Dial.

For device changes outside of the IP phone line features, please contact Customer Support.

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

- Go to either:
  - Account > Users > Devices**
  - Account > Devices**



- Locate the device you want to manage and click .
- Under **Line Configuration**, click  on the line you want to assign a feature to.

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	



- Features include:

<ul style="list-style-type: none"> <li>• Advanced Shared Line</li> <li>• Call Park</li> <li>• Custom<sup>a</sup>.</li> <li>• Deactivated</li> <li>• Device Line</li> <li>• Intercom</li> <li>• Paging Group</li> <li>• Presence/BLF</li> <li>• Shared Line</li> <li>• Speed Dial</li> </ul>	<div> <h3>Device Line Info</h3> <p><b>Line Number</b> 2</p> <p>Type Paging Group ▼</p> <p>Assignment * Back Office ▼</p> <p> <input type="button" value="Cancel"/> <input type="button" value="Save"/> </p> </div>
---	--

<sup>a</sup>Only shown if a custom configuration has been set for this line via Phonism, a third-party device configuration service. Contact your service provider for details.

1. Remember to click **[Save]** after any changes!

## Advanced Shared Lines

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 configuration of the target line determines how the line functions for users in the group. For example, if the target line is configured as a Device Line, any user with the shared line reference on their device can make and receive calls, place calls on hold, and retrieve held calls using that line. If the shared line is configured as Call Park, users in the group can park and retrieve calls using the parking spot. See [Line Configuration](#) for details.

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. Users can have multiple devices, so be sure to select an active device with the line you intend to share.
- **Line:** Select an active line on the target user's device. The target line must be configured as a Device Line.
- **Advanced shared line display name:** Enter the name that will be displayed for the device key, such as the name of the monitored user.

**Device Line Info**

Line Number  
3

Type  
Advanced Shared Line

Target user\*  
Sarah Jane

Device\*  
Cisco 8851 (3PCC)

Line\*  
Line

Advanced shared line display name\*  
Sarah Jane

Cancel Save



### 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 3 — Donna	Phone 1 — Sarah
Line 3	Phone 3 — Donna	Phone 1 — Sarah	Phone 2 — Rose



	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
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.

The screenshot shows a web form titled "Device Line Info". It contains the following fields: "Line Number" with the value "2", "Type" with a dropdown menu set to "Call Park", and "Assignment \*" with a dropdown menu set to "Parking Spot 2". At the bottom, there are "Cancel" and "Save" buttons.

## 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 Number:** The line this feature is assigned to. Line 1 is always set to Device Line; it cannot be changed. This is the primary line belonging to the device's owner.
- **Type:** Device Line
- **911 callback number:** The phone number sent with 911 calls.
- **Registration Status:** Whether or not the device is registered with the voice server.

The screenshot shows a web form titled "Device Line Info". It contains the following fields: "Line Number" with the value "2", "Type" with a dropdown menu set to "Device Line", "911 callback number" with a dropdown menu set to "1 (206) 320-5102 - 1555 Broadway E, Seattle, WA...", and "Registration Status" with a red "No" and a red "X" icon. At the bottom, there are "Cancel" and "Save" buttons.





### Fax

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.

## Multi-Line Call Handling

Multiple **Device Lines** for the same user can be set up on a single device, so the user can hold incoming calls and see their other extensions' presence in real-time. In a multi-line device setup, incoming calls will ring to the user's first available (idle) line on the device based on the user's settings:

Feature	Description
<b>Auto-Attendant</b>	<p>If the user is a member of an <b>Auto-Attendant Group</b>, when a call is received from the group and the user is idle, the call will be delivered to the user's first available line.</p> <p>If the user is already on a call (busy), the incoming call will follow the group's logic and not ring the busy user.</p>
<b>Call Handling</b>	<p>If a user has SIM Ring or Find Me/Follow Me enabled, the call will follow the routing logic, but it will ring only the first available line on any of the user's registered devices. If a user declines the call on one device, it will stop ringing on all their devices.</p>
<b>Call Waiting</b>	<p>To take full advantage of Multi-Line Call Handling, Call Waiting should be disabled. Calls to the device will ring the multiple lines in turn until all lines are busy, after which the call will follow the user's Busy setting.</p> <p>If Call Waiting is enabled and a call comes in, the call will be delivered to the first line on any of their registered devices. Calls will not be delivered to any other line on the device.</p>
<b>Multiple Calls</b>	<p>While on a call, the user can answer subsequent calls by pressing the ringing or flashing key, or by using the <i>Answer</i> function on the phone.</p> <p>Answering a subsequent call will automatically place the active call on hold and connect the selected call. To move between calls, press the line key of the call on hold.</p>

## Intercom with Auto Answer

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.



The intercom feature key can be configured to dial only one user and one device, which is typically a line on another user's phone. It cannot be assigned to groups. 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.

- **Target:** 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."

The screenshot shows a 'Device Line Info' form. It includes fields for 'Line Number' (set to 1), 'Type' (set to Intercom), 'Target user' (set to Main Entrance), 'Device' (set to ALGO 8201), 'Line' (set to Line), and 'Intercom display name' (set to Main Entrance).

## 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 speaker-phone.
  - If the target user is on an active call, the call follows their [Call Waiting](#) settings.
  - If the target user has [Do Not Disturb](#) enabled, the caller is routed to voicemail or hears a busy tone.
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. See [Paging Groups](#) for details.

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

The screenshot shows a 'Device Line Info' form. It includes fields for 'Line Number' (set to 2), 'Type' (set to Paging Group), and 'Assignment' (set to Back Office). There are 'Cancel' and 'Save' buttons at the bottom.

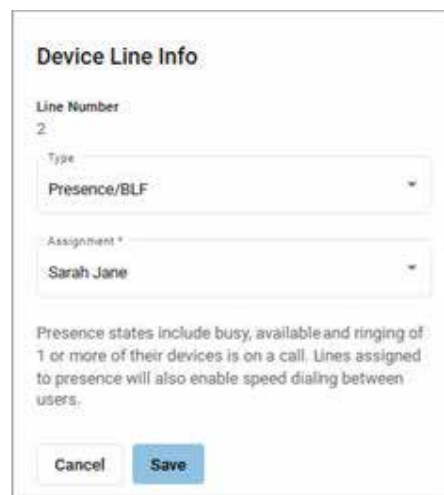




## Presence/BLF

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

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



The screenshot shows a web form titled "Device Line Info". It contains the following fields:

- Line Number:** 2
- Type:** A dropdown menu with "Presence/BLF" selected.
- Assignment \*:** A dropdown menu with "Sarah Jane" selected.

Below the fields is a text block: "Presence states include busy, available and ringing of 1 or more of their devices is on a call. Lines assigned to presence will also enable speed dialing between users."

At the bottom are two buttons: "Cancel" and "Save".

## 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 sends the shared user's caller ID. Dialing a star code (for forwarding calls, accessing voicemail, etc.) while on the shared line also affects the assigned user.

For users that have been assigned 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



The screenshot shows a web form titled "Device Line Info". It contains the following fields:

- Line Number:** 2
- Type:** A dropdown menu with "Shared Line" selected.
- Assignment \*:** A dropdown menu with "Sarah Jane" selected.

At the bottom are two buttons: "Cancel" and "Save".







### 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.

Users < Details < Device

Edit Device

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	

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



Users < Details

## Donna Noble

Calls Devices Settings Voicemail 0

### Device Lines

Add Device

Device Type	MAC Address	Line Number
Yealink T58W	0010fa6e386a	1-27

### Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
Cisco 8851 (3PCC)	0010fa6e384a	3	Sarah Jane

## Speed Dial

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

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

### Device Line Info

Line Number  
2

Type  
Speed Dial

Assignment \*  
Sarah Jane

Cancel Save

## 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.

**Device Line Info**

Line Number  
2

Type  
Speed Dial - Custom

Speed Dial \*

Speed Dial Display Name \*  
Line 2

Cancel Save

## Sidecar Management

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.

**Sidecar**

Sidecar type  
CP-8800-A-KEM-3PC

Number of sidecars  
1

Bulk Edit Save

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	



1. When you're done, click **[Save]** and the sidecar lines will be displayed below. Select a line and assign it to a feature, the same way you do for a standard device.

## Bulk Sidecar Bulk Edit

Use **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.



### Warning

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.

**Sidecar Bulk Edit**

Setup  
Custom

Select	Username
<input checked="" type="checkbox"/>	John Miller
<input checked="" type="checkbox"/>	Zack Davis
<input checked="" type="checkbox"/>	Jack Murphy
<input type="checkbox"/>	Ron Williams
<input type="checkbox"/>	Donna Noble
<input type="checkbox"/>	Bob Johnson
<input type="checkbox"/>	Chris Jenson
<input type="checkbox"/>	Timothy Lee
<input type="checkbox"/>	Mickey Smith

Cancel
Save

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 Devices

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.

**Tip**

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

1. Go to either:
  - **Account > Business Cloud > Users > Devices**
  - **Account > Business Cloud > Devices**
2. Locate the device you want to manage and click **Edit** on the right to expand the **Device Info**.
3. Click **[Swap]**.



4. 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.
5. Double-check the list of Affected Device Lines to make sure you won't break anything. Once the switch is complete, you may need to set up these lines again.
6. Click **[Confirm]** to complete the switch.





## Swap Device — 0010fa6e384b

Device type \*

Cisco SPA-504



MAC address \*

0010fa6e395b

Device Name

Mickey Smith

### Affected Device Lines

Username	Device name	Line
	Line	1
	Line 2	2

Cancel

Save



# Media Files

Media Files is a library of audio files stored on the account that can be reused throughout the portal.

Rather than uploading a new prompt or message for Music On Hold or each auto-attendant route, you 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 your computer.
- 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. Record new prompts and messages in a browser.
2. Upload one or more .mp3 or .wav files.

## Manage Media Files

Go to **Business Cloud > Media Files**. Media files are listed alphabetically, each with a name, description, upload date, and usage count. Search by file name or description, 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.



## Media Files

Upload
 New Recording

Name	Description	Added	Media Type	Usage Count	
1 - Support.wav	Auto Import from Auto A...	6/9/24 12:25 PM	AA Prompt	0	
2 - Billing.wav	Auto Import from Auto A...	2/25/24 - 9:37 PM	AA Prompt	1	
Thank you for calling	Auto Import from Auto A...	2/25/24 9:32 PM	Music On Hold	1	
Main - Intro with 1 seco...		4/11/24 1:37 PM	Queue Announcement	1	
Enter_Prompt.wav	Auto Import from Auto A...	2/22/24 - 2:18 PM	AA Prompt	1	
Message Spring Promo		3/25/25 10:54 AM	Queue Announcement	1	

1 of 6



### Auto-Import

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

## Play Audio

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

Thank you for calling

Auto Import from Auto A...

2/25/24  
- 9:32 PM

Music On Hold

1


00:04 / 00:22

## 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* and *Description* fields and view the file details, including when it was added to the account, who added it, and where the file is being used.

### Details

Name\*
Menu Holiday Hours.wav

Description
2024 Holiday Hours

Added
3/26/24 - 3:20 PM

Media Type\*
AA Prompt

Uploaded By
Ashley Roney

Used In
None

Save

### Details

Name\*
Urban Sunrise.mp3

Description

Added
9/5/24 - 9:14 AM

Media Type\*
Music: On Hold

Media In Use
The media type cannot be updated while the file is in use

Uploaded By
Bob Johnson

Used In
Account Music On Hold

Save

Field	Description
<b>Name</b>	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.
<b>Description</b>	A description of the file or search terms to help identify the audience, language, purpose, etc. The description is displayed on the Media Files page and included in the search results (up to 1,024 characters).
<b>Added</b>	Date and time the file was added to the account.



Field	Description
<b>Media Type</b>	<ul style="list-style-type: none"> <li>• <b>AA Prompts</b> can be used in auto-attendant <b>Menu</b>, <b>Message</b>, and <b>Directory</b> routes. However, these routes can only be updated on auto-attendants that are not <i>Activated</i> or <i>Live</i>. See <b>Edit an Auto-Attendant</b> for details.</li> <li>• <b>Music On Hold</b> files can be assigned to the <b>Music On Hold</b>, <b>individual users</b>, <b>hunt groups</b>, and <b>queues</b>.</li> <li>• <b>Queue Announcements</b> can be used in <b>hunt groups</b> and <b>queues</b>, which can be assigned to auto-attendants.</li> </ul>
<b>Uploaded By</b>	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."
<b>Used In</b>	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 component 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.



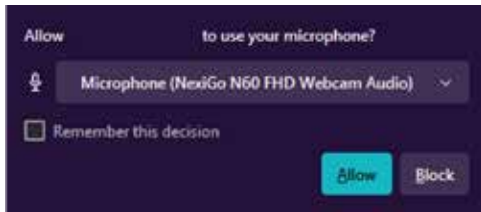
## Record Media Files

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.



1. 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. Select a microphone and playback device.

### New Media File

Choose a recording device, position the microphone close to the sound source, and press the record button below. Speak clearly and at a consistent volume. When finished, press the stop button and listen to the recording to check for quality. If necessary, adjust your settings before saving the media file.

Name\*

Description






Select your microphone

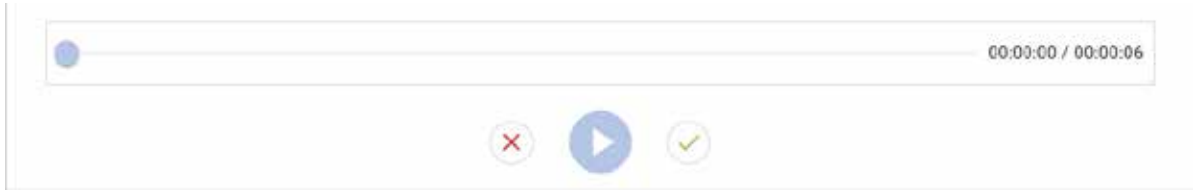
Microphone (NexiGo N60 FHD Webcam Audio)

Playback device

00:00:11

Record Stop Play

6. When you're ready, click  **Record**, then dictate your prompt into the computer's microphone.
7. When you're done, click  **Stop** to complete the recording.
8. Click  **Play** to listen to the recording. If you're satisfied, click  **Save** to add it to the library. Otherwise, click  **Cancel** to discard the recording and try again.

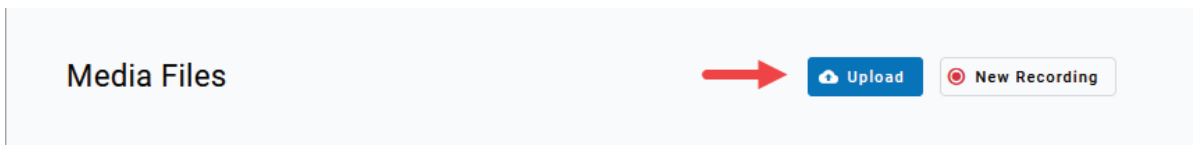


Once saved, the recording is added to the [Media Files](#) library.

## 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]** at 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 the [Routes Guide](#) for details.
  - **Music On Hold** files can also be assigned to the [account](#), [individual users](#), [hunt groups](#), and [queues](#) to give callers a custom experience.
  - **Queue Announcements** are prompts, messages, or music that callers hear when they reach a queue to customize the experience. See [Queues](#) and [Queue Announcements](#) 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.

1 Add your media files

2 Name & Description

### Name & Description

You can upload one or more WAV or MP3 files by dragging and dropping them onto the upload area, or by clicking the upload area and selecting the files from your device.

Drop file or [click to browse](#)

WAV or MP3

1. **Name and Description.** Before uploading the file(s) to the account, edit the file name and description (optional) to make it easier to identify later. Each file name must be unique.
  - If needed, click **Play** to listen to the file or **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.



### Audio Quality

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.

## Manage Media Files

To manage the media files on an account, go to **Business Cloud > Media Files**. Files are listed alphabetically, each with a name, description, upload date, and usage count. Search by file name or description, 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.





**TeleCom Cable**  
BCC Communications

Business Cloud

- Users
- User Groups
- Phone Numbers
- Devices
- Auto-Attendant
- Account Codes
- Call Groups
- Voicemail
- Media Files

**Media Files**

Upload New Recording

Search media files

Name	Description	Uploaded	Usage Count
Support Menu.mp3	Menu for Support	2/1/24 - 8:15 PM	1
Support After Hours.mp3		3/22/24 - 11:05 AM	0
Prompt 1.mp3	Auto Import from Auto Att...	2/1/24 - 8:15 PM	1
Spring Promo	Promo April 2024	3/21/24 - 3:01 PM	0

1 - 4 of 4



### Auto-Import

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

## 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.

### Details

Name\*
Menu Holiday Hours.wav

Description
2024 Holiday Hours

Added
3/26/24 - 3:20 PM

Media Type\*
AA Prompt

Uploaded By
Ashley Roney

Used In
None

Save

### Details

Name\*
Urban Sunrise.mp3

Description

Added
9/5/24 - 9:14 AM

Media Type\*
Music On Hold

Uploaded By
Bob Johnson

Used In
Account Music On Hold

Save

Media In Use
The media type cannot be updated while the file is in use

Field	Description
<b>Name</b>	The file name which is displayed on the Media Files page and in the file selection menus throughout the portal. The name must be unique and can include the file type.
<b>Description</b>	A description of the file or search terms to help identify the audience, language, purpose, etc. The description is displayed on the Media Files page and included in the search results (up to 1,024 characters).
<b>Added</b>	The date and time the file was added to the account.



Field	Description
<b>Media Type</b>	Where the file can be used in the portal: <ul style="list-style-type: none"> <li>• <b>AA Prompts</b> can be used in auto-attendant Menu, Message, and Directory routes. See the <a href="#">Routes Guide</a> for details.</li> <li>• <b>Music On Hold</b> files can also be assigned to the <a href="#">account</a>, <a href="#">individual users</a>, <a href="#">hunt groups</a>, and <a href="#">queues</a> to give callers a custom experience.</li> <li>• <b>Queue Announcements</b> are prompts, messages, or music that callers hear when they reach a queue to customize the experience. See <a href="#">Queues</a> and <a href="#">Queue Announcements</a> for details.</li> </ul>
<b>Uploaded By</b>	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."
<b>Used In</b>	The name of the users, auto-attendants, hunt groups, and queues the file is assigned to.

## 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 auto-attendant route 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.

### Are you sure?

Do you really want to delete this media file? This process cannot be undone

Cancel



Remove

## Assign Media Files

Media files can be used and reused in various places throughout the portal. The media type assigned to the file determines where it can be used. The type can be [changed](#) if the file is not in use.



## Auto-Attendant Prompts

AA Prompts can be used in the [Menu](#), [Message](#), and [Directory](#) routes in an auto-attendant. For each prompt, click the 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 in a route. See [Edit an Auto-Attendant](#) for details.

### Prompts

Intro Prompt (Optional)  
Holiday Hours.wav

Menu Prompt

## Music On Hold

Custom Music On Hold files can be used in the following locations:

- **Account Settings** as the default hold music for the account.
- **Call Groups** for hunt groups and queues.
- **User Settings** to customize the experience for callers who are placed on hold by the user.

## Queue Announcement

Queue Announcements are prompts, messages, or music that callers hear when they reach a queue. Each queue can be assigned an *Intro prompt*, a *Primary message*, and an *Interrupt message*.

Go to **Call Groups > Queues**, select the queue you want to modify, then scroll down to **Queue Announcement** and select the media files you want to use. See [Queues](#) and [Queue Announcements](#) for details.

### Queue Announcement

Intro prompt (optional)

Primary message  
Contact Hours

Interrupt message  
Interrupt audio file

Interval (sec)  
30





**Tip**


Queue configurations can be modified at any time, without interrupting call flows or duplicating the autoattendant. See [Queues](#) for details.

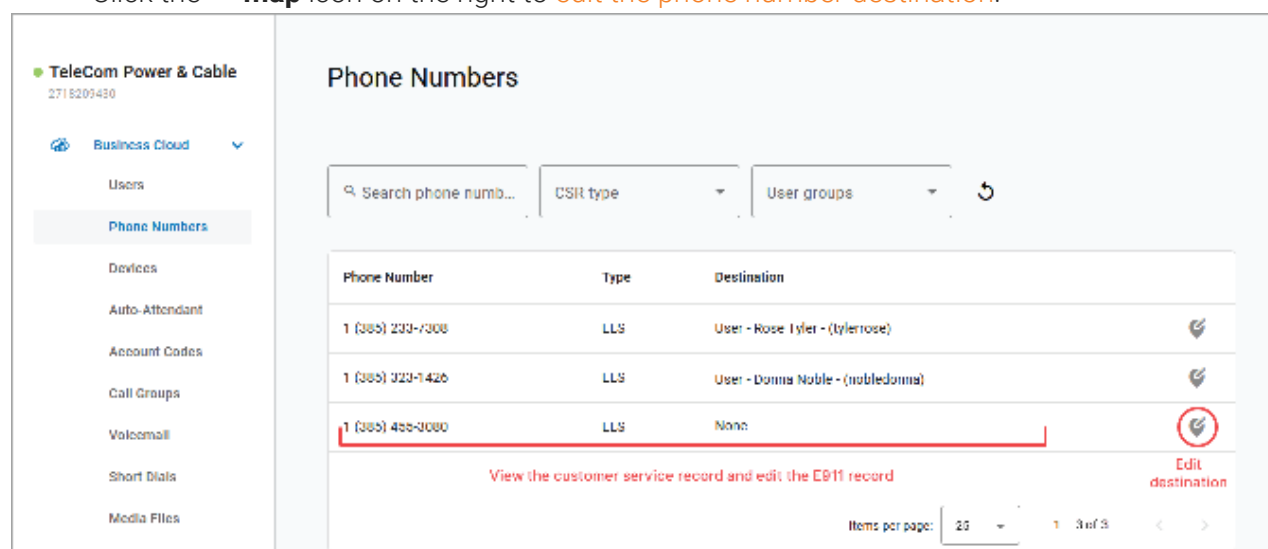


# Phone Number Management

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 (CSR) or E911 record.

- 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 phone number destination](#).



Phone Number	Type	Destination
1 (385) 233-7308	LLS	User - Rose Tyler - (tylerrose)
1 (385) 323-1426	LLS	User - Donna Noble - (noble donna)
1 (385) 485-0080	LLS	None




## Note

To add a new phone number to the account, please contact Customer Support.

## Change 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 reassigning a phone number from one user to another.

To change the destination of a phone number:

1. Go to the **Phone Numbers** page.
2. Locate the phone number you want to modify and click the  **map** icon on the right.



Phone Number	Type	Destination	
1 (206) 320-5102	ELS	User - Sarah Jane - (s.jane)	Edit destination → 
1 (206) 323-1004	ELS	User - Zack Davis - (zachdavis)	
1 (206) 327-9291	ELS	User - Donna Noble - (donna.noble)	

- 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. Supported destinations include auto-attendants, hunt groups, queues, users, and virtual faxes.
  - 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).
- Click **[Save]**. The changes will be applied immediately.

**Phone Number Destinations**

User groups:

Phone number rings to:

☒ Assign Phone Number as Caller ID

Priority ring:



#### Note

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

## Manage E911 Addresses

- Go to the **Phone Numbers** page.



2. Locate the number to be updated, then click the phone number to open the record.
3. Make any necessary updates to the E911 Record fields. Field descriptions are in the **E911 Record** section below.
4. When you're done, click **[Save]**. It may take several hours for the changes to take effect.

**Note**

This feature must be enabled by your service provider. If you don't see Phone Numbers in the menu, please 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 the service provider.

### Customer Service Record

**Address Preview**

1039 Abbey Ct  
New Haven, IN 46774

## 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 customer service record** box. If not, **uncheck the box** and enter the correct information in the fields below.

### E911 Record


☐ Same as customer service record

Postal code\*

Enter address



▼ Manual entry

☐ Provide lat/long 





Field	Description
<b>Postal code</b>	The postal code of the address.
<b>Enter address</b>	The address associated with the phone number. Start typing an address and options will populate below. Select the correct address.
<b>Manual entry</b>	Enter the address manually. These fields 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.
<b>Provide lat/long</b>	<p>Check this box to view and/or modify the latitude and longitude coordinates for the E911 address. <b>These coordinates determine the PSAP responsible for receiving the 911 call, not the ambulance dispatch location.</b> This additional information is useful for new addresses that haven't yet been registered with the Master Street Address Guide (MSAG).</p> <p>When checked, the coordinates are automatically generated using the provided address. Click <b>View Lat/Long in Google Maps</b> to see the approximate location. If you have more exact coordinates, enter them here and click <b>[Save]</b>.</p>



# 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**. See the individual articles to learn more. To edit or delete existing short dials, see **Manage Short Dials**.

**Short Dials**

Search short dials

Short Dial	Maps to	Description
2005	1 (801) 555-1238	Emergency Support Attendant
2004	1 (801) 555-1238	
2006	1 (801) 555-1240	
2054	1 (801) 555-1234	IT Helpdesk
2003	1 (801) 555-1237	
2007	1 (801) 555-1241	
2009	1 (801) 555-1243	

Display per page: 20 1 - 7 of 7



## Short Dial vs Short Code

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 Cybus's Short Dials, in that it allows users to dial common numbers from their desktop phones.

## Add Short Dial

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

Short Dial\*  
250  
3 digits

Phone Number \*  
8015551234

Description (optional)  
IT Helpdesk

CancelAdd

## 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.

## 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:

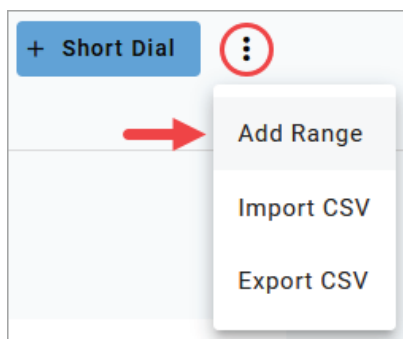
- (214) 555-8536: 2000
- (214) 555-8537: 2001
- (214) 555-8538: 2002
- (214) 555-8539: 2003
- (214) 555-8540: 2004

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 200 and ending with 225.



### Add Short Dial Range

Enter a range of up to 250 codes and the first phone number it maps to. Short dials are assigned to phone numbers sequentially.

From\*  
200

To\*  
225

Starting Phone Number\*  
214-555-2000

Cancel

Add

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



### Add Description

To add a description to any of these short dials, click the pencil icon on the right, enter a description, then click **[Save]**. This step is optional. 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

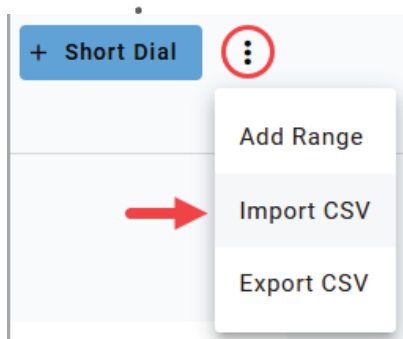
1. Create a .csv file with columns in the following order: Short Dial, Maps to, Destination, and Description.
  - Alternatively, [export a list \(CSV\)](#) of your current short dial numbers to use as a template. Remember to remove all existing numbers before importing it to the account.
2. Fill out 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 name or description, 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

3. Save the completed spreadsheet as a .csv file.

## 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.



### Import Short Dials

Upload a CSV file with columns in this order: Short Dial, Maps To, Destination, and Description. See this [Help Center article](#) for details.



Drop file or [click to browse](#)

CSV file (250 row limit)

Cancel
Import

## 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.

## 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.

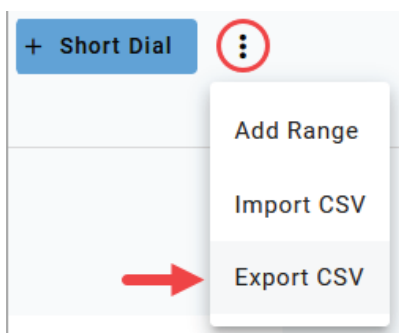


## Export Short Dial List

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.



### Notice

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.






Short Dial	Maps to	Description
2005	1 (801) 555-1239	Emergency Support Attendant
2004	1 (801) 555-1238	
2006	1 (801) 555-1240	
2004	1 (801) 555-1234	IT Helpdesk
2008	1 (801) 555-1237	
2007	1 (801) 555-1241	
2009	1 (801) 555-1243	

## Edit Short Dial

Follow these steps to edit the phone number or description of an existing short dial:

1. Go to **Business Cloud > Short Dials**.
2. Locate the short dial in the list. If it isn't easily visible, search by number, *Maps To* location, or description.
3. Click the  **edit** icon on the right to update the name or description.
4. Click **[Save]** when you're done.

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.



## Edit Short Dial

Short dial (3 digits)\*

485

Phone number \*

1 (801) 555-8487

Description (optional)


Emergency Support Attendant

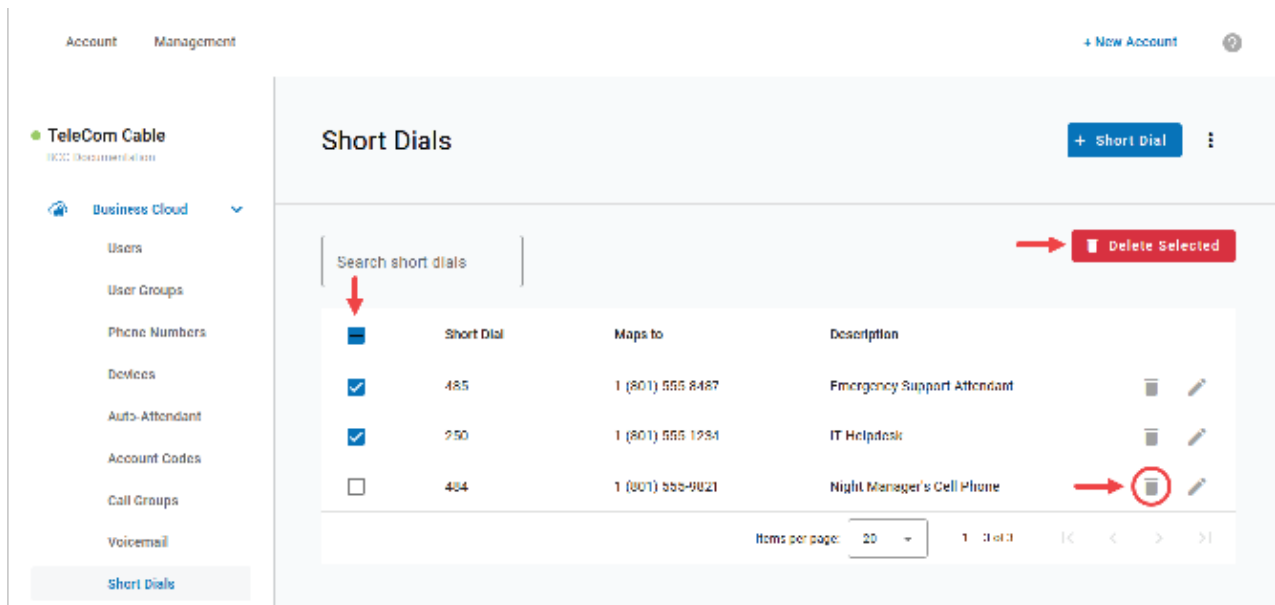
Cancel

Save

## Delete Short Dials

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

1. **Delete One:** Locate the short dial, then click the  **trash** icon on the right.
2. **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]**.



Account Management + New Account ?

TeleCom Cable  
TK22 (800) 555-4100







Business Cloud

- Users
- User Groups
- Phone Numbers
- Devices
- Auto-Attendant
- Account Codes
- Call Groups
- Voicemail
- Short Dials

### Short Dials

+ Short Dial ⋮

Search short dials

	Short Dial	Maps to	Description	
<input checked="" type="checkbox"/>	485	1 (801) 555-8487	Emergency Support Attendant	 
<input checked="" type="checkbox"/>	250	1 (801) 555-1234	IT Helpdesk	 
<input type="checkbox"/>	484	1 (801) 555-9021	Night Manager's Cell Phone	 

Items per page: 20 1 of 3 < >

# User Management

Users, the heart of any account, are managed here. Each user is set up with a device, phone number, calling plan, etc. If *Voice Portal Access* is enabled in the Settings tab, they can manage their account settings in the end user portal.

Go to **Account > Users**, then select a user to view and manage their settings.

Users			
Search users		All	
Name ↑	Username	User Type	Extension
Bob Johnson	bob.johnson	End User	204
Chris Jenson	chris.jenson	Advanced Admin	207
Donna Noble	donna.noble	Standard Admin	205
Jack Murphy	jack.murphy	Basic Admin	206
John Miller	sean.hansen+johnmiller@alianza.com	End User	209
Mickey Smith	m.smith	Super Admin	203

Field	Description
<b>Search Filter</b>	Filter the displayed users by username, first or last name, extension, device, MAC address, phone number, caller ID number, or user tag.
<b>User Type Filter</b>	From the menu next to the search bar, select a user type to filter the list by.
<b>Name</b>	The user's first and last name.
<b>Username</b>	Their Voice Portal username or email address, if it's being used as their user-name. If this is blank, the user does not have access to the Voice Portal.
<b>User Type</b>	Identifies whether the user is a Super Admin, Advanced Admin, Standard Admin, Basic Admin, or End User. This determines the level of access the user has to the Voice Portal. <b>See also:</b> <a href="#">BCC Admin User Types</a>



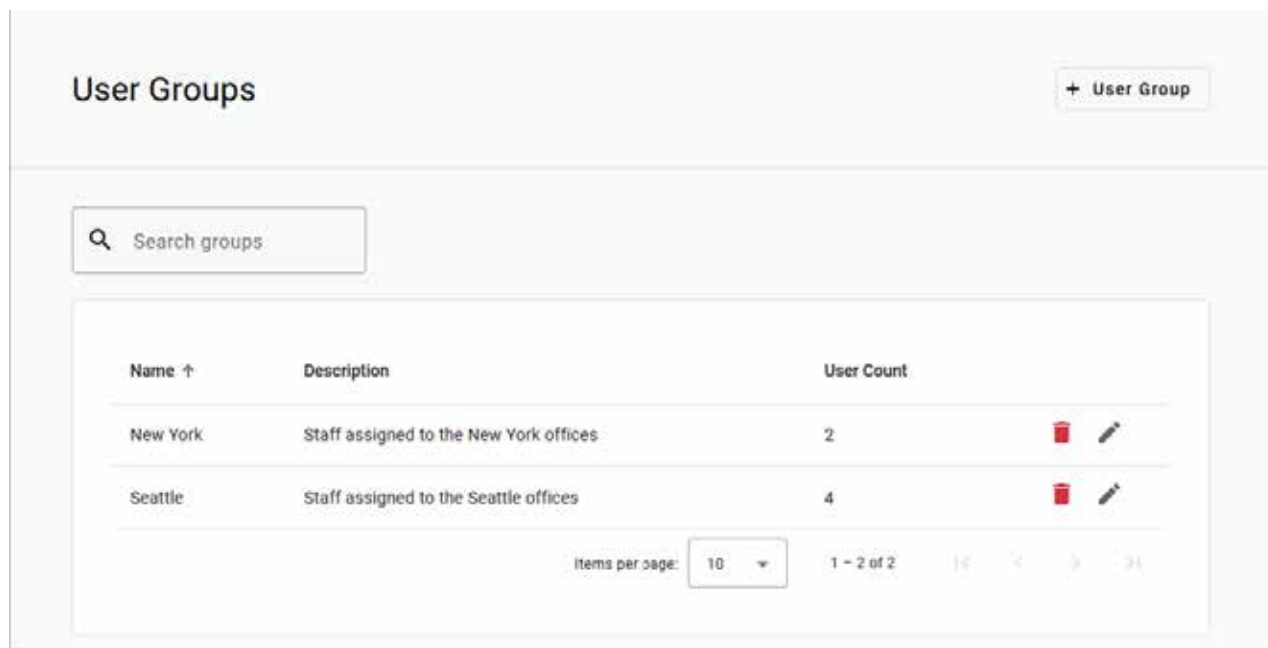
Field	Description
<b>Extension</b>	The dial-able extension assigned to the user on the account.
<b>Edit</b>	Select a user or click <b>Edit</b> to view and manage their settings in each tab: <a href="#">Calls</a> , <a href="#">Devices</a> , <a href="#">Settings</a> , and <a href="#">Voicemail</a> .

## User Groups

User Groups enable account end users to be segmented by location, department, skill-set, language, or any other criteria while continuing the use of extension-to-extension dialing between all users on the account.

The most common use case is to create groups based on locations and restrict admin access to a subset of users in order to maintain data privacy and complement an organizational structure. As such, [Admin end users](#) assigned to a group **can only access** other users (and phone numbers associated with those users) in the same group. However, admin end users who are not assigned to a group can access all users.

To see which group a user is assigned to, go to the [user's Settings](#) tab.



## Add a User Group

Users can only be assigned to one group, so it's best to create groups based on inclusive categories rather than narrow criteria. Only service provider users, Account Managers, and Super Admin end users can add and edit user groups.



1. Go to **Business Cloud Communications > User Groups**.
2. Click **[+ User Group]** in the top right.
3. Enter a name and brief description. The name will be displayed in user group filters throughout the account, so give it a name that will be easily recognized.
4. Search or scroll through the list of users and click **+ Add** to assign a user to the group.
  - Users already assigned to a group will not appear in the list.
  - To maintain full account access, Super Admin and Account Manager end users cannot be assigned to a group.
5. Once you've added all the necessary users, click **[Save]**.

### New User Group

Name\*
 
6/25

Description
 
36/100

### Group Members


Bob Johnson Jack Murphy Mickey Smith

### Add User

Name ↑	Email	User Type	
Chris Jenson	cjenson@demo.com	End User	+
Donna Noble	dnoble@demo.com	End User	+
Sarah Jane	sjane@demo.com	End User	+

## Add or Remove Users in a Group

Groups can be renamed, and users can be added or removed as needed. If a user needs to be moved to a different group, first remove the user from their current group, then assign them to the new one. To see which group a user is assigned, go to the [user's Settings](#) tab.

1. Go to **Account > User Groups**.
2. Locate the group and click the  **Edit** icon on the right.
  - To locate the group a user is in, enter the user's name in the search bar above the table.
3. Edit the name and description and add or remove users as needed.
4. Click **[Save]**.

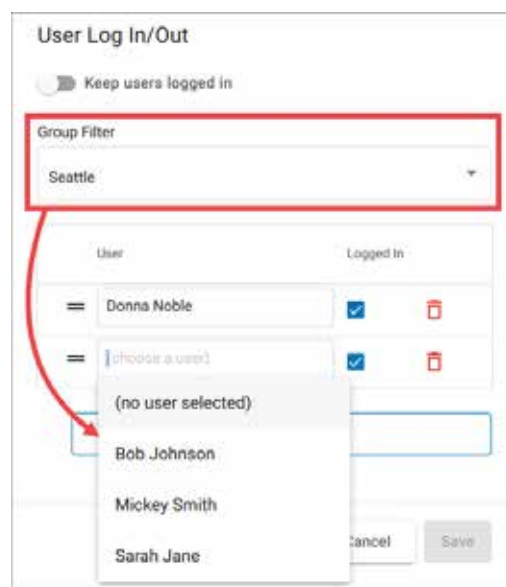
## Filter by Group

User Groups can be set as filter criteria to narrow a list of users or phone numbers or users to a particular group in the following features, so it's easier to find what you need:

- [Phone number search](#)
- [Phone number destinations](#)
- [Auto-Attendant Group user list](#)

For example, if creating an auto-attendant hunt group for the Seattle office, you can filter the user list by that group to avoid adding a user from the New York office.

Users that are not in a group and phone numbers that are not assigned to users in a group will be displayed in the list, even if the Group Filter is set.



The screenshot shows a web interface titled "User Log In/Out". At the top, there is a toggle switch labeled "Keep users logged in". Below this is a "Group Filter" dropdown menu, which is highlighted with a red rectangle and currently shows "Seattle". Below the filter is a table with columns "User" and "Logged In". The table contains two rows: one for "Donna Noble" with a checked "Logged In" box, and another for a dropdown menu labeled "[choose a user]" with a checked "Logged In" box. This dropdown menu is open, showing options: "(no user selected)", "Bob Johnson", "Mickey Smith", and "Sarah Jane". A red arrow points from the "Group Filter" dropdown to this user selection dropdown. At the bottom right of the table area are "Cancel" and "Save" buttons.



## Manage a User's Calls

While many settings can be configured at the account level, sometimes it's best to customize call screening and handling for specific users. To access these settings, go to **Account > Users** and open the **Calls** tab.


### Call Details

Call Details contains important call information such as the phone number and extension assigned to the user, which phone number and name displays as their caller ID, and if caller ID is enabled for outbound calls.



Field	Description
<b>Phone number</b>	The phone number routed to this user to contact them directly, if any. If a number has not yet been assigned, see <a href="#">Phone Number Management</a> for more information.
<b>Extension</b>	The dialable extension the user can be reached at on the account. This field is required.



Field	Description
<b>Caller ID</b>	<p>The phone number and name sent with outbound calls from this user which is displayed on the phone of the person being called. Start typing to filter the list. Users can choose the main account number, their phone number, or choose <i>None</i> to not send out any caller ID at all. This field is required.</p> <p>The same phone number can be assigned as caller ID for multiple devices, which can be ideal for in-office workers who are all in the same location. However, those users will be unable to customize their E911 address in the end user portal, since changing the address for one would change it for everyone.</p> <div>  <p><b>Note</b> It is important to choose a <b>number</b> here, even if you choose to disable caller ID (below). If this field is set to <i>None</i>, outbound calls — even to 911 — will be sent out as <i>Anonymous</i>, and the carrier may reject the call</p> </div>
<b>Enable Caller ID</b>	<p>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 portal or via <a href="#">star codes</a>.</p> <ul style="list-style-type: none"> <li>• <b>On:</b> Caller ID will be sent on all outbound calls.</li> <li>• <b>Off:</b> Caller ID will be sent as BLOCKED. The phone number selected in the <i>Caller ID</i> field will still be sent with calls to 911.</li> </ul>



### Caller ID for Softphone Users

For UC app and Microsoft Teams users, the phone number assigned as the user's caller ID (above) will provide the location to emergency services when a 911 call is placed from the app. A separate 911 callback number can be assigned to the user's physical devices.

For remote workers, we recommend setting the caller ID to the user's own phone number, so the E911 record (on that number) can be customized to their location and the user can modify it as-needed in the end user portal.

## Call Screening

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

The options for each category are *Allow*, *Allow with Priority Ring*, *Block*, *Block with Message*, *Forward*, and *Voicemail*.

To access these settings, go to **Users > Calls** tab.





These settings can also be managed by [dialing star codes](#).

### Call Screening

Screening forward number

Forwarded calls are routed to this number.

Anonymous callers

Block with message

Toll-free callers

Voicemail

All other callers

Allow

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



## Custom Screening

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

To add a custom rule, click **[Add Rule]**, then enter the phone number and choose an action from the menu. To create a rule for a group of phone numbers (numbers with the same area code and/or prefix), enter the first few digits of the phone number instead.



### Custom Screening Rule by Digit Pattern

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.

## Call Screening Actions

For each category, choose a screening action (behavior) from the menu.

Field	Description
<b>Allow</b>	Allow the caller to ring through.
<b>Allow with Priority Ring</b>	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
<b>Block</b>	Block the caller from ringing through. Callers hear a busy signal.
<b>Block with Message</b>	Block the call with a message: <ul style="list-style-type: none"> <li><b>Custom Callers:</b> "The number you have dialed is not accepting calls at this time."</li> <li><b>Toll-Free Callers:</b> "The number you have dialed is not accepting calls from toll-free numbers at this time."</li> <li><b>Anonymous Callers:</b> "The number you have dialed is not accepting calls from anonymous numbers."</li> </ul>



Field	Description
<b>Forward</b>	Forward the caller to a specific number. If you choose this option, you <b>must</b> enter the number those calls are forwarded to in the <i>Screening Forward Number</i> field.
<b>Voicemail</b>	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 to determine how incoming calls are handled, then set up schedules to change the call handling settings on different days or times.

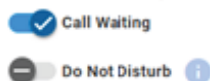


### Call Handling Schedules

See [Call Schedules](#) to create or assign a schedule which will determine how incoming calls are routed during a set time.

To access these settings, go to **Users > Calls** tab.

#### Call Handling



## Call Waiting

Call Waiting allows a second call 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.

Call Waiting can also be managed via star code. See [Call Waiting](#) for details.



### 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 your voicemail box.
- **Off:** Incoming calls follow your call handling settings.

DND can also be managed via star code. See [Do Not Disturb](#) for details.



### Voicemail Box

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

## Ring Phone

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

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

Ring Phone

Forward All

SIM Ring

Find Me

No answer

Send to voicemail

Timeout (seconds)\*

20

Busy

Busy tone

Out of service

Forward

Forwarding number

Description

Field	Description
<b>No answer</b>	Choose what happens to the call if it is unanswered after the number of seconds specified in the <i>Timeout</i> field below.
<b>Busy</b>	Choose what happens to the call when the device is busy (already in use and Call Waiting is not enabled).



Field	Description
<b>Out of service</b>	Choose what happens to the call when the device is not registering on the server.



### Ring Length

Each ring is approximately 6 seconds long: 2 second ring + 4 second pause.

## 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, extension or short dial that you enter here. Once a forwarding phone number, extension, or short dial is saved, this feature can be enabled or disabled from the device by [dialing Call Forwarding star codes](#).

1. Choose the forwarding type from the dropdown.
2. Enter the phone number, extension, or short dial.
3. Enter a description to identify the destination (optional).
4. Click **[Save]**.

Ring Phone
Forward All
SIM Ring
Find Me

Type  
Extension

Forward extension\*
Description

## Simultaneous Ring

Simultaneous Ring, or SIM Ring, rings 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.



Ring Phone

Forward All

SIM Ring

Find Me

Simultaneous Ring will ring all of the user's registered devices and the phone numbers listed below at the same time. The first to answer will take the call. If the call is not answered, it will follow the timeout action.

Phone Numbers

Add Number

Number

Timeout action

Send to voicemail

Timeout (seconds)\*

20

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

Find Me/Follow Me

Maintain an "at work" presence while you're working from home or on the go by delivering your calls to a sequence of destinations—including devices and phone numbers—ensuring you're reachable wherever you are, without giving out your cell phone number.

Find Me/Follow Me can be configured in any number of ways. For example, incoming calls can be routed to all your devices at once, or sequentially to any phone number, such as your cell phone, home phone, an auto-attendant, hunt group, queue, etc. You can even select another user on the account, so they can cover your calls if you're unavailable for a seamless customer experience.





Calls ring through each destination sequentially until it's answered or times out. If a call is unanswered by the end of the sequence, the caller is either sent to your voicemail box or hears a busy tone.

To set a schedule for Find Me/Follow Me, see [Call Schedules](#).

Ring Phone	Forward All	SIM Ring	Find Me
<p>Find Me/Follow Me will ring each destination sequentially. If the call is not answered by any of the destinations, the call will be sent to the timeout action. Calls that ring for longer than 120 seconds are subject to carrier disconnection.</p>			
Destination		Ring Duration (seconds)	Add Destination
<div> <input checked="" type="radio"/> Device         </div>			
=	<input type="radio"/> Phone number <input type="radio"/> User	Ring Devices <input type="text" value="20"/>	<input type="button" value="Add"/>
<div> <input type="radio"/> Device         </div>			
=	<input checked="" type="radio"/> Phone number <input type="radio"/> User	Phone number <input type="text" value="18015551234"/> <input type="text" value="20"/>	<input type="button" value="Add"/>
<div> <input type="radio"/> Device         </div>			
=	<input type="radio"/> Phone number <input checked="" type="radio"/> User	User <input type="text" value="Sarah Jane"/> <input type="text" value="20"/>	<input type="button" value="Add"/>
<div> <input checked="" type="radio"/> User         </div>			
<p>Timeout action</p> <p>Send to voicemail</p>			

1. In the user's **Calls** tab, scroll down to **Call Handling** and select the **Find Me** tab.
2. Click **[Add Destination]** on the right.
3. Select the destination type:
  - **Device:** Ring all of the user's devices simultaneously.
  - **Phone Number:** Enter any off-net phone number.phone number (on- or off-net).
  - **User:** Select a user on the account to receive your calls.



4. To the right of the destination, enter the number of seconds the call will ring before moving on to the next destination. Please note, calls that ring longer than 120 seconds may be disconnected by the carrier.
5. Repeat steps 2–4 to add another destination.
6. In the *Timeout action* field, choose what will happen to the call after all destinations have timed out:
  - Busy tone
  - Send to voicemail
7. Review the list of destinations to make sure they're correct and in the right order. Drag  to reorder a destination or click the  trash icon to delete it.
8. When you're done, scroll down and click **[Save]**.

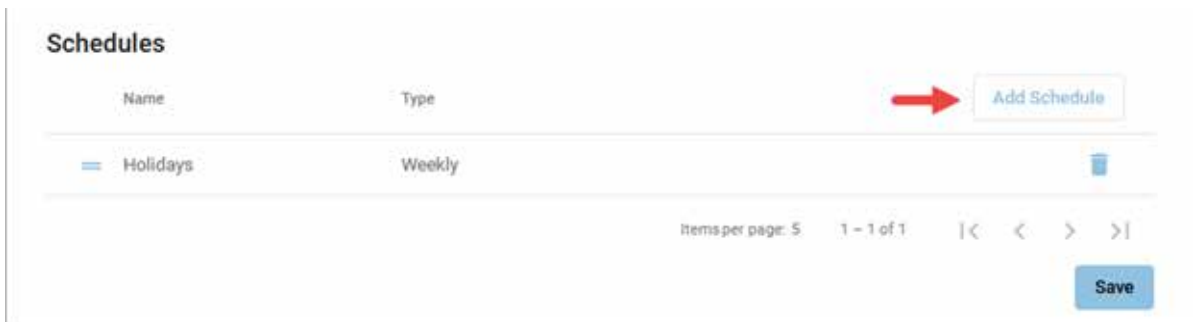
## Call Schedules

Schedules enable custom routing for your callers based on when they call, down to the very minute. Schedules follow your account's default time zone. The main Call Handling section will take effect *outside* of these scheduled hours.

To access this feature, sign in to the portal and scroll down to **Call Handling**. For Admin users, go to **Users > Calls** tab.

### Add Schedule

1. Click **[Add Schedule]**. The Scheduling window will open in a popup.



**Schedules**

Name	Type
Holidays	Weekly

Items per page: 5    1 - 1 of 1    |< < > >|

**Save**

2. Enter the name of the schedule.
3. 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.





**Scheduling**

Schedule name\*  
Christmas

Custom Weekly

Add Day

Date\* Start time\* End time\*

12/25/2023 08:00 AM 05:00 PM

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

**Scheduling**

Schedule name\*

Custom Weekly

	Start time	End time
Sun		
Mon		
Tue		
Wed		
Thu		
Fri		
Sat		


Cancel OK

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



**Call Handling**

☒ Call Waiting

☐ Do Not Disturb 

Ring Phone

Forward All

SIM Ring

Find Me

No answer

Send to voicemail

Timeout (seconds)\*

20

Busy

Busy tone

Out of service

Forward

Forwarding number

1. 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.

### Scheduling

Schedule name\*

Christmas


Custom

Weekly

Add Day

Date\*

12/25/2023



Start time\*


08:00 AM

End time\*

05:00 PM

### Call Handling

☒ Call Waiting

☐ Do Not Disturb 

Ring Phone

Forward All

SIM Ring

Find Me

Forwarding number

12085551234







Cancel

OK



## Manage a User's 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 is listed under **Referenced Devices**.

Calls	Devices	Settings	Voicemail <span>0</span>												
<div> <b>Device Lines</b> </div> <table> <tr> <th>Device Type</th><th>MAC Address</th><th>Line Number</th><th></th></tr> <tr> <td>Cisco 8851 (3PCC)</td><td>0010fa6e384a</td><td>1-10</td><td></td></tr> <tr> <td>Cisco 8851 (3PCC)</td><td>682c7bcabd6a</td><td>1-10</td><td></td></tr> </table>				Device Type	MAC Address	Line Number		Cisco 8851 (3PCC)	0010fa6e384a	1-10		Cisco 8851 (3PCC)	682c7bcabd6a	1-10	
Device Type	MAC Address	Line Number													
Cisco 8851 (3PCC)	0010fa6e384a	1-10													
Cisco 8851 (3PCC)	682c7bcabd6a	1-10													
<div> <b>Referenced Devices</b> </div> <table> <tr> <th>Device Type</th><th>MAC Address</th><th>Line Number</th><th>Device Owner</th></tr> <tr> <td>Grandstream GRP 2616</td><td>0010fa6e384b</td><td>2</td><td>Mickey Smith</td></tr> </table>				Device Type	MAC Address	Line Number	Device Owner	Grandstream GRP 2616	0010fa6e384b	2	Mickey Smith				
Device Type	MAC Address	Line Number	Device Owner												
Grandstream GRP 2616	0010fa6e384b	2	Mickey Smith												

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:

1. **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.
2. **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.
3. **Sidecar:** Configure a sidecar (key expansion module) on the device.

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

## UC Apps

The user's UC 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.



Legacy Cymbus apps are not referenced.

#### UC Apps

#	Device	OS	App Version	Call Enabled
1	MOBILE	android android33	0.2.2	✗
2	DESKTOP	WINDOWS win10.0.22621	1.0.0	✓
3	MOBILE	android android33	0.2.2	✓

## Manage a User's 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.

**See also:** [Reassign User Account](#)



## User Information

Calls
Devices
Settings
Voicemail 0

User Information

First name\*

Sarah

Last name\*

Jane

Language

English

Time zone\*

US/Mountain

Email\*

sarah.jane@demo.com

✓

Username\*

sarah.jane

User tags

Admin

Headquarters

Field	Description
<b>Name</b>	The first and last name of the user.
<b>Language</b>	<p>The user's default language, which applies to the web portal, telephone user interface (TUI) audio prompts, and system-generated emails.</p> <ul style="list-style-type: none"> <li>English</li> <li>French (Canadian)</li> <li>Spanish</li> <li>This is separate from the Language setting on the <b>Voicemail tab</b>, which applies specifically to that voicemail box. Please remember to set both.</li> </ul>
<b>Email</b>	A valid email address is required for every user who has access to the Voice Portal. This is where their <i>Welcome</i> and <i>Forgot Password</i> emails are sent.
<b>Username</b>	Enter a unique username which can be used to log in to the portal.



Field	Description
<b>Time zone</b>	The time zone displayed on the user's device and call records.
<b>User tags</b>	User tags are 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.

## License & User Type

The user's current license determines what features they have access to. To update a user's license, contact Customer Support for assistance.

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

## Voice Portal Access

**License & User Type**

License\*
 

Standard

☒ Voice Portal Access
 ☐ Admin Access

The 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 licenses. However, it is optional for users with a Standard license.

Option	Description
<b>Voice Portal Access</b>	<p>For users with a Standard license, choose whether to enable Voice Portal access:</p> <ul style="list-style-type: none"> <li>• <b>Disabled:</b> The user does not have access to the Voice Portal, and the <i>Email</i> field is optional.</li> <li>• <b>Enabled:</b> The user has access to the Voice Portal, and the <i>Email</i> and <i>Username</i> fields are required.</li> </ul>



Option	Description
<b>[Resend Welcome Email]</b>	Resend the <i>Welcome</i> email with the URL to their account portal, a link to create a password, and their UC app information.
<b>[Reset Password]</b>	Send the user an email with a link to reset their password.

## Admin Access

The level of access a user has in the portal depends on their user type: **End Users** can only manage their own account settings, while **Admin Users** can manage the users and settings on the account. See [Admin User Types](#) for details.

☒ Admin Access

Admin Types\*
 

Basic Admin

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

1. **Super Admins:** Create, edit, delete. They have full account-level permissions and can administer all other admin users.
2. **Advanced Admins:** Create, edit, delete (modified). They have the same level of access as Super Admins but cannot manage Super Admin users.
3. **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.
4. **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.

## Music On Hold

Select the custom Music On Hold file that will play for callers who are placed on hold by the user. If the file you're looking for isn't listed, it may need to be added to the [Media Files](#) library.

**Music On Hold**

Custom music on hold
 

Support - Thank you for holding.mp3

Save





## Call Recording

Call Recording is included in BCC Advanced and Professional license; however, it must be manually enabled and configured for each user who wants it. See [Enable Call Recording](#) for details.

Here you can see whether Call Recording is enabled, the recording type, and what additional settings are set. Recordings can only be accessed in the Dubber portal by the user they belong to. See [Manage Call Recordings](#) for details.

### Call Recording

[Manage Recordings](#)

☒ Enable call recording

Product

BCC Call Recording

Recording Type

Automatic

On Demand

☒ Allow user to pause recording

☐ Announce when call is being recorded

Save

## Calling Plans

This shows the calling plan(s) assigned to this user. 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 of the user's calling plans.

To add or modify a calling plan, contact Customer Support.

Calling plans		
Calling plan	Minutes Used	Total Minutes
Default Plan	0	Unlimited

## 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.



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. See ??? for more information.

**Account Codes**  
☒ Enable account codes  
☐ Override account level settings ⓘ  
☐ Require account codes for internal calls  
☐ Validate account codes when dialed  
Save

## Manage a User's 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 **Forward Voicemail to Email** and **Voicemail Transcription**.

Please note, as an Account Manager or Admin user, you can download only your own voicemail messages.

CallsDevicesSettings**Voicemail 0**

**Voicemail Box Details**  
Voicemail box name  
Clara Oswald  
Owner  
Clara Oswald  
Language  
English  
Reset PIN



Field	Description
<b>Voicemail box name</b>	The name of the voicemail box assigned to this user. To change the user's box, click the menu and select one from the list. To change the name of the voicemail box, go to <b>Account &gt; Voicemail</b> and search for the box.
<b>Owner</b>	The name(s) of the user(s) this voicemail box is assigned to.
<b>Language</b>	<p>The user's default language, which applies to the web portal, telephone user interface (TUI) audio prompts, and system-generated emails.</p> <ul style="list-style-type: none"> <li>• English</li> <li>• French (Canadian)</li> <li>• Spanish</li> </ul> <p>If this voicemail box is assigned to multiple users, changing this setting for one user will change it for the other users.</p> <p>This is separate from the Language setting in the user's Settings tab, which applies to the web portal UI, telephone user interface (TUI) audio prompts, and system-generated emails.</p>
<b>Reset PIN</b>	If the user cannot remember their voicemail box PIN to sign in, click <b>Reset PIN</b> to reset it for them. The default PIN is 1234. The first time the user logs in to their voicemail box in with the default PIN, they will be asked to set a new one.

Voicemail boxes can be managed at the user level (here) or in the Voicemail section of the portal. See [Voicemail Management](#) for more information about these settings.

## Admin User Types

Users who have been given Voice Portal access are able to view and manage their services in the portal. The level of access a user has depends on their user type: **Users** can only manage their own account settings, while **Admins** can manage the settings for other users on the account.

For organizational flexibility, there are five types of Admin users with varying levels of access:

Admin Type	Access Description
<b>Account Managers</b>	<p><b>Create, edit, delete</b></p> <p>Account Managers have full account-level permissions and can administer all other admin users. They do not have voice services of their own, so they are managed by your provider.</p>

Admin Type	Access Description
<b>Super Admins</b>	<b>Create, edit, delete</b> Super Admins have full account-level permissions and can administer all other admin users.
<b>Advanced Admins</b>	<b>Create, edit, delete (modified)</b> Advanced Admins have the same level of access as Super Admins but cannot manage certain settings for Super Admin users.
<b>Standard Admins</b>	<b>Edit and view</b> Standard Admins can manage most existing settings, but cannot create anything new. Most admins fit in this category.
<b>Basic Admins</b>	<b>View only</b> Basic Admins are often support representatives or other individuals who need to see what's going on in an account but don't need to make any changes. They can always escalate to a higher-level admin if needed.

Admin users can only manage the settings for users **at or below their own level**, which means a Standard Admin cannot change the settings for an Advanced or Super Admin. Additionally, only a Super Admin can assign admin access to an End User.

## Enable Admin Access

Only a Super Admin can enable Admin Access or modify the Admin Type for another user. See also [Manage a User's Settings](#).

1. In the Admin Portal, go to Account > Users.
2. Locate the user from the list and click **[ Edit ]**.
3. Under **License & User Type**, enable the **Voice Portal Access** and **Admin Access** toggles.
4. Select an *Admin Type* from the menu.
5. Click **[ Save ]**.



License & User Type

License Details

License\*
Professional

☒ Voice Portal Access

Resend Welcome Email
Reset Password

Last sent: Nov 29, 2023 1:28 PM

☒ Admin Access

Admin Types\*
Standard Admin

Save

## End User Feature Access

Business Cloud Communications users who have been given Voice Portal access (in [User > Settings](#)) are able to view and manage their services online. The level of access a user has in the portal depends on their user type: Users can manage only their own settings, while Account Managers and Admin users can manage the settings for other users on the account.

### Account Manager & Super Admin > Advanced Admin > Standard Admin > Basic Admin > User

Account Managers, which are end user admins who do not have their own voice services, have the same level of access as Super Admins, who have a higher level of access than Advanced Admins, who have a higher level of access than Standard Admins, and so on. Additionally, Admin users can only manage the settings for users **at or below their own level**, which means a Standard Admin cannot change the settings for an Advanced or Super Admin, for example.

For more information about these users, see [Admin User Types](#).

## Access Levels

The access hierarchy is as follows: **Create or Manage > Delete > Edit > View**. More permissive rights grant all lower rights (e.g. Edit means the user can also View; Create or Manage means the user can also Delete, Edit, and View).

The features each user type has access to in the Voice Portal are detailed below for Business Cloud Communications.



## Account Settings & Features

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
<b>Account Codes</b>	Create	Create	Create	Create	
<b>Call Groups</b>	Create	Create	Edit	View	
<b>Call History</b>	View	View	View	View	
<b>Call Park</b>	Create	Create	Edit	View	
<b>Emergency Notification Configuration<sup>a</sup></b>	Create	Create	View	View	
<b>Media Files</b>	Create	Create	Create	Create	
<b>Music On Hold</b>	Create	Create	Edit	View	

<sup>a</sup> If you don't have access to these settings, please contact your account administrator for assistance.

## Call Handling

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
<b>Call Schedules</b>	Edit	Edit	Edit	View	Edit
<b>Call Screening</b>	Edit	Edit	Edit	View	Edit
<b>Call Waiting</b>	Edit	Edit	Edit	View	Edit
<b>Do Not Disturb</b>	Edit	Edit	Edit	View	Edit
<b>E911 Address<sup>a</sup></b>	Edit	Edit	View	View	Edit
<b>Find Me/Follow Me</b>	Edit	Edit	Edit	View	Edit
<b>Forward All</b>	Edit	Edit	Edit	View	Edit
<b>Phone Number Destinations<sup>a</sup></b>	Edit	Edit	Edit	View	View
<b>Simultaneous Ring</b>	Edit	Edit	Edit	View	Edit
<b>Unanswered Call Handling</b>	Edit	Edit	Edit	View	Edit

<sup>a</sup> If you don't have access to these settings, please contact your account administrator for assistance.



## Devices

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Assigned Devices	View	View	View	View	View
UC Apps	View	View	View	View	View
MAC Address	View	View	View	View	
Device Type	View	View	View	View	View
Configuration Status	View	View	View	View	
Swap Device	Edit	Edit			
Bulk Line Configuration	Edit	Edit			
Line Configuration	Edit	Edit	View	View	
Sidecar	Edit	Edit	Edit	View	

## User Management

Contact your service provider to add or delete users.

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Account Codes	Create	Create	Create	Create	
Admin Type	Edit	View	View	View	
Calling Plan	View	View	View	View	
Caller ID (Enable/Disable)	Manage	Manage	Manage	View	Manage
Caller ID Name (CNAM)	View	View	View	View	View
Caller ID Number	Edit	Edit	Edit	View	View
Email Address	Edit	Edit	Edit	View	
Extension	View	View	View	View	



Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
<b>First and Last Name</b>	Edit	Edit	Edit	View	View
<b>License</b>	View	View	View	View	
<b>Language</b>	Edit	Edit	Edit	Edit	
<b>Reassign User<sup>a</sup></b>	Edit	Edit	Edit		
<b>Reset End User Password</b>	Manage	Manage	Manage	View	Manage
<b>Reset Voicemail PIN</b>	Manage	Manage	Manage	View	
<b>Time Zone</b>	Edit	Edit	Edit	View	
<b>User Groups</b>	Create	Create	Edit	View	
<b>User Tags</b>	Create	Create	Create	View	
<b>Username</b>	Edit	Edit	Edit	View	View

a.

## Voicemail

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
<b>Bypass Voicemail PIN</b>	Edit	Edit	View	View	
<b>Change Voicemail Box</b>	Edit	Edit	Edit	View	
<b>Custom Greetings</b>	Manage	Manage	Manage	Manage	Manage
<b>Forward to Email</b>	Manage	Manage	Manage	View	Manage
<b>Language</b>	Edit	Edit	Edit	Edit	
<b>Messages<sup>a</sup></b>	Manage	Manage	Manage	View	Manage
<b>Reset Voicemail PIN</b>	Manage	Manage	Manage	View	
<b>Voicemail Box Name</b>	Edit	Edit	Edit	View	

For security reasons, you can only download your own voicemail messages in the portal. However, Admin users can view, save, and delete another user's messages.





## Auto-Attendant

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
<b>Auto-Attendants<sup>a</sup></b>	Create	Create	Edit	View	
<b>Name</b>	Edit	Edit	Edit	View	
<b>Assigned Phone Number</b>	Create	Create	Edit	View	
<b>Status</b>	View	View	View	View	

a.

## Specialty Lines

Account Managers and Admin end users can view their Specialty Lines in the , as shown below, but must contact their service provider to add a line, make any changes to the line, or assign a phone number. Users do not have any access. As an Account Manager, you can view the Specialty Lines on the account, as shown below, but contact your service provider to add a line, make any changes to a line, or assign a phone number.

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
<b>Line Name</b>	View	View	View	View	
<b>Phone Number</b>	View	View	View	View	
<b>Device MAC Address</b>	View	View	View	View	
<b>Device Registration Status</b>	Refresh	Refresh	Refresh	Refresh	
<b>Device Port Number</b>	View	View	View	View	

## Reassign User Account

This feature allows you to reassign a 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 a 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:

- Calling plan assignments (not minutes used)
- Product tier
- Voice Portal access
- End user role (Admin or Limited)
- Caller ID phone number and settings
- Device lines assigned to the user
- Phone numbers routing to the user
- Cymbus UC device lines
- Extension number
- Language
- Time zone
- Shared lines, speed dials, and BLFs owned by or reference the user
- Paging and Pick Up Groups to which the user belongs
- Queues to which the user belongs
- IVR/Auto-Attendant references that point to the user, their device lines, or their voicemail box
- SIP trunk overflow routing (pointed at the user or their voicemail)



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

### Reassign User

If you reassign the user, the current user will be removed from the system, and their account settings will be reassigned to a new users. This process cannot be reversed.

**Reassign**

4. 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 **[Continue]**.

### Reassign User Account

Enter the new user's information to reassign the account

First name \*

Donna

Last name \*

Noble

Must change first or last name

Username \*

d.noble

Email \*

doctordonna@demo.com

✓

☐ Block the welcome email

Cancel

Save

5. 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]**.

### Reassign user account?

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

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

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

Cancel
Save

1. 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.



#### Note

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

## End User Access

**Admin end users**, including Account Managers, can reassign users on their account in the end user portal, but you'll need to give them permission first.

1. Go to **Account > Settings > User Access**.
2. Scroll to **Voice Portal Permissions**.
3. For *Reassign end users*, select **Allow editing**.
4. Click **[Save]**.



# Voicemail Management

A user's voicemail box can be managed in the user's Voicemail tab. You can also go to the **Voice-mail** section to view all the voicemail boxes on the account, listed by name. The settings for individual voicemail boxes are the same in either location.

Voicemail		
<div> <input type="text" value="Search"/> <span>Bypass Voicemail PIN</span> </div>		
Name	Owners	Voicemails (New/Total)
Chris Jenson		1/3
Donna Noble	Donna Noble	2/10
Bob Johnson	Bob Johnson	0/0



## Voicemail Access

Voicemail messages and greetings can also be managed by dialing in to the voicemail box. See [Voicemail Access](#) for details.



## Bypass Voicemail PIN

When *Bypass Voicemail PIN* is enabled, users accessing their voicemail box from their own phone number are automatically authenticated—no PIN required. For the security of all users, a PIN is always required to access a voicemail box from an external phone number and to change the PIN from the voicemail menu.

To ensure all users' messages remain protected, a PIN is always required to access a voicemail box from an external phone number and to change the PIN from the voicemail menu.

To enable this feature for the account, go to **Account > Voicemail** and toggle on *Bypass Voicemail PIN*. If you don't have access to this setting, contact a higher-level admin for assistance.



## Voicemail Box Details

**Voicemail Box Details**

Voicemail box name

Donna Noble

Owner

Donna Noble

Language

English

Reset PIN

Field	Description
<b>Voicemail Box Name</b>	Enter or edit the name of the voicemail box. In the <b>User &gt; Voicemail</b> tab, you can choose which voicemail box to assign to a particular user.
<b>Owner</b>	The name of the user(s) this voicemail box is assigned to. This is not an editable field.
<b>Language</b>	<p>The language used for the voicemail menu audio prompts and forwarded <b>Voicemail to Email</b> messages:</p> <ul style="list-style-type: none"> <li>English</li> <li>French (Canadian)</li> <li>Spanish</li> </ul> <p>If this voicemail box is assigned to multiple users, changing this setting for one user will change it for the other users.</p> <p>This is separate from the Language setting in the user's Settings tab, which applies to the web portal UI, telephone user interface (TUI) audio prompts, and system-generated emails. Remember to set both.</p>
<b>Reset PIN</b>	<p>If the user cannot remember their voicemail PIN, click here to reset it.</p> <p>The next time the user calls in to their voicemail box, they will log in with the default PIN (1234) and be prompted to set a new one.</p>




## Voicemail Box Greetings


Upload and manage 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 .mp3, .ogg, and .wav files that are less than 10MB.

### Voicemail Greetings

#### Basic Greeting

  
Drop file or click to browse  
Accepted files: WAV, MP3, and OGG files under 10MB

#### Personal Name


  
Drop file or click to browse  
Accepted files: WAV, MP3, and OGG files under 10MB

---


### Custom Greetings

Custom voicemail greetings override Basic and Personal Name greetings.

#### Busy Greeting

  
Drop file or click to browse  
Accepted files: WAV, MP3, and OGG files under 10MB







#### No Answer Greeting

  
Drop file or click to browse  
Accepted files: WAV, MP3, and OGG files under 10MB






## Messages

Voicemail messages are stored in the voicemail box, which can be accessed here or by dialing in (see [Voicemail Access](#)). Messages can be sorted by Time/Date, Length, and Status (New or Saved).

Messages				<a href="#">Delete All</a>	
Date ↓	Caller	Length	Status		
Jul 14, 2022, 5:37 PM	14842858432	40 seconds	New		
Jun 16, 2022, 10:26 AM	12605159136	8 seconds	New		
May 10, 2022, 12:50 PM	13863199735	37 seconds	New		
Items per page: 20    1 – 3 of 3     < < > >					

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

-  **DOWNLOAD:** Save a copy of the message to your computer as an .mp3 file.
-  **SAVE:** Change the status of the message to *Saved*.
-  **DELETE:** Delete this message from the box. To delete all messages at once, click **[Delete All]** in the top right.



### Message Waiting Indicator

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





## Message Settings

### Forward Voicemail to Email

All voicemail boxes have the option to forward voicemail messages to one or more email addresses. When a message is left on your voicemail box, an email notification is sent to the specified email address(es) with the message recording attached as an .mp3 file.

**Message Settings**  
☒ Forward voicemail to email  
☐ Save copy in voicemail box  
☐ Enable voicemail transcription  

Email addresses

Save

1. In the voicemail box, scroll down to **Message Settings**.
2. Check the box for *Forward voicemail messages*.
3. Optionally, check the box for *Keep a copy in voicemail box*.
  - When checked, the message waiting indicator (MWI) on the user's device will stay on until the user listens to or deletes the message from their device or the Voice Portal.
  - If unchecked, voicemail messages are removed from the voicemail box when forwarded to email.
4. Optionally, check the box for "*Enable Transcription of Messages*".
5. In the field below, enter one or more email addresses in the field below separated by commas.
6. Click **[Save]**.



## Example Email

Hi Ashley,

You got a new voicemail. Here are the details:

From: [REDACTED] ASHLEY / [REDACTED]

Time: Friday, November 8, 2024 at 10:43 AM

Duration: 00:43

See attachment.



### Note

Forwarded voicemails are sent from noreply@cymbus.com. Please remember to whitelist this address so the emails can be delivered to your inbox.

## Voicemail Transcription

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription, available only on Business Cloud Communications, takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an .mp3 file (depending on if you also have **forwarding** enabled).

With voicemail transcription, you can:

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



### Message Settings

☒ Forward voicemail to email

☐ Save copy in voicemail box

☒ Enable voicemail transcription

Email addresses
 

s.jane@demo.com

Save

1. In the voicemail box, scroll down to **Message Settings**.
2. Check the box for *Enable Transcription*.
3. Optionally, check the box for *Forward Voicemail to Email* to email an .mp3 of the message and *Keep a copy in voicemail box* if you want to save a copy of the message in the voicemail box when it's forwarded.
4. In the field below, enter one or more email addresses in the field below separated by commas (required).
5. Click **[Save]**.

Voicemail messages will be transcribed and sent to the email address(es) indicated here. If *Forward Voicemail to Email* is also enabled, an .mp3 of the message will be attached to the email.

## Example Email

Hi Mickey,

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

From: Kevin O / 1000

Time: Tuesday, October 19, 2021 at 11:56 AM

Duration: 00:40

Transcription:

Mickey, this is a test of our voice transcription service on business cloud communications. All you have to do to test it is to call a number that's registered on the platform and leave a message and it will send you an email. I hope you're having a good day. Bye.

See attachment.

Thanks,





### **US English**

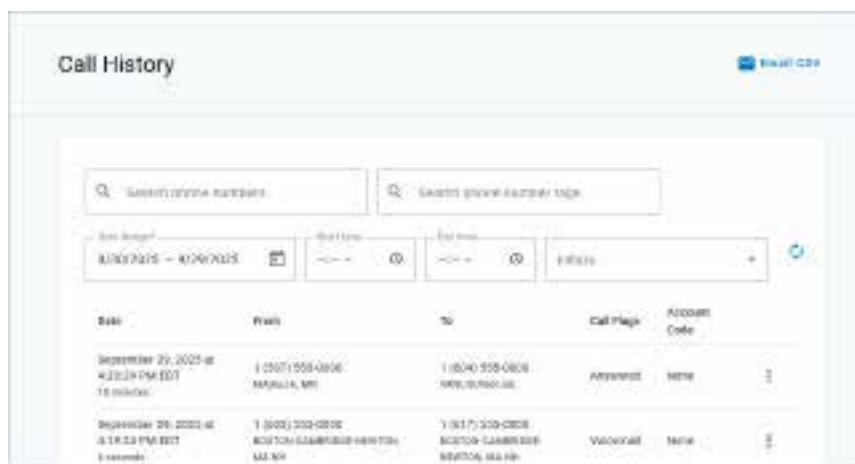
Voicemails can only be transcribed from US English. If a message cannot be transcribed for any reason, such as poor audio quality, an email will still be sent with a message saying, "Message could not be transcribed."



# 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), where the call terminated (To), the call flag for inbound calls, and the account code used.

At the top right of the page, the current record list can be emailed as a .csv file. See [Call History Report](#) for details.



The screenshot shows the 'Call History' portal. At the top, there are two search bars: 'Search by phone number' and 'Search by phone number type'. Below these are filters for 'Date Range' (set to 8/23/2025 - 8/24/2025), 'Direction' (set to Inbound), and 'Call Type' (set to All). A table of call records is displayed below the filters.

Date	From	To	Call Type	Account Code
September 29, 2025 at 4:22:19 PM EDT 18 seconds	1 (507) 555-0808 MARSH, MI	1 (800) 555-0808 NEW, WISCONSIN	Answered	None
September 29, 2025 at 4:18:23 PM EDT 5 seconds	1 (800) 555-0808 BOSTON-CAMBRIDGE MA, MA	1 (817) 555-0808 BOSTON-CAMBRIDGE MA, MA	VoiceMail	None



## CDR Storage


The FCC requires that all carriers keep call detail records for a period of 18 months. While some states defer to the FCC, other states have retention rates that exceed the federal requirement. To be safe, the portal displays call records for the past 18 months, but our database stores call records for a minimum of 3 years.

## Apply Call Filters

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


- **Search phone numbers:** Search for a specific phone number or extension. Results automatically populate after the first three digits are entered.
- **Date Range:** 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 displayed.
- **Start/End Time:** Choose the time range, between 12:00 AM and 11:59 PM, based on the account's time zone settings.



- **Filters:** Filter the call records by Direction, Number, Call Flags, and/or Call Category. These filters allow you to identify patterns in the calls, such as how many calls are being sent to voicemail, what calls are being missed, etc.
- **Reset:** When you're finished with your search, click  **Reset Filters** to remove any parameters and display all calls.



# Select 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.

April 11, 2025 at 1:00:11 PM EDT 0 seconds	1 (408) 555-1234 SAN JOSE-SUNNYVALE-SANTA CLARA, CA	1 (469) 555-4321 DALLAS-FORT WORTH-ARLINGTON, TX	Missed	None	
April 11, 2025 at 1:00:02 PM EDT 2 minutes	1 (778) 555-1234 VANCOUVER, BC	1 (515) 555-0987 AMES, IA	None	No	<div><div>Block Number</div><div>Details</div></div>
April 11, 2025 at 12:56:30 PM EDT 2 minutes	1 (778) 555-7654 VANCOUVER, BC	1 (515) 555-6543 AMES, IA	None	None	

# Block Number

If necessary, you can block an inbound caller from making additional calls to either the user or the account. Callers to auto attendants cannot be blocked from the call history.

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.


## Details

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

Field	Description
<b>Time and Length</b>	When the call started, connected, and ended, what duration of the call was billed, and the actual length of the call.
<b>Cost</b>	The cost of the call, if the call was within the calling plan, and the rate per minute from the plan.
<b>Origination</b>	The number and location of the originating call, if the call came from on or off the network, and any tag that's been assigned to the phone number.
<b>Termination</b>	The number and location of the user who received the call, if they were on or off the network, any tag that's been assigned to the phone number, and how the call was flagged.

## 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 for offline use.

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






### Email Address

The link to download the Call History report is sent to the email address on your user account. If your email address is not linked to your account yet, you can add it in **Users > Settings**, or contact an account administrator for assistance.

## Call History Report

Call History report data can be filtered and exported into a .csv file for offline use.

1. At the top right of the page, click  **Email CSV**. A banner displays on the page to indicate that your report is being generated.
2. In the account, go to **Call History**.
3. Apply the appropriate filters to locate the data you need.
4. At the top right of the page, click **[Email CSV]**. A banner is displayed on the page to indicate that your report is being generated.
5. When the file is ready, an email with a link to download the report is sent to the email address in your settings. The link **expires in 7 days** and can only be used once.

Here's an example of what it looks like:







### Email Address

The link to download the Call History report is sent to the email address on your user account. If your email address is not linked to your account yet, you can add it in **Users > Settings**, or contact an account administrator for assistance.

## Report Fields

This list includes all the fields available in the Call History report which can be emailed (exported) from the portal as a .csv file. Each line in the file represents a call.

#	Field Name	Type	Description
A	AccountBillableAbbrRCName	string	Abbreviated name of the rate center of the account billable phone number.
B	AccountBillableCityName	string	Name of the city of the address associated with the phone number.
C	AccountBillableLocation	string	MSA (metropolitan statistical area) of the address associated with the number.
D	AccountBillableNumber	string	Phone number on the account.
E	AccountBillableState	string	State of the address associated with the rate center.
F	AccountCode	string	Account code tagged on this call.
G	AccountNumber	string	Client-assigned account number of the account to which the call is billed.



#	Field Name	Type	Description
H	AcctId	string	Unique ID of account to which the call is billed.
I	ActualCallLengthSeconds	numeric	Length, in seconds, of the call from connect to end.
J	BillCallLengthSeconds	bigint	Length, in seconds, of the call from connect to end rounded according to applied calling plan product.
K	BillingCode	string	Unique code to identify the partition responsible for billing.
L	CallFlagType	string	Indicates if the call was answered on a device, and if not answered on a device, how did it terminate. <ul style="list-style-type: none"> <li>• Answered</li> <li>• Busy</li> <li>• Forwarded</li> <li>• Missed</li> <li>• Voicemail</li> </ul>
M	CallPickupFromId	string	Indicates the object that picked up the call.
N	CallPickupById	string	Indicates the object from which the call was picked.
O	CallType	string	Inbound or outbound.
P	CallingPlanProductId	string	Unique ID of the calling plan product with which the call was rated.
Q	CallingPlanProductName	string	Name of the calling plan with which the call was rated.
R	ConnectTime	date/time	Date and time the call was connected. Billing starts at this time.
S	Cost	double	Rated value of call, according to calling plan product.
T	DialedNumber	string	Digits originally dialed to start the call.



#	Field Name	Type	Description
U	DisconnectType	string	Indication of which party disconnected the call; "HangUp" indicates the origin, "HangUpOther" indicates termination.
V	EndTime	date/time	Date and time the call ended.
W	ForwardingNumber	string	Phone number the call was forwarded to.
X	ForwardingNumberAbbrRCName	string	Abbreviated name of the rate center of the phone number the call was forwarded to.
Y	ForwardingNumberCityName	string	Associated rate center city name of the phone number the call was forwarded to.
Z	ForwardingNumberLocation	string	MSA (metropolitan statistical area) of the rate center of the number.
AA	ForwardingNumberState	string	State of the associated rate center of the phone number the call was forwarded to.
AB	Id	string	Unique string of characters assigned to each call within the Alianza system.
AC	IdentityAttestLevel	string	STIR/SHAKEN field. A = fully attested or trusted source, B = partially attested, or C = not attested (potential spam).
AD	IdentityOriginationId	string	STIR/SHAKEN field. A unique identifier used to identify the source of the call.
AE	IdentitySignOrganization	string	STIR/SHAKEN field. The code for the carrier that performed the signing.
AF	IdentitySignSPCode	string	STIR/SHAKEN field. The code assigned to the service provider that signed the call.
AG	InPlan	boolean	True/False indicator of whether the call was considered "in plan."
AH	LegType	string	Indication of direction of call: <ul style="list-style-type: none"> <li>• Origination</li> <li>• Termination</li> <li>• Forward</li> </ul>



#	Field Name	Type	Description
AI	MeanOpinionScoreAverage	numeric	Average MOS for the call.
AJ	MeanOpinionScores	list<string>	List of MOS scores associated with each SIP call leg.
AK	MediaServerType	string	Indication of what media service was used by call, if any.
AL	MetroServiceArea		<i>Reserved for future use</i>
AM	OrigAbbrRCName	string	Abbreviated name of the rate center of the phone number that made the call.
AN	OrigCallCategory	string	Type of call that was made.
AO	OrigCarrier	string	Name of the carrier, if applicable.
AP	OrigCityName	string	City for the associated rate center for the phone number that made the call.
AQ	OrigLocation	string	MSA (metropolitan statistical area) of the rate center for the phone number that made the call.
AR	OrigNumber	numeric	Phone number that made the call.
AS	OrigState	string	State of the associated rate center for the phone number that made the call.
AT	PartitionId	string	Unique ID of client partition to which the associated account belongs.
AU	RateLocalFromNumber		
AV	RatePerMinute	double	Per-minute rate for call, according to the calling plan assigned to the user making the call.



#	Field Name	Type	Description
AW	RateType		Indication of why the call was rated the way that it was. <ul style="list-style-type: none"> <li>• Local</li> <li>• OnPlanMinutes</li> <li>• OnPlanRated</li> <li>• OffPlanRated</li> <li>• Free</li> <li>• TollFree</li> <li>• 411</li> <li>• Operator</li> <li>• Local requires the calling plan to be set up with Unlimited Local, and the calls are rated at \$0.</li> </ul>
AX	ReferenceId	string	Unique ID of the acting or responsible party on the associated account to which the call was billed.
AY	ReferenceName	string	Name of acting or responsible party.
AZ	ReferenceType	string	Type of object to which the call is billed. <ul style="list-style-type: none"> <li>• SIP_TRUNK</li> <li>• END_USER</li> <li>• ACCOUNT</li> <li>• BUSINESS_LINE</li> </ul>
BA	SessionId	string	Internal softswitch session ID.
BB	SipCallIds	set<string>	List of SIP callIds associated with the call.
BC	StartTime	date/time	Date and time the call started ringing.
BD	TermAbbrRCName	string	Abbreviated name of the rate center of the phone number that received the call.
BE	TermCallCategory	string	Type of call that was made.



#	Field Name	Type	Description
BF	TermCarrier	string	Name of the carrier, if applicable.
BG	TermCityName	string	Associated rate center city name of the phone number that received the call.
BH	TermLocation	string	MSA (metropolitan statistical area) of the rate center of the phone number that received the call.
BI	TermNumber	string	Phone number that received the call.
BJ	TermState	string	State of the associated rate center of the phone number that received the call.
BK	OrigCnam	string	Originating caller's name.
BL	TermCnam	string	Terminating caller's name.
BM	ForwardingCnam	string	Forwarding caller's name.
BN	VerStat	string	STIR/SHAKEN field. String from the <i>verificationResponse</i> containing: <ul style="list-style-type: none"> <li>• <b>TN-Validation-Passed.</b> The number passed the validation.</li> <li>• <b>TN-Validation-Failed.</b> The number failed the validation.</li> <li>• <b>No-TN-Validation.</b> No number validation was performed.</li> </ul>



#	Field Name	Type	Description
BO	VerStatReason	string	STIR/SHAKEN field. String of text from the <i>verificationResponse</i> message used in case of failed verification. <ul style="list-style-type: none"> <li>BAD_IDENTITY_INFO</li> <li>CLAIM_TO_SIP_MISMATCH</li> <li>INVALID_IDENTITY_HEADER</li> <li>MALFORMED_IDENTITY_HEADER</li> <li>STALE_DATE</li> <li>UNSUPPORTED_CREDENTIAL</li> <li>UNSUPPORTED_PASSPORT_FORMAT</li> </ul>
BP	CorrelationData		
BQ	ApplicationData		
BR	OrigNumberTags	string	Tag(s) assigned to the number on an out-bound call.
BS	TermNumberTags	string	Tag(s) assigned to the number on an in-bound call.



# Inventory Dashboard

The Alianza One platform consists of a suite of products organized into families with billable features identified as licenses.

The inventory dashboard, viewable only to Account Managers and Super Admin users, displays a read-only view of the products, licenses, and add-ons in an account.

Each product is organized by name, the account status (Active, Suspended, or Disabled), the date the status was last updated, and the licenses (any packages and/or add-ons) that are included.

For example, if an account has the Business Cloud Communications product with Microsoft Teams licenses, the licenses section will indicate how many users have Standard, Advanced, or Professional licenses and how many Microsoft Teams licenses are in use.

Inventory		
<div><div>Product</div><div><b>Business Cloud Communications</b></div><div>Active • May 30th, 2024</div></div> <div><div>Licenses</div><div>Microsoft Teams Professional</div><div>3 13</div><div>Standard</div><div>1</div></div>	<div><div>Product</div><div><b>Contact Center</b></div><div>Active • May 1st, 2024</div></div> <div><div>Licenses</div><div>Gold Platinum</div><div>6 3</div></div>	<div><div>Product</div><div><b>Virtual Fax</b></div><div>Active • May 1st, 2024</div></div> <div><div>Licenses</div><div>Virtual Fax</div><div>1</div></div>





# Account Settings

## Call Park

Call Park combines the elements of transferring a call and putting it on hold. Rather than having a caller try again later, or sending them to voicemail, the user can dial a star code to transfer the call to a virtual parking spot where the caller will remain on hold until the person they are calling becomes available.

## Use Call Park

There are two ways to use Call Park:

1. **Star code.** To park and retrieve calls via star code, see [Call Park Star Codes](#).
2. **Feature Key.** To assign a parking spot to a line on a user's device, see [Call Park Line Key](#).



### Caller ID for Parked Calls

When a call is retrieved from a parking spot, the caller ID displays the original calling name and number, if available. If caller ID is not available, it is presented as *Not Available* or *Anonymous*. On Cloud PBX, when a call is retrieved from a parking spot, the caller ID displays the call park number.

## Manage Parking Spots

To manage the parking spots on an account, go to **Settings > Calls**.

Call Park

+ Add Parking Spot

☒ Ring back user after timeout

Timeout (seconds)\*

Name ↑

Parking Spot 1		
Parking Spot 2		

Save




## Auto Ringback

Auto Ringback prevents the parked caller from getting stuck in limbo. When a call is parked using a star code and is left in the parking spot for a specified amount of time, the system will automatically return the caller to the user who parked it. Auto Ringback is enabled with a recall timer of 180 seconds by default, but it can be disabled or modified at any time.

1. Go to **Account > Settings > Calls**.
2. Scroll down to Call Park.
3. Toggle on *Ring back user after timeout*.
4. Enter the number of seconds after which the parked call will ring back the user who parked it.
5. Click **[Save]**.

## Add Parking Spot

1. Go to **Account > Settings > Calls**.
2. Scroll down to Call Park and do one of the following:
  - **New:** Click **[+ Add Parking Spot]**.
  - **Edit:** Click the  pencil icon on the right.
3. Enter a name for the parking spot.
4. Click **[Save]** to implement your changes.

## Delete Parking Spot

To delete a parking spot, click the trash  icon on the right, then click **[Delete]** to confirm.

## Music On Hold

On hold music and messaging is a proven marketing tool for any company. Silence, bad music, or playing the radio is a wasted opportunity to create a positive customer experience. With the right audio, callers are less likely to hang up and are more likely to be in a good mood. See [Music On Hold Best Practices](#) for tips.

## Set Up Music On Hold

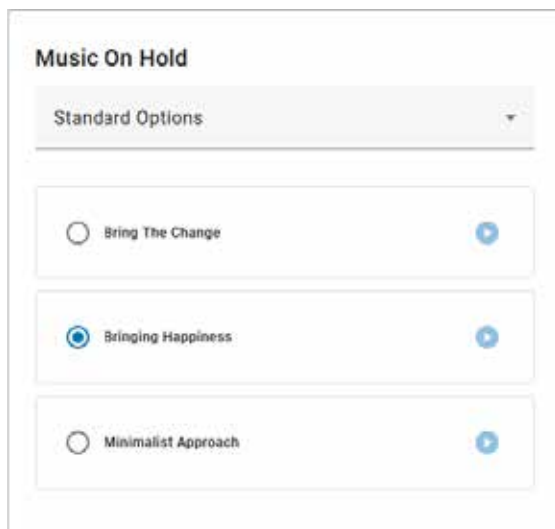
Music On Hold can be configured in the following locations:

### Account Call Settings

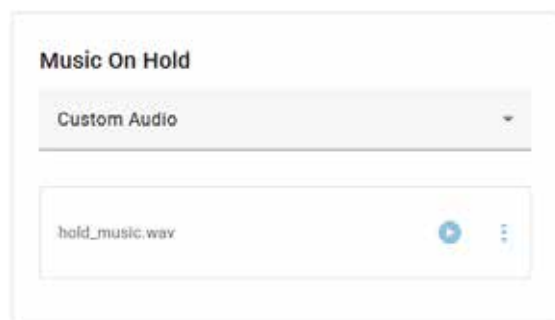
Music On Hold set at the account level is used for the entire account. Callers will hear this audio file when they are placed on hold, unless the auto-attendant, hunt group, queue, or user who placed the call on hold has been assigned a custom audio file.



1. Go to **Account > Settings > Calls**.
2. Under Music On Hold, select a setting from the drop-down menu to apply it to the account:
  - **None (Intermittent Beep).** The caller will hear two short beeps every 15 seconds.
  - **Standard Options.** Choose from one of three looped, copyright-free audio files.



- **Custom Audio.** Select a Music On Hold file from the Media Files library. See [Upload Media Files](#) for details.



3. The new setting will be applied to the account *immediately* — no saving necessary.




### Listen to the audio file in your browser

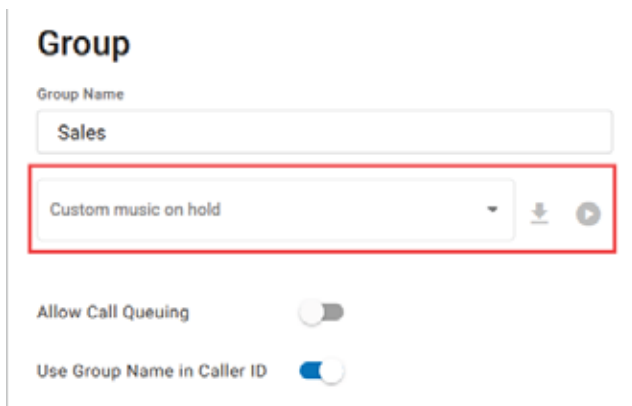
To hear what it sounds like, click **play** on the right or call a phone number on your account and ask to be placed on hold.

## Call Groups

Assign a Music On Hold file to a hunt group or queue to customize the caller experience. Callers will hear the hold music when they are placed on hold in a hunt group or reach a queue, whether directly (phone number or extension) or via an auto-attendant. See [Hunt Groups](#) and [Queues](#) for details.




1. Go to Call Groups > Hunt Groups or Queues.
2. Select the group you want to modify.
3. Scroll down to *Custom music on hold* and select a file from the [Media Files](#) library.
4. To be sure you've got the right file, click  **Play** on the right.
5. Click **[Save]**.



**Group**

Group Name

Sales

Custom music on hold 

Allow Call Queuing ☐

Use Group Name in Caller ID ☒

## User Settings

Assign Music On Hold to individual users to customize the experience for callers who are placed on hold by the user. This setting is optional. If the user does not have their own, callers will hear the hold music assigned to the account. See [Manage a User's Settings](#) for details.

1. Go to **Users** and select the user you want to modify.
2. Open the **Settings** tab and scroll down to **Music On Hold**.
3. Click the menu and select a file from the [Media Files](#) library.
4. Click **[Save]**.



**Music On Hold**

Custom music on hold

Support - Thank you for holding.mp3

**Save**

## Music On Hold Best Practices

According to [CallTrackingMetrics](#), more than **80 percent** of people are put on hold every time they contact a business. Your end users now have the opportunity to leverage Music On Hold to influence their customers' experiences for the better.



## The Benefits of Music On Hold Marketing

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



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



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



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

## Tips for the Perfect Music On Hold

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

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

- **Be on-brand.** Choose a track or song that represents the feel of your business.
- **Add useful messaging.** Record custom voice tracks to let callers know how to reach a specific extension or department, announce a new feature, notify of upcoming sales, etc.
- **Keep it simple.** Avoid repetitive and dynamically variable music, which can cause the on-hold sound to cut in and out.
- **Avoid lyrics.** Phone systems aren't designed to handle lyrics, so it's more likely to sound off to your callers. Also, you can't include a branded message over the top.
- **Don't apologize.** Messages like "Your call is important to us, and we will answer your call as soon as possible," are impersonal and interrupt the music, making callers think their call is getting answered.

## Finding Affordable, Legal Music

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

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



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



### Recommendation

Not just as an ironic song title for callers, the Warm category at [Melody Loops](#) offers a file called “Your Time Has Come” which has a positive, uplifting tone.

## Sound Quality

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

When an audio file is uploaded to Media Files for Music On Hold, Alianza automatically converts and optimizes it for use by the phone system. You can upload any .wav, .mp3, or .ogg audio file under 15 MB (that you have the rights to), but the conversion process will result in some degree of quality loss.



### Recommendation

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

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

## 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.



## Emergency Notifications

### Emergency Call Notifications

Required for all multi-line telephone systems (MLTS) by FCC law [\[E\]](#)

☐ Alternative solution in use

Enter the email addresses and/or SMS numbers for users at a central location (front desk, security, administrators, etc.) who will be alerted when a 911 call is placed.

Email

office@telecomdemo.com

john.snaw@telecomdemo.com

rtylee@telecomdemo.com

SMS

1 (305) 555-0459

1 (801) 555-0995

Reset Save

### Testing Notifications

There are two ways to make sure notifications can be received:

- Ask the end user to dial 933
- Click the button below

A test notification will be sent to the email address(es) and SMS number(s). Check the log below for details.

Test Notifications



### 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 Emergency 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. In the portal, 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 and click **[Save]**.



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.

## Test Notifications

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

- Click **[Test Notifications]** to send notifications to the email address(es) and SMS number(s) configured for the account.
- 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. The end user is expected to contact their service provider if the information is incorrect or any changes are needed.

The end user should confirm that all recipients have received the notifications and that they understand its purpose.

## Example Texts

SMS notifications include the type of message and caller details.

**911 NOTIFICATION: Shirley Bennent (801-489-7891) 20MAY20 6:15 PM MST Location: 1242 N 400 W, Suite 980, Pleasant Grove UT 84023**

**933 NOTIFICATION: Shirley Bennent (801-489-7891) 20MAY20 6:15 PM MST Location: 1242 N 400 W, Suite 980, Pleasant Grove UT 84023**

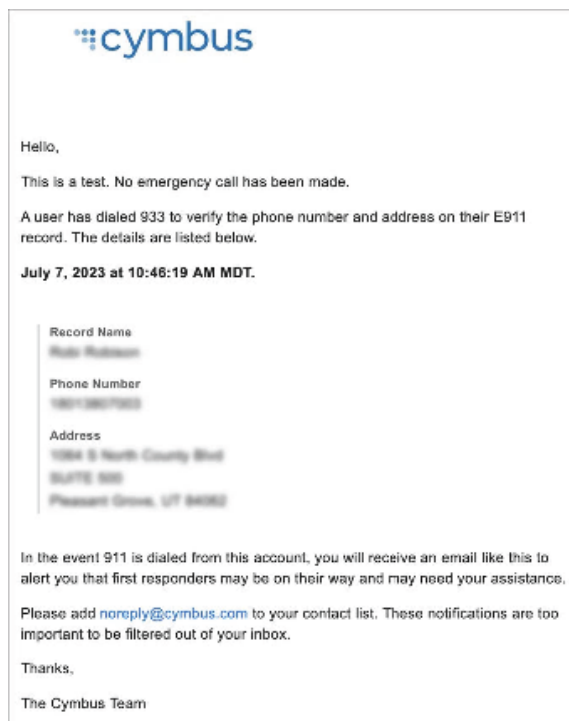
**TEST NOTIFICATION: In the event a 911 call is placed, you will receive a text like this one to notify you that first responders may be on their way and may need your assistance.**

## Example Emails

The test notification will let you know this is only a test. In the event 911 is dialed, the notification email will include the name, phone number, and address on the E911 record, and additional details including the name of the device owner, the extension, device type, line name, and MAC address.







## Emergency Notification Log

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

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

Expand an entry for details:

Emergency Notification Log		
Notification Type	Date	Sent Status
933 Test	12/14/2022 - 08:59 AM	Successful
933 Test	08/17/2022 - 04:11 AM	Partially Failed



933 Test

08/17/2022 - 04:11 AM

Partially Failed



### 933 Test Log

Email	Status
s.jane@demo.com	✓ Sent
d.noble@demo.com	✓ Sent

SMS	Status
1 (385) 555-0459	✗ Failed
1 (801) 555-3995	✗ Failed





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