MY CLOUD SERVICES PORTAL

VOICE USER GUIDE



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In This Guide

Welcome	
Introduction	
My Cloud Services Portal	9
Sign In	
Site tour	
Quick Access Tools	
Menu	
Work Area	
My Services Dashboard	
Support	
Training	
Account Management	
Dashboard Links	
Profile	
View Profile	
Change e911 Address (Temporary)	
Add a Temporary e911 Service Address	
Edit Primary e911 Service Address	
Reset to Primary e911 Service Address.	
Change Recovery/Notification Email	
Enable/Manage Multi-factor Authentication (MFA)	
Change Password	
Edit Profile	
Additional Profile Settings	
Applications	
Voicemail	
Enable/Disable Voicemail	
Play Voicemail	
Download Voicemail	
Forward Voicemail	
Voicemail Block Delete	
View All Voicemails	
Reset Voicemail Pin	
Manage Voicemail Settings	
Voice Messaging	
Send All Calls to Voicemail	

Send Busy Calls to Voicemail	
Send Unanswered Calls to Voicemail	
Forward to Multiple Emails	
Forward to One Email	
Notify Me by Email When New Messages Arrive	
Email a Carbon Copy of the Message	
Transfer on '0' to Phone Number	
Manage Voicemail Greetings	
Message Deposit	
Disable Message Deposit	
Call Logs	
Filter Call Logs	
View All Call Logs & Details	
Basic Features	21
Working with Settings	
Access the Settings Page	
View / Edit Feature Settings	
Manage Settings for Multiple Lines/Accounts	
Profile	
Manage Profile	
Anonymous Call Rejection	
Manage Anonymous Call Rejection	
Announcement Repository	
Add an Announcement File	
Download an Announcement File	
Edit an Announcement File	
Delete an Announcement File	
Automatic Hold / Retrieve	
Barge-In Exempt	
Call Block	
Add a Call Block	
Edit a Call Block	
Activate a Call Block	
Delete a Call Block	
Caller ID	
Manage Caller ID	
Call Notify	
Setup Call Notify	

Activate Call Notify	
Edit Call Notify Settings	
Delete Call Notify	
Call Transfer (Recall)	
Manage Call Transfer Recalls	
Call Waiting	
Manage Call Waiting	
CommPilot Express	
Connected Line Identification Restriction	
Manage Connected Line ID Restriction	
Conference List	
Add a Conference Listing	
Manage Conference Recordings	
Edit a Conference Listing	
Delete a Conference Listing	
Launch Moderator Tool	
Manage Conference Moderators	
Custom Ringback User	
Add a Custom Ringback List	
Edit a Custom Ringback List	
Delete a Custom Ringback List	
Direct Call Pickup with Barge-In	
Do Not Disturb	
Manage Do Not Disturb	
Hoteling Guest	
Manage Hoteling Guest	
Hoteling Host	
Manage Hoteling Host	
Music On Hold	
Manage Music On Hold	
Outbound Caller ID Block	
Manage Outbound Caller ID Block	
Priority Alert	
Add a Priority Alert	
Activate a Priority Alert	
Edit a Priority Alert	
Delete a Priority Alert	

Privacy3	5
Manage Privacy	
Receptionist Dashboard3	5
Monitor Users in Receptionist Dashboard	
Quick Access to the Receptionist Dashboard	
Receptionist Dashboard SMB	6
Monitor Users in Receptionist Dashboard SMB	
Quick Access to the Receptionist Dashboard SMB.	
Selective Call Acceptance	36
Add a Selective Call Acceptance List	
Edit a Selective Call Acceptance List	
Delete a Selective Call Acceptance List	
Speed Dial	7
Add a Speed Dial Contact	
Edit a Speed Dial Contact	
Delete a Speed Dial Contact	
Export Speed Dial Contact List	
Call Forwarding3	8
Set Call Forwarding Number(s)	
Edit Call Forwarding Numbers	
Delete Call Forwarding Numbers	
Call Forwarding Selective	8
Add a Call Forwarding Selective List	
Edit a Call Forwarding Selective List	
Delete a Call Forwarding Selective List	
Find Me – Simultaneous Ring	0
Setup Find Me – Simultaneous Ring Numbers	
Setup Find Me – Simultaneous Ring Triggers	
Edit Find Me – Simultaneous Ring	
Delete Find Me – Simultaneous Ring	
Find Me – Sequential Ring4	1
Setup Find Me – Sequential Ring	
Setup Find Me – Sequential Ring Triggers	
Edit Find Me – Sequential Ring	
Delete Find Me – Sequential Ring	
Push to Talk4	2
Manage Push To Talk	
Virtual Number4	3

Contact Centers
Manage Contact Center Settings.
Client App44
Supervisor
Manage Supervisor Settings
Fax-to-Email / Email-to-Fax
Voicemail44
Distribution List
Manage Distribution List
Reset Voicemail Pin45
Anywhere
Setup Anywhere
Edit Anywhere
Delete Anywhere
Remote Office
Manage Remote Office
Enterprise Directory46
Print Enterprise Directory Summary
Print Enterprise Directory Details
Time Schedule
Add a Schedule
View a Schedule
Delete a Schedule
Add a Time Schedule Event
Edit a Time Schedule Event
Delete a Time Schedule Event
Contact Us

Welcome

Welcome to the Momentum family. We are thrilled to be working with you!

We also want to welcome you to the new My Cloud Services Portal. The Momentum Team is constantly developing ways to improve your experience and offer new communications management tools that increase your productivity and make it easy to do what you do. At Momentum, we understand the critical nature of communications services to businesses and to *people*, and we take our responsibility seriously. It is our mission to make certain that you have the ultimate in state-of-the-art communications, unparalleled network reliability, and a consistently superior customer experience to ensure that you and your company are in a position to *thrive*.

Thank you for letting us help you communicate!

Sincerely,

The Entire Momentum Telecom Team

INTRODUCTION

This reference guide is a convenient, go-to resource for individual users just getting started with the new My Cloud Services Portal for online account feature and service management. It provides an overview of the application website sections that may be available within the Portal and offers instructions and tips for setup and maintenance of the communication features and services. It should be noted that some features described here may not be included with every subscription type or offered to all users by every organization.

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, and professional support, and we offer in-depth training upon request. The team at Momentum is committed to doing everything possible to deliver an exceptional experience, and we strive to improve every day.

My Cloud Services Portal

The My Cloud Services Portal website makes it easy for voice subscribers to review, customize, and manage account information and feature settings securely while working online.

SIGN IN

To Access the My Cloud Services Portal:

- 1. Open a web browser and enter the URL (web address) provided for online account management.
- In most cases your initial Admin sign in credentials come from the Service Provider. If you need assistance for <u>initial</u> sign in (first time login), please contact your System Administrator or the Service Provider primary contact (Support, AM, or PM).
- Enter the Admin Account Username (xxxxxx@email.com format) and correctly formatted Password credentials in the fields when they are provided/displayed. Note: Password allows up to 30 characters.
 - Use the Forgot Password? link to securely update your password credential. Account holders with a defined email address on file in Manage Users can use this tool and will receive an email with a secure link to change the password. Contact your organization's System Admin for assistance if notified that the process cannot complete or if the system identifies that your account does not yet have a notification email address on file.



Note: For your security, the link provided in the *Forgot Password* email is only active for 60 minutes - once that time limit expires, you must use the 'Forgot Password?' feature again to generate a new email with an active link to proceed, or contact your organization's Subscriber Portal SuperAdmin for assistance.

- 3. Click the Sign In button.
- Follow any Multi-Factor Authentication (MFA) method setup steps and/or 6-digit code entry requirements if prompted. The My Cloud Services Portal opens when security protocols are met.



Terms & Conditions

The first time a user accesses the portal they are presented with an E911 Dialing Terms and Conditions acknowledgment dialog that must be completed to present

- 1. Use the tools to review or save the document, as desired.
- 2. Click to place a check in the check box.
- 3. Click the Save button to submit and close the dialog.

Note: Once submitted, this dialog will not be presented at login again, unless these Terms and Conditions are updated.

Once you have signed into the My Cloud Services Portal and acknowledged the terms and conditions when they are presented, access to the tools you need to manage the communications features on the account are right at your fingertips.



SITE TOUR

All *My Cloud Services Portal* users will see the **My Services Dashboard** when the portal opens, and they review their individual account. This is the Home page within the portal, offering an up-to-date view of your profile, call logs, and voicemails, along with quick access to all of your setting management tools.

Although it is currently optimized for desktop usage, the My Cloud Services portal *is* accessible from any Internet-enabled device – desktop, laptop, tablet, or smartphone – so you can manage your calling services, whether you are in your office, at home, or on the go.

	Jane Smith Calling L	ine ID: 4075551212	Voicemail o		Call Lo	ogs			
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	Service Number:	IMAP ID: Portal Login Username:	Voicemail Settings Manage Greetings			Bridge		2018-	AM 5.14.2
		Ponai Login Osernaine.	Reset Voicemail Pin		In	Patrick Higgi	ns	08-16	PM
	Network Class of Service:	Email:			Out	Patrick Higgi	rs	2018- 08-18	5:11:04 PM
		Mobile: Pager: Yahoold:	Basic Features		Out	John-Michael Castillo	1	2018-08-18	5:00:30 PM
	E911 Address:	Location: MOMENTUM TELECOM	Anonymous Call Rejection 1	•	Out	Collaborate		2018-	2.21:03
		Phone Model:	Caller ID i	0		Bridge		08-15	PM
		_VA/X500	Call Waiting i		In	Jason Cochra	an	2018- 08-14	4:41:06 PM
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	Applications								
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Your account type and/or role determines the features and services displayed to you within the portal. Helpful information is offered throughout each section of the portal to make it easy for users of all levels to manage their account settings and calling features.

The following sections describe the site tools and sections that are available to all users.

For your security, if the connection to this portal is left idle by the user for more than 10 minutes, the system will start and display a 60 second countdown with an option to remain logged in. If the countdown reaches zero (0), the connection to the portal automatically closes and displays the Sign In page for the Cloud Services Portal.

Quick Access Tools

The drop-down menu at the top of the Portal application screen offers quick access throughout the site:

	Hi, Jan 🗸
My Profil	e
Support	
Training	ð
Log Out	

- The **Hi**, **You>** drop-down menu offers direct links to:
- ✤ My Profile View/Edit your Profile information.
- Support Opens the Support page where you can view useful information.
- ✤ Training Opens the MomentumU web page for quick access to resources.
- ✤ Log Out Return to the My Cloud Services Portal Sign In page.

Menu

The panel on the left offers direct menu access to all line/extension accounts assigned to the user and any areas of the portal the user may view. These options can include:

My Services	
Executive	
Executive Ext	
Virtual Fax 500	

- ✤ Logo The logo offers a quick link back to the Dashboard / Home Page.
- My Services Access to the My Services Dashboard for any line(s) and extensionsincluded on an individual account.
- Support This menu option opens a new web browser to the Support page on the Momentum website for quick access to all methods for communicating with Customer Care.
- Training This menu option opens a new browser window to Momentum University - an online library of documentation and training resources that are available to you 24/7

Work Area

The <u>center</u> of the portal screen is your 'Work Area' where information, features, and tools are displayed.

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My Services Dashboard

The **My Services Dashboard** is the Home page. It displays important account information and offers quick access to manage features and settings for individual accounts.

All the tools and features within or related to the account are accessible from this page.

The feature section widgets (cards) on the Dashboard provide easy access to information and tools for managing account and voice feature settings.

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Support

The **Support** option in the Menu panel (and in the quick access drop-down menu at the top of the screen) opens a new web page with direct access to the Support page of the Momentum company website for quick and easy access to customer care contact information when you need it.



Training

The **Training** option in the left navigation Menu panel (and in the quick access drop-down at the top of the screen) opens a new web page with direct access to Momentum University.

This constantly updated online library offers links to useful documentation and resources about the applications, features, and communications tools Momentum provides.

Simply click on the My Cloud Services Portal section and review the latest information and documentation when you need it -24/7.



Account Management

DASHBOARD LINKS

- Profile This dashboard section widget (card) displays your profile information and links to the View Profile page where access to manage your profile settings, password, e911 features, MFA, and notification email addresses is provided.
- Call Logs This card offers the recent Call Log history and links to a view of up to 1000 incoming and outgoing calls that occurred within the past 90 days.
- Voicemail This card displays recent messages and links to the available Voicemail Settings and lists for easy access to manage your voicemail and messaging features.
- Applications This card provides helpful links to the Sign In or landing pages of any add-on modules or applications enabled for use on your account.
- Basic Features This card offers quick access to your On / Off settings and a link to the Settings pagewhere management tools for additional features and services are provided.

PROFILE

This section of the dashboard displays a summary of your account profile information (Name, Address, Phone Number, User ID, Device model, etc.), and provides links to set up a temporary e911 location, review the entire profile, and access your password and directory profile management tools.

The My Profile link found in the toolbar (the drop down by your username) also offers another access point to view the Profile.

The following features and access links are all provided via the **Profile** card on the My (User) Services Dashboard:

View Profile

(View Profile) Click on the View Profile button to review your current contact information and access the management tools for your password, email notification settings, MFA management, and temporary e911 location changes.

Secondary links to <u>Edit Profile</u>, <u>Change Password</u> and other setting tools are also included in the View Profile dialog.

User's Name	
Mount Green Logistics, LLC	Portal Login Username:
880 Moniclair RD BIRMINGHAM, AL 35213	470 S@myntexus
Department: newlast!	User ID: 470 - 30mmmin es
Service Number:	Extensise (D):
47 Ebd 1465	310 1
Email: stokor@momenlumfelscom.com	E911 Address:
Nobile: Peperi	BIRNINGHAM, AJ, 35242
Yahodid:	
Location	Temporarily Update Current 911 Service Address
4/2021	PLEASE READ. Your Current E911 Service Address is considered the address at which emergency
Phone Model:	personnel uill respond when an E911 call is placed from your number. By default, your Current E911 Service
VV/000_310_COLOR_SC	Address will be the same as your Primary E911 Service Address, which is the primary address at which your service resides. You must temporarily update your Current E911 Service Address in the event you utilize the
Mac Address:	service from an address other than the Primary ES11 Service Address. Current ES11 Service Addresses
621	rejust validate with the Public Safety Answering Point (PSAP) system. Using the service to place E311 calls at a non-validated E911 service address can result in an unsuccessful emergency personnel dispatch. If a
Language:	service address cannot be validated, it may be because the address you entered is not specific enough, is
English	either a PO Box, is not with the 46 United States or Hawaii, or too new to be verified by the PSAP system. If you are unable to validate a service address, please contact your administrator or service provider. Please
	allow 10 minutes for address to validale in our system after updating. To charge the Primary E011
	Service Address listed, please context your administrator or service provider to initiate a Change of Address, or "Move", order.
	Password Recovery:
	Change Recovery Ernal
	Change Password
	Authentications
	Akinoge Blutt Lector Autoentisation
	Edit Profile



Change e911 Address (Temporary)

The Temporarily Update Current 911 Service Address link opens the dialog that allows the user to add and validate temporary e911 Service Address locations for use when traveling to different locations with the associated device. You must temporarily update your e911 Service Address in the event you may need to access emergency services from an address other than the Primary e911 Service Address, and then reset it back to the Primary e911 Service Address upon your return.

Note: <u>Any time a user changes the e911 address on their profile - either Temporary or Primary - fees may be incurred for the organization and the System Admin will receive an email notification of the change.</u>

Add a Temporary e911 Service Address

- 1. Click on the Temporarily Update Current 911 Service Address link to begin.
- 2. Enter the complete Address information for the temporary address you wish to use in the fields provided please <u>include specifics</u> like building, department, floor, N/S/E/W, and similar helpful information (a Dispatchable Location) that can be sent to the PSAP to help emergency responders find you quickly during an emergency.
- 3. Click on the Save button to submit the information and receive a Success! message when the address confirmation process completes.

Please allow up to 10 minutes for the address to validate after updating. If the address cannot be validated, it may be because the information is not specific enough, is for a PO Box, is not within the continental United States, Puerto Rico, or Hawaii, or is too new to be verified by the PSAP system. If you are unable to validate a service address, please contact your Administrator or customer service at the service provider for assistance.

Edit Primary e911 Service Address

By default, your e911 Service Address is the primary address of record for your service account. If a change is required, please contact your Administrator or service provider to initiate a Change of Address (or "Move" order) to change the Primary E911 Service Address permanently.

Reset to Primary e911 Service Address

- 1. Click on the Temporarily Update Current 911 Service Address link in the View Profile dialog.
- 2. Click on the Reset to Primary link.
- Click on the Save button to submit the change and receive a Success! message when it is completed.

Change Recovery/Notification Email

- 1. Click the Change Recovery Email link to open the Change Email dialog.
- Password Recovery Email: Enter or change the email address on file for recovering your login information. The system will send your password to this email address.

ange Email	
for password recovery	
for service and update notifications	
	0
Close	
	for password recovery for service and update notifications re Close

- 3. Service & CPNI Email Notifications: Enter or change the email address on file for receipt of notifications from the provider. The system will send service notifications to this email address.
- 4. Click on the Save button when your edits are complete.

Enable/Manage Multi-factor Authentication (MFA)

The Enable / Manage Multi-factor Authentication link in the View Profile dialog allows users to define the preferred security authentication method (SMS Text or supported code generator Authentication App

User's Name	
Mount Green Logistics, LLC	Portal Login Username:
880 Montclair RD	470 G@mymtmus
BIRMINGHAM, AL 35213	
	User ID:
Department: newlast!	47C Significant us
Service Number:	Enterprise ID:
47 Ext. 1469	310 1
Email: stokor@momentum/slecon.com	E911 Address:
Mobile:	the second se
Paper:	BIRMINGHAM, AL 35242
Yahoold:	
	Temporanily Update Current 911 Service Address
Location:	Comparent options contents of contents
4/2021	PLEASE READ: Your Current E911 Service Address is considered the address at which emergency
	personnel will respond when an E911 call is placed from your number. By default, your Cament E911 Service
Phone Model:	Address will be the same as your Primary E911 Service Address, which is the primary address at which you
VVX100_310_COLOR_SC	service resides. You must temporarily update your Current E911 Service Address in the event you utilize the
Mac Address:	service from an address other than the Primary E911 Service Address. Current E911 Service Addresses
021	must validate with the Public Safety Answering Point (PSAP) system. Using the service to place E911 calls
Vic I	al a non-validated E911 service address can result in an unsuccessful emergency personnel dispatch. If a
Lanswager	service address cannol be validated. It may be because the address you entered is not specific enough, is
English	either a PO Box, is not with the 48 United States or Hawaii, or too new to be verified by the PSAP system. It
Light	you are unable to validate a service address, please contact your administrator or service provider. Please
	allow 10 minutes for address to validate in our system after updating. To change the Primary E911
	Service Address listed, please contact your administrator or service provider to initiate a Change of Address
	tr 'Nove", order.
	Password Recovery:
	Change Receivery Email
	Change Pappaged
	Authentications
	Misroge Multi-Instar Autoenviron
	Fill Profile

(Google, Okta, Microsoft).

Use the following steps for 1st-time setup or management of account MFA settings while working in the portal if this security protection method has been enabled (as optional or mandatory) for your organization. Instructions for managing MFA settings are provided in the dialog as you make your selection.

Enable Multi-factor Authentication	Х
dd an extra layer of security to block unauthorized access and protect your	account.
wo-step verification options:	
Fext Message	
Authenticator app code	

- 1. Click on the Enable/Manage Multi-factor Authentication link in the *View Profile* dialog.
- 2. Choose one of the MFA Verification options:

Text Message

- Click to toggle this option ON
- Enter your SMS-enabled 10-digitt phone number in the field provided and click the **Submit** button.

Authenticator App Code

- Click to toggle this option to ON

- Scan the single-use QR code that is created to connect your Okta Verify, Google Authenticator, <u>or</u> Microsoft Authenticator app and follow the App's instructions for setup.

3. Enter the six (6) digit code you receive via the method you just setup in the Please submit your code field below.

4. Click on the **Save** button. Once completed, entry of the 6-digit code received via your selected MFA verification method will be required on all subsequent portal sign in attempts.

Enter your r	nobile devic	e number!		Submit
		Please submit your code:		
		Save		
A				
Authentic	ator ap	o code 🔿 🦱		
		p code on o	kta Google o	r Microsoft
Scan the QR	code and e	nter the pin generated by O	kta, Google o	r Microsoft
Scan the QR	code and e	nter the pin generated by O	kta, Google o	r Microsoft
Scan the QR	code and e	nter the pin generated by O	kta, Google o	r Microsoft
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Scan the QR	code and e	nter the pin generated by O		r Microsoft

Repeat the steps above to modify/change the MFA verification method selection from this dialog

NOTE: When changes are made to these settings, the system deactivates the old MFA method. Users/Admins must complete the steps above in full again for the preferred MFA option to set up a new method.

Contact your organization's Administrator if you need help to Reset MFA in order to access the Portal.

Change Password

The Change Password link provides direct access to update your unified communications password information.

- 1. Click on the Change Password link.
- 2. Type a new Password.
- 3. Retype to verify.
- Click the Save button. New passwords must be 8 or more characters and contain at least 1 number or special character, 1 lower case letter, and 1 upper case letter.

Edit Profile

Edit Profile The Edit Profile button provides access to modify additional profile contact information. The information you include (mobile phone, email, etc.) is visible to other group members whenviewing the directory or phone list.

In View Profile:

- 1. Click the Edit Profile button to view/edit the following options:
 - Preferred Name (First/Last)
 - Preferred Name when dialing out (First/Last)
 - Work Information (Title, Department)
 - Language preference
 - Time Zone
 - Class of Service
 - Additional Contact Information (phone, email, personal address)
- 2. Click the Save button when you are finished to update the data.

An Administrator is needed to modify some of the Profile information. Contact your Administrator for assistance with the settings you cannot modify.

Additional Profile Settings

Access to additional profile settings for the directory and monitoring services is provided in the **Settings** page.

See Also: Profile (in Settings).

rutile					Υ
number, extensio	an, and de	other informa	used for handling o tion to be visible to	ation. The information falled in spec alls. Filling in the additional inform other group members in the group	tion section allows your
Enterprise ID :				Group	
User ID:					
Last Name:		Doe		First Name:	Jan
Calling Line 10 Li	est Name:			Calling Line ID First Name	
Name Dialog Las	t Name:			Name Dialing First Name:	
Department		None		Language	English ¥
Time Zone)		(GMT-04 00)	(US) Eastern Time	V Network Class of Service	None ¥
Tria Pager: E-mail Location Address	CEO		Mobile: Yahosid	5551234567	
			State/Province		
Cay	-				
Zio/Postal Code:	P		Country:	USA	
IMAP ID:	_				
Save Ci	incet"				
					See instructions

	×
Change Password	
We recommend you choose a strong password to protect your online profile. The password length must be at least 6 characters. The password must contain at least 1 number, at least 1 lower case letter, and at least 1 upper case letter.	
Avoid using passwords that can be easily guessed such as your name, telephone number, social security number, or account number.	
Type Password	
Retype Password	
Save Close	

Edit Profile Profile allows you to view and maintain your profile information. The information filed in specifies your primary phone number, estension, and device that are used for handling and device that are used for handling other information and only be modified by your administrator. Enterprise 10::::::::::::::::::::::::::::::::::::	
specifies your'p pinang yebone number, extension, and device that are used for handling additional information section allows your onbile phone, pager, and other information to be visible to other group members in the group phone list. Some of this information can only be modified by your administrator. Enterprise ID : Group: User OD : Opin mymtim us MAP ID: Opin mymtim us Calling Line ID Last Name: Dee First Name Last Name Name Dialing Last Name	
Group: Liver D. : mymtm. us MAP ID: Vējim. mymtm. us Caling Line ID First Name: Jan Caling Line ID Last Name: Doe First Name Last Name Name Dialing First Name	
Calling Line ID Last Name Last Name Name Dialing First Name Name Dialing Last Name	
Name Dialing First Name Name Dialing Last Name	
Title	
Department Language	
Time Zone Network Class of Service	

APPLICATIONS

The **Applications** card in the Dashboard displays links to any additional applications related to the account.My Cloud Services offers an easy way to connect directly to the sign in or landing page of the corresponding service or application in this section of the Dashboard. Contact your administrator for assistance if you require assistance to access add-on modules on your account.

1. Click on the Connect link to open and access the sign in / landing page or application of the corresponding option in a new browser window.

Applications
No applications are available.

If no additional applications are included with the service, this card displays a simple "No applications are available." message.

VOICEMAIL

The Voicemail card displays a list of your current un-deleted voicemail messages and the common voicemail feature management tools in the Dashboard. It offers quick access to any additional messages, Voicemail feature tools, and to update the Voicemail PIN information. The red dot • next to a Voicemail indicates an un-played message.

		Play	Phone	Date	
6		•	205.978.4458	5/8/2018 02:00 PM	
0		•	205.824.6817	5/9/2018 01:55 PM	
			205.824.6817	5/9/2018 12:07 PM	
C.			205.824.6817	4/25/2018 11:47 AM	
8		•	205.824.6817	4/25/2018 11:47 AM	
	G	/oicemail !	Settings Manage Gr	eetings Reset Voicemail Pin	Message Deposit

Many Voicemail settings are also found within the Voicemail Edit view in the Settings page.

Enable/Disable Voicemail

The **On**/Off toggle at the top of the Voicemail card **enables** or disables the Voicemail feature right from the Dashboard.

Play Voicemail

Click on the Play icon next to a voicemail in the list to listen to the message online.

Download Voicemail

Click on the Download icon next to a message to download and save a copy of the message file to a location on your system.

Forward Voicemail

Click on the Forward icon next to a message to send the voicemail .wav file to an email address.

Voicemail Block | Delete

 \Box Click to place a checkmark \checkmark in the box next to a Voicemail to view the Block | Delete options above. Simply click on the option you prefer to perform the action.

- Block disallows future calls from the number without providing a warning message to the caller.
- Delete immediately removes the Voicemail from your dashboard/phone list and deletes the record/recording fully from the database at midnight the day you elected to delete it.

View All Voicemails

Click on the View All Voicemails link below the list to open the dialog and review or manage any additional voicemails.

Reset Voicemail Pin

Reset Voicemail Pin

Click on the Reset Voicemail Pin button to reset the current PIN to the default (8462) to allow a new Voicemail PIN to be safely entered via the telephone/device.

Manage Voicemail Settings

Voicemail Settings

The Voicemail Settings button opens the Voicemail Settings pop-up dialog where the following voicemail settings may be turned on or off, and email notifications and forwarding on '0' may be managed.

Always click the Save button once changes are made to submit new information. A Success! Message displays when an update to Voicemail Settings is completed.

Voice Messaging

On Off - Turns the Voicemail feature on or off.

Send All Calls to Voicemail

On Off – All calls are sent to voicemail while this feature is enabled.

Send Busy Calls to Voicemail

On | Off – When this setting is enabled, new incoming calls are sent directly to voicemail if the line is already in use (busy).

Send Unanswered Calls to Voicemail

On | Off – When this setting is enabled, calls that go unanswered after a specified number of rings are sent to voicemail by the system.

Forward to Multiple Emails

On Off- (Unified Communications) Saves the voicemail recording in the portal/voicemail inbox and sends voicemail recording files to the email address(es) specified. Click the toggle to turn On (enable), then enter at least one 1 and up to five (5) email addresses separated by commas in the text field that is provided.

Voicemail Settings	
Voice Massaging	
Send All Cafa to Volcemail	
Send Busy Calls to Voicemail	
Send Unanswered Calls to Voicemail	
Forward to multiple email Forward to one email	
Notify me by Email when new messages arrive	
Email Address	
popi@momentumtelecom.com	
Email a carbon copy of the message	
Email Address	
popi@momentumtelecom.com	
Transfer on 10' to Phone Number	
Phone Number	
2058675309	
Save Cancel	

Forward to One Email

On Off– Sends the voicemail recording file to a specified email address. Note: Enabling this option sendsthe message recordings to the email address and does <u>not</u> save the voicemails to the portal or voicemail inbox. Click the toggle to turn On (enable) and then enter the email address in the text field provided.

Notify Me by Email When New Messages Arrive

On Off – When enabled, a simple new voicemail received notification email is sent to the address that is defined in the text field provided.

Email a Carbon Copy of the Message

On Off – When enabled, a copy of the new voicemail notification email is sent to the email address defined in the text field provided.

Transfer on '0' to Phone Number

On Off– When set to ON and a 10-digit phone number is defined, incoming callers are given the option to press '**0**' to transfer.

Manage Voicemail Greetings

The Voicemail card displays the Manage Greetings button, providing access to select the greetings used when a caller is sent to voicemail. The system provides a default greeting, so these settings are optional.

- 1. Click on the Manage Greetings (Manage Greetings) button.
- Select or define the following as needed to setup voicemail greetings:
 - Busy Greeting: Click to select System Greeting (default) or Personal Greeting. If Personal Greeting is selected, use the adjacent drop-down menu to choose an Announcement already uploaded (in the Announcement Repository) for use.
 - No Answer Greeting: (Optional) Click to select System Greeting (default) or the Unavailable Greeting option.
 - Alternate No Answer Greetings: This dialog allows the user to prepare multiple no answer greetings that can be used and then select the one that is in use. Click to select an alternate No Answer greeting that was already uploaded for use.
 - Number of rings before greeting Select an amount of rings (from 1-10) that will occur before the caller is sent to voicemail and will hear the greeting currently in use.

Busy Greeting		
	eeting 🔹 Personal Greeting	
Voice Portal 2	018-04-25 11:46:13.092_001	
No Answer Gree	ting	
O System Gr	eeting O Unavailable Greeting	
Alternate No Ans	awer Greetings	
Greeting N	lame	
 Test 		
Greeting A		
Greeting	1	
Greeting M	lame	
0		
Greating A	udio	
Greeting M	lame	
0		
Greeting A	udio	
Number of rings	before greating:	
5		
Auto-log	gin to Voice Portal when calling from my phone	
	Save Cancel	

- Auto-login to Voice Portal when calling from my phone: Click to enable this setting to allow the system to keep you logged into the Voice Portal on the phone for quick access.
- Click the Save button to submit the changes, close the dialog, and return to the Dashboard view. Return to this dialog to edit settings in the future.

See also: Announcement Repository, Manage Voicemail Settings

Message Deposit

The Voicemail card displays a quick access button for Message Deposit settings. These settings allow the user to quickly disable the ability for incoming callers to leave a message after hearing the user's voicemail greeting. By default, Message Deposit is always turned **On** which allows callers to leave a message and hear the menu options. This feature works with the Voicemail Greeting Settings.

	Message Deposit
General	
Disable Message Deposit	
No Answer Greeting	
Disable Message Deposit	
	Save Cancel

Note: When Message Deposit is disabled, the Voicemail Menu is disabled. This means that incoming callers won't hear the menu

options and the user will not hear menu options announced when logging in to manage voicemails if Message Deposit is disabled.

Disable Message Deposit

In the Voicemail card on the Dashboard:

- 1. Click on the Message Deposit (Message Deposit) button to view the Message Deposit dialog.
- 2. Choose the option to use:
 - General A check mark I here disables message deposit for all calls that go to voicemail.
 - No Answer Greeting A check mark ☑ here disables message deposit for calls that are sent to voicemail when a No Answer Greeting is in use.
- **3.** Click on the **Save** button to submit the change, close the dialog, and return to the Dashboard. Return to this dialog to turn off the setting when it is no longer needed.

CALL LOGS

The **Call Logs** card displays a list of the latest incoming and outgoing calls on the account with filters to review specific call types and date ranges. It also provides easy access to review all available call log data for the past 90 days – up to 1000 calls via the View All Call Logs & Details link.

Filter Call Logs

Within the **Call Logs** dashboard card, multiple *Filters* are provided that allow users to select specific call types and date ranges to review. The Call Logs filter options include:

Call Type	Call ConnectionType
All Calls	All Calls
Incoming Calls	Connected
Outgoing Calls	No Answer
	Incomplete
	Forwarded
Date	
Today	
Yesterday	
Last 7 Days	
Last 30 Days	
Last 90 Days	
Custom	

All	Cals		All Calls	Im	Today	
0	Direction	Calle	All Calls Connected	Phone		Date
9	outgoing	Mirar	No Answer Incomplete	237 401	100	1/13/18
0	outgoing	Chan	Forwarded	822 659		1/13/18
8	incoming	Maro		586 947		1/13/18
8	outgoing	Wyne		714 638		1/13/18
8	incoming	Shen		391 594	de la compañía de la	1/13/18
	outgoing	Anna		321 332		1/13/18
8	outgoing	Aisha		345 780		1/13/18
0	outgoing	Alena		674 970		1/13/18
	outgoing	Sung		622 410		1/13/18
	incoming	lvory		612 407		1/13/18
9	incoming	Jacq		756 694		1/13/18
8	incoming	Deed		953 282	ġ.	1/13/18
0	outgoing	Del F		966 201	100	1/13/18
0	incoming	Duan		576 684		1/13/18
8	outgoing	Sharl		647 238		1/13/18
8	outgoing	Carin		682 850	1000	1/13/18
8	incoming	Betty		920 758		1/13/18
	incoming	Rash		556 527		1/13/18
9	incoming	Kimb		789 385	and the	1/13/18
0	outgoing	Chan		998 921		1/13/18

View All Call Logs & Details

The <u>View All Call Logs & Details</u> link at the bottom of the Call Logs card offers easy access to review a detailed list of up to 1000 calls over the past 90 days. The same filters offered within the dashboard are available within the larger view to make it simple to locate information about specific call types or calls that occurred within specific time-frames, and a link to <u>Export Call Logs</u> allows the user to download the data to an excel spreadsheet format.

BASIC FEATURES

The **Basic Features** Dashboard card provides quick access to your On/Off feature settings and information about each. This dashboard section also provides a <u>View All Features</u> link that opens the **Settings** page for review and management of additional service features.

Anonymous Call Rejection i	
Barge-In Exempt i	
Caller ID i	
Call Waiting i	
Connected Line ID Restrictions i	
Do Not Disturb i	
Music On Hold i	
Outbound Caller ID Block i	

Each item displayed within the **Basic Features** card on the Dashboard is an **On** / **Off** setting for the individual user account. Descriptions of the features that are provided for management here display as pop-up information by placing the cursor over the 'I' icon next to an item. *i*

The slider toggles in the Basic Features card allow the user to set each available option to On (enabled) or Off (disabled) quickly and easily.

Additional settings may be managed by clicking on the <u>View All Features</u> link at the bottom of this dashboard card. This opens the full list of feature settings on the user's account for review and management.

WORKING WITH SETTINGS

Clicking on the <u>View All Features</u> link at the bottom of the Basic Features card opens the <u>Settings</u> page, which lists the features and services that are available to the user in a simple table format and provides access to review and to *Edit* the settings for each feature.

- Features are generally grouped by type to make similar features easy to locate.
- The drop-down (top right) offers quick access to additional assigned accounts for setting management tasks.
- On/Off features show their current status within the table.
- ◆ The arrow ▶ under the View/Edit column (far right) adjacent to a feature opens the *Edit* view.
- While viewing a feature's setting details, the
 See instructions icon at the bottom of the view provides access to helpful information about setup and/or interactions with other features.

001 Profile		1 (testing ext2) VIEW/EDIT
Profile		VIEW/EDIT
General		VIEW/EDIT
Anonymous Call Rejection	OFF	VIEW/EDIT
Anonymous can Rejection Announcement Repository	OFF	P
Automatic Hold / Retrieve		P
Call Block	OFF	P
Caller ID	ON	P
Call Notify	OFF	P
Call Transfer	OFF	P
Call Waiting	ON	P
Connected Line Identification Restriction	OFF	P
Custom Ringback User	OFF	P
Do Not Disturb	OFF	P
Hoteling Guest	OFF	P
Hoteling Host	OFF	P
Outbound Caller ID Block	OFF	P
	OFF	P
Pre-Alerting Announcement Priority Alert	OFF	P
		P
Privacy	OFF	P
Selective Call Acceptance	OFF	P
Speed Dial Forwarding		VIEW/EDIT
Call Forwarding		VIEW/EDIT
-	OFF	P
Call Forwarding Selective	OFF	P
Find Me – Simultaneous Ring Find Me – Sequential Ring	OFF	P
Find Me – Sequential Ring Push to Talk	OFF	4
Push to Talk Messaging	ON	VIEW/EDIT
Messaging Voicemail	<u>ON</u>	VIEW/EDIT

 Many of the On/Off features shown in this list and the individually enabled settings shown here may also be managed through the device using phone codes,AKA: Star Codes. (ex: *77).

Your account type and/or role defines the features and services you may access. Some features described in this document may not be available to all users.

<u>/!\</u>

Access the Settings Page

In the My Services Dashboard:

1. Click on the View All Settings link in the Basic Features card to open the Settings page.

View / Edit Feature Settings

1. In the Settings page: Click on the arrow ► under the View/Edit column next to a feature to open the *Edit* dialog view.

Manage Settings for Multiple Lines/Accounts

Where multiple lines are assigned and may be viewed by a User or Admin, the drop-down tool within the **Settings** view (just above the table on the top right) offers the ability to switch between those lines to manage the feature settings for all accounts that are available to the user (or Administrator) for multiple lines.

- 1. Click on the drop-down tool to view a list of any additional lines for selection.
- 2. Click on an option in the list to choose and begin working with that line's settings. The settings for the new line will display in the table below for review/management.
- 3. Repeat to review or make changes to additional account/line settings to which access is provided.

Note: The system will also help the user or Administrator to quickly get back to the dashboard of the account/line they started with by displaying it at the top of the Left Navigation panel at all times.

Profile

The **Profile** section of the *Settings* page offers additional personal data fields that may be added to display in directories and phone lists. Click the adjacent drop-down arrow \blacktriangleright to access this feature's *Edit* view.

Manage Profile

- 1. Enter any information that you wish to make available in lists ordirectories.
- 2. Click the Save button to update and return to the Settings page.

Velle					VENED
rafile					Ŧ
mumber, exten mobile phone.	sion, and d pager, and	evice that are other information	used for handling o	ation. The information filled in sp alls. Filling in the additional info other group members in the gro	mistion section allows your
Enterprise O				Ontore	
User ID					
Last Name		Dee		FirstName	(Jan
Caling Line D	Last Name			Caling Line O Fret Na	
Name Dialog 2	aut Name			Name Dialog First Nam	
Cepannent		None	•	Campuage	English +
Time Zone		GMT-04 00	(US) Eastern Time	 Network Class of Service 	te frone *
Additional infor	CEO				
Paper	Cev.		Noble	5551234547	
Fage:			Valuetati	202143429/	
1000000000			Tanoold		
Location:					
ADDess	÷				
City	£		State Province	(· · · · · · · · · · · · · · · · · · ·	
Zo-Peatal Cod	e 51		Country	USA	
MAR IS-					

Anonymous Call Rejection

On | **Off** setting. Anonymous Call Rejection tells the system to play an intercept message and reject (block) incoming calls from anyone with Caller ID set to 'Anonymous'. Because the calls are blocked and will not ring through, Call Logging, etc. are disabled when a call triggers this feature. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Anonymous Call Rejection

- 1. Slide the toggle to ON or Off.
- 2. Click the Save button.



Announcement Repository

The Announcement Repository service offers the ability to upload and store message .wav files for use as Voicemail greetings and announcement messages.

otal Size of file	s:15 KB of 1 GB used				
Descr	iption	Туре	FileSize	Download	Edit
	Portal 2017-11-02 3.778_001	WAV	15	Download	Edit
		-			
Cancel	Add Delete				

- The repository provides up to 1 GB of storage space.
- The amount of storage space displays for review.
- Maximum file size for audio announcements is 5 MB in CCIT u-Law 8kHz, 8-bit Mono format.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add an Announcement File

- 1. Click on the Add button to begin.
- 2. Type the Name to be displayed in selection lists.
- 3. Click on the Choose File button to select a local audio file to upload into the repository.
- 4. Click the Save button to submit the change and return to Settings.

Download an Announcement File

- 1. Click on the Download link.
- 2. Navigate to and select the local folder you wish to use to save a copy of the file.

Edit an Announcement File

- 1. Click on the Edit link next to an Announcement listing to open its Edit view and make changes.
- 2. Click on the Save button to submit changes and close this dialog.

Delete an Announcement File

Use Caution. The removal action is immediate and cannot be undone.

- 1. Click to place a check I in the box next to an Announcement in the file list to select it.
- 2. Click on the Delete button.

Automatic Hold / Retrieve

This setting provides a method to place incoming calls on hold and retrieve them automatically without using the feature access (Star) codes.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

- 1. Select and/or enter the following:
 - Automatic Hold / Retrieve On Off Click to set to \bigcirc **On** or \odot **Off** (default)

utomatic Hold / Ret	rieve		Ψ
Automatic Hold / Re	etrieve		
	Retrieve provides an alt		Id and retrieve calls. Incoming calls e access codes.
A	utomatic Hold / Retrieve	Oon Ooff	
* Automatica	Ily retrieve the call after:	120	seconds

- Automatically retrieve the call after: - Enter the number of seconds the call will remain on hold before it is automatically retrieved to the line.
- 2. Click the Save button when finished to submit the changes and close the dialog.

Barge-In Exempt

.

On | Off Setting. When enabled (ON), barge in attempts clickon the adjacent drop-down arrow the adjacent drop-down arrow ► to access this feature's Edit view.

Barge-in Exempt	OFF	*
Barge-in Exempt allows you to block barge-in att	empts from other users with Directed Call Pickup	with Barge-in
Barge-In Exempt: I On Off		
Save		
		 See instructions

Call Block

Use the Call Block feature to define criteria that will block calls from people you would rather not talk to, limit or forward calls from specific numbers, or even create a list of numbers you always want to accept

even when Call Block is enabled. Incoming calls that meet all criteria defined here are notified that you cannot be reached, and the call is disconnected. These calls are not logged.

	to reject calls that meet your pre-defined crite			
	would rather not talk to. The criteria for each criteria for an entry must be true to reject the		phone numbers or digit patterns, a sp	becified time schedule, and a spec
onday scredule. All t	untena ior an entry must be true to reject the	udii.		
Active	Description	Reject	Calls	Edit
8	test 1	Yes	All calls	Edit

Add a Call Block

- 1. Click on the Add button to begin defining new Call Block criteria.
- 2. Define the following criteria, as needed:
 - Description Required: A short descriptive title for this call block type to show in the list.

Settings - Call Block

- Reject Call Optional: Click to setup this list to Block Calls when your criteria are met.
- Do Not Reject Call Optional: Click to setup this list to accept calls from specific numbers when the criteria are met.
- Select Time Schedule Optional: Choose a Time Schedule from the drop-down menu. OR...
- Selected Holiday Schedule Optional: Choose a Holiday Schedule from the drop-down menu.

	O Do not Reject C dule: Every Day A			
Selected Holiday Sche	dule: None	¥		
From following phone				
Any Private Numb	er.			

- Note: Only one schedule type (Time or Holiday) can be selected at a time.
- From Any Number Optional: Select if any number dialed in will be accepted or blocked for the schedule you selected.

- ✤ Forwarded Optional: Select if incoming forwarded numbers will be blocked.
- From Following Phone Numbers Select to define individual numbers to accept or block.
- Any Private Number Select to trigger on incoming calls with "Private" Call ID.
- Any Unavailable Number Select to trigger on incoming calls with "Unavailable" Call ID.
- Specific Phone Numbers Select and then enter up to twelve (12) 10-digit phone numbers.
- 3. Click the Save button when finished to submit the call block criteria and close the view.

Edit a Call Block

- 1. Click on the Edit link next to a Call Block entry.
- 2. Make changes to the Description, Trigger Options, and/or the specified Phone Numbers.
- 3. Click the Save button when finished.

Activate a Call Block

- 1. Click to place a checkmark I next to a Call Block entry to activate that selection.
- 2. Click the Save button to submit the change and close the *Edit* view.

Delete a Call Block

Use caution. The item is immediately removed when Delete is selected.

- 1. Click on the *Edit* link next to a Call Block entry.
- 2. Click the Delete button to remove the selected Call Block and its information from the system.

Caller ID

On | Off Feature. **Caller ID** allows the user to turn the *view Caller ID for incoming calls* feature on or off. When enabled, it may take up to two (2) rings to see the available Caller ID information on your device. **Note:** The Off option deactivates Caller ID for incoming calls, but not for your outgoing calls. See

Outbound Caller ID Block.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

		See instructions
Save Cancel		
ON		
Identify your caller before picking up the telephone.		0
Caller ID	ON	J.
our proce	011	

Manage Caller ID

- 1. Slide the toggle to ON to enable or Off to disable.
- 2. Click on the Save button to submit the change and close the *Edit* view.

Call Notify

The **Call Notify** service allows users to define the recipient address for email notifications when specific types of calls are received. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Call Notify			OFF	
*Send e-mail	to: cc .com			
Active	Description	Call Notify	Call From	Edit
No data found				
Cancel	ve Add o			
	ve Add Im			

Setup Call Notify

- 1. Send email to: Enter the email address for call notifications.
- 2. Click the Add button to define new Call Notify criteria.
- 3. Description: Enter a name to display in lists.
- 4. Select or define the following options, as needed:
 - Set to Notify or Do Not Notify.
 - * Select Time Schedule: Optional: Select a pre-defined Time Schedule OR -
 - Selected Holiday Schedule: Optional: Select a Holiday Schedule. Note: Only one schedule type (Time or Holiday) may be selected for use in each Call Notify event.
 - Call Policies: Select an option from the following - From Any Phone Number, Following Phone Numbers, Any Private Numbers, Any Unavailable Numbers, and/or specify up to twelve (12) Phone Numbers, as needed.
- 5. Click the Save button and wait for the Data Saved Successfully! message to display.
- 6. Click on the 🗵 Exit icon to close the criteria dialog.
- 7. Click the Save button to update the system and close the Edit view.

Activate Call Notify

1. Click to place a check in the box ☑ under the Active column for a listing to activate it.

Edit Call Notify Settings

- 1. Click the Edit link next to a *Call Notify* listing.
- 2. Make changes as needed.
- Click the Save button and wait for the Data Saved Successfully! message to display.
- Click on the Imes Exit icon to close the dialog.
- 5. Click on the Save button to update the system and return to the Settings list view.

Delete Call Notify

- 1. Click the Edit link next to the desired listing.
- 2. Click the Delete button and wait for the Deleted Successfully! message to display.
- Click on the Imes Exit icon to close the dialog.
- 4. Click on the Save button to update the list and return to Settings.

Description 1 estly * Nextly © Do air Notify Selected Exology Scheduler, Verse Selected Exology Scheduler, Verse	2	
© Any Phone number # Exhloring Phone Numbers # Any Provide Number # Any Curratuble Number Specific Phone Numbers 1216406373	-	
ia narnd roccensfull) Sans		



Call Transfer (Recall)

The **Call Transfer** service enables a user to transfer calls to specified destinations as Blind, Consultative, or 3-way Consultative Transfers. This setting defines the criteria to automatically recall your transferred calls when they are not answered for any reason, and/or to prevent your transferred calls from being automatically redirected by the destination user's settings. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.



Manage Call Transfer Recalls

- 1. Click within the appropriate radial button to turn the service \odot **On** or \bigcirc Off.
- 2. Configure the following setting options, as needed:
 - * Number of rings before Recall: Select a number of rings from the drop-down menu.
 - ◆ Enable Busy Camp On for x Seconds: Turn on 'busy' for a set time. Click to place a check in the box to ☑ enable (or □ disable) and enter a number of seconds in the adjacent field.
 - ◆ Use Diversion Inhibitor for Blind Transfer: Disallow auto-redirects on Blind Transfers. Click within a radial button to set to ⊙ On or ○ Off.
 - ◆ Use Diversion Inhibitor for Consultative Transfer: Disallow auto-redirects on Consultative Transfers. Click within a radial button to set to

 On or O Off.
- 3. Click on the Save button to submit the setup/change(s) and close the *Edit* view.

Call Waiting

Or|Off Setting. The **Call Waiting** service allows users to receive calls while their line is in use, see the callerID of the new caller, and decide whether to automatically place the current caller on hold and answer the second call - or let the second call go to Voicemail (if enabled). Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Manage Call Waiting

1. Slide the toggle to **ON** or Off and click on the Save button to submit the change and close the *Edit* view.

Call Waiting	OFF	V
Switch to a new incoming call while you are already on another call.		
OFF		
Save Cancel		
	🧃 See instruc	ctions

CommPilot Express

The CommPilot Express settings allow a user to define profiles that control what happens when an inbound call arrives and the CommPilot presence indicates that user is Available - In the office, Available - out of office, Busy, or Unavailable. Once defined, saved, and enabled, each profile can be managed in this area of the portal or via the phone/device (where supported). Note: when enabled, CommPilot Express will take precedence over some other service settings that relate to incoming call behavior. The use of these settings and profiles is optional. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

- 1. To manage CommPilot Express settings, select or enter information for the following:
 - Current Profile: Choose from the drop-down menu options to select a saved profile.
 - Available In the Office
 - Also ring this phone number: ______
 Enter the alternate 10-digit phone number to simultaneously ring.

If Busy:

- O Have Voice Messaging (take the call)
 Click to

 select/enable calls to be sent to voicemail when busy, OR
- O Forward to this phone number ______
 Click to ③ select/enable, and enter the 10-digit phone number to which the system should forward calls when in office but busy

If No Answer:

- O Have Voice Messaging take the call
 Click to

 select/enable and instruct the system to send calls to voicemail if calls go unanswered, OR
- O Forward to this phone number: _____ Click to
 Select/enable and enter the 10 digit phone number to which the system should forward calls in the adjacent field

Available – Out of Office

- O Have Voice Messaging take the call Click to enable and instruct the system to send calls to voicemail when out of office, OR
- O Forward to this phone number: ______ Click to enable and enter the 10 digit phone number wo which the system should forward calls in the adjacent field.
- Also notify me by e-mail when a call comes in: ______ Click to I select/enable and enter the email address the system should use to send notifications for incoming calls while out of office.

♦ Busy

- O Send all calls to Voice Messaging except calls from these phone numbers: Click to enable and enter up to three (3) 10-digit phone numbers in the fields directly below.
- Which will be forwarded to this phone number: Enter a 10-digit phone number in the adjacent field to which <u>only</u> calls from the phone numbers listed above will be forwarded.

ommPilot Express	OFF	Ŧ
CommPilot Express allows you to pre-conf calls. These profiles can quickly be change your desk orwhen you are at remote location precedence oversome of your other service incoming calls.	d using the web or phone when you leave on. If you useCommPilot Express, it takes	
Current Profile: None	T.	
Available - In the Office		_
Also ring this phone number:		
f Busy:		
Have Voice Messaging		
OForward to this phone number:		
If No Answer:		
Have Voice Messaging take the call		
OForward to this phone number:		
Available - Out of the office		
When a call comes in:		
Have Voice Messaging take the call		
OForward to this phone number:		
Also notify me by e-mail when a call comes in	n:	
Busy		
		_
Send all calls to Voice Messaging except call	Is from these phone numbers:	
Which will be forwarded to this phone number:		
Unavailable		
0-		
Send all calls to Voice Messaging except call	Is from these phone numbers:	
Which will be forwarded to this phone number:		
Have Voice Messaging take the call using:		
No Answer Greeting		
OUnavailable Greeting		
Save Cancel		
	See instruction	ne
	See Instructio	115

■ Also E-mail me here when a call comes in: - Click to I select/enable and enter the email address the system should send notifications to when a call comes in while you are *Busy*.

Unavailable

- O Send all calls to Voice Messaging except calls from these phone numbers: Click to enable and enter up to three (3) 10-digit phone numbers in the fields directly below.
- Which will be forwarded to this phone number: Enter a 10-digit phone number in the adjacent field to which <u>only</u> calls from the phone numbers listed above will be forwarded.
- Have Voice Messaging take the call using:
 - O No Answer Greeting Click to

 select/enable to instruct the system to use the No Answer Greeting you've setup for voicemails - OR
 - O Unavailable Greeting Click to ⊙ select/enable to instruct the system to use the Unavailable Greeting you've setup for voicemails.
- 2. Click on the Save button to submit the changes to the profile and exit the dialog or click the Cancel button to exit without saving any changes.

Connected Line Identification Restriction

On Off Setting. The **Connected Line Identification Restriction** feature allows you to block your number from being shown when receiving a call. Members of your group can still see your number when they call you.

Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view. Connected Line Identification Restriction OFF V Connected Line Identification Restriction allows you to block your number from being shown when receiving a call. Members of your group can still see your number when they call you. You have the choice of turning it on or off for all calls and then selectively turning it right back on or off using the feature access codes.

Manage Connected Line ID Restriction

1. Slide the toggle to **ON** or **Off** and click on the Save button to submit the change and close the *Edit* view.

Conference List

The **Conference List** service allows users to manage settings for online conferences, the participants and moderators, and the conference recording downloads.Click the adjacent drop-down arrow ▶ to access this feature's setting management tools.



Add a Conference Listing

- 1. Click on the Add button to create a new conference.
- 2. Select the appropriate Conference Bridge type from the drop-down menu.
- 3. Define the following:
 - Title (a short description of the conference)
 - Estimated Number of Participants _____
 - Maximum Number of Participants _____

Conference Bridge:	Conferencing 1360261 V
Title:	
Estimated # of Participants:	
Max Participants:	
Account Code:	
Mute Participants on Entry:	
End conference when moderal leaves:	tor
Moderator required to start:	
When participant joins:	Please Select Option 🔻
Type:	Select a Conference Type 🔻
Conference End Type:	Please Select the End Type V

- Account Code (an x-digit code for participants to use to access the conference)
- 4. Click to place a check within the adjacent box ☑ to enable the following options, as needed:
 - Mute Participants on Entry
 - End Conference When Moderator Leaves
 - Moderator Required to Start
- 5. Define When Participant Joins: Select the appropriate action from the drop-down menu.
- 6. Define Type: Select from *One Time* (Define the Date, Start Time, and Duration in HH and MM), *Reservationless* (Define the Start Date and End Type), and *Recurring* (Define the Recurrence information as required)
- 7. Click the Save button to add the new Conference setup and close the criteria view.
- 8. Click the Save button in Conference List settings to update the system and exit the Edit view.

Manage Conference Recordings

The following <u>recording</u> management tools are provided in the *Edit* view:

A. Click on the Recordings link next to the appropriate Conference Listing to review any recording details and options.

11101:0	JU:00	v			
iless 2018- 11T01:(06- 00:00	Recordings	Moderate	Edit	Delete
		J			

- B. Click on the Download option and follow the steps to save a recording to a local file.
- C. Click on the Delete option next to a listing to remove the selected recording from the archive.

Edit a Conference Listing

- 1. Click on the *Edit* option next to the appropriate Conference listing to open the criteria setup view.
- 2. Make changes to the setup, as needed.
- 3. Click on the Save button to update the conference list information.

Delete a Conference Listing

Use Caution. The item and all its information are immediately removed from the system.

1. Click on the Delete option next to the appropriate Conference Listing to Immediately remove it.

Launch Moderator Tool

- 1. Click on the Moderate link next to the appropriate Conference Listing.
- 2. Enter your Password.
- 3. Click the Launch Moderator Tool button to open the pop-up view for the conference.

Manage Conference Moderators

- 1. Click Edit next to the appropriate Conference listing.
- 2. Highlight the appropriate Available Users and use the arrows ► < to move them to/from the ConferenceModerators section.
- 3. Click the Save button to return to the Settings list when finished.

Custom Ringback User

As a **Custom Ringback User**, you can select a ringback message to be played to specified callers based on your pre-defined criteria.



The criteria for each Custom Ringback you define can include up to 12 phone numbers or digit patterns and specific schedules. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Custom Ringback List

- 1. Click on the Add button to begin defining a Custom Ringback listing.
- 2. Description: Type a name that will display in the Custom Ringback list.
- 3. Enter or select from the following options, as needed:
 - ✤ Play custom Ringback: Click within the ⊙ radial button to enable

 - Selected Time Schedule: Use the drop-down menu to select the correct option. <u>OR</u>...
 - Selected Holiday Schedule: Use the drop-down menu to select the correct option.
 Note: Only one schedule type (Time or Holiday) can be defined per list.
 - Audio Ringback: Click within he appropriate radio button to enable
 No personal Ringback, or URL, or Personal Ringback File and enter or use the drop-down menus toinclude the information required for your selection.

Add
Description: customer
Play custom ringback
O Do not play custom ringback
Selected Time Schedule: Holiday Schedule 🔻
Selected Holiday Schedule: Enterprise Business 🔻
Audio Ringback:
No Personal Ringback
© URL:
Personal Ringback File Greeting T
Calls From:
Any phone number
Following phone numbers:
Any private number
Any unavailable number
Specific phone numbers:
Saven

- As Needed: Click within the adjacent check boxes ☑ to include calls from Any private number, and/orAny unavailable number.
- Specific Phone Numbers: Enter the 10-digit numbers in the fields provided, as needed to define calls from specific numbers.
- 4. Click on the Save button to submit the new Custom Ringback listing and close the Edit view.

Edit a Custom Ringback List

- 1. Click on the Edit link adjacent to the desired Custom Ringback listing.
- 2. Make changes to the setting options, as necessary.
- 3. Click on the Save button to submit the changes and return to Settings.

Delete a Custom Ringback List

Use Caution. Once Delete is selected, the item and all its information are immediately removed from thesystem.

- 1. Click on the Edit link adjacent to the Custom Ringback listing you wish to remove.
- 2. Click on the Delete button to immediately remove the custom callback list from the system and exit the *Edit* view.

Direct Call Pickup with Barge-In

Dial into a call to another member of the group and if already answered, create a 3 way conference. Click on the adjacent drop drop-down ▼ arrow to access this feature's Edit view and enable the following options:

- 1. Barge-In Warning Tone: Click On to enable the tone
- 2. Automatic Target Selection: Click On to enable.
- 3. Click the Save button to submit the change and close the view.

Direct Call Pickup with Barge	e-in	ON	Ŧ
to pickup (answer) a call d enterprise), or barge in on	irected to another user in the	to dial a feature access code (FAC) followed same customer group (or enterprise, if the g y answered. When a barge-in occurs, a thre the controller.	group is part of an
Bargin-in Warning Tone : Automatic Target Selection : Save Cancel			
			j) See instructions

Do Not Disturb

On [Off Setting. When Do Not Disturb is enabled, incoming callers receive a message stating that you are busy and can be sent to your Voicemail if that service is also turned ON. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Do Not Disturb	OFF	V
Callers will receive a message stating you are busy and be	sent to your Voicemail.	
OFF Ring Reminder		
Save Cancel		

Manage Do Not Disturb

- 1. Click to toggle the switch to **On** or Off, as desired.
- 2. Ring Reminder: Click to place a check in the box 🗹 if you wish to be reminded that DND is enabled.
- 3. Click the Save button to submit the change and exit the Edit view.

Hoteling Guest

The Hoteling Guest feature allows a user to associate their account profile with a <u>Hoteling Host</u> user's device/number, which means the Hoteling Guest user can utilize the Hoteling Host's device as though it is their own device/extension for a period of time. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

e the host's

Manage Hoteling Guest

- 1. Click within a radial button to set Hoteling Guest to On or Off.
- 2. Limit Association to x Hours: Click to place a check mark to enable and then enter the number of Hours.
- 3. Highlight an Available Host number and use the arrow ► to move it to the Associated Host section to select it.
- 4. Click the Save button to submit the change and exit the *Edit* view.

Hoteling Host

The Hoteling Host service allows a user account/device to be designated as a *Host*. A user who is already setup as a Hoteling Guest can then select the Hoteling Host. When the two are associated, the Host allows the Guest to use the host's device with the guest's service profile (as though it is their own device/extension) for a period of time. Click the adjacent drop-down arrow \blacktriangleright to access this feature's *Edit* view.

Hoteling Host	ON	₹
Hoteling Host allows a user to be designated as a host user. A u to the host user. When associated, the host user allows the gues association limit is not enforced, the Guest user is allowed to ass	t user to use the host's device with the guest's service	
Hoteling Host: ® On @ Off		
Inforce Association Limit 24 Hours		
Access Level: ©Enterprise ® Group		
Associated Guest		
Last Name: First Name:		
Phone Number: Extension:		
Associated Date:		
Save		
Save		See instructions

Manage Hoteling Host

- 1. Hoteling Host: Click within a radial button to set to On ⊙ or Off (default).
- 2. Enforce Association Limit 24 Hours: Click to place a checkmark in the box ☑ to enable the limitation. If the Association limit (24hrs) is not enforced, the Guest user is allowed to associate with the Host user's device indefinitely.
- 3. Access Level: Click to select \odot *Enterprise* or \odot *Group*.
- 4. Associated Guest: Enter the requested information (Last Name, First Name, Phone Number, Extension, and the Associated Date).
- 5. Click Save to submit and close the Edit view.

Music On Hold

On | Off feature. The **Music On Hold** feature may also be available to manage from the <u>Basic</u> <u>Features</u> card on your Dashboard/Home Page. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Music On Hold

- 1. Click within the appropriate radial button to turn **On** ⊙ or **Off** ⊖ (default).
- 2. Click the Save button to submit the change and close the view.

Music On Hold	ON	V
Music on Hold: On Off		
Save		
		í See instructions

Outbound Caller ID Block

On | **Off** feature. When enabled, the **Outbound Caller ID** feature allows you to block your Caller ID information from being displayed when you call someone. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Outbound Caller ID Block

Click within the appropriate radial button to turn On
 ⊙ or Off ○ (default).

OFF	W
Il someone.	
09	ee instructions
	ll someone.

2. Click the Save button to submit the change and close the *Edit* view.

Priority Alert

The **Priority Alert** feature allows a user to define criteria thattriggers distinctive alerts for specific incoming calls. Click the adjacent drop-down arrow \blacktriangleright to access this feature's *Edit* view.

Add a Priority Alert

- 1. Click on the Add button to open the criteria dialog.
- 2. Description: Type a short title (E.g., Priority 1, Low Priority, etc.) for this alert.
- 3. Select, set, or define the following options, as needed:
 - Use Priority Alert Click the radial button to
 enable or /disableO.
 - Do Not Use Priority Alert click to enable O/disableO.
 - Selected Time Schedule: Choose an option from the drop-down menu, or...
 - Selected Holiday Schedule: Choose an option from the drop-down menu.
 Note: Only <u>one</u> schedule type (Time or Holiday) may be selected for each Priority Alert.
 - Any External Phone Number click to enable ⊙/disableO.
 - ✤ Following Phone Numbers click to enable ☉/disableO.
 - Any Private Number enable ⊙/disableO.
 - Any Unavailable Number click to enable ⊙/disable○.
 - Specific Phone Numbers enter up to 12 (twelve) 10-digit numbers that will be included for the alert.
- 4. Click on the Save button to submit the new Priority Alert and return to Settings.

Activate a Priority Alert

1. Click to place a checkmark *I* in the Active box next to a Priority Alert listing to activate it.

Edit a Priority Alert

- 1. Click on the Edit link next to the appropriate Priority Alert listing to open the Criteria dialog for editing.
- 2. Make changes to the settings, schedules, or numbers, as needed, and click Save to update.



Delete a Priority Alert

- 1. Click on the Edit link next to the appropriate Priority Alert listing to open its *Edit* view.
- 2. Click on the Delete button to remove the Priority Alert from the system. *Wait for the* Deleted Successfully! *message*.
- 3. Close the dialog to return focus the Priority Alert list and click on the Save button to update and exit.

Privacy

The **Privacy** feature allows you to define your name and number privacy settings for Directories, Auto Attendants, and Hunt Groups.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Privacy

- 1. Click to enable ☑ or disable □ the following options, as needed:
 - Enable Directory Privacy when enabled, removes the the name/number from group/enterprise directories.
 - Enable Auto Attendant Extension Dialing Privacy - when enabled, removes extension/ number from Auto Attendant extension dialing.



- Enable Auto Attendant Name Dialing Privacy when enabled, removes the Name from Auto Attendant name dialing.
- 2. Click the Save button to update the system with the new information and close the *Edit* view.

Receptionist Dashboard

This feature allows the user assigned to the Broadsoft Receptionist Client to select other users in their organization whom they wish to monitor for presence status within the Receptionist Dashboard client.

Monitor Users in Receptionist Dashboard

To select users to monitor within the application:

- 1. Select from the listed lines in the **Available Users** section and use the arrow tools to move them to the **Monitored Users** section.
- 2. Click Save when finished to submit changes and close the dialog.

Quick Access to the Receptionist Dashboard

1. Click on the Client App link to open the sign in page for the Broadsoft Receptionist client application in a new browser window.





Receptionist Dashboard SMB

This feature allows the user assigned to the Broadsoft Receptionist SMB client application to select other users in their organization whom they wish to monitor for presence status within the Receptionist Dashboard application.

Monitor Users in Receptionist Dashboard SMB

To select users to monitor within the application:

- 1. Select from the listed lines in the **Available Users** section and use the arrow tools to move them to the **Monitored Users** section.
- 2. Click Save when finished to submit changes and close the dialog.

Quick Access to the Receptionist Dashboard SMB

1. Click on the Client App link to open the sign in page for the Broadsoft Receptionist SMB client application in a new browser window.



fece	ptionis
enter username here	
Append Domain	
English (US)	
Sigr	n in 🔤
	0
 Stay Signed In 	

Selective Call Acceptance

Selective Call Acceptance allows the user to create lists of specific incoming calling numbers and the

Selective Call Acceptar

Add

Descri

Active

criteria for acceptance (or Non-acceptance).

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Selective Call Acceptance List

- 1. Click on the Add button to open the criteria view.
- 2. Define the following criteria options, as needed:
 - Description Required: A short descriptive title for this call block type.
 - Accept Call Click to setup this list to <u>accept</u> specific calls when all the criteria defined here are met.
 - Do Not Accept Call Click to setup this list to Block Calls specific calls when all criteria defined here are met.
 - Select Time Schedule Choose a pre-defined Time Schedule from the drop-down menu. OR...
 - Selected Holiday Schedule Choose a pre-defined Holiday Schedule from the drop-down menu.
 Note: Only one schedule type (Time <u>or</u> Holiday) can be selected at a time.
 - Any Number Select if any number dialed in will be accepted or blocked.
 - * Following Phone Numbers Select to define individual numbers to accept or block.
 - Any Private Number Select to trigger for incoming calls with "Private" Caller ID.
 - Any Unavailable Number Select to trigger for incoming calls with "Unavailable" Caller ID.
 - Specific Phone Numbers Select and enter up to twelve (12) 10-digit phone numbers.
- 3. Click the Save button when finished to submit the changes and close the *Edit* view.


Edit a Selective Call Acceptance List

- 1. Click on the Edit link next to the appropriate Selective Call Acceptance listing to open the item's *Edit* view.
- 2. Make changes to the settings, schedules, or numbers as needed.
- 3. Click on the Save button to update the Priority Alert information.

Delete a Selective Call Acceptance List

- 1. Click on the Edit link next to the appropriate listing.
- 2. Click on the Delete button and wait for the Deleted Successfully! message.
- 3. Click on the \boxtimes Exit icon to return to the list.
- 4. Click on the Save button to update the information and return to Settings.

Speed Dial

This feature allows users to define **Speed Dial** options for specific numbers using short 2 digit codes (00-99) prefixed by the # sign. Some 2-digit code combinations will conflict with Calling Feature (Star) Codes. These Star Codes are listed to assist the user. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Add a Speed Dial Contact

- 1. Click on Add Contact.
- 2. Enter First Name and Last Name.
- Enter at least one (1) Phone Number (10 digits, no spaces or special characters) in the appropriate field (Home, Work, Mobile)
- 4. Primary Phone: Select the type using the drop-down menu (Home, Work, or Mobile)
- 5. Select from the <u>available</u> (unused) list of Speed Dial Codes using the drop-down menu (00-99). (Check the Star Codes listed for you to ensure there are no conflicts)
- 6. Click the Save button to submit the new Speed Dial Code and close the *Edit* view.

Edit a Speed Dial Contact

- 1. Click Edit next to a Speed Dial Contact in the list.
- 2. Make changes to name, numbers, primary assignment, or code, as needed.
- 3. Click the Save button to submit the change and close the view.

Delete a Speed Dial Contact

- 1. Click within the checkbox ☑ in the first column to select an item in the list.
- Click on the Delete button below.
 OR
- 1. Click the Edit link next to a Speed Dial Contact to open its Criteria dialog.
- 2. Click the Delete button.
- 3. Click the 🗵 Exit icon to return to the *Edit* view.
- 4. Click Save to submit the changes and return to Settings.

Export Speed Dial Contact List

1. Click on the Export button to automatically download a .csv format report containing the current list of Speed Dial Contacts which can be saved to a local folder or printed, as desired.

Speed Dial			Ψ
Add Contact Export			
Name	Phone Number	Speed Dial	Edit
Delete Cancel			Page 🔽 of 0
Note: Some Speed Dial octes conflict with certa their Patture Acces Code Standbonstly when a 440 Call Forencing Boyr 7 Volce Mail Deathy 443 Call Valling Persistent Deathyston 443 Call Valling Persistent Deathyston 443 Call Valling Persistent Deathyston 443 Call Valling Persistent Deathyston 470 Night Service Activation Manual Override 477 Forest Forenering Deathyston 477 Forest Forenering Deathyston	stive: #31 Calling Line ID Delivery Blockin ation sactivation	a list of conflicting Speed Dia g Peralatent Deactivation	I codes that completely over-ride
#77 Call Forwarding Selective Descrivation #00 Make Outgoing Call as Call Center #01 Make Personal Outgoing Call #03 Escalate Call to Supervisor			

Call Forwarding

The **Call Forwarding** service allows users to set up simple forwarding numbers for specific purposes and set the service to work Always, when you Don't Answer, have a Busy Line, or when you're Not Reachable.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Set Call Forwarding Number(s)

- 1. Click the toggle next to the appropriate forwarding option(s) to turn **ON** or Off.
- Enter the 10-digit number or extension (no spaces or special characters) in the adjacent Forward To: field for the option(s) selected.
- Forward After x Rings: Use the drop-down menu to select the number of rings before a call is forwarded.

		Forward to:	
Call Forward Always	OFF	8979	
Call Forward Don't Answer	OFF	123	Forwards After 4 T Rings
Call Forward Busy Line	OFF	123	
Call Forward Not Reachable	OFF	123	

4. Click the Save button to submit the changes and close the *Edit* view.

Edit Call Forwarding Numbers

- 1. Make changes as needed to forwarding numbers or enabled options.
- 2. Click the Save button to submit the change(s).

Delete Call Forwarding Numbers

1. Simply remove (erase) the number from the appropriate Call Forwarding type and click the Save button.

Call Forwarding Selective

The **Call Forwarding Selective** feature allows users to set up a default forwarding number, define very specific criteria that will trigger call forwarding, and receive a reminder when the feature is enabled. Note: All criteria defined must be met for this feature to work. Click the adjacent dropdown arrow \blacktriangleright to access this feature's *Edit* view.



Add a Call Forwarding Selective List

- 1. Click within the radial button for O ON to enable or O Off to disable (default).
- 2. Enter the Default Call Forward To number (10-digits, no spaces or special characters).
- 3. Click within the check box ☑ to enable Play Ring reminder when a call is forwarded.
- Click the Save button to update the system this closes the view.
- 5. Reopen the Call Forwarding Selective *Edit* view.



- 6. Click the Add button to open the dialog further and define the selective forwarding trigger criteria.
- 7. Enter or select from the following:
 - Description: Type a short description or title for review in lists.
 - Forward To: Select an option from those you defined (see steps 1-4 above) using the drop-down menu.
 - Selected Time Schedule: Choose a Time Schedule using the drop-down menu. Selected Holiday Schedule: Choose a Holiday schedule using the drop-down menu. Note: Only one schedule type (Time or Holiday) may be selected at a time.
 - Calls From: Select an option using the drop-down menu (If From Following Phone Numbers is selected, enter up to twelve (12) 10-digit number(s) in the From Following fields provided below)
 - Click within the radial buttons

 to include forwarding to the default number for Anonymous caller ID and/or Unavailable caller ID.
- Click the Save button to submit the data and close the view.
 Optional: Repeat these steps to create multiple lists with alternative triggers or schedules.

Edit a Call Forwarding Selective List

Editing options found within the Call Forwarding Selective *Edit* view:

- A. Turn On/Off: Click within the radial button for ON to enable or Off to disable (default) and Save.
- B. Change Default Call Forward Number: Type a new 10-digit phone number in the field provided and Save.
- C. Ring Reminder: Click within the Play ring reminder... check box to enable 🗹 / disable 🗆 and Save.
- D. Edit the Forwarding Trigger Criteria:
 - 1. Click on the Edit link next to the desired listing to open the *Call Forwarding Selective Criteria* dialog.
 - 2. Make changes to the trigger criteria (Description, Schedules, and/or specified numbers to forward), as needed.
 - 3. Click the Save button to submit the changes and close the view.

Delete a Call Forwarding Selective List

Caution: This action is immediate and cannot be undone.

1. Click on the Delete link next to the desired listing to instantly remove the selected listing.

Find Me – Simultaneous Ring

The Find Me – Simultaneous Ring service makes it easy to ensure you don't miss a call. It allows users to define up to ten (10) alternate phone numbers/ SIP URI addresses to ring when a call comes through and create multiple scenarios to use when the service is *On*. All numbers defined here ring at the same time if they are enabled for usage. Click the adjacent drop-down arrow ▶ under View/Edit to access this feature's *Edit* view.

Setup Find Me – Simultaneous Ring Numbers

- Click within the appropriate radial button to turn ON ⊙ or Off O (default).
- 2. Do not ring my simultaneous ring numbers if I'm already on a call: Click to place a check in the box ☑ to enable this feature.
- 3. Phone Number / SIP URI: Enter up to ten (10) phone or SIP URI numbers in the fields provided.
- 4. Answer Confirmation Required: Click to place checkmarks in the box to enable this feature for a number.
- 5. Click the Save button when finished to save the data and close the view.

Setup Find Me – Simultaneous Ring Triggers

- 1. Click on the Add button beneath the number list to open the *Add Simultaneous Ring Criteria* list.
- 2. Description: (required) Type a short descriptive title for review in lists.
- 3. Define the following criteria options, as needed:
 - Setup Options: Use the drop-down menu to define whether this criteria list will use Simultaneous Ring or not.
 - Select Time Schedule: Choose a Time Schedule using the drop-down menu.
 OR
 - Selected Holiday Schedule: Choose a Holiday schedule using the drop-down menu. Note: Only one schedule type (Time or Holiday) may be in use.
 - Calls From: Use the drop-down menu to choose an option (and enter up to 12 10-digit phone numbers in the fields provided below if *Following Phone Numbers* is selected).
 - $\diamond\,$ Anonymous Callers: Click to add a check in the box $\boxdot\,$ to enable.
 - \diamond Unavailable Callers: Click to add a check in the box \boxdot to enable.
- 4. Click on the Save button when finished to submit the criteria and close the view. *Repeat to create additional criteria for different calling scenarios or schedules.*

Description	
Setup options:	- Please Select Option - *
Selected Time Schedule	Every Day All Day •
Selected Holday Schedule	 Jeans and previous constraints and a second s
Calls From	
Anonymous callers:	8
Unavailable callers:	
Grananabie Carera.	

Answer Confirmation Required	Phone Number / SIP URI	
8	3219486370	
0	3215551212	
	4073107552	
0		
8		
0		
0		
0		
Save		

MY CLOUD SERVICES PORTAL

1. Make any changes to the Find Me settings.

Edit Find Me – Simultaneous Ring

- 2. Click the Edit link next to an item to modify the triggers.
- 3. Click the Save button(s) to submit the changes.

Delete Find Me – Simultaneous Ring

Caution: This action is immediate and cannot be undone.

- 1. Click the Delete link next to an item in the *Simultaneous Ring Criteria List* section to remove the selection.
- 2. Click the Save button to update the list information and return to Settings when finished.

Find Me – Sequential Ring

The Find Me – Sequential Ring service allows the user to define and manage up to five (5) alternate phone numbers that can be set to ring one after the other based on specific criteria if an incoming call is not answered. Click the adjacent drop-down arrow \blacktriangleright to access this feature's *Edit* view.

Setup Find Me – Sequential Ring

- 1. Define the following basic setup options, as needed:
 - Use base location first: Click to turn On ☑ or Off □ (default).
 - Number of rings for Base location: Use the drop-down menu to select a number of rings.
 - Continue the search process if the base location is busy: Click within the check box to turn On ☑ or Off ☑ (default) to allow forwarding even when the base number is busy.
 - ✤ Enable caller to skip process: Click within the check box to turn On I or Off □ (default).
- 2. Define the setup for the numbers that will be used for forwarding (in the order of their use):
 - Answer Confirmation Required: Click to place a check in the box to enable this.
 - Phone Number / SIP URI: Type a 10-digit number (no spaces or special characters) in the field(s) provided.
 - Number of Rings: Use the drop-down selection tool to choose a number of rings before trying the next number in the list (below).
- 3. Click the Save button to submit the changes and return to Settings.

Setup Find Me – Sequential Ring Triggers

- 1. Click on the Add button beneath the number list to open the Add Sequential Ring Criteria dialog
- Add a Description: (required) Type a short descriptive title for review in lists.
- 3. Enter or select from the following trigger options, as needed:
 - Setup Options: Use the drop-down menu to define whether this list will use Sequential Ring.

opential Ring Criteria Descriptor Satury options	
Setup options	
Delected Time Schedule: Every Day All Day	
Selected Holday Schedule: None •	
Cals From Please Select Option - *	
Anonymous cellers:	
Ordivatable callers -	

Simultaneous Ring (Criteria List		
Name	Edit	Delete	
test 1	Edit	Delete	
Cancel Add			

42

- Select Time Schedule: Select a Time Schedule using the drop-down menu. OR
- Selected Holiday Schedule: Choose a Holiday schedule from the drop-down menu.
 Note: Only one schedule type can be used at a time when defining a set of criteria.
- Calls From: Use the drop-down menu to choose an option (and enter phone numbers in the fields provided below if *Following Phone Numbers* is selected).
- ♦ Anonymous Callers: Click to add a check in the box ☑ to enable.
- ◆ Unavailable Callers: Click to add a check in the box ☑ to enable.
- 4. Click on the Save button when finished to submit the trigger criteria and return to Settings.

Edit Find Me - Sequential Ring

- 1. Make changes to numbers or Answer Confirmation settings, as needed.
- 2. Click the Edit link next to a list item and make changes to the trigger criteria, as needed.
- 3. Click the Save button to update the information when finished.

Delete Find Me – Sequential Ring

Caution: This action is immediate and cannot be undone.

- 1. Click the Delete link next to a list item.
- 2. Click the Save button to update the list and return to Settings.

Push to Talk

The **Push to Talk** feature allows specific calls to be answered automatically via the speakerphone/ intercom function on the device. Users can define which numbers/callers within the directory will have *Push to Talk* access when calling you. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Manage Push To Talk

- 1. Define the following options, as needed:
 - Auto Answer: Click to place a check in the box to automatically answer *Push to Talk* calls via speakerphone / intercom.
 - ✤ Outgoing Connection Type: Click within the radial buttons to select the appropriate connection type.
 - One Way: The originator can talk to the party receiving the call, but the receiver cannot respond.
 - Two Way: The originator and receiver can talk to each other.
 - Access Lists: Click within the radial button to select the appropriate option:
 - Allow Calls from Selected Users: Select users to allow below.
 - Allow Calls From Everyone Except Selected Users: Select users to disallow below.
 - Available Users: Highlight and use the arrows ▶

 to move users to move selection(s) to and from the Selected Users section.
- 2. Click on the Save button to submit the changes and return to Settings when finished.





Virtual Number

Note: The Virtual Number feature requires an Administrator to have configured new numbers and extensions for use. The setting dialog allows a user to define up to ten (10) additional phone numbers and extensions to ring along with your primary number and extension. All additional numbers ring your phone(s) just like your primary phone. The user can specify a distinctive ringing pattern for each number if the phone device supports it. Only an administrator can <u>configure</u> new numbers and extensions for your virtual number. If you do not have additional virtual numbers available for selection in this dialog, contact your Administrator for assistance.

Click the adjacent drop-down arrow ► to access the *Edit* dialog view.

- 1. Select and or enter information for the following, as needed:
- 2. Distinctive Ring: Click to turn the distinctive ring capability for the numbers/extensions defined below ⊙ On or O Off.

Phone Number: Select a pre-defined

hone Number	Extension	Ring Patterns	Description
None 🛩		Normal	
None 🗸		Normal	
None 🗸		Normal	
None 🗸		Normal 🗸	
None 🗸		Normal	
None 🛩		Normal 🗸	
None 🗸		Normal 🗸	
None 🗸		Normal	
None 🗸		Normal	
None 🛩		Normal	

- option from the drop-down menu as needed to define the ring for an extension/number.
- Extension: Type the correct extension in the field provided for each line (as needed).
- Ring Patterns: Choose an available ring pattern from the drop-down menu, as needed.
- Description: Type a short description in this field to assist with future edits/changes.
- 3. Click on the Save button to submit the new information and return to the Settings list view.

Contact Centers

•••

The settings for **Contact Centers** are generally pre-defined by an Admin during the installation and implementation of a Contact Center, or upon the addition of new users. However, some Supervisors or Managers may receive additional access to modify limited settings used in conjunction with the Contact Center features within their individual accounts. Remember, these personal account settings do <u>not</u> override the Enterprise Contact Center Agent or Supervisor settings.

The adjacent drop-down arrow ► opens this feature's *Edit* view.

Manage Contact Center Settings

- 1. Define the following options, as needed:
 - ACD State: Select an option from the drop-down menu.



- * Make outgoing calls as: Click to enable and select the appropriate menu option.
- * Use Guard Timer Setting: Click to select for either Default or User.
- ◆ Enable guard timer: Click ☑ to enable and select the appropriate number of Seconds using the drop-down menu.
- Use Agent Unavailable Settings: Click to select either Default or User settings.
- ♦ Click I to enable I disable Force agent to unavailable on Do Not Disturb activation.
- Click ☑ to enable/ □ disable Force agent to unavailable after X consecutive bounced calls and specify the number.
- ♦ Click I under Join Contact Center to enable your account for contact center usage.
- Select an alternate Skill Level using the available drop-down menu options.
- 2. Click the Save button when finished to submit the changes and close the view.

Client App

The **Client App** feature in the *Settings* page provides authorized users with an access point for the Contact Center or Supervisor client application sign in page. Instructions are provided in the *Edit* view.

Supervisor

Contact Center ID

Cancel

4703770093@mymtm.us

Nient App	₹
Client App (m) To access the Contact Center Agent or Supervisor client applications, please click the link above. You will be prompted to enter a username and password. Your password will be the username and password you use to login to this portal; however, you will append the domain "@mymtm.us" to the username. See example below: Username (example): 5555551234@mymtm.us or 555551234X100@mymtm.us Password (example): ******** Please contact your administrator or service provider to purchase Contact Center Agent and Supervisor client applications.	

Supervisor

The **Supervisor** feature in the *Settings* page offers authorized users the ability to manage their Contact Center agent assignments. Click the adjacent dropdown arrow ► to access this feature's *Edit* view.

Manage Supervisor Settings

- 1. Click on the Edit link to view the Agent assignment options.
- 2. Highlight the agents you wish to select and use the
 A arrows to move Available Agents to Assigned Agents or vice versa.
- 3. Click the Save button when the changes are complete to update the system and close the *Edit* view.

Fax-to-Email / Email-to-Fax

- 1. Click on the Edit link to view the setting options.
- 2. Enter email address below: Enter the email address to use for Fax.
- 3. Click the Save button when the changes are complete to update the system and close the *Edit* view.

Voicemail

See Voicemail.

Distribution List

The Distribution List feature allows the user to create one or more messaging distribution lists (up to 14) that will send Voicemail notifications using the portal setup when new messages are left on voicemail. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Description II In Units 1 2 4 6 7 8 1	Distribution List		
0 0			
Derburg Lee Phone Sunce (2R-UR) (000005225)		0 11 12 13 14	
Derburg Lee Phone Sunce (2R-UR) (000005225)	Descrution 1		
Prone Sunder S Public (00000123)			
See Para notes SP (R) Ne car hund	Denovor Le		
Ind data fund	Prone Number 2 PLUR: (83)	mination and a second s	
Ind data fund	(Barrison		
taur 1	Televe."		
1444			
Taxe .			



Edit

Annaging		VIEW/EDIT
ax-to-Email / Email-to-Fax		Þ
Send callers to your own personal Voicemail inbox	when you are on another call, not there, or just	too busy
Send and received using any email account.		
Enter email address in the below:		
usemame@exampledomain.com		
Note: Only one email address be associated with	your Fax-to-Email / Email-to-Fax account.	
Save Cancel		
		See instructions

Manage Distribution List

- 1. Click to select a Distribution List Number from the options at the top.
- 2. Enter the Description (name).
- 3. Type the Phone Number/Ext (10-digits; no spaces or special characters).
- 4. Click the Add button and click Save to submit the data and exit.

Reset Voicemail Pin

See Reset Voicemail Pin.

Anywhere

The **Anywhere** feature allows users to set up another way to ensure no calls are missed by defining an Alternate Phone Number for use with the **Mobility** application. Click the adjacent dropdown arrow ▶ to access this feature's *Edit* view.

constant an electrical de Color-de Cale seus			
View Austinities Partiel Line			
Phone No.	Description	100	Select
201544ddat7	Test (det.	8
Love and the Address of Taxana			

Phone Number

Cancel

Business hours
 Use Anywhere
 Do not use Anywhere
 e Schedule: Enterprise Business (*)

Setup Anywhere

- 1. Click the View Available Portal List link to review the available Anywhere numbers and make note.
- Click the Add button to set up Anywhere Phone Number and Selective Criteria.
- 3. Enter the 10-digit Anywhere phone number.
- 4. Enter a short Description (name) for display in lists.
- 5. Click within the check boxes to Enable ☑ / Disable □ the options, Note: Only one Schedule type (Holiday or Time) can be defined at a time.
- 6. Click on the Selective Criteria tab to define trigger criteria (schedules,caller types, or to specify numbers).
- 7. Click the Save button(s) to submit the data and exit the *Edit* view.

Edit Anywhere

- 1. Click on the *Edit* link next to the Anywhere listing.
- 2. Make changes to the *Phone Number* or *Selective Criteria* settings, as needed.
- 3. Click the Save button(s) to submit the changes and return to Settings when done.

Phone Number Se	elective Criteria	
Phone Numb		
Descriptio		
	Enable this Location	
	ernate Phone Number/SIP URI:	
	Enable diversion inhibitor	
	Require Answer Confirmation	
	Use Call Control Services	

Delete Anywhere

Use caution. This action immediately removes the Anywhere number association and cannot be undone.

- 1. Click to place a check in the box \square next to the desired listing.
- 2. Click on the Delete button to remove the listing and return to Settings.

Remote Office

The **Remote Office** service allows you to redirect all calls to the phone number defined here. Use your homephone, cell phone, or even a hotel room phone as your business phone in conjunction with the *CommPilot Manager* application. When enabled, you can make phone calls and have them billed to your business. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Remote Office

- 1. Click to toggle the service ON or OFF.
- 2. Remote Phone Number: Enter a number.
- 3. Click on the Save button.

Remote Office	OFF	
Remote Office allows you to use your home phone, your c using the CommPilot Call Manager, you can make phone o business. This service also directs all calls coming to you	alls from this remote phone and have them billed to y	ne. By our
ON		
Remote Phone Number: 1234567890		
Cancel		
	👔 See	instructions

Enterprise Directory

The Enterprise Directory feature offers an online listing of all phone service information within the Enterprise directory for theaccount. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Print Enterprise Directory Summary

 Click on the Enterprise Directory Summary Link to view a summary listing of the Phone List to print using your browser feature.

Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID	
3100001051-02-Default (Collaborate - Audio)						3100001951- 02	
3100001951-03-Default (Collaborate - Audio)						3100001951- 03	
3100001951-04-Default (Collaborate - Audio)						3100001051- 04	
3100001951-05-Default (Collaborate - Audio)						3100001₽51- 05	
Auto Attendant 1360264 (Auto Ittendant)	4705321472	1472				3100001951- 01	
Auto Attendant 1369371 (Auto Attendant)	4703770098	0096				3100001951- 01	
BroadWorks Anywhere 1380257 (BroadWorks Anywhere)	4705321011	1011				3100001951- 01	
Collaborate Bridge 1360262 (Collaborate - Audio)	4705321400	1400				3100001951- 01	
Conferencing 1360261 (Meet-Me Conferencing)	4703770082	0082				3100001951- 01	
DID,DID	4705093280	3280				3100001951- 02	
010,010	4705093291	3291				3100001951- 02	
010,010	4705093284	3284				3100001951-	

Print Enterprise Directory Details

1. Click on the Enterprise Directory Details link to view a detailed phone list that is ready to print using your browser features.

Time Schedule

The **Time Schedule** feature allows users to schedule call behaviors (send to voicemail, etc.). Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Schedule

- 1. Click to place a check mark ☑ next to Business Hours or Holiday Schedule.
- 2. Click the Add button for that option.
- 3. Enter a unique Schedule Name.
- 4. Click the Save button when finished.

	Business Hours Schedule	Level	Action	
	Enterprise Business	Service Provider	View N	-
	test22222	Group	Edit	
	test3	Group	Edit	_
	Cancel Add Delete	Level	Action	-
	Holiday Schedule	Service Provider	View	-
	test	Group	Edit	
	test3	Group	Edit	-
C	Cancel Add Delete			

View a Schedule

Some schedules are read-only in this view. Simply click View to review the schedule's current setup.

Delete a Schedule

Use caution. This action removes the schedule and any underlying events and cannot be undone.

- 1. Click within the checkbox Ø adjacent to a Schedule to select it.
- 2. Click on the Delete button within that section to remove the Schedule and any events within it.

Add a Time Schedule Event

- 1. Click to place a checkmark I next to the preferred schedule option (Business Hours or Holiday).
- 2. Click Add Event.
- 3. Event Name Type a short title for review in lists.
- 4. Define the following <u>as needed</u> for a specific event type:
 - ✤ Start Date select the date the event begins.
 - Select the All Day Event checkbox ☑, OR define the following:
 - Start Time, End Time, and/or End Date
 - Recurs Select from Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearlyby Week
 - * Recur every X (Months or Year and/or the Numerical day of the month).
 - End Select from Never, After (x # of occurrences), or Date (and set the end date).
 - Announcement Start and Announcement End Optional. Select a Start announcement from the drop-down list to use at the beginning of the period defined forthe event. Select an End Announcement from the drop-down list to play when the event is slated to stop.

Note: An announcement defined for the End <u>may</u> play to callers if an announcement/prompt is not defined for regular hours, none is specified at the start of the next event, or if there are no other schedules with events that have prompts/announcements that will trigger to play at the time this event is slated to end.

Note: This specialized and optional feature is only for use in Holiday Schedules and in tandem with the location/group level Auto-Attendant Tree features. It is not for use with personal Business Hours schedules. Start and End announcements may be used with AA tree holiday prompt schedules in events that run during 1 single day (within the hours of 12:00am-11:59pm in one 24 hour period). The Start and End announcements are not optimized for use in any other schedules, events set to be recurring, or for events that span multiple days and/or that are defined to cross the midnight hour.

See also: Announcement Repository.

5. Click Save when finished to submit the data and return to Settings.

Edit a Time Schedule Event

- 1. Click on the Edit link next to the desired Time Schedule option.
- 2. Make changes to the event name, date(s), time(s) or recurrences.
- 3. Click Save when finished to submit the changes and close the view.

Delete a Time Schedule Event

Use caution. This action immediately removes the event and cannot be undone.

- 1. Click within the checkbox Ø adjacent to a Schedule to select it.
- 2. Click the Edit link next to the selected item to review the Schedule's events.
- 3. Click within the checkbox ☑ adjacent to an *Event* listing to select it.
- 4. Click on the Delete Event button.
- 5. Click on the Save button to refresh the Schedule data and exit.

Contact Us

A team of expert customer support professionals are here to assist with technical issues, questions related to billing, feature usage, and service upgrades, as well as any other general inquiries you may have. Simply contact us and a friendly representative will help you with your request.

In order to provide optimal support, we recommend that the account owner (or a fully Authorized Contact) submit a ticket or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. A phone call is always the fastest way to get expert assistance. And always keep your account number handy to help us better assist you right when you need us.

Support by Phone

1.888.538.3960

Live phone support is available 24/7 for fast emergency assistance.

Online Support

www.GoMomentum.com/support

Quickly and easily submit a support request ticket. For fast resolution, include the issue, details of your efforts to resolve (if any, and your organization's Momentum customer account number.

Online Documentation

Momentum University

Momentum University is an online knowledge base of training and support content that will equip you with all you need to learn about Momentum's best-in-class cloud services and features. This library includes a routinely updated and ever-expanding set of product user guides, FAQs, quick reference tools, videos, and more. These resources are available 24/7.

