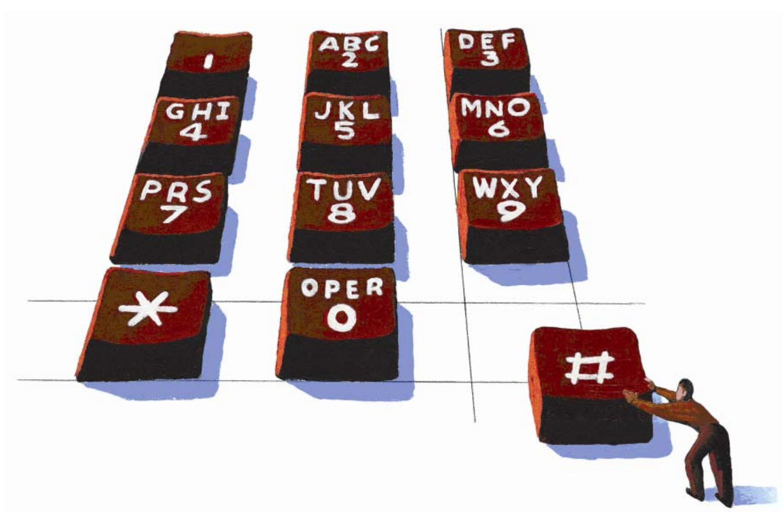
MetroCast Business Class
Phone Manager Guide



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January 2011

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Overview

What is Business Services?

Business Services is a phone service customized to the needs of small businesses that require more than just telephone service. Business Services bundles a suite of calling, automated call transferring (hunting) and voicemail features so that your business is positioned to communicate quicker and more efficiently with your customer base.

Part of Business Services includes the Phone Manager web-based portal application that allows your company to administer calling features, voicemail and call history.

This manual provides you with the ability to create and grant varying access privileges to other Business Services users in your company. As the administrator, you have access to all account features – additional users have exposure to features assigned to them by you.

Refer to

How to use the calling and voicemail features through the handset is described in the *Business Services Call Features and Voicemail Guide*.

As an Administrator, it is recommended that you become very familiar with the features so that you may answer your users' questions.

What's in this Guide?

This guide provides you with detailed procedures to perform the administrative tasks need to add and maintain user accounts. Click on the topic link for quick access to the information or set of procedures.

- Creating and maintaining user accounts
- Setting up and managing hunt groups
- Viewing Call History
- Managing user call feature settings
- Managing voicemail
- Managing the Auto Attendant
- Configuring portal preferences

Disclaimer

The information in this document is current as of the date it was written. While care has been taken to ensure the accuracy of the information, last minute changes can cause the content to become out-dated. Report any inaccuracies or direct questions to your cable company.

Terms and Definitions

The following acronyms and terms are used throughout this guide – they are listed so that you understand the context in which they are used:

Interactive Voice Response (IVR) – a technology whereby your telephone keystrokes are recorded and analyzed so that a voice recording can guide you through steps needed to complete your task.

Hunt Group – a set of phone numbers (members) to which a caller may be transferred after dialing the main hunt group phone number.

Hunt Group Member – a phone number belonging to a set of phone numbers assigned to a hunt group.

Line – a phone line or extension.

Main Hunt Group Number – the first phone number in the hunt group member list designated to start the hunting process when dialed by an outside caller.

Private Branch Exchange (PBX) – a private, mini-network offering special telephone features (such as hunt groups) to connect phones within your organization.

Switch Hook – the plunger on which the handset of the phone rests. Lifting the handset raises the plunger and delivers dial tone. Depressing the plunger disconnects the call and stops dial tone.

System Requirements

An internet connection using one of the following browsers:

- Microsoft Internet Explorer 7.x or greater
- Firefox 3.0.x

Your browser must be configured to accept cookies and use JavaScript.

Administering User Accounts

Overview

This chapter contains procedures on the following tasks that you perform as the Administrator to:

- Create the initial Business Services Phone Manager account for yourself so that you can set yourself up as the Administrator.
- Access the Business Services Phone Manager portal and understand the navigational links.
- Add user accounts and set-up permissions for portal access.
- Modify user permissions.
- Delete users.

Refer to

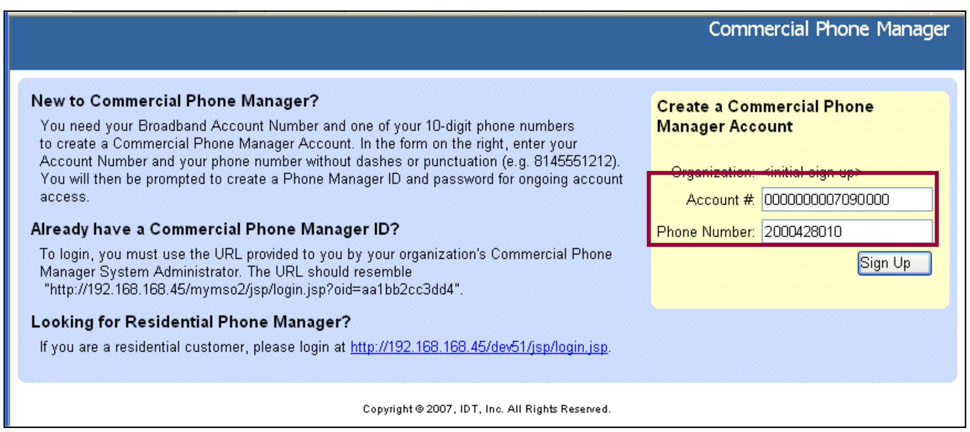
Use the table in *Appendix A* to gather information before you begin. You will use the collected information to complete the tasks throughout this chapter.

Creating the Administrator Account

You need to establish the Administrator account first before you can add any other users to the portal.

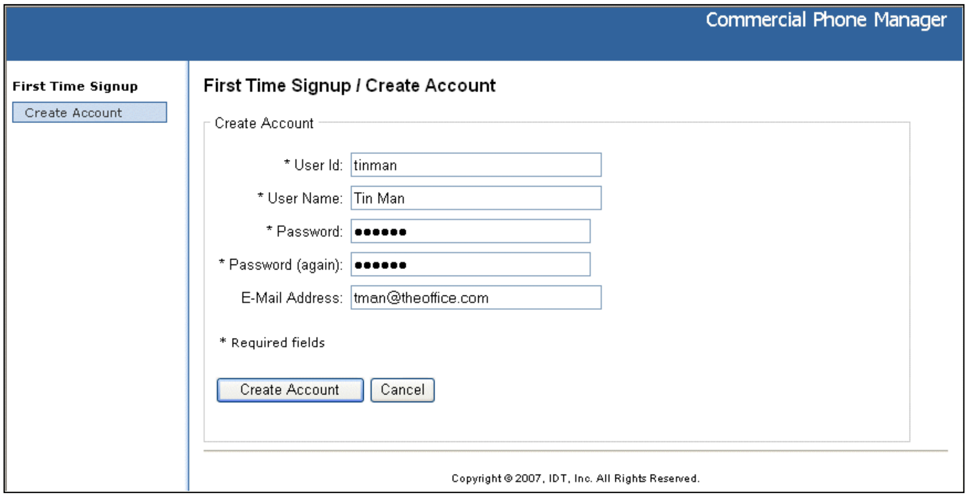
To create the Administrator account:

1. Open your browser and enter the cable provider's URL given to you to display the welcome page – read the posted instructions for "New to Business Phone Manager."



2. Enter your business account number in the **Account #** field.
3. Enter the 10-digit phone number (without dashes) of one of the business phone numbers assigned to you by your cable provider in the **Phone Number** field.

4. Click the **Sign Up** button to display the First Time Signup/Create Account page.



5. Enter the following information – fields marked with an asterisk (*) require information:

Refer to

Use the information you gathered in *Appendix A* to complete the required information.

User ID – Enter the administrator's login ID – the field is case sensitive.

User Name – Enter the administrator's real name. Make sure **not** to include spaces when defining the user name.

Password – Enter the administrator's password – the field is case sensitive.

Password (again) – Re-enter the administrator's password.

Email address – Enter the administrator's email address – use a non-shared, company or private email address that is unique to the administrator.

6. Click the **Create Account** button and read the information displayed on the First Time/Success! page.

   The URL displayed on the First Time/Success! page is the URL to your company's business account portal. This is the URL you will always use to access the portal.

7. Bookmark the URL so that you can record it for later use.

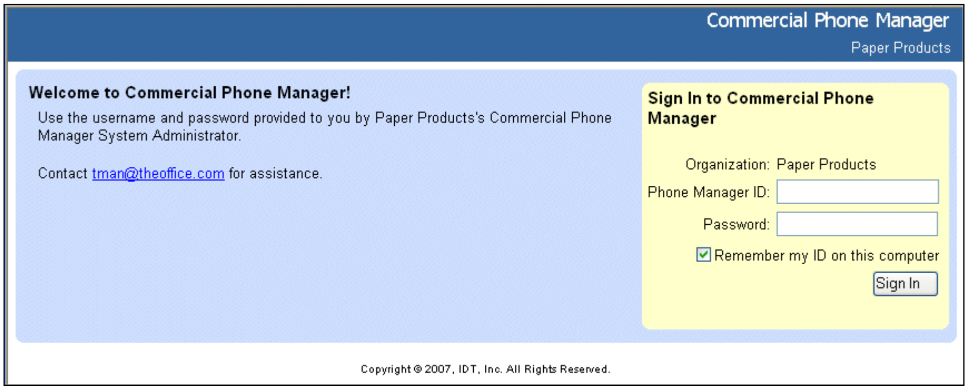
Hint

Write the URL down for future reference – you will pass the URL to other users you create.

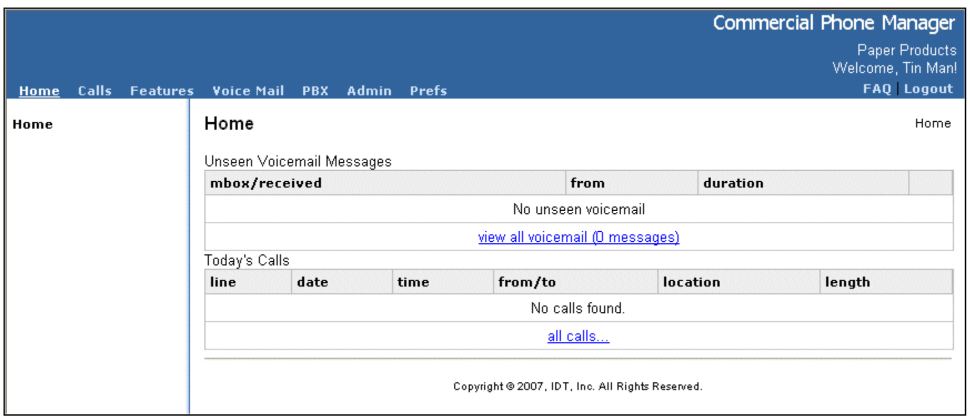
Accessing the Business Services Phone Manager Portal

To access the Phone Manager portal:

1. Open your browser and enter the bookmarked URL to launch your Phone Manager portal login page.



2. Enter your administrator login ID previously defined in the **Phone Manager ID** field.
3. Enter your administrator password previously defined in the **Password** field and click the **Sign In** button to display the Phone Manager **Home** page.

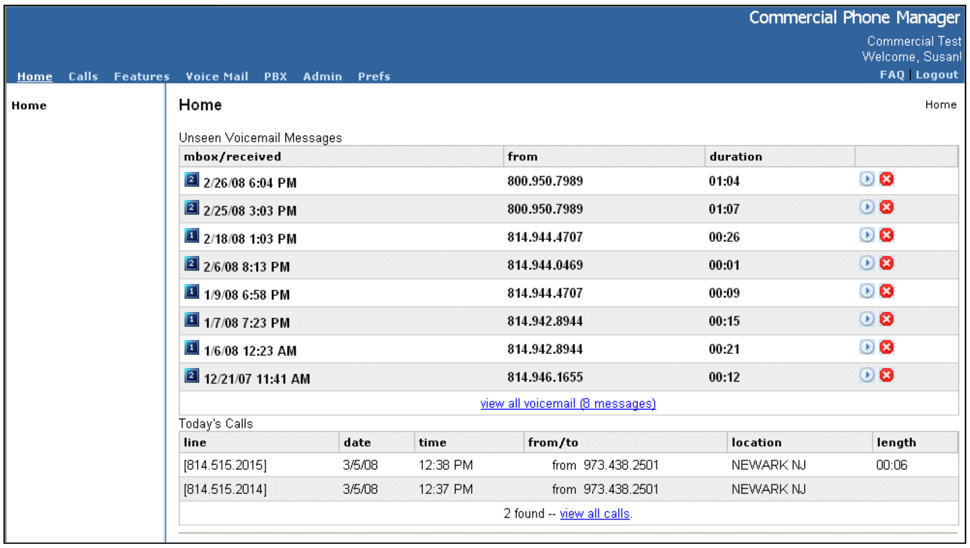


Understanding the Home Page

The **Home** page is the initial page displayed each time you enter the Phone Manager portal. The home page displays:

- Unheard voicemail messages
- Today's calls

Checking the list of unheard voicemail messages and today's calls are the two most common activities performed on a daily basis.



Click the **play** ( ) icon to listen to the unheard messages directly from the Home page. Click the **delete** ( ) icon to delete the messages directly from the Home page.

Menu Bar

The Menu bar provides access to all the commercial Phone Manager functions through the following links:

- **Home** – lists the unheard voicemail messages in each mailbox and the current day's incoming and outgoing calls.
- **Calls** – searches for a history of calls between the current and previous month.
- **Features** – displays the call feature status for each phone line and enables modification of the features.
- **Voice Mail** – lists all voicemail messages in each mailbox and allows you to listen to or delete those messages.
- **Contacts** – displays existing contacts and allows you to create new contacts and import/export address book contacts.
- **PBX** – enables you to label and control phone lines as well as create and manage hunt groups. Permissions are granted to administrator only.
- **Admin** – enables you to create, modify or delete user IDs/passwords and portal page access. Permissions are granted to administrator only.

- **Prefs** – displays the current page attributes and allows you to make modifications. Also provides your users with the ability to change the password to their mailboxes.
- **FAQ** – lists frequently asked questions.
- **Logout** – exits the Business Services Phone Manager portal.

Unseen Voicemail Messages

Unseen Voicemail Messages

mbox/received	from	duration	
2 2/26/08 6:04 PM	800.950.7989	01:04	
2 2/25/08 3:03 PM	800.950.7989	01:07	
1 2/18/08 1:03 PM	814.944.4707	00:26	
2 2/6/08 8:13 PM	814.944.0469	00:01	
1 1/9/08 6:58 PM	814.944.4707	00:09	
1 1/7/08 7:23 PM	814.942.8944	00:15	
1 1/6/08 12:23 AM	814.942.8944	00:21	
2 12/21/07 11:41 AM	814.946.1655	00:12	

view all voicemail (8 messages)

The Unseen Voicemail Messages frame provides you with a quick view of the voicemail messages in each mailbox that have not yet been viewed. Each message has basic envelope information provided (including the play and delete functions) as follows:

- **mbox** – identifies the mailbox number containing the message based on the Phone Manager's internal numbering of the mailboxes for simpler identification. Clicking the mailbox number icon (1) launches the Voice Mail page for that mailbox.
- **Received** – specifies the date and time the message was received.
- **From** – specifies the phone number of the calling party that left the message provided the number was not blocked by the caller.
- **Duration** – specifies the size of the message in minutes and seconds.
- **View all voicemail** – a link that when clicked, launches the Voice Mail Overview page that displays all messages for all mailboxes.

Today's Calls

Today's Calls

line	date	time	from/to	location	length
[814.515.2015]	3/5/08	12:38 PM	from 973.438.2501	NEWARK NJ	00:06
[814.515.2014]	3/5/08	12:37 PM	from 973.438.2501	NEWARK NJ	

2 found -- view all calls.

The Today's Call frame provides you with a quick view of all incoming and outgoing calls for the day. If you need to know when a certain call took place, you can quickly view the list of Today's Calls to find it. If you need to find a call from an earlier day, use the **view all calls** link to go to the Call History page.

The following list describes the information displayed for each call:

- **Line** – specifies the business phone line involved with the call.
- **Date** – specifies the date of the call.
- **Time** – specifies the time of the call.
- **From / to** – specifies the phone number of the calling party.

- **Location** – specifies the location of the calling party.
- **Length** – specifies the duration of the call in minutes and seconds.

Managing User Accounts

This section provides you with information and procedures needed to create, modify and delete users within your organization.

Sharing Access

As the administrator, you control who in your company may access the Phone Manager portal, view phone lines and voicemail and view or modify feature settings. You will use the **admin** link on the Menu bar to add, modify and remove users from the portal as needed.

Hint

You may choose to provide access to phone line information based on the person assigned to that line.

For example – you have 2 extensions (2014 and 2015) and you assigned Mary extension 2014. Mary will be allowed to control her phone features and voicemail messages but will not be given access to any of the other phone lines.

Assigning an employee access to the business portal does not require the employee to have a business phone line. You can assign access privileges to the portal to anyone you choose; however, you should avoid giving two individuals “box manager” or “line feature modifier” permission to the same phone line since one person may change a setting without notifying the other person.

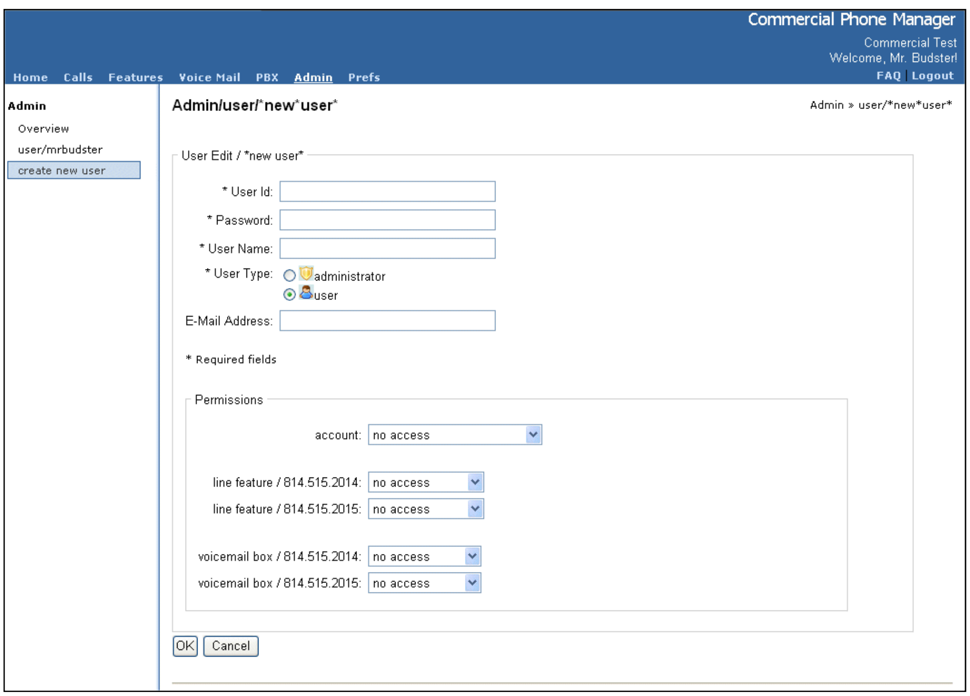
For example – You have a small travel agency business and customers call and leave voicemail messages. You are trying to make the most of the agent’s time so you hire a part time employee to listen to all unheard messages on each line and notify the agents of the important messages. The part time employee does not need a phone since the employee can listen to the messages from the portal. This employee would need a portal login ID with “view” permission granted to each voicemail box but no access to view the phone feature set-up.

Creating User Accounts

To create user accounts and grant access privileges to the portal's web pages:

1. Log into the Business Services Phone Manager portal using the URL you bookmarked earlier to display the Home page.
2. Click on the **Admin** link in the Menu bar to display the Admin/Overview page.

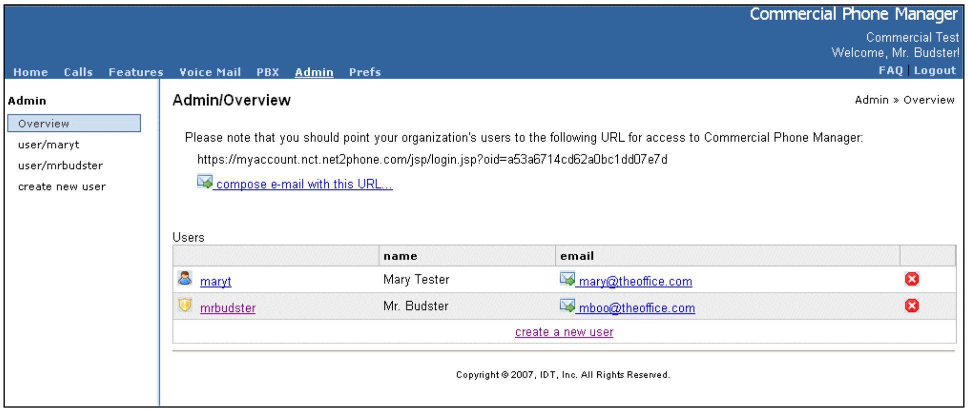
3. Click on **create new user** link in the **Admin** frame or **create a new user** link in the **Admin/Overview** frame. To display the Admin/user/*new*user* page.



4. Fill in the fields using the following list as a guide:
   - **User ID** – enter a login ID to identify the new user account. The field is case sensitive.
   - **Password** – Enter the password you wish to assign to the new user. The field is case sensitive.
   - **User Name** – Enter the user's real name. Make sure **not** to include spaces when defining the user name.

- **User Type** – click the radio button next to one of the following choices to select a user type:
  - — **Administrator** – grants privileges to the entire portal. No further definitions are needed for the subsequent fields listed under Permissions.
  - — **User** – grants standard user privileges to the portal. You must complete the subsequent fields under Permissions to define the level of access to each of the listed features. Standard users are never able to create/modify users or hunt groups and therefore the PBX and Admin page links never display.
- **Email Address** – enter the user's email address. Use a none-shared, company or private email address that is unique to the employee.
- **Permissions** – select from the following to define the user's access:
  - — **Account** – drop down list with the following selections:
    - **Call Detail Statement Viewer** – allows users to view billing statements.
    - **No Access** – denies access to the billing statements.
- **Line Feature** – drop down list with the following selections:
  - — **Settings Modifier** – grants view and modify permissions to line feature settings for that phone.
  - — **Settings Viewer** – grants view-only permission to line feature settings for that phone line. Denies access to making modifications.
  - — **No Access** – denies access to view and modify line feature settings for that phone.
- **Voicemail Box** – drop down list with the following selections:
  - — **Box Manager** – grants manager permission to the voicemail box for that phone line. A manager can view the list of messages, listen to and delete messages.
  - — **Message Viewer** – grants view-only permission to the mailbox for that phone line. A message viewer can view and listen to messages but can not delete them.
  - — **No Access** – denies access to all voicemail box messages for that phone line.

5. Click the **OK** button. The user account is created and displayed in both the Admin and Admin/Overview frames.



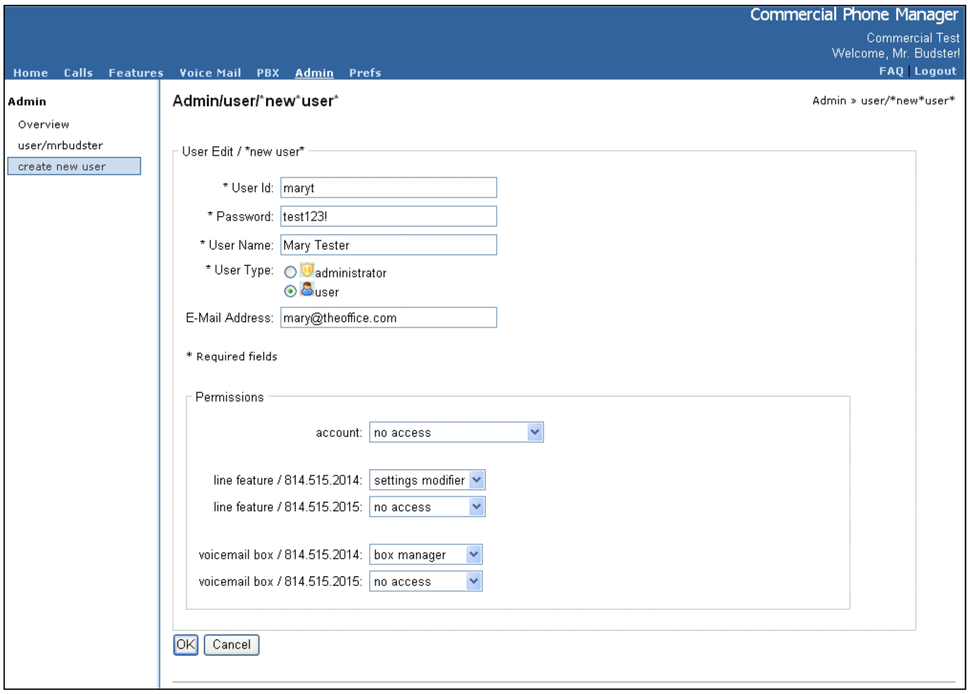
6. Email the URL to the newly created account by clicking the **compose e-mail with this URL** link.

   Your email application will open a new "send message" window and display the URL in the body of the email.

7. Repeat steps 3 through 6 to add new user accounts.

Example Scenario

The following sample screen represents a scenario for Mary. Mary is a travel agent working for a 2-person office. The office has two phones (818-515-2014 and 814-515-2015). Mary's phone is 814-515-2014. As shown in the sample screen, Mary will be allowed to control her phone features and voicemail box but will not be given web access to the other phone's controls.



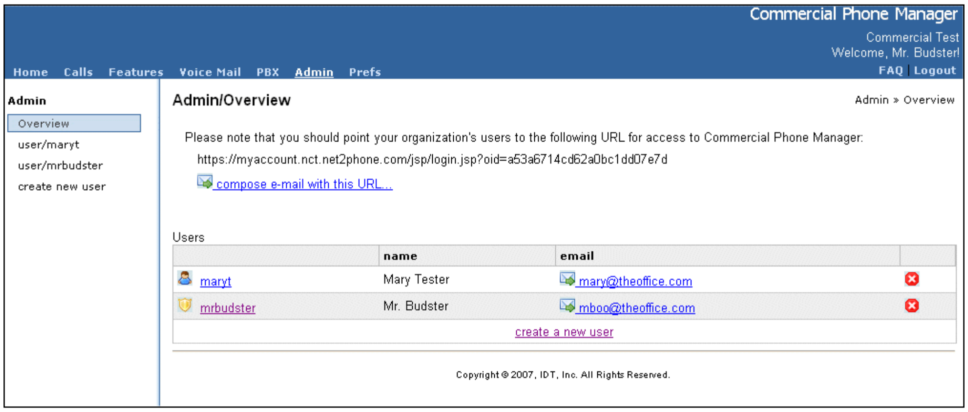
Modifying User Permissions

You may need to modify a user's permissions for a variety of reasons such as:

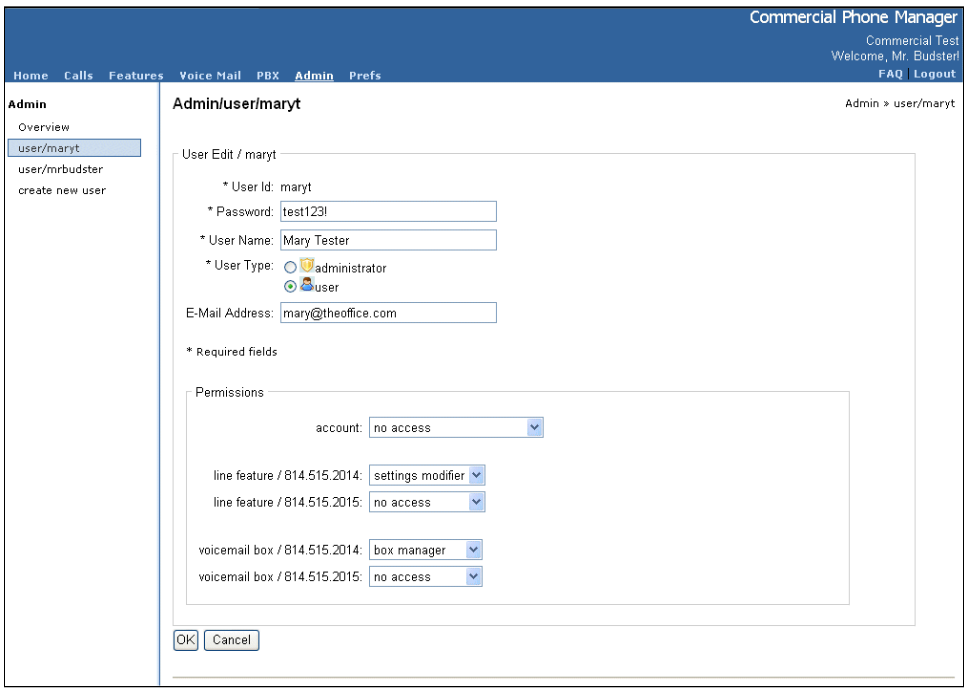
- The user forgot his or her login ID or password causing you to view or reset the information.
- You are changing user passwords as a routine security measure.
- The user's responsibilities have changed causing you to grant more or less access to features or voicemail boxes.
- The user is on a leave of absence and will return after a few weeks or months. You may want to suspend the user's access for that period of time without deleting the user – when the user returns, you will grant access as before.

To modify a user's permissions:

1. Log into the Business Services Phone Manager portal and click on the **Admin** link in the Menu bar to display the Admin/Overview page.



2. Click the user's **user ID** link displayed in the Admin or Admin/Overview frames to display the user's access permission page.



3. Update the permissions as needed according to the definitions found in the Creating User Accounts section.

4. Click the **OK** button when finished to return to the Admin/Overview page.

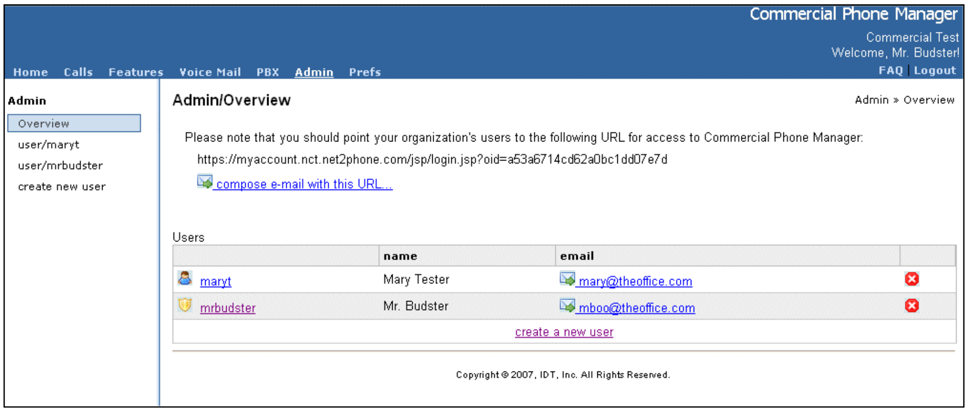
5. Make sure you notify the user of the changes according to your internal procedures.

Deleting User Accounts

Deleting user accounts is normally done when employees leave the company.

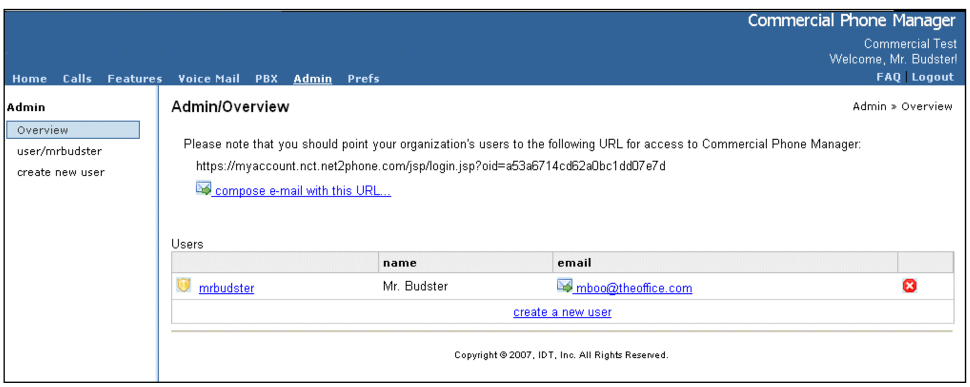
To delete a user account:

1. Log into the Business Services Phone Manager portal and click on the **Admin** link in the Menu bar to display the Admin/Overview page.



2. Click the **delete** () icon next to the user you wish to delete.

   The system deletes the account and removes it from the Admin/Overview page.



Administering Hunt Groups

Overview

This chapter provides you with:

- A description of hunt groups so that you understand the set-up.
- The types of hunting methods you can define.
- Best practices to follow as you set up your organizations hunt groups.
- Hunt group rules so that you can successfully create hunt groups.
- Creating and activating hunt group procedures.
- Suspending hunt groups procedures.
- Procedures to modify a hunt group.
- Procedures to delete a hunt group.
- How to use hunt group-specific features.

Understanding Hunt Groups

A hunt group is a set of phone numbers (members) that a caller may access by dialing the first phone number in the group. The list of member numbers is hunted until the call is answered or until the maximum number of attempts to reach an idle number is reached.

The goal of the hunt group is to direct the caller to a member of your organization or voicemail as quickly as possible.

Hunting Methods

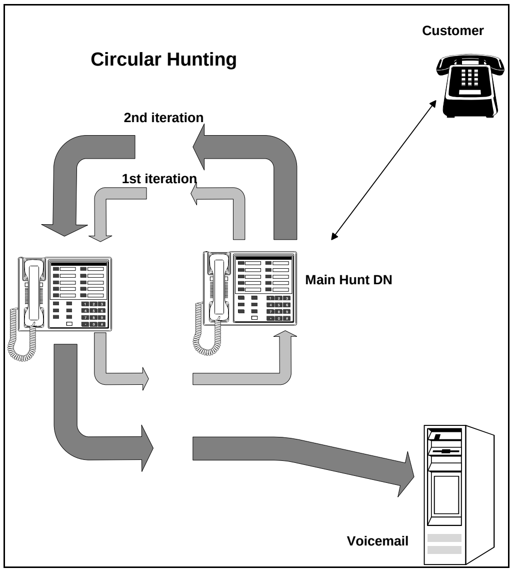
Business Services provides you with three types of hunting methods:

- Circular
- Sequential
- Uniform

Each method is described in the following subsections.

Circular

Circular hunting always starts with the main (first) hunt group phone number and continues to the next member in the hunt group until the call is answered.

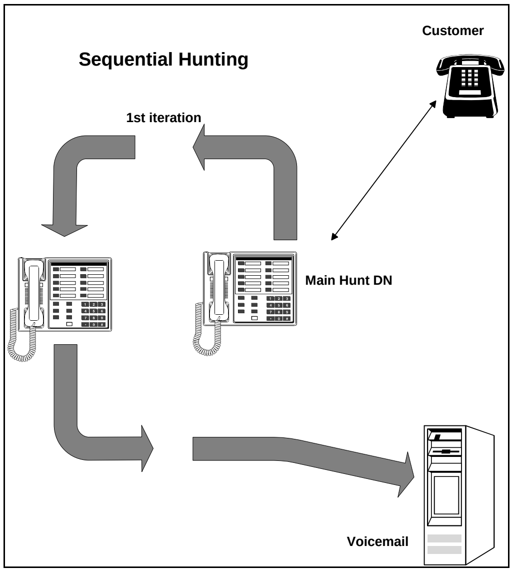


Calls hunt through the group members in a repeated circular manner when the current line is busy or has not answered within a set amount of time. When the call is hunted through the cycle twice, hunting stops and overflow processing begins. Overflow processing performs one of the following:

- Sends the call to the voicemail of the main group member (first phone number in the hunt group list).
- Sends the call to a defined phone number.
- Drops the call.

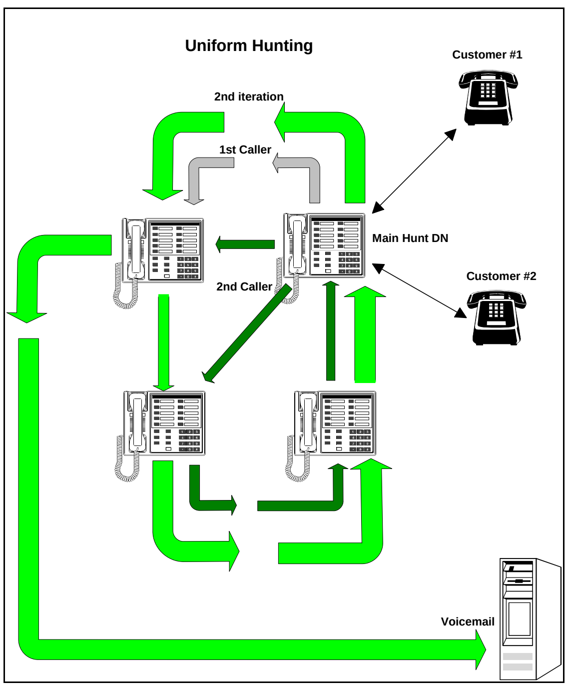
Sequential

Sequential hunting is a subset of circular hunting. The call is hunted through the cycle only once.



Uniform

Uniform hunting is a special case of circular hunting that provides a more even distribution of incoming calls by varying the member phone number at which the hunt starts its search. When the uniform hunting is selected, the system remembers the last member hunted. The next number in the list is then used as the first number when a new hunt begins. Once the new hunt starts, it goes through the circular method.



Best Practices

Use the following recommendations as guidelines when creating a hunt group:

- Keep hunt groups small

  Each hunted phone subjects the caller to a series of rungs until the call is forwarded to the next phone in the group. Too many phones in a hunt group subject a caller to extended periods of rings. Keep the groups limited to three or four phones and then forward the call to voicemail if not answered.

- Always use Terminal Make Busy (TMB)

  Employees stepping away from their phone should always activate TMB to force the hunt to the next phone in the group. This spares the caller from being subjected to long periods of rings.

- Use Group Make Busy (GMB) after hours or when the office is closed for the day or weekend.

  When activated, this feature immediately forwards the call to voicemail or a defined number (such as an answering service).

- Use Sequential or Uniform hunting

  These two methods minimize the delay in reaching a person in your organization or voicemail.

  Refer to the following table as a guideline when setting up your hunting method:

Use the…	When…
Circular method	The hunt groups consist of only 2 lines. This method is generally used by a very small business where each department has no more than 2 employees.
Sequential method	The hunt group consists of 3 or 4 lines but the call volume is high. This method is generally used by a small but growing business where each department has no more than 2 employees.
Uniform hunt groups	The hunt groups consist of 2-4 lines but call volume is low or manageable. This method is generally used by a small, established business where each department has more than 2 employees and business has been steady for some time.

Hunt Group Rules

The following lists the rules to follow when establishing or working with hunt groups:

- Modems, fax machines and IVR are not allowed on hunt group lines.
- The maximum number of hunt groups allowed is 4.
- The maximum number of lines in a hunt group is limited to 15 including the main phone number and overflow number.

- The minimum number of lines in a hunt group is 2 and must consist of the main phone number and a member.
- No lines within the hunt group list may begin with 911.
- The main number of the hunt group must be a business services phone number. It cannot be the main number or member of another hunt group.
- Members of a hunt group must be a business services phone number and cannot be a member of another group.
- Members of a group do not need to be consecutive numbers.
- Call features disabled while hunting is in progress are:
  - Call Waiting
  - Caller ID on Call Waiting
  - Anonymous Call Rejection
  - Call Forwarding on Busy, No Answer, All
  - Selective Call Forwarding, Rejection
  - Distinctive Ring with Call Waiting
  - Do Not Disturb

Note

Call features are not permanently disabled on any phone line associated with a hunt group. Features for lines associated with a hunt group are temporarily disabled **only** when a hunt is in progress and will be disabled on a per call basis only.

Creating a Hunt Group

Hunt groups are created using the Business Services Phone Manager PBX page. Only users with administrator privileges can manage hunt groups.

Creating hunt groups are broken down into three main tasks and must be completed in the following order:

Step 1 – Label each phone line. All lines must be labeled before they can be a member of a group.

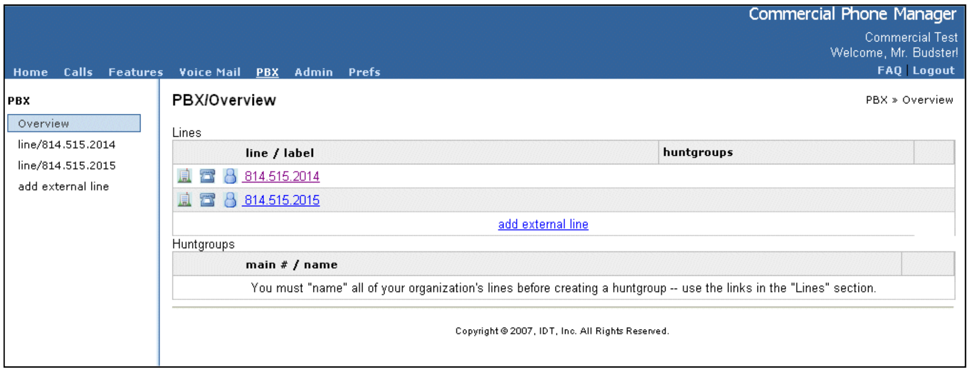
Step 2 – Create the hunt group, add members and define the hunting order.

Step 3 – Activate the hunt group.

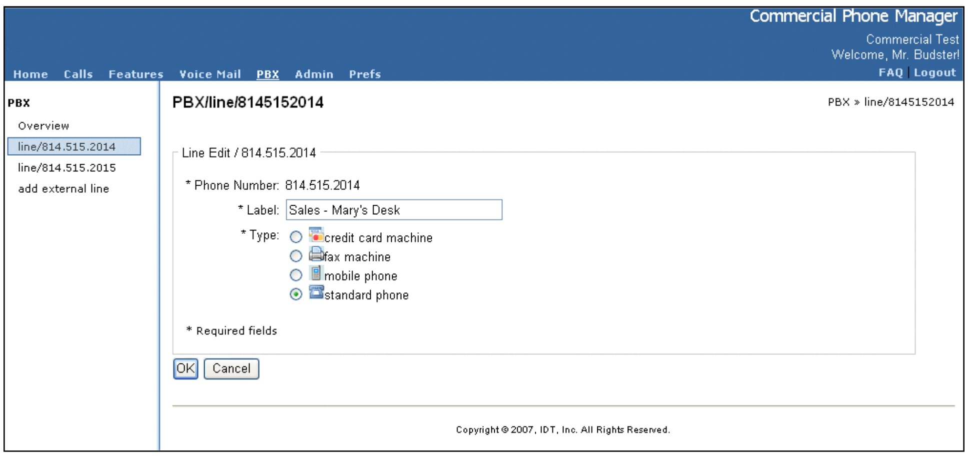
Labeling Phone Lines

To label the lines so that they can become members of a group:

1. Log into the Business Services Phone Manager portal and click on the **PBX** link in the Menu bar to display the PBX/Overview page.



2. Click on a **phone line link** listed in the PBX or PBX/Overview frame to display the PBX/line page.



3. Enter a descriptive, unique label for the phone line in the **Label** field.

Hint

Use the employee's name assigned to that phone number for lines to be added to a hunt group.

4. Click on the radio button that matches the type of phone. Remember, if you are labeling the phone to eventually become a member of a hunt group, you cannot select Fax or credit card machine as the type – refer to the Hunt Group Rules section for more details.

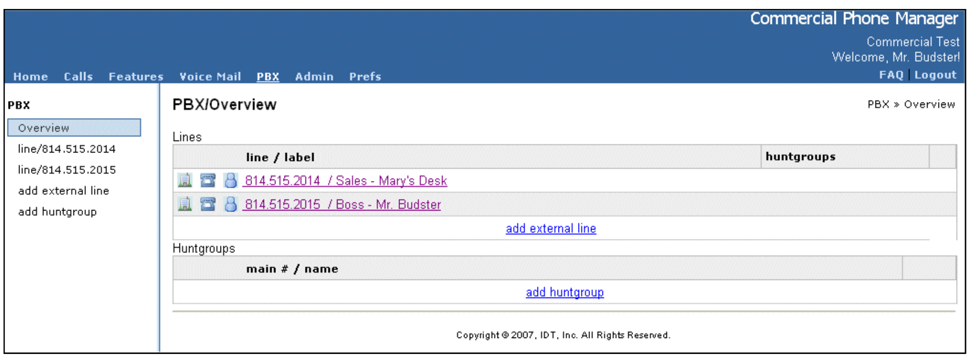
5. Click the **OK** button.

   The PBX/Overview page displays with the newly labeled phone line.

   If the page does not display the new label immediately, click your browser's refresh button to re-display the page. It may take a few seconds before the updates are registered by the server and responses are displayed on the page.

6. Repeat steps 2 – 5 to label the remaining phone lines.

   The system recognizes when all phone lines have been labeled and displays an **add huntgroup** link at the bottom of the page and in the PBX frame. This link will not appear until all lines have been labeled.



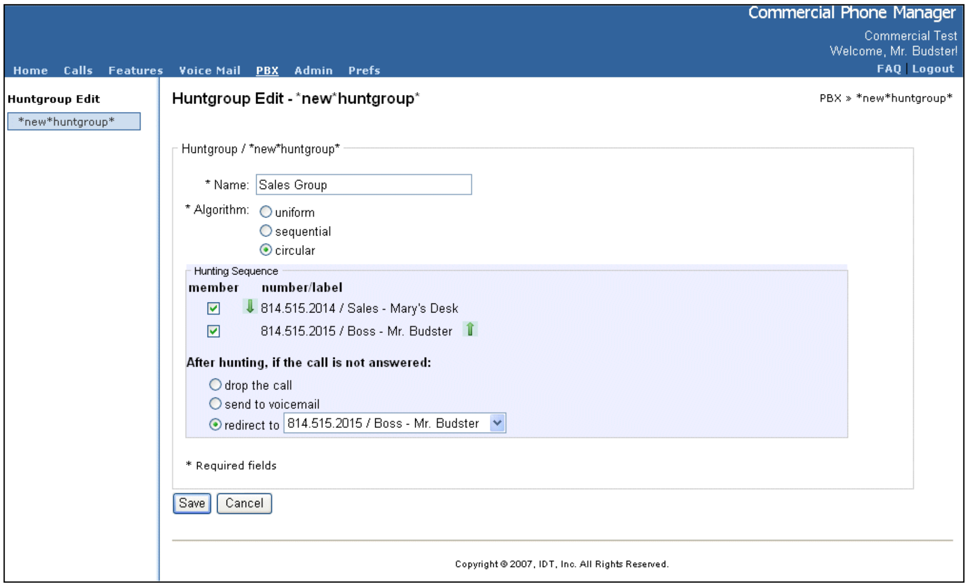
Once you have the phones labeled, you can proceed to the next section or wait until you have decided which phone lines will belong to each group you create. Remember, hunting will not occur until you create the group, assign members to the group and activate the group.

Creating Groups and Assigning Members

Once your phone lines are labeled, you can proceed with creating groups and assigning numbers to each group.

To create a group and assign members to the group:

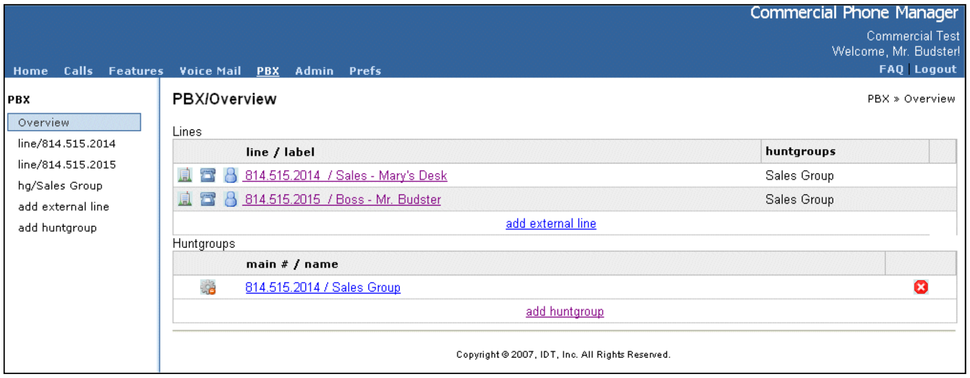
1. If you are not on the PBX/Overview page, click the **PBX** link in the Menu bar to display the page.
2. Click the **add huntgroups** link in the PBX or PBX/Overview frame to display the Huntgroup Edit page.



3. Enter the name of the hunt group in the **Name** field making sure the name is unique.
4. Select the appropriate hunting method radio button. Refer to the Hunting Methods and Best Practices sections for help and guidelines.
5. Select and arrange hunt group members using the following as a guide:
   - The number at the top of the list becomes the main hunt group number. The following number is the next number to be called during the hunt.
   - To include/exclude numbers in the group, add/remove the check mark next to the number under the **member** column in the **Hunting Sequence** frame.
   - Reorder the numbers by clicking the up arrow to move the number higher in the hunt order or the down arrow to move the number lower in the hunt order.
6. Specify how the call should be processed if hunting completes and the call is not answered. Click on the radio button that defines the completion. Choices are:
   - **Drop the call** – disconnects the caller.
   - **Send to voicemail** – sends the caller to the mailbox of the main hunt group member.
   - **Redirect to** – sends the caller to the hunt group member selected from the drop down list and if not answered, sends the call to the mailbox of that member.

7. Click the **Save** button.

   The PBX/Overview page displays the new hunt group and which numbers are members.



Once your groups are defined, you can proceed to the next section or wait until you want to activate hunting. Until the huntgroup is activated, no hunting will occur – the group remains in a suspended state.

Activating Hunt Groups

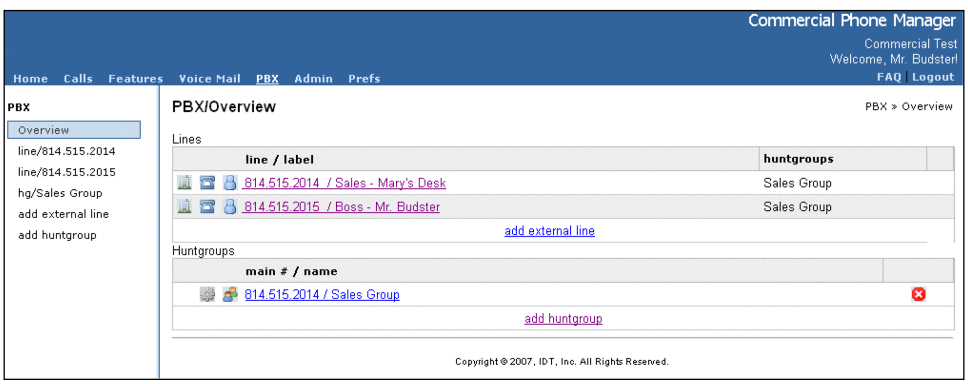
Now that your hunt groups have been created and members assigned to the group, you are ready to activate the group so that hunting will occur.

To activate a hunt group:

1. If you are not on the PBX/Overview page, click the **PBX** link in the Menu bar to display the page.

2. Click on the **suspend** icon ( ) associated with the hunt group name in the Huntgroups area to activate the hunt group.

   The icon changes to the activated icon ( ) – an indication that the hunt group is now active. The Group Make Busy (GMB) icon ( ) also displays.



   If the page does not display the changed icons, click your browser's Refresh button to re-display the page. It may take a few seconds before the updates are registered by the server and responses are displayed on the page.

Suspending Hunt Groups

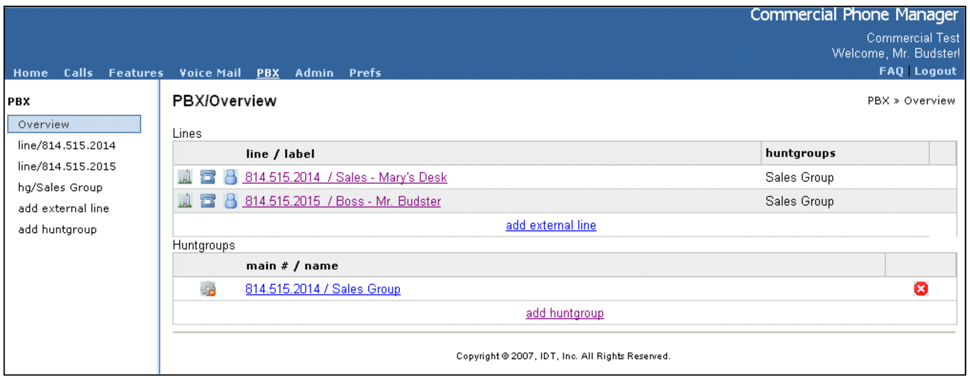
At times you may want to temporarily turn off a hunt group without having to delete and recreate it at a later time. Suspending the hunt group allows you to temporarily turn off the group until you re-activate it later.

To suspend a hunt group:

1. If you are not on the PBX/Overview page, click the **PBX** link in the Menu bar to display the page.

2. Click on the **activate** icon ( ) associated with the hunt group name in the Huntgroups area to suspend the hunt group.

   The icon changes to the suspended icon ( ) – an indication that the hunt group is now active and the Group Make Busy icon is not longer displays.

   If the page does not display the changed icons, click your browser's Refresh button to re-display the page. It may take a few seconds before the updates are registered by the server and responses are displayed on the page.

Modifying Hunt Groups and Members

Hunt groups and their members may be modified at any time. The following subsections provide you with procedures on how to modify both.

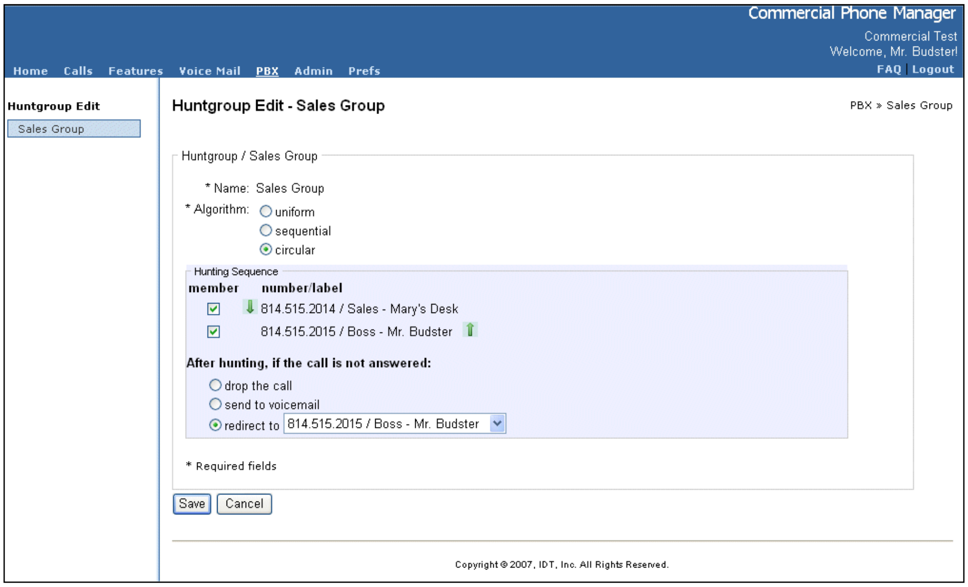
Modifying Hunt Groups

It is important to note that as you are making modifications to an active group, the system will suspend the group. You must activate the group again before hunting will occur on that group.

To modify a hunt group:

1. If you are not on the PBX/Overview page, click the **PBX** link in the Menu bar to display the page.

2. Click on the **hunt group name link** in the Huntgroups or PBX frame to display the Huntgroup Edit page.



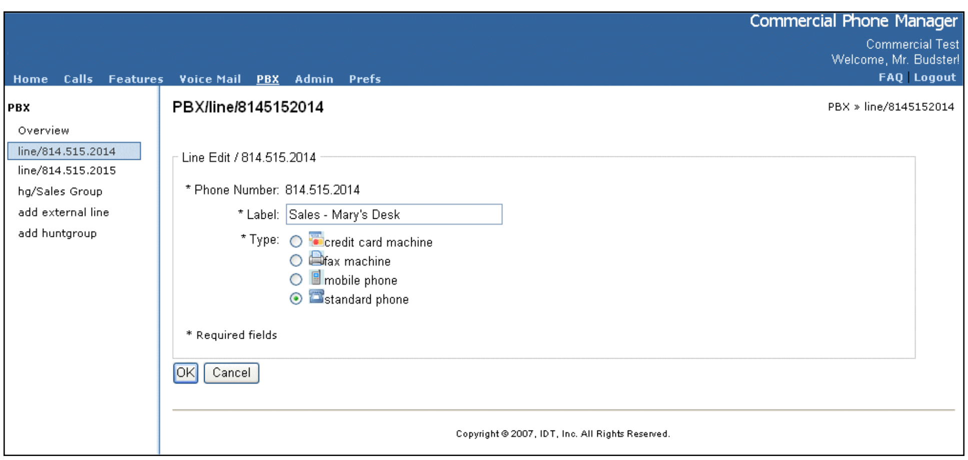
3. Make needed changes according to field descriptions in the Creating Groups and Assigning Members section.
4. Click the **Save** button to save your changes.
5. Activate the group again as described in the Activating Hunt Groups section.

Modifying Hunt Group Members

The procedures for modifying a group member (phone line) are the same whether or not the phone line is a hunt group member or not. If the phone line happens to be a member of a group, updates to the line do not suspend hunting.

To modify a member (phone line):

1. If you are not on the PBX/Overview page, click the **PBX** link in the Menu bar to display the page.
2. Click on the **phone number/name** link in the PBX or Lines frame to display the PBX/Line edit page.



3. Change the **Label** or **Type** as needed and click the **OK** button to save your changes.

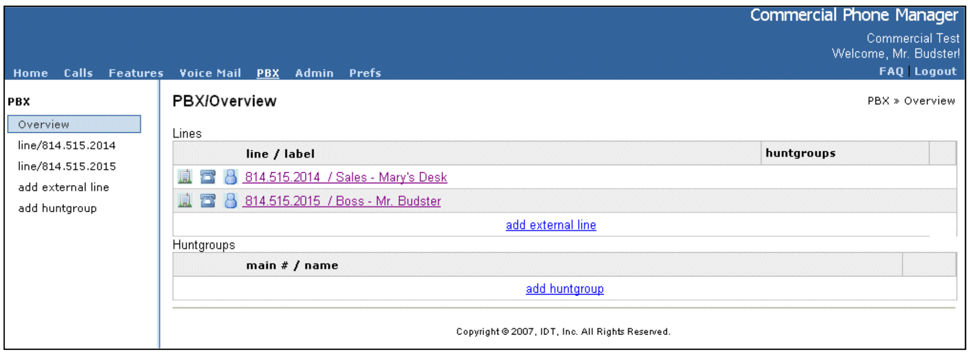
Deleting Hunt Groups

Because the maximum number of hunt groups you can create is limited to four, you may need to delete a hunt group that is no longer needed to make room for a new one.

To delete a hunt group:

1. If you are not on the PBX/Overview page, click the **PBX** link in the Menu bar to display the page.
2. Click the **delete** ( ) icon associated with the hunt group you wish to delete.

   The hunt group is removed from the system and no longer displays in the PBX or PBX/Overview frames on the page.



Using Hunt-Group Specific Features

The following two call features are specific to hunt groups and can be controlled through your handset or the Phone Manager portal:

- Terminal Make Busy (TMB)
- Group Make Busy (GMB)

The next two subsections provide you with procedures on how to use and activate these features using the Phone Manager portal. TMB and GMB enabling/disabling is done through the portal's PBX/Overview page.

Using Terminal Make Busy

Terminal Make Busy (TMB) is a feature that applies to hunt group members only. The TMB feature allows individual lines to appear busy during the hunting cycle but does not affect non-hunting calls made directly to that number. When TMB is activated the hunt rings the next number in the group.

Typical uses of TMB are as follows:

- An employee must step away from his or her desk.
- An employee is on an important call and does not want to be disturbed during the call.

Refer to

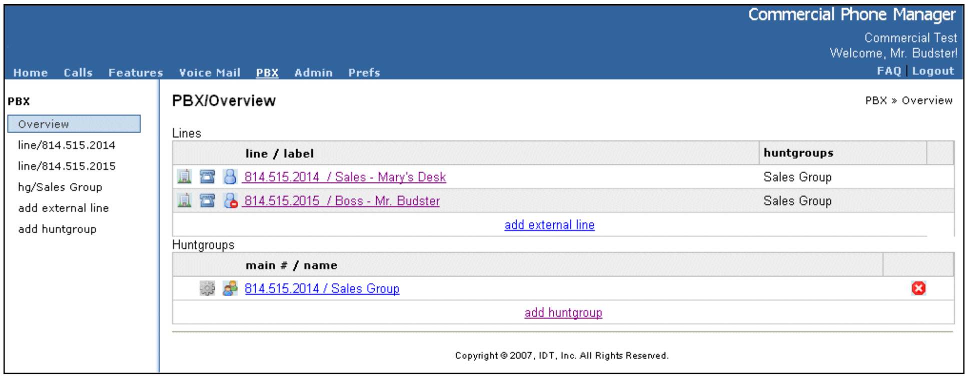
How to activate and deactivate this feature through the handset is described in the *Business Services Call Features and Voicemail Guide*.

Enabling and Disabling TMB

Enabling and disabling TMB through the Business Services Phone Manager portal is done using the enable/disable icon.

When the feature is enabled, the enabled icon ( ) displays next to the phone line.

When the feature is disabled, the disabled icon ( ) displays next to the phone line.



Click the **enabled** icon ( ) to turn the feature **off**. Click the **disabled** ( ) icon to turn the feature **on**.

Using Group Make Busy

Group Make Busy (GMB) is a feature that applies only to the main hunt group phone number when the hunt group is in an active state. Activating the GMB feature prevents all hunting in the group from occurring by allowing the entire hunt group to appear busy during the hunting cycle. Calls are immediately forwarded to the overflow method you defined when you created the group. Non-hunting calls made directly to phone lines within the group are not affected.

Typical uses of GMB are as follows:

- An employee meeting is under way and no one from the department is available to take calls.
- The office is closed for the weekend or holiday and no one is available to answer calls.

Refer to

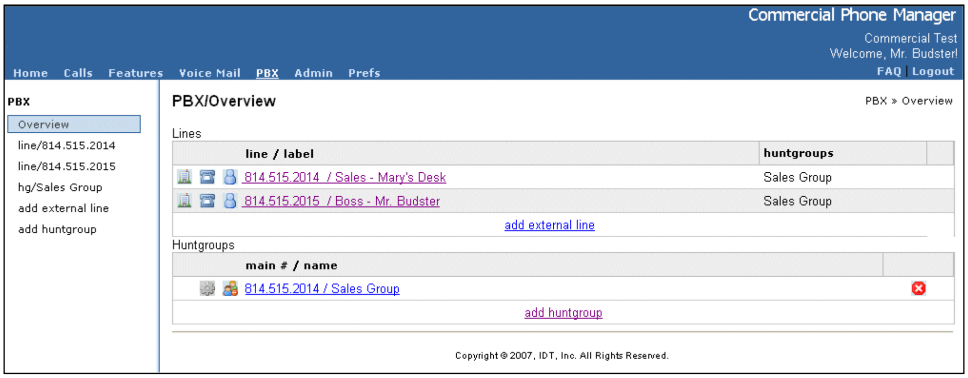
How to activate and deactivate this feature through the handset is described in the *Business Services Call Features and Voicemail Guide*.

Enabling and Disabling GMB

Enabling and disabling GMB through the Business Services Phone Manager portal is done using the enable/disable icon.

When the feature is enabled, the enabled icon ( ) displays next to the phone line.

When the feature is disabled, the disabled icon ( ) displays next to the phone line.



Click the **enabled** icon ( ) to turn the feature **off**. Click the **disabled** ( ) icon to turn the feature **on**.

Viewing Call History

Overview

The Business Services Phone Manager portal provides you with search capabilities for locating a specific call or viewing a history of calls based on a range of dates. The range is limited to calls within the current or previous month. A combined list of both incoming and outgoing calls is returned once you enter the search criteria.

Examples for searching a call or producing a call history include:

- You are trying to measure call volume to determine whether you need to obtain more phone lines and/or employees to handle the call volume.
- You are trying to determine how quickly each employee is handling calls in the Customer Care department based on the number of calls associated with each line.
- You are tracking calls based on Account Codes.

Displaying Call History

You may search for call history on a single line or all lines. Information displayed in both the single and "all" line results are:

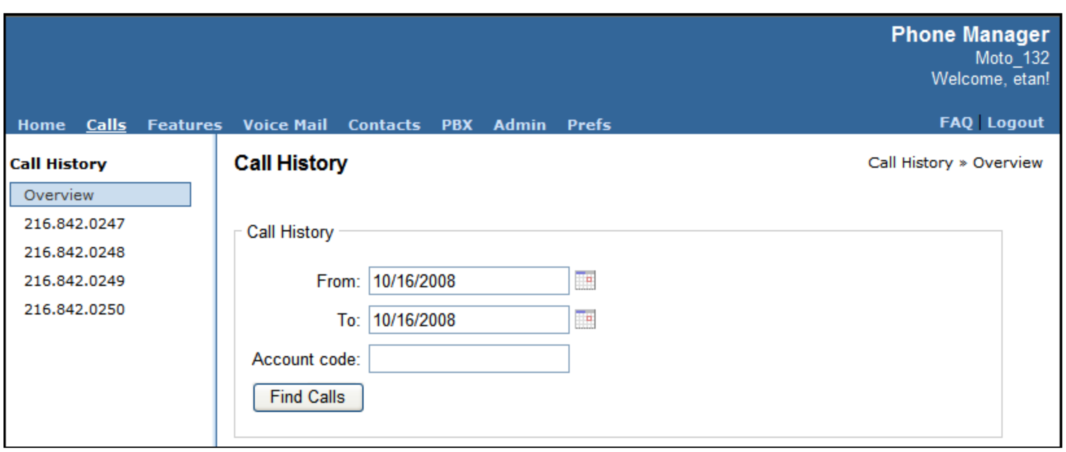
- **Line** – specifies the phone line involved with the call.
- **Date** – specifies the date of the call.
- **Time** – specifies the time of the call.
- **From / To** – displays the called/calling party phone number.
- **Location** – displays the location of called/calling party.
- **Length** – specifies the duration of the call in minutes and seconds.

The following two subsections provide you with procedures on how to display call history for a specific line or all lines.

Viewing Call History on a Single Phone Line

To search for call history on a single line:

1. Click on the **Calls** link in the Menu bar to display the Call History page.

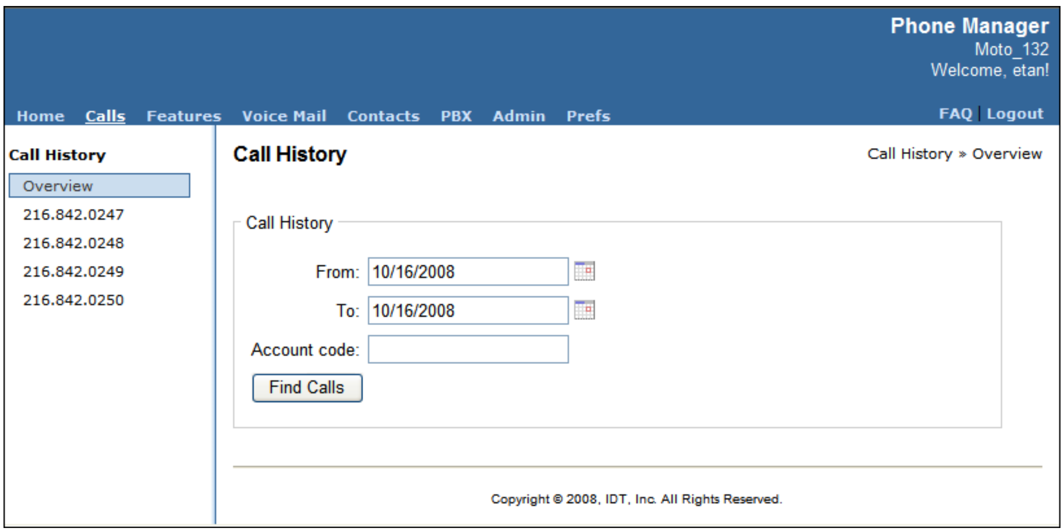


2. Click on the **phone number** in the **sidebar Call History** frame for which you want call history.
3. Enter a date range in the **From** and **To** fields or click the **calendar** icon to select the date. The default is the current date.
4. Click the **Find Calls** button to display the results. Refer to the Displaying Call History section for a description of the results.

Viewing Call History on All Phone Lines

To search for call history on multiple lines:

1. Click on the **Calls** link in the Menu bar to display the Call History page.
2. Click on the **Overview** link in the sidebar Call History frame to get call history for all lines.

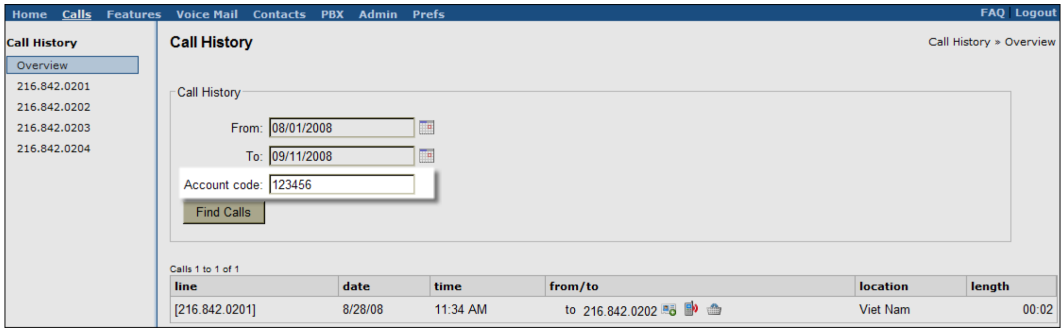


3. Enter a date range in the **From** and **To** fields or click the **calendar** icon to select the date. The default is the current date.
4. Click the **Find Calls** button to display the results. Refer to the Displaying Call History section for a description of the results.

Viewing Call History Using Account Codes

To search for call history for outbound calls that used Account Codes:

1. Click on the **Calls** link in the Menu bar to display the Call History page.
2. Click on the **phone number** in the sidebar Call History frame for which you want to retrieve call history.



3. Enter a date range in the **From** and **To** fields or click the **calendar** icon to select the date. The default is the current date.
4. Enter the code you wish to get history on in the **Account code** fields and click the **Find Calls** button to display the results. Refer to the Displaying Call History section for a description of the results.

Managing Call Features

Overview

Business Services Phone Manager provides you with a way to manage a set of features from the portal in addition to managing them from the phone. The features available to be managed from the portal are a subset of the calling features package.

Hint

If you have granted your employees permission to manage their own calling features, use this chapter as a reference when they call you with questions.

The features you can manage from the portal include:

- Call Forwarding (on All, on Busy and on No Answer)
- Caller ID Blocking
- Call Waiting
- Do Not Disturb
- Selective Call Rejection
- Speed Dialing

Refer to

Detailed descriptions of these features (and others) are provided in the *Business Services Call Features and Voicemail Guide*.

This chapter provides you with the procedures needed to:

- View Call Feature settings
- Manage the Call Forwarding settings
- Manage the Caller ID Blocking settings
- Change Call Waiting
- Change Do Not Disturb
- Manage the Selective Call Rejection settings
- Manage Speed Dialing

Why Use the Portal to Manage Calling Features?

There are a number of reasons why it's easier to use the portal to manage the calling features – the most common are:

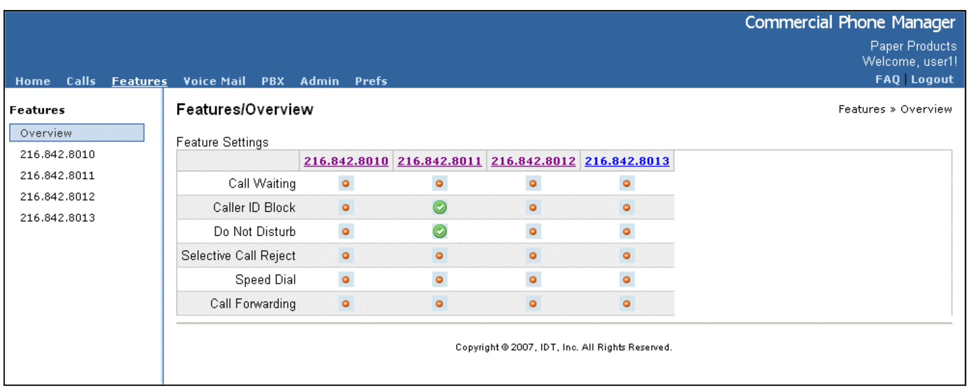
- Features that contain lists of numbers such as Speed Dialing and Selective Call Rejection are easier to maintain from the portal where each number is displayed.
- Phones aren't ringing or calls are not coming through and you want to be sure that it isn't the result of an accidental activation of one of the managed features such as Do Not Disturb.
- You don't remember the "star codes" to use to activate or deactivate one of these features and you don't have the *Business Services Call Features and Voicemail Guide* handy or there is no one nearby to ask.
- You are away from your office and need to remotely set or change one of these features.

Viewing Call Feature Settings

Viewing the feature settings allows you to see the different features activated on an individual phone line. You may want to view call feature settings to initially troubleshoot issues that may be directed to you by the people in your organization.

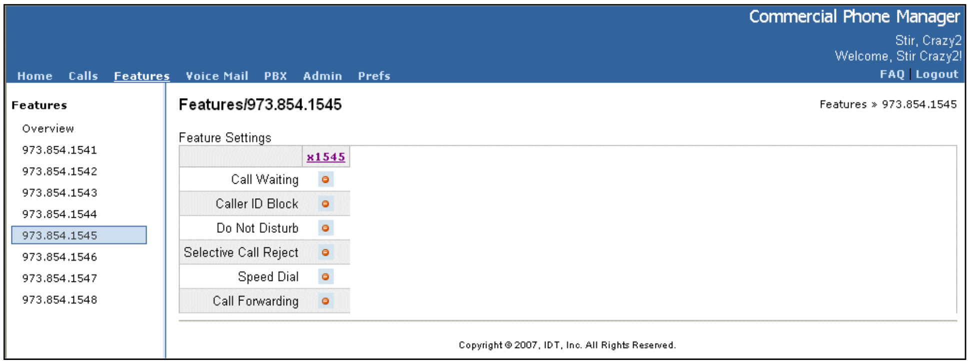
To view the status of call features on a phone line:

Click on the **Features** link in the Menu bar to display the Features/Overview page.



- Each phone line displays as a column heading in the Feature Settings frame.
- Active features display a check mark ( ) under the phone number column. Inactive features display a minus sign ( ). Clicking on either launches the feature edit page for the call feature and associated phone line.

- Clicking on a single line in the column heading or clicking on the number in the Features sidebar frame limits the display to that phone number. For example:



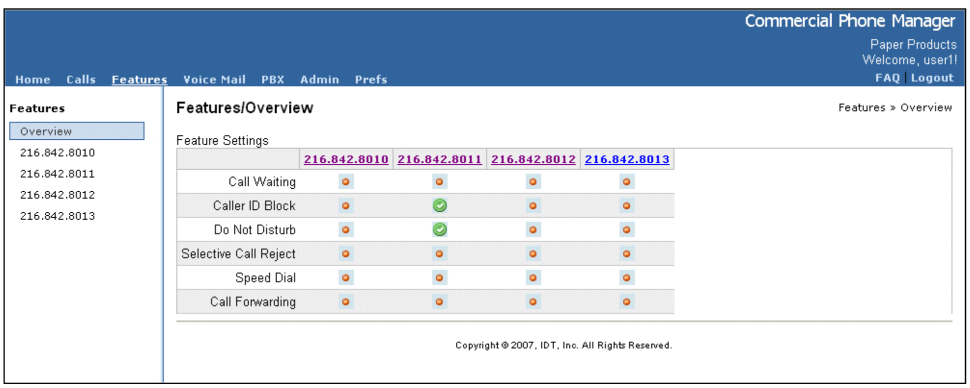
- Clicking on the Overview link in the Features sidebar frame returns the multi-column display.

Managing the Call Forwarding Settings

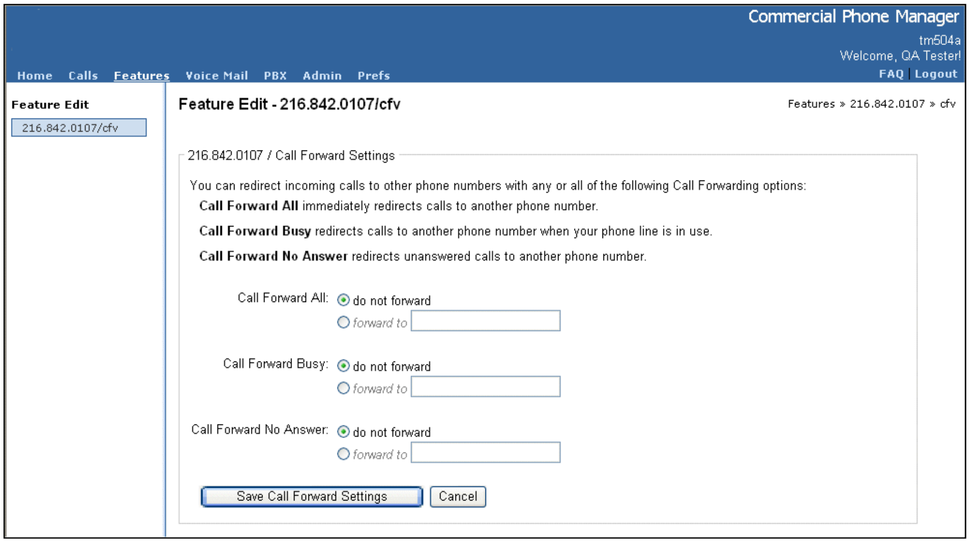
The Call Forwarding features (All, On Busy and No Answer) are all administered from a single Call Forwarding page.

To change a Call Forwarding setting for a single phone line:

1. Click on the **Features** link in the Menu bar to display the Features/Overview page.



2. Click on the **active / inactive** icon (or) associated with the line for the Call Forwarding setting you wish to change.



3. Make your change to the feature by using the following guidelines:

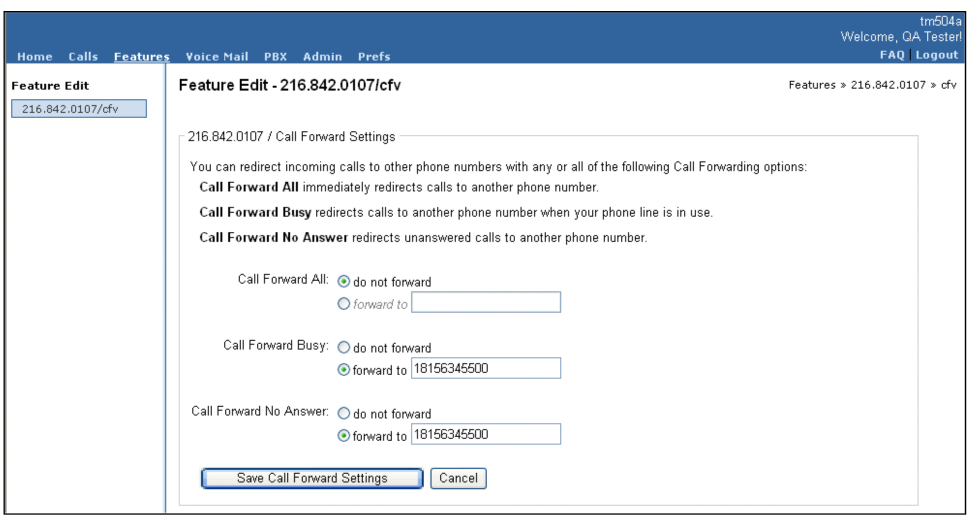
Note

Remember these rules while changing Call Forwarding settings:

- Call Forward All overrides Call Forward Busy and Call Forward No Answer.
- You can activate both Call Forward Busy and No Answer at the same time.
- If you want activate Call Forward Busy or Call Forward No Answer, make sure to deactivate the Call Forward All.

- Click the **do not forward** radio button for "Call Forward All" to deactivate all call forwarding.
- Click the **forward to** radio button next to the setting you wish to activated and enter the 10-digit phone number (no dashes) where the call is to be forwarded.

  For example:



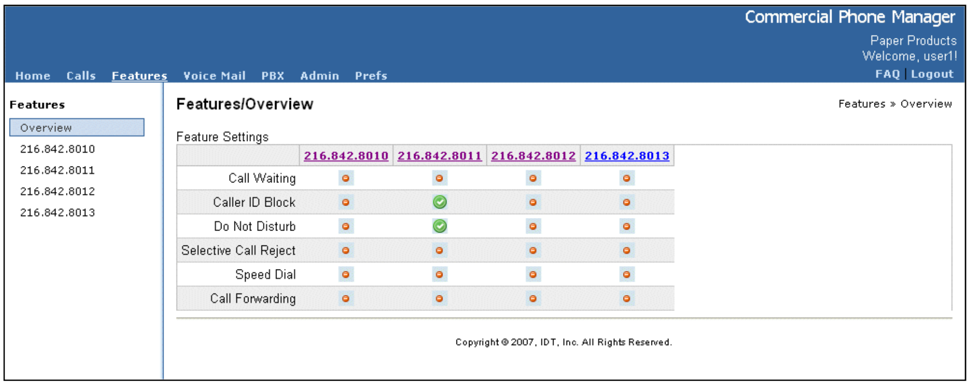
4. Click the **Save Call Forward Settings** button to save your changes and return to the **Features/Overview** page.

Changing Call Waiting

Call Waiting is either turned on or turned off using the PCCW page.

To change Call Waiting on a single line:

1. Click on the **Features** link on the Main menu to display the Features/Overview page.



2. Click on the **active/inactive** icon (or) associated with the line for which you wish to turn Call Waiting on or off. The PCCW page displays.

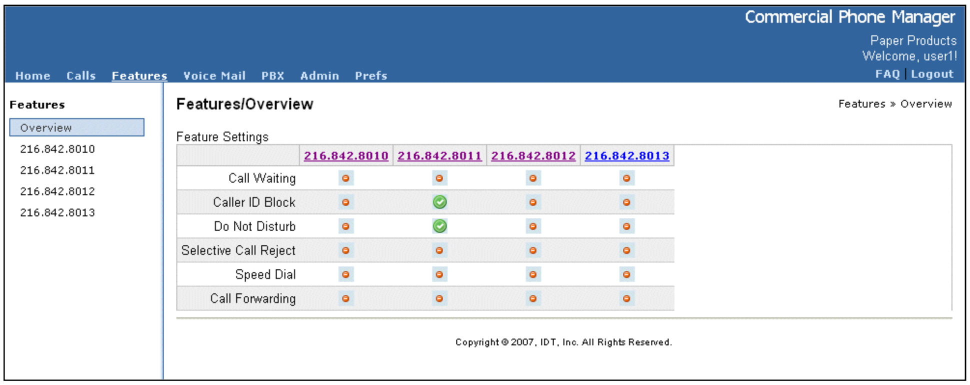
3. Click the **Turn Call Waiting On** button to activate the feature – click the **Turn Call Waiting Off** button to deactivate the feature.

Managing the Caller ID Blocking Settings

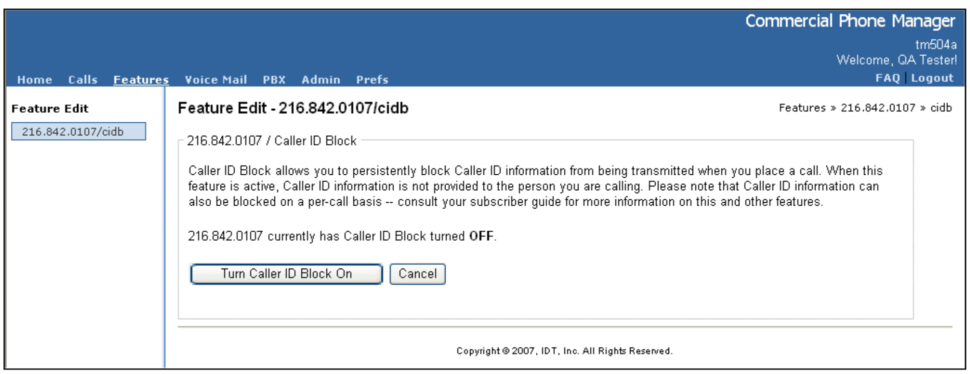
Caller ID Blocking prevents your number from appearing on the called party's Caller ID screen when activated. This feature can be turned on or off using the portal's CIDB page.

To turn Caller ID Blocking on or off:

1. Click on the **Features** link on the Main menu to display the Features/Overview page.



2. Click on the **active / inactive** icon (or) associated with the line for which you wish to turn Caller ID Blocking on or off. The CIDB page displays.



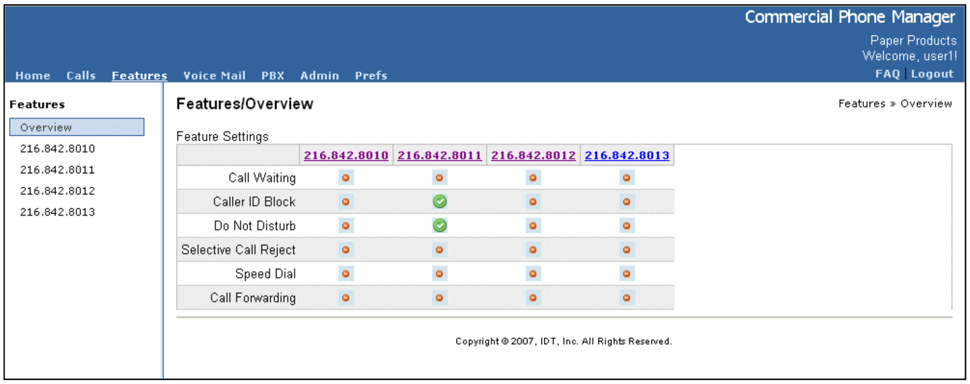
3. Click the **Turn Caller ID Block On** button to activate the feature – click the **Turn Caller ID Block Off** button to deactivate the feature.

Changing Do Not Disturb

The Do Not Disturb feature allows your phone not to ring and is turned on or off using the DND page.

To turn Do Not Disturb on or off:

1. Click on the **Features** link on the Main menu to display the Features/Overview page.



2. Click on the **active / inactive** icon (or) associated with the line for which you wish to turn Do Not Disturb on or off. The DND page displays.

3. Click the **Turn Do Not Disturb On** button to activate the feature – click the **Turn Do Not Disturb Off** button to deactivate the feature.

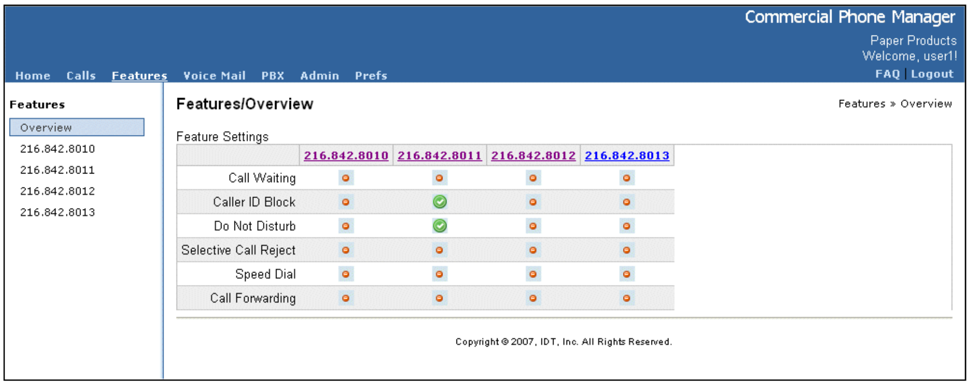
Managing the Selective Call Rejection Settings

Selective Call Rejection maintains a list of phone numbers defined by you from phone numbers you don't wish to take when the feature is active. You can add numbers to or from this list at any time from the SCR page.

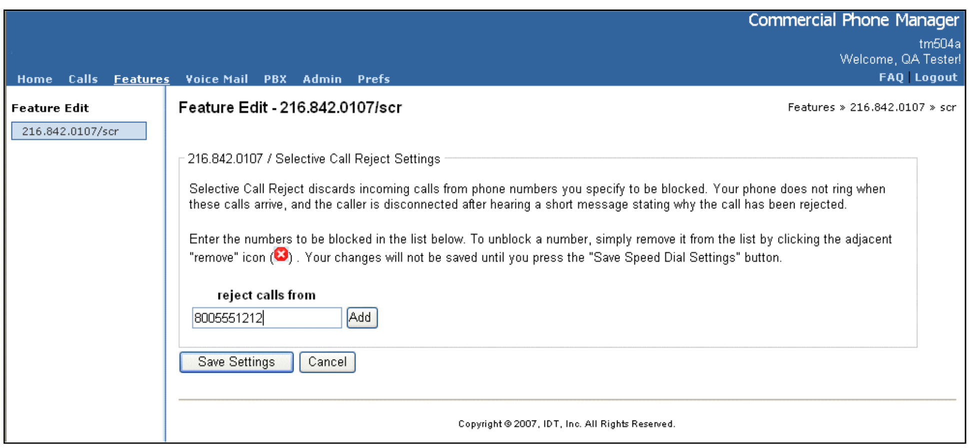
Adding Numbers to the List

To add phone numbers to the list of rejected numbers:

1. Click on the **Features** link on the Main menu to display the Features/Overview page.

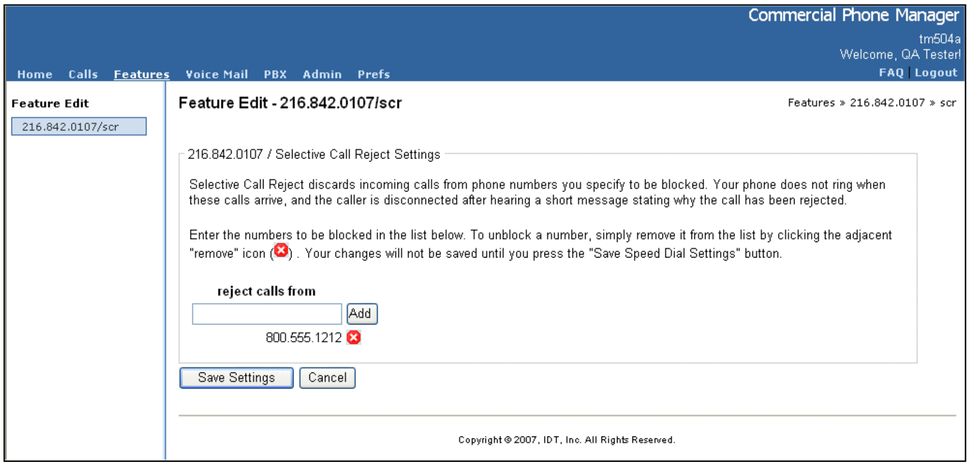


2. Click on the **Selective Call Reject active/inactive** icon (or) associated with the line to display the SCR page.



3. Enter the 10-digit phone number (no dashes) to be rejected in the **reject calls from** field and click the **Add** button.

The number is added to the list under the "reject calls from" field.

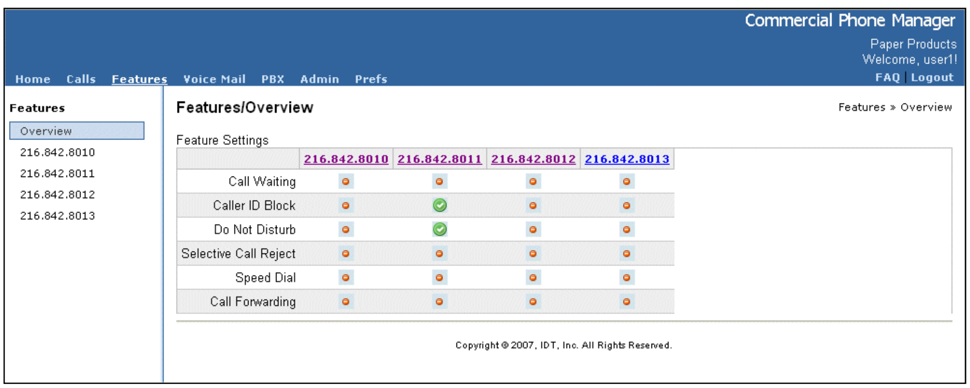


4. Repeat steps 3 and 4 for each phone number to be added to the list.
5. Click the **Save Settings** button once you're done.

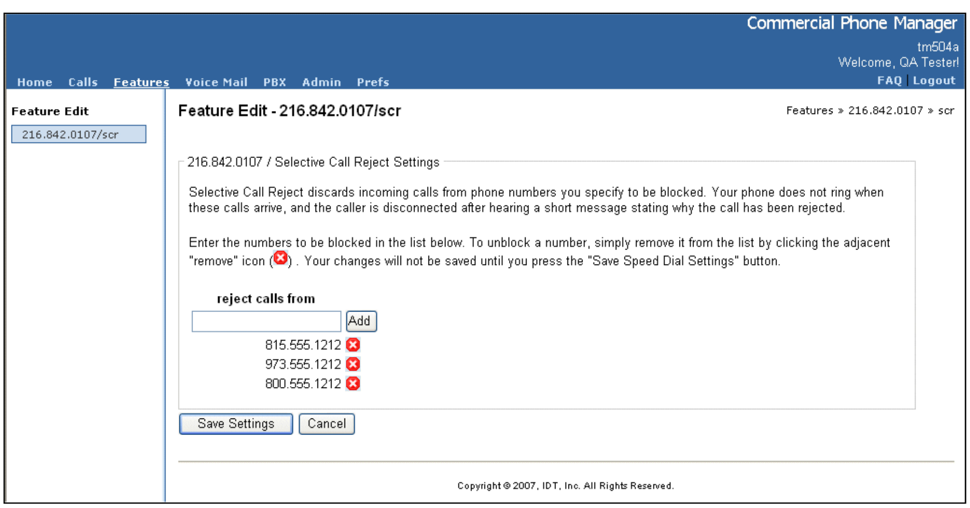
Removing Numbers from the List

To delete phone numbers from the Selective Call Rejection list:

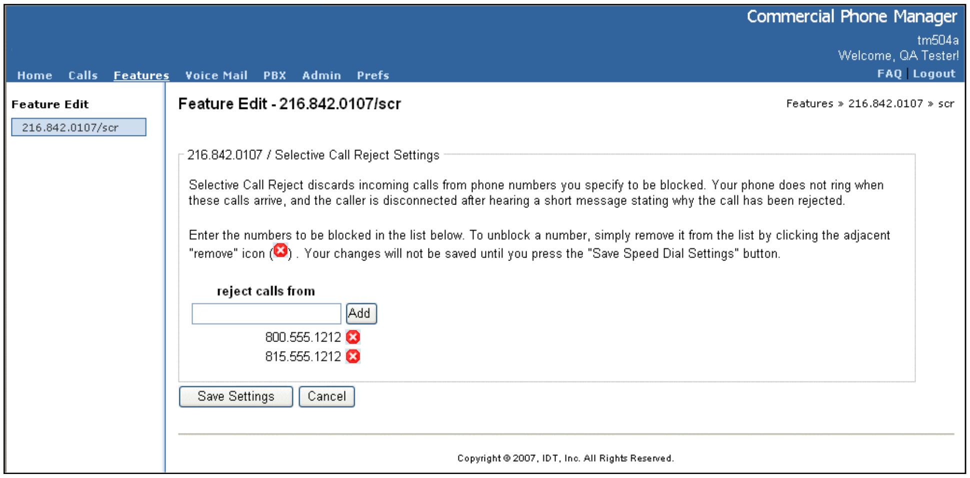
1. Click on the **Features** link on the Main menu to display the Features/Overview page.



2. Click on the **Selective Call Reject active / inactive** icon (or) associated with the line to display the SCR page.



3. Click the **delete** ( ) icon next to the number to remove it from the list.



4. Repeat step 3 for each number to be removed from the list.
5. Click the **Save Settings** button when you're done removing the numbers and to return to the Features/Overview page.

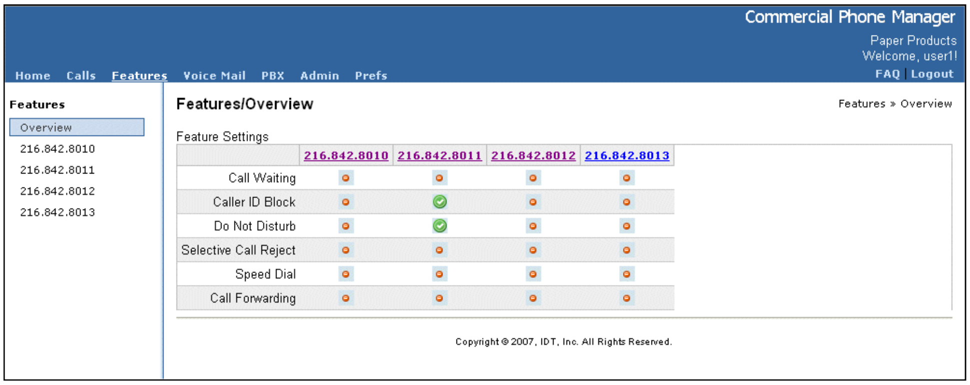
Managing Speed Dialing

Speed Dial maps maintains a list of speed dial keys and the associated phone numbers. You can add or remove phone number associations at any time from the SD page.

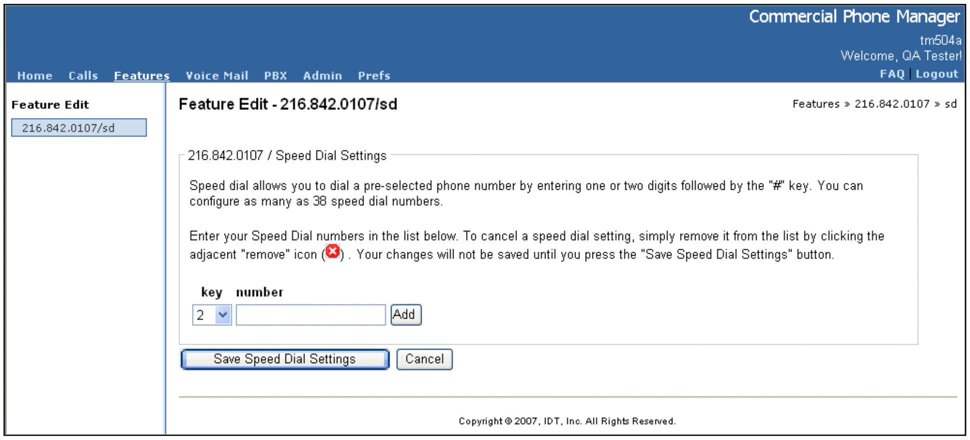
Adding Numbers to the List

To add phone number associations to the Speed Dial list:

1. Click on the **Features** link on the Main menu to display the Features/Overview page.

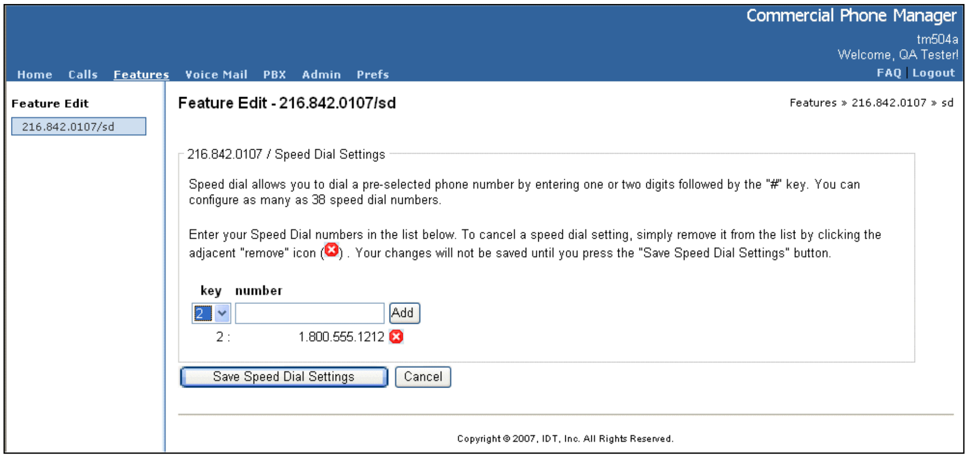


2. Click on the **Speed Dial active/inactive** icon (or) associated with the line to display the SD page.



3. Select an unused Speed Dial key from the **key** drop down list and enter the 10-digit number (no dashes) to be dialed in the **number** field.

4. Click the **Add** button to add the number association to the list. The number is added under the key and number fields.



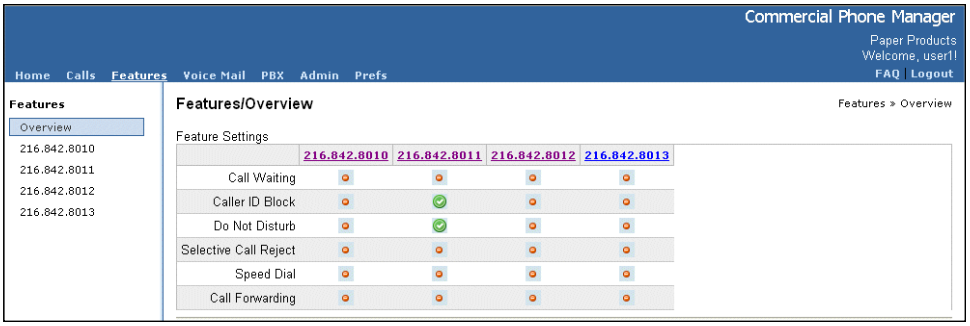
5. Repeat steps 3 and 4 to add numbers to the Speed Dial list.

6. Click the **Save Speed Dial Settings** button when you're finished adding the key-to-phone number associations.

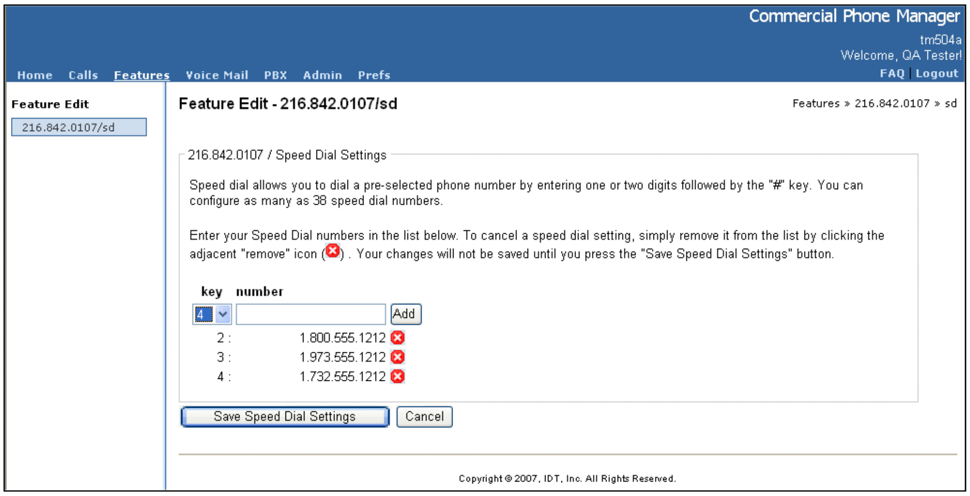
Removing Numbers from the List

To remove phone numbers from the Speed Dial list:

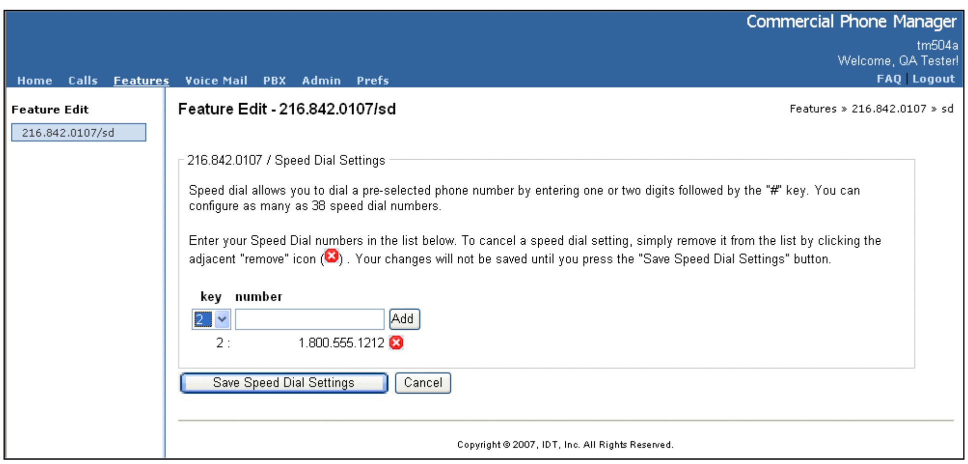
1. Click on the **Features** link on the Main menu to display the Features/Overview page.



2. Click on the **Speed Dial active/inactive** icon (or) associated with the line to display the SD page.



3. Click the **delete** icon ( ) next to the number you want to remove from the list. The system removes the number from the page.



4. Repeat step 3 to continue to remove numbers.

5. Click the **Save Speed Dial Settings** to save your changes and return to the Features/Overview page.

Managing Voicemail

Overview

The Business Services Phone Manager portal provides you with the ability to manage certain voicemail features that are also managed using the phone.

Hint

If you have granted your employees permission to manage their own voicemail features, use this chapter as a reference when they call you with questions.

From the portal, you can:

- View, Listen to and Delete voicemail messages
- Assign a name to a mailbox

Refer to

Detailed descriptions of these features (and others) are provided in the *Business Services Call Features and Voicemail Guide*.

Why Use the Portal to Manage Voicemail?

There are a number of reasons why it's easier to use the portal to manage voicemail features – the most common are:

- You can instantly see a view of all existing voicemail messages for all phone lines or you can drill-down to a single mailbox.
- An employee left the company and you want to quickly clean up and initialize the voicemail box on the phone for the hired replacement.
  - — You need to rename the mailbox for the hired replacement.
- You are away from your office and phone but want to check for voicemail messages.

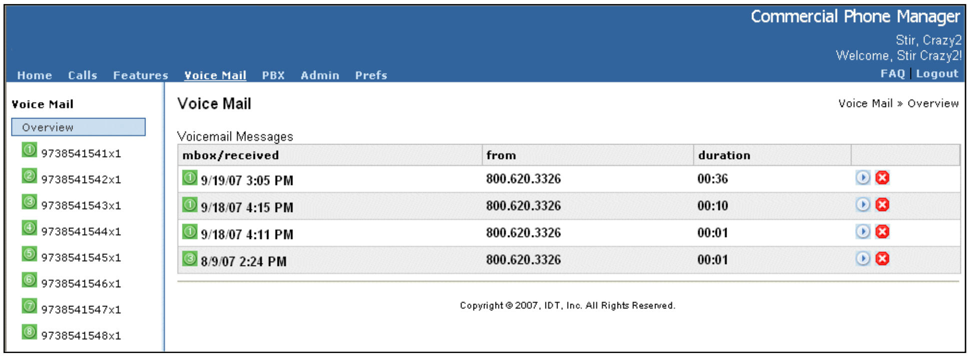
Viewing, Listening to & Deleting Messages

The following subsections provide you with procedures on how to view, listen to and delete voicemail messages.

Viewing Messages

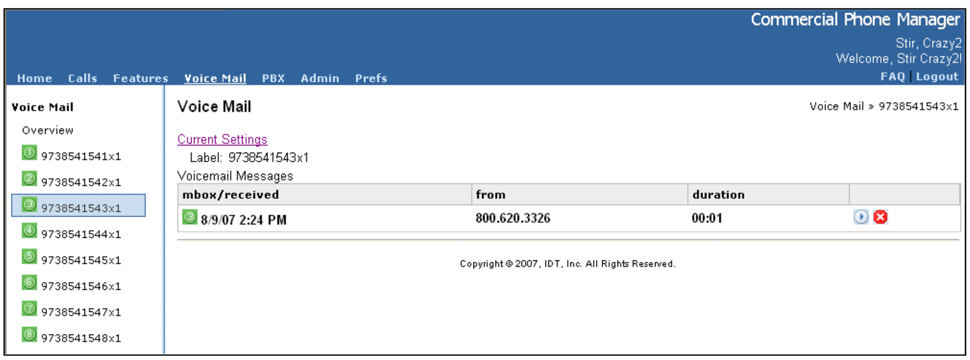
To view messages from a single or multiple mailboxes:

1. Click on the **Voice Mail** link in the menu bar to display the Voice Mail page.



- The sidebar Voice Mail frame lists the names of each mailbox. By default the names reflect the phone line until you specify a specific name for the mailbox.
- The Voice Mail frame to the right lists the messages for all mailboxes.

2. Click on the **phone number** in the left sidebar frame to display messages for that mailbox only.



Click on the **Overview** link in the left sidebar frame to return to the list of messages for all phone lines.

The following information is displayed for all voicemail messages:

- **Mbox** – identifies the mailbox containing the message based on the Business Services internal numbering of the mailboxes for easier identification. The mailbox number correlates to the same number association with the mailbox name in the left sidebar Voice Mail frame.
- **Received** – specifies the date and time the message was received.
- **From** – displays the phone number of the calling party that left the message provided the number was not blocked by the caller.
- **Duration** – specifies the length of the message in minutes and seconds.

Listening to Messages

You can listen to messages by viewing all lines or a single line from the Voice Mail page.

To listen to messages:

1. Access the Voice Mail page as described in the Viewing Messages section.
2. Click the **play** icon ( ) to listen to the message you wish to hear.

Deleting Messages

You can delete messages by viewing all lines or a single line from the Voice Mail page.

To delete messages:

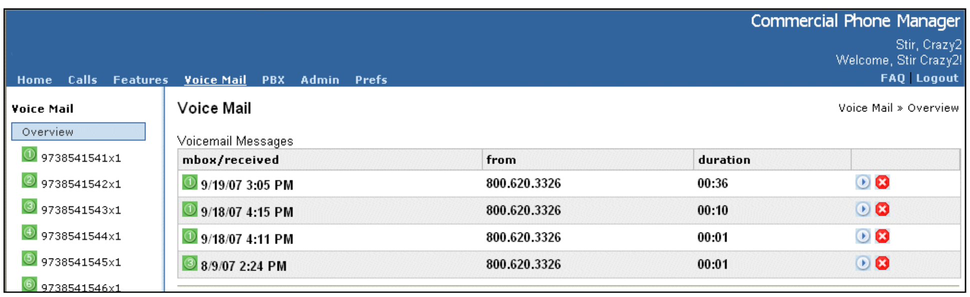
1. Access the Voice Mail page as described in the Viewing Messages section.
2. Click the **delete** icon ( ) to delete the message you want removed.

Assigning Names to Mailboxes

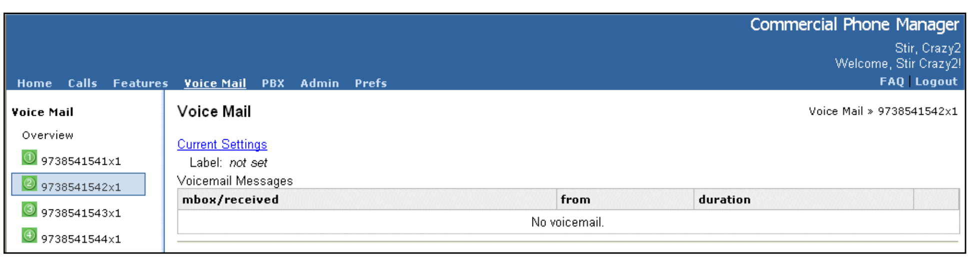
You may want to match the voicemail box numbers to employee names for easier viewing.

To assign a name to a mailbox:

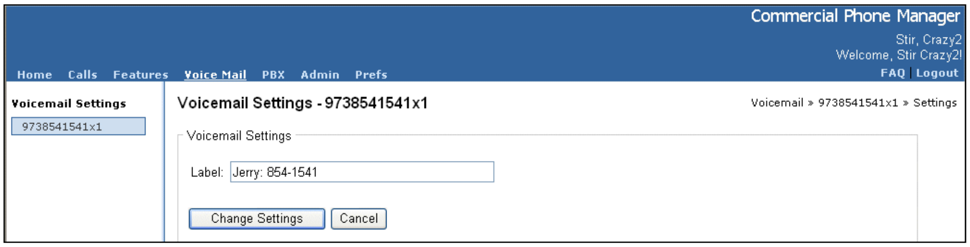
1. Access the Voice Mail page as described in the Viewing Messages section.



2. Click the **phone number link** in the left sidebar Voice Mail frame to display the Voicemail Messages page for that line.

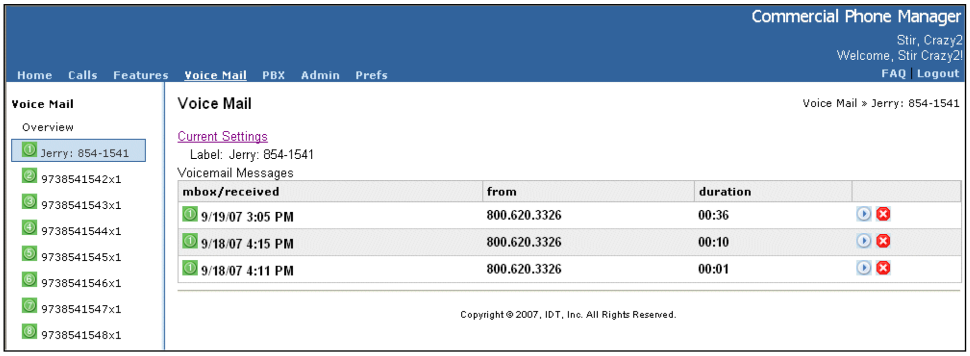


3. Click the **Current Settings** link at the top of the right Voice Mail frame to display the Voicemail Settings page.



4. Enter the name you wish to assign in the **Label** frame

5. Click the **Change Settings** button to save your changes and return you to the Voice Mail page where the change displays.



Managing the Auto Attendant

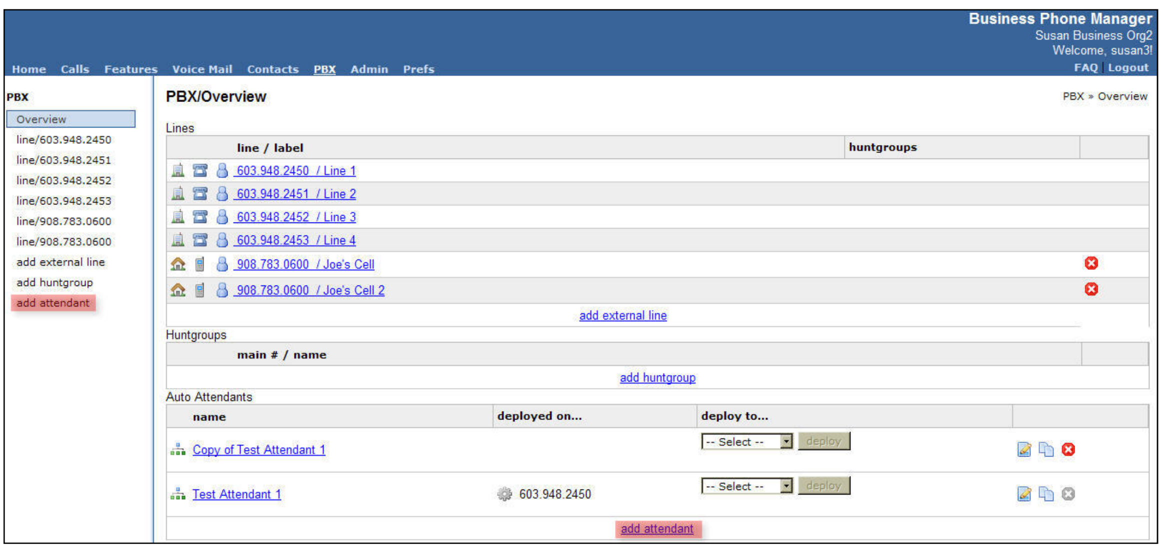
Overview

The Auto Attendant is an automated answering service that increases your productivity by eliminating the need to "man the phone" each time it rings. It allows you to continue working as calls are directed to the appropriate team or staff member. Features include:

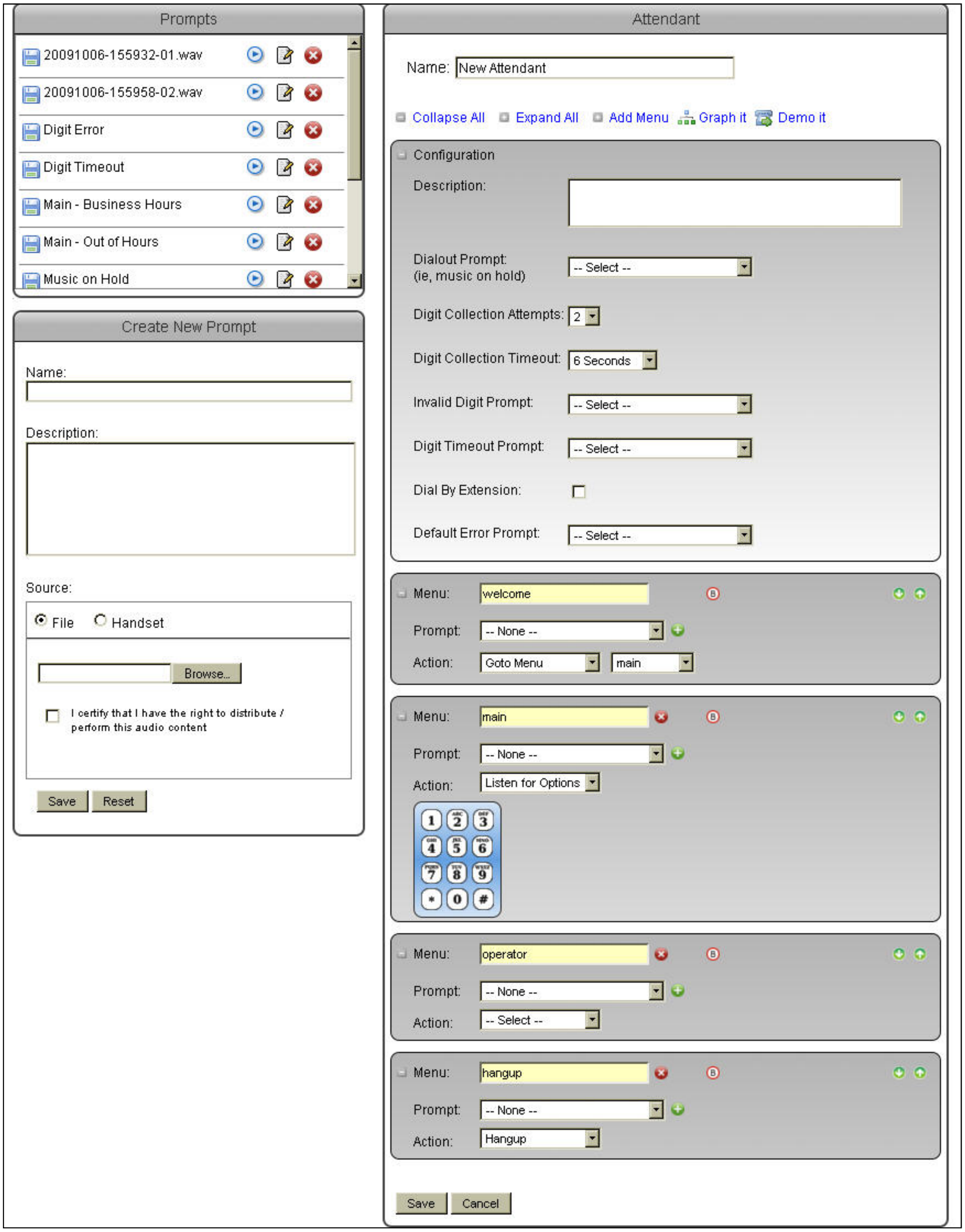
- Configuration and management of multiple attendants that may contain multiple levels of "menus."
- Recorded prompts can be uploaded, played and edited from Business Phone Manager. There is no limit to the number of prompts that may be uploaded.
- Ability to copy an existing attendant to create new attendants that can be modified.
- Attendants may be set up to forward calls to an extension, hunt group, another menu, external telephone number, prompt or hang-up.

Attendant Page Overview

The Attendant page is accessed by clicking the **add attendant** link in the PBX sidebar menu or on the PBX/Overview page.



You can mouse-over the fields to get descriptions so that you can enter the appropriate information. See the following figure for the page overview.



Each newly created attendant comes with a set of system default menus – two of these menus can not be deleted:

- **Welcome** – is what callers hear when they first dial your phone number. You can modify the Welcome menu to play an uploaded audio file or direct the caller to another menu.
- **Error** – plays the prompt or takes the action you define.

Getting Started

Before you upload prompts or create attendants there are a few helpful hints that you may want to follow.

- Make sure all of your phone lines that you plan to use in your attendant are labeled.
- If you do not have voicemail, order it. Auto attendant will disconnect calls forwarded to voicemail if the feature is not enabled on your account.
- Plan your attendants before prompts are recorded and then create the prompts based on the planned attendant.
- If you are recording your own prompts, make sure you have a microphone that can plug into a PC and that you record in a quiet room to avoid background noise.
  - If you are recording your prompts using your phone's handset, make sure the phone is of good quality.
- Audio (recorded prompts) must be saved as ".wav" or "MP3" files. The Phone Manager will convert the uploaded audio files to the required format it needs to play the prompts.

Creating Attendants

After your phone lines are labeled, you can create attendants in four basic steps:

Step 1 – Add the attendant using the "add attendant" link.

Step 2 – Upload the audio prompts or record them using your phone's handset.

Step 3 – Name the attendant and configure the attendant's settings.

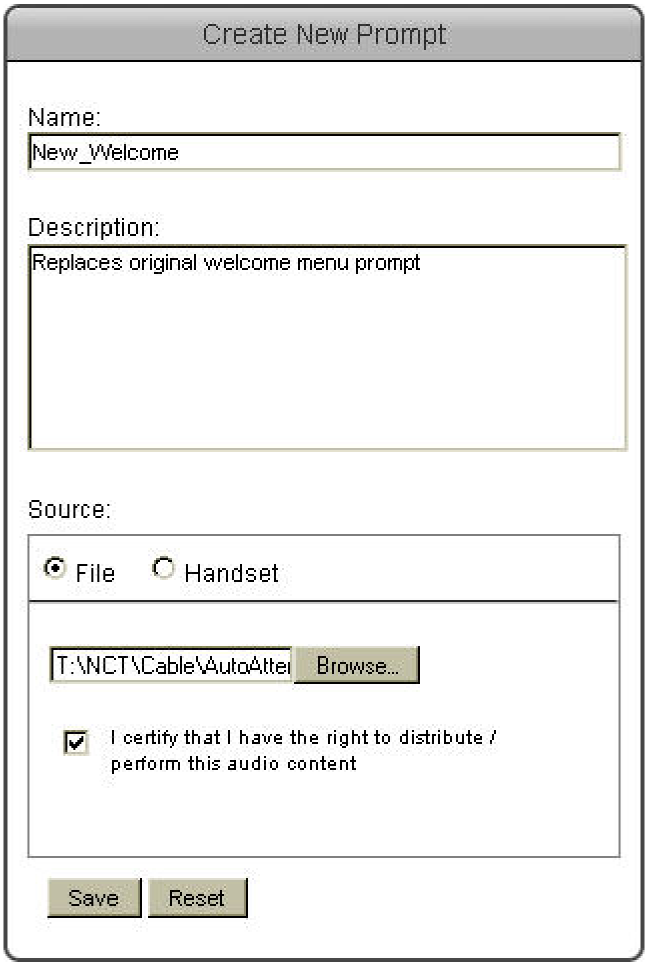
Step 4 – Set up the attendant's menus.

Step 1 – Add the Attendant

Click the **add attendant** link in the Phone Manager's sidebar menu or in the PBX/Overview page to display the Attendant page.

Step 2 – Add the audio prompts using the upload option

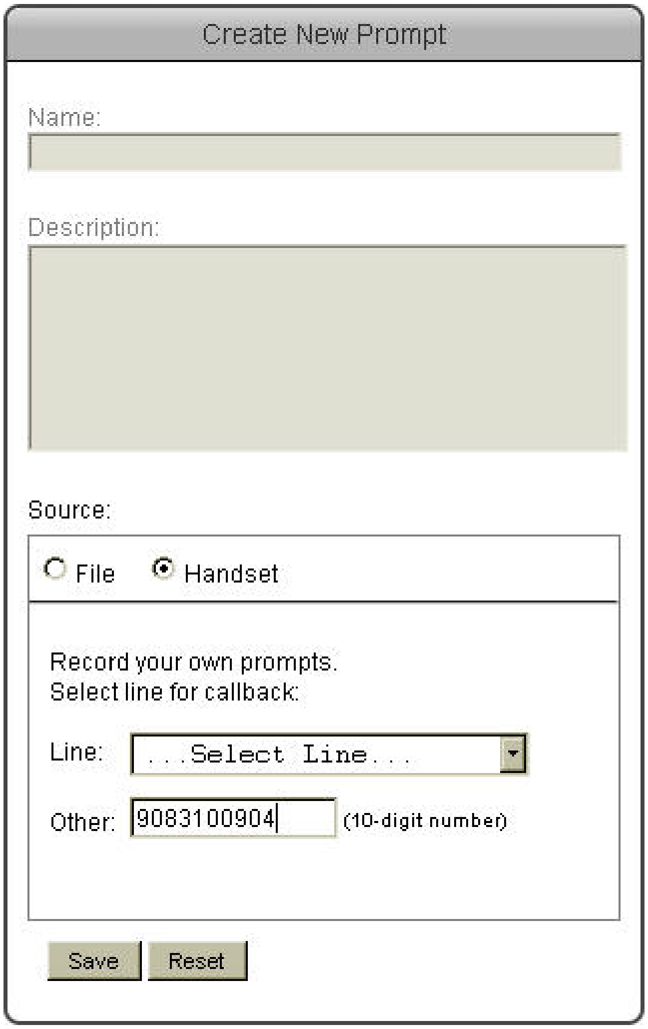
In the Create New Prompt frame:



1. Enter the name of the audio file to be uploaded in the **Name** field. You may enter up to 50 characters.
2. Enter a description of the prompt being uploaded in the **Description** field – up to 65,536 may be entered. Note that this is not a required field but recommended.
3. Click the **Browse** button and select the audio file to be uploaded or enter the full path and filename in the **Create from file** field.
4. Click the **copyright** checkbox to indicate the right to use the recorded prompt.
5. Click the **Save** button to upload the file. The prompt displays in the upper section of the Prompts frame.

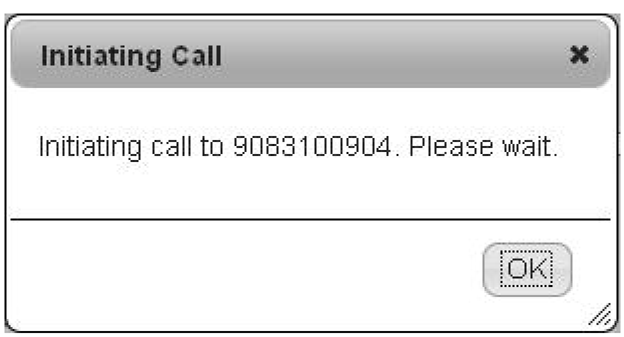
Step 2 – Add the audio prompts using the handset option

In the Create New Prompt frame:



1. Select the **Handset** radio button in the Source frame.
2. Either select the line you wish to record from or enter a 10-digit phone number of the phone where you will record your prompt.
3. Click the **Save** button.

   The system rings the phone you specified in step 2 and displays the Initiating Call dialog box.



4. Click the **OK** button. Pick up the phone and follow the audio instructions to record your prompt.

   Your newly recorded prompt appears in the Prompts frame using the date and time you recorded the prompt.

Hint

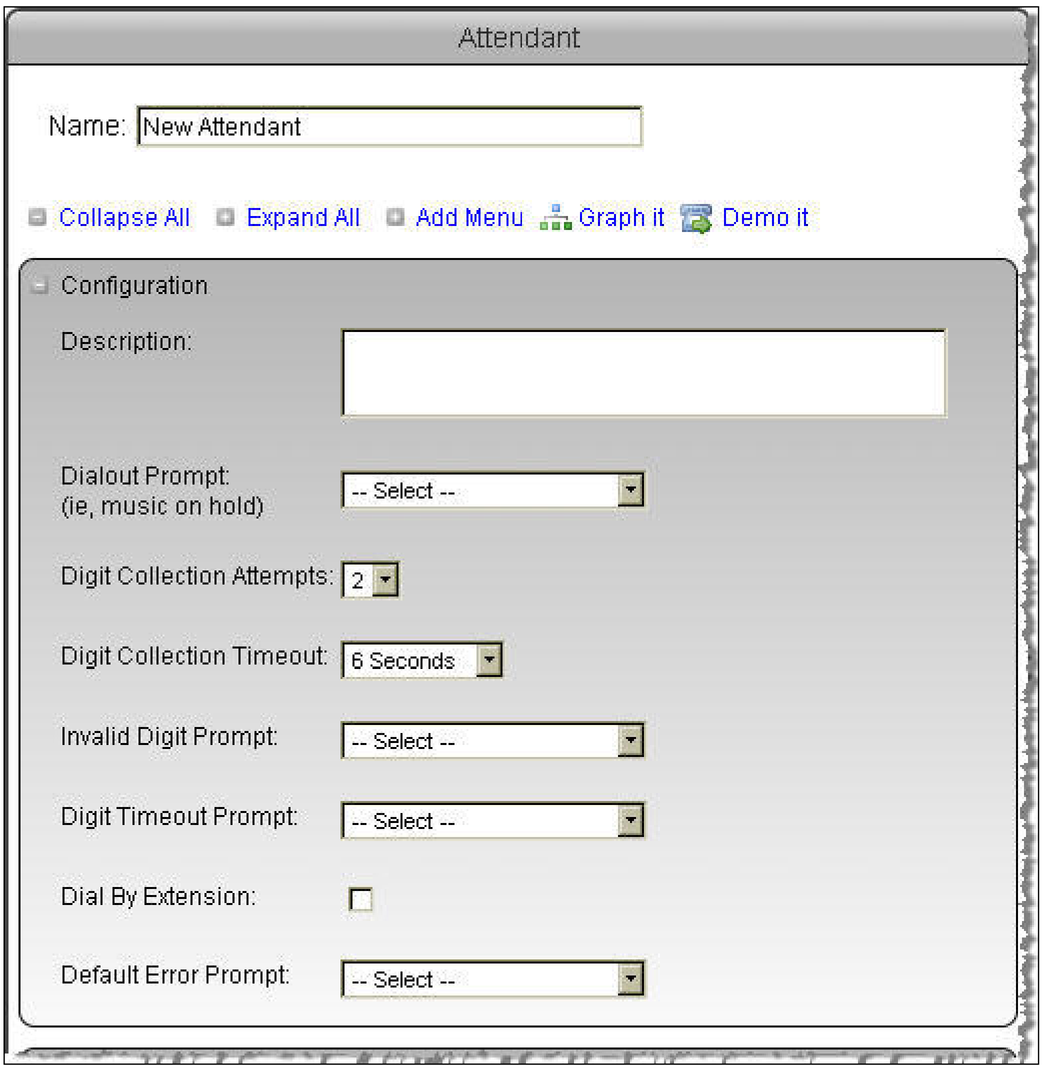
Mouse-over an existing prompt name to view its description.

You can play any uploaded prompts by clicking the **Play** ( ) icon in either the Prompts or Attendant frame.

Step 3 – Name the attendant and configure the settings

Click the **+** icon next to "Configuration" to expand the section. You can accept the default values populated in the Digit Collection Attempts and the Digit Collection Timeout fields in the Configuration section of the Attendant frame or select your own from the drop down lists.

In the Configuration section of the Attendant frame:



1. Enter the name of the attendant in the **Name** field. You may enter up to 64 characters.
2. Enter the attendant information in the **Description** field – up to 65,536 characters may be entered.
3. Select the audio file that callers hear while the call is transferred from the **Dialout Prompt** drop down list. Silence is heard by the caller while the attendant is transferring a call if a prompt from the Dialout Prompt menu is **not** selected.
4. Select the number of times a caller can enter an invalid menu option before generating an error from the **Digit Collection Attempts** drop down list.
5. Select the number of seconds a caller has to enter a digit before a timeout error occurs from the **Digit Collection Timeout** drop down list.
6. Select the audio file to be played when a caller enters the unrecognized digit from the **Invalid Digit Prompt** drop down list.
7. Select the audio file to be played when a timeout error occurs from the **Digit Timeout Prompt** drop down list.
8. If callers are allowed to enter a 4-digit extension at any time during the prompt, select the **Dial By Extension** checkbox. You must have the Extension Based Dialing feature active before using this feature.
9. Select the prompt to be played under any error condition **if** no error prompts are selected in either the Configuration or Menu frames.
10. Complete the procedures in **Step 4 – Create associated menus**.

Hint

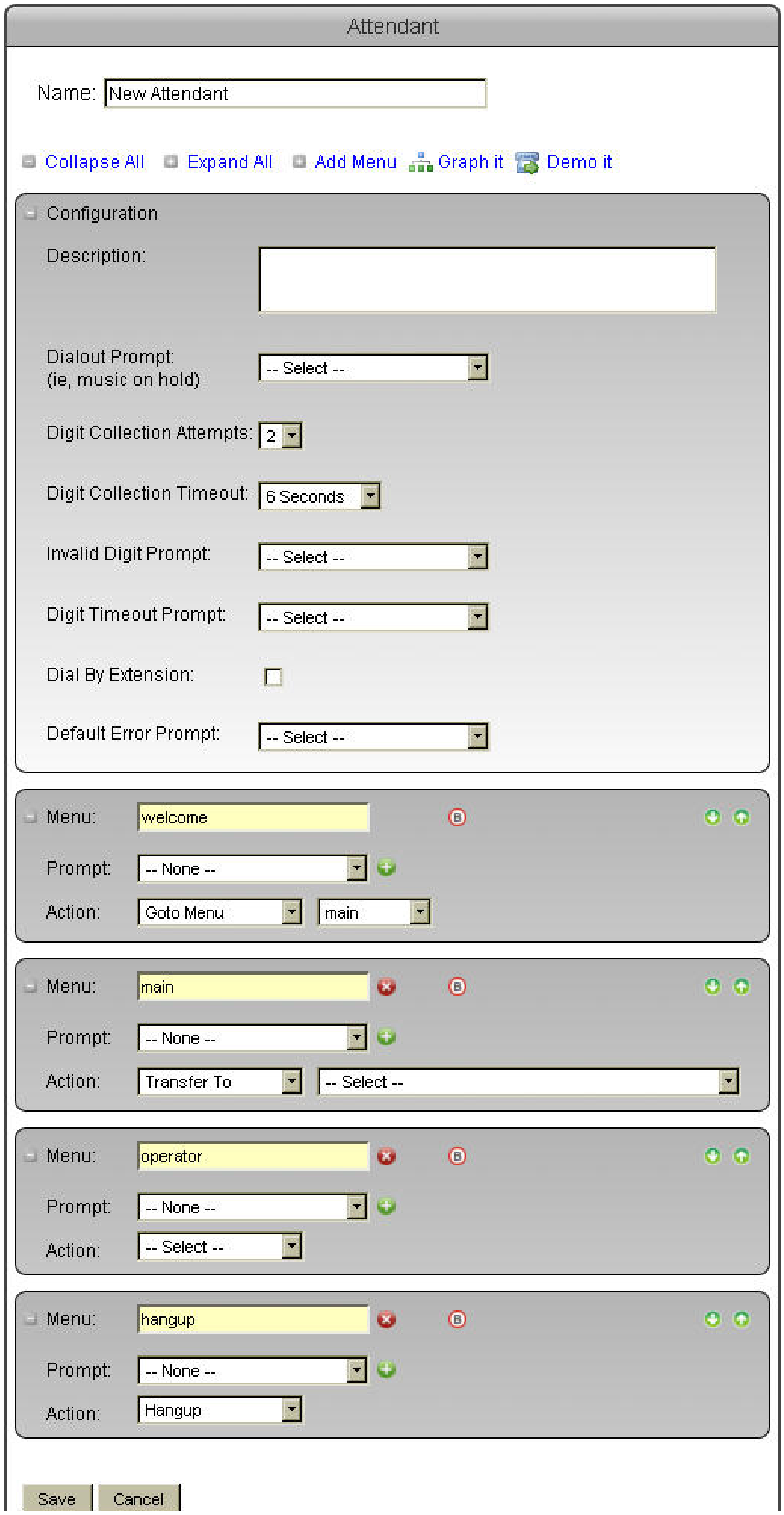
You can save the attendant without adding menus and come back later to create them. The Phone Manager retains the configuration once the attendant is saved. The same is true when you save a menu but don't configure the attendant – menus are saved.

Step 4 – Create associated menus

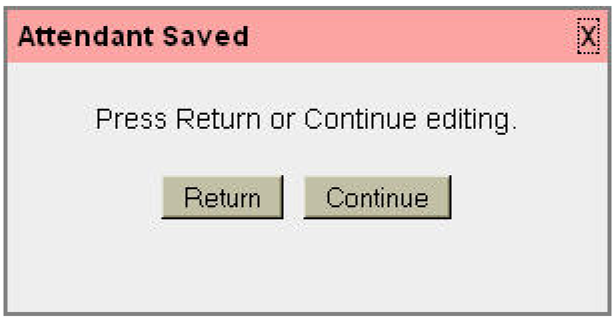
As you set up new or modify existing menus within an attendant you can have the attendant:

- Play or not play an audio file (prompt).
- Take one of the following actions:
  - **Listen for Options** – waits for caller digit input to transfer the call to a specified number, go to another menu or hang up the call.
  - **Hang Up** – immediately disconnects the caller.
  - **Go to Menu** – go to a specified menu.
  - **Transfer To** – forward to an internal number/extension or an external number as long as that number is not an international number.
  - **Go Back** – go to the previous menu.

In the menu section of the Attendant frame:



1. Set up the Welcome menu to play a prompt and then direct the caller to the main menu. You can bypass a prompt and sent it directly to the main menu.
   a. Select which audio file is to be played when a caller first calls your phone number from the **Prompt** drop down list.
   b. Select **Go to Menu** from the **Action** drop down list and select "main."
2. Set up the "main" menu.
   a. If the main menu is not visible, click the **Add Menu** link at the top of the Attendant frame.
   b. Select which audio file is to be played once the Welcome menu plays from the **Prompt** drop down list.
   c. Select what action is to be taken from the **Action** drop down list.
3. You can change the name of the default menu names by highlighting them and typing in a new name. Menu names are limited to 32 characters and can **not** contain spaces.
4. Click the **Save** button to save the attendant. A confirmation dialog box displays.



5. Click the **Return** button to save the attendant or the **Continue** button to go back to the attendant to make additional changes.

   The newly created attendant displays in the Auto Attendants frame on the PBX/Overview page.

Auto Attendants			
Attendant	Deployed on...	Deploy to...	
Business Hours		-- Select -- deploy	
Out of Hours		-- Select -- deploy	
Create an auto attendant			

   Add as many attendants as you need – there are no limits to the number of attendants that can be created but only **one** attendant can be deployed per line.

   Once you have created your attendant, you can deploy it in order for callers to be directed to the attendant.

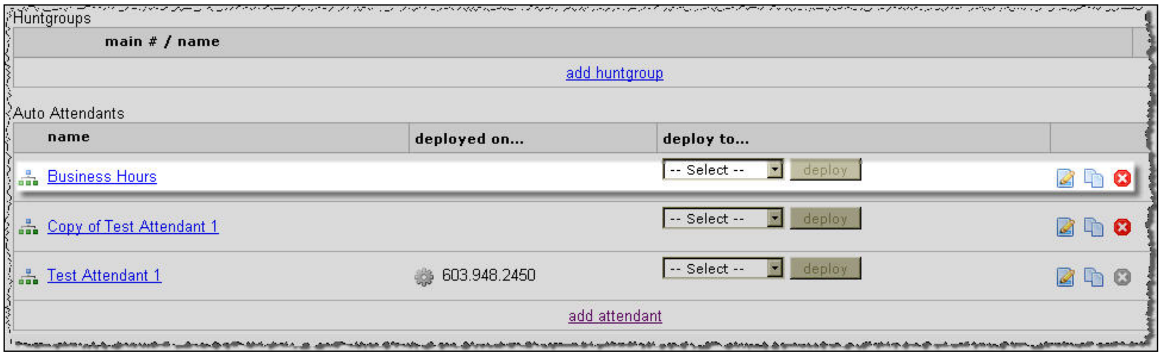
Menu Extras

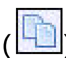
- You can change the visual order of your menus by clicking the up or down arrows.
- You can turn barging on or off by clicking the "B" icon. Barging allows your callers to cut through the attendant prompts by pressing a key on their phones. By default Barging is set to on.

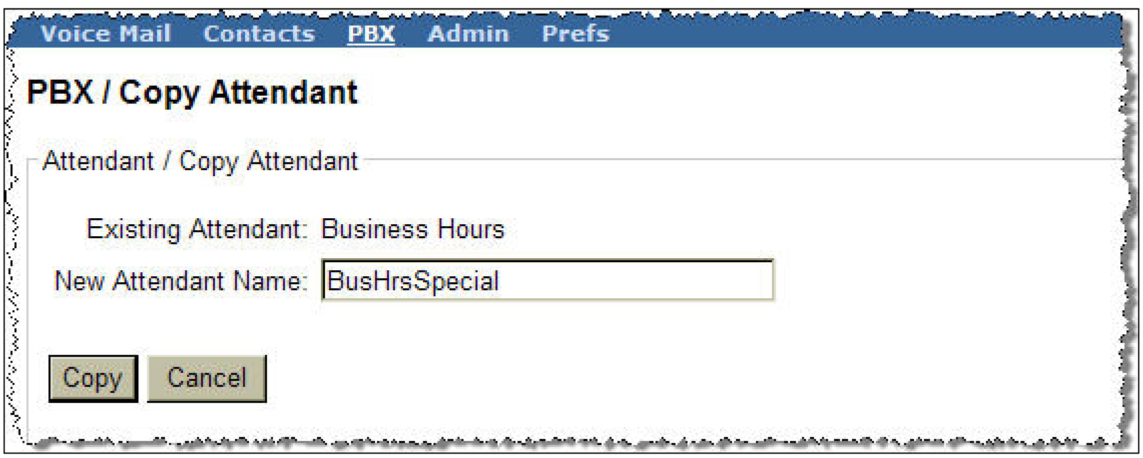
Creating a New Attendant Using the Copy Feature

You can create new attendants that have slightly different characteristics from an existing attendant using the Copy feature.

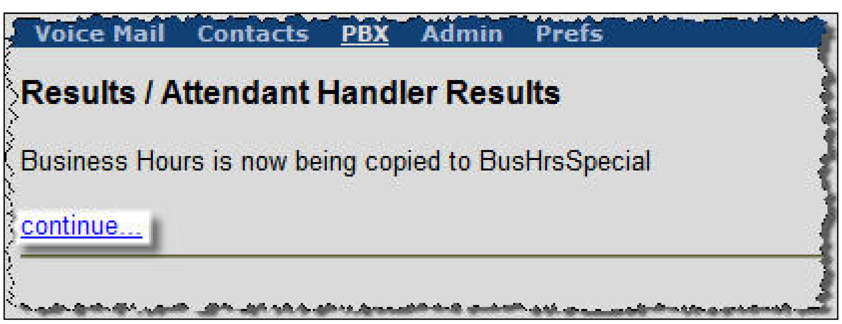
On the PBX/Overview page:



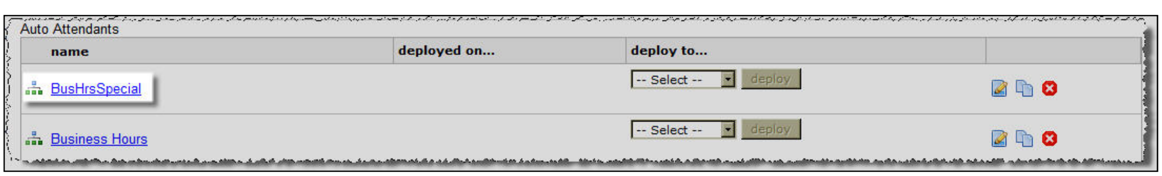
1. Click the **Copy** () icon next to the attendant you wish to copy.



2. Enter the new attendant's name in the **New Attendant Name** field and click the **Copy** button.



3. Click the **Continue** link to copy the attendant. The Phone Manager navigates you back to the PBX/Overview page.



4. Click on the new Attendant and modify the prompts and/or attendant characteristics as described in the Creating Attendants section.

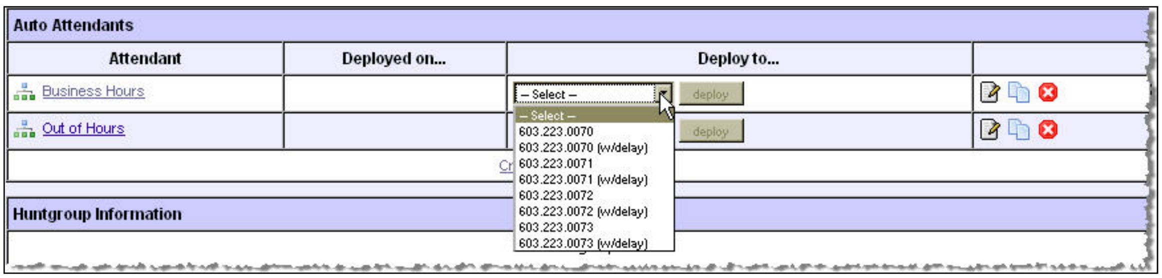
Deploying an Attendant

Before deploying your attendant, you might want to give it a test run. To demo your attendant, refer to the Previewing an Attendant section.

An attendant must be deployed to become active. Some rules to remember when deploying an attendant include:

- Hunt groups take precedence over the Auto Attendant. If hunting is deployed on the same line as the attendant, it will override the attendant and direct the incoming calls according to how the hunt group is defined.
- If the deployed attendant phone number has been call-forwarded to another number, the incoming call bypasses the attendant and gets directed to the forwarded number.

To deploy an attendant from the PBX/Overview page:



1. Scroll down to the Auto Attendants frame and select the phone number where the attendant is to be deployed from the **Deploy** drop down list. This is the number callers dial to reach your company.
2. Select the number from the drop down list where the attendant is to be deployed. Note that you can select a delay so that the phone rings several times before being transferred to the attendant.
3. Click the **deploy** button.

4. Click the **continue…** link.

The attendant is deployed when the phone number displays in the "deployed on…" column.

Click the icon before the 10-digit phone number again to "undeploy" the attendant.

Editing Prompts

Edit capabilities include:

- Changing the name and description.
- Uploading replacement audio.

To edit prompts from the Prompts frame on the Attendant page:

1. Click the **edit** () icon next to the name of the prompt to be edited to display the Edit Prompts frame.

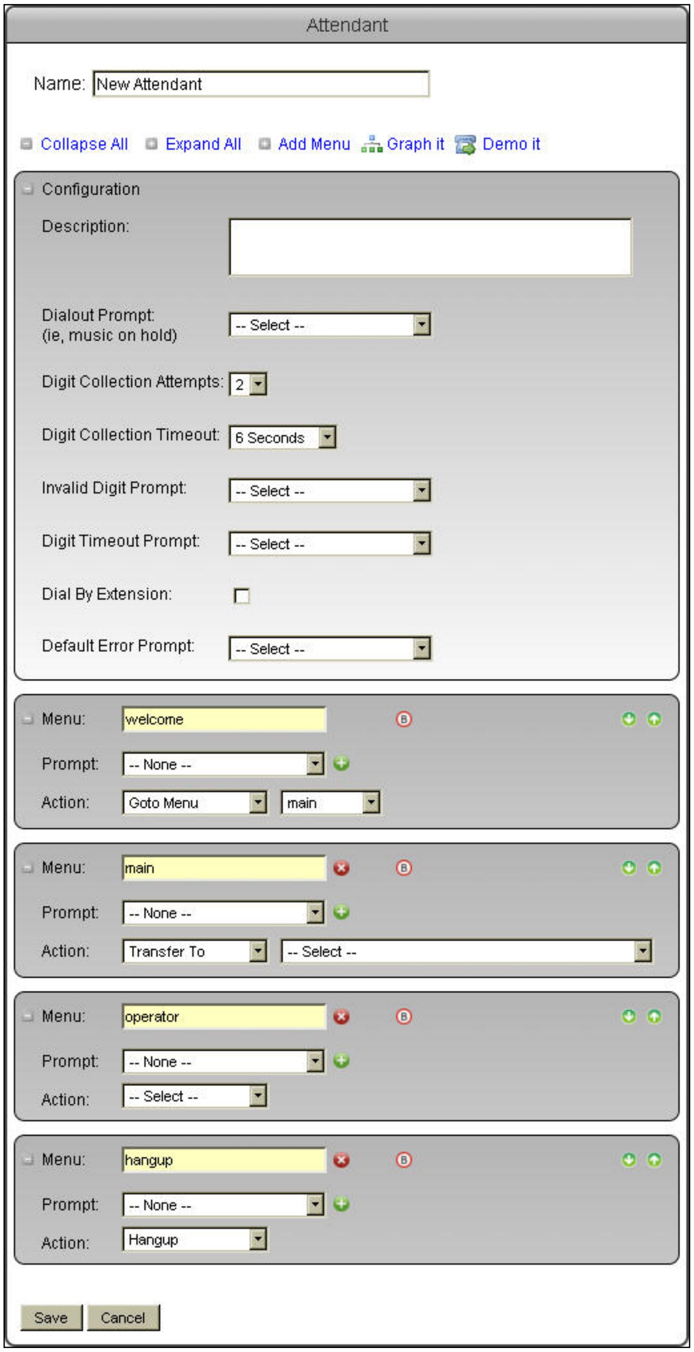
2. Make your name and/or description change or upload a replacement file by selecting the **Replace Prompt** button and file.
3. Click the **Save** button to save your changes.

Editing Attendants

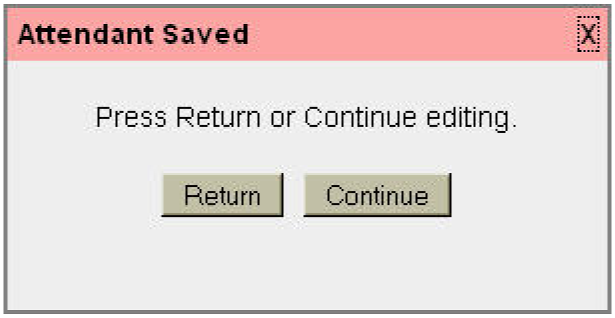
Edit capabilities include:

- Adding and changing menus.
- Changing the menu order.
- Adding prompts to a menu.
- Changing configuration settings.

1. Click the **edit** icon next to the name of the attendant to be edited on the PBX/Overview page. Phone Manager displays the attendant page.

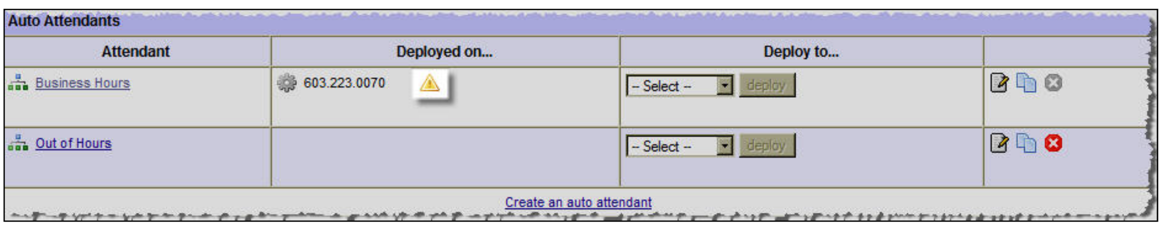


2. Make you changes:
   - Click the **Up**/**Down** arrows (/) to change the visual order of the menus.
   - Click the **Plus** () icon to add additional prompts.
   - Click the **Delete** () icon to delete a menu or prompt.
   - Click the **Barge** ( ) icon to turn barging on or off.
3. Click the **Save** button to submit your changes.



4. Click the **Return** button to save your edits or the **Continue** button to go back to the attendant for additional changes.

You can detect when a deployed attendant was modified by the **updated** () icon that displays in the "Deployed on…" column.



Deleting Attendants

You can delete an attendant as long as it is **not** deployed. If you want to delete a deployed attendant, you need to "undeploy" it and then delete it.

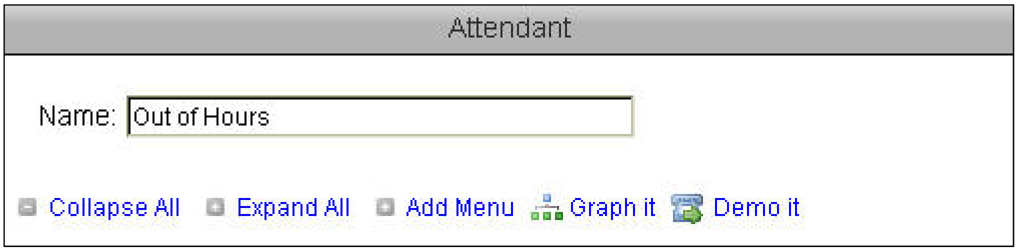
Attendants are deleted from the PBX/Overview page. Click on the **delete** () icon next to the attendant you wish to delete.

Previewing an Attendant

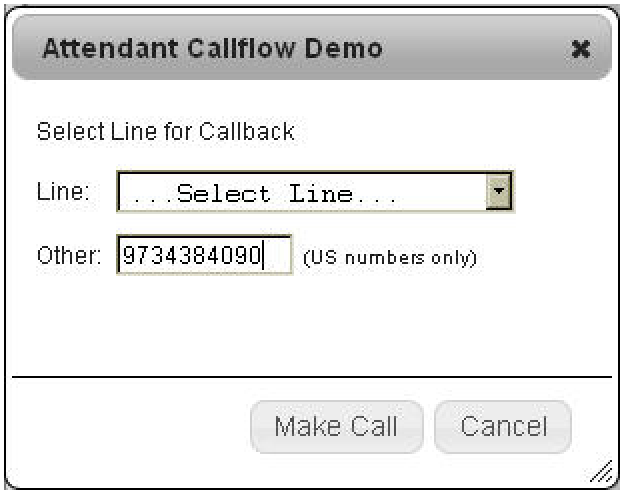
You can preview an attendant at any time. Doing so allows you to hear all the prompts and call flow. You can simulate the attendant by pressing keys and listening to the prompts your callers will hear.

To preview an attendant:

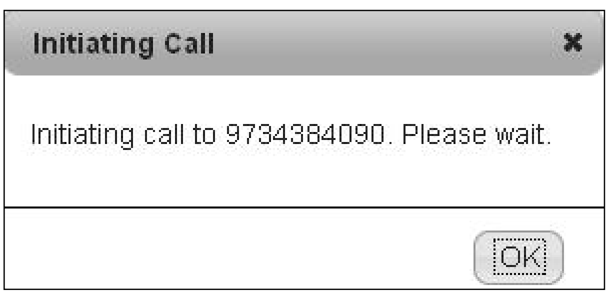
1. Select the attendant you wish to demo from the PBX page to display the attendant page.



2. Click the **Demo It** link at the top of the Attendant frame to display the **Attendant Callflow Demo** dialog box.

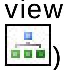


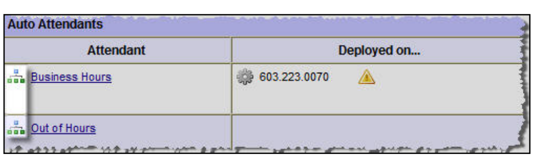
3. Select the line or enter the 10-digit phone number of the phone where you will listen to the demo. Click the **Make Call** button.

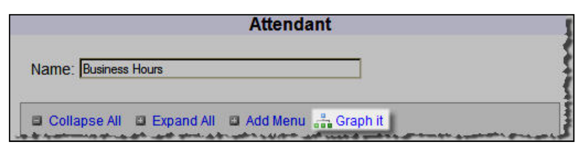


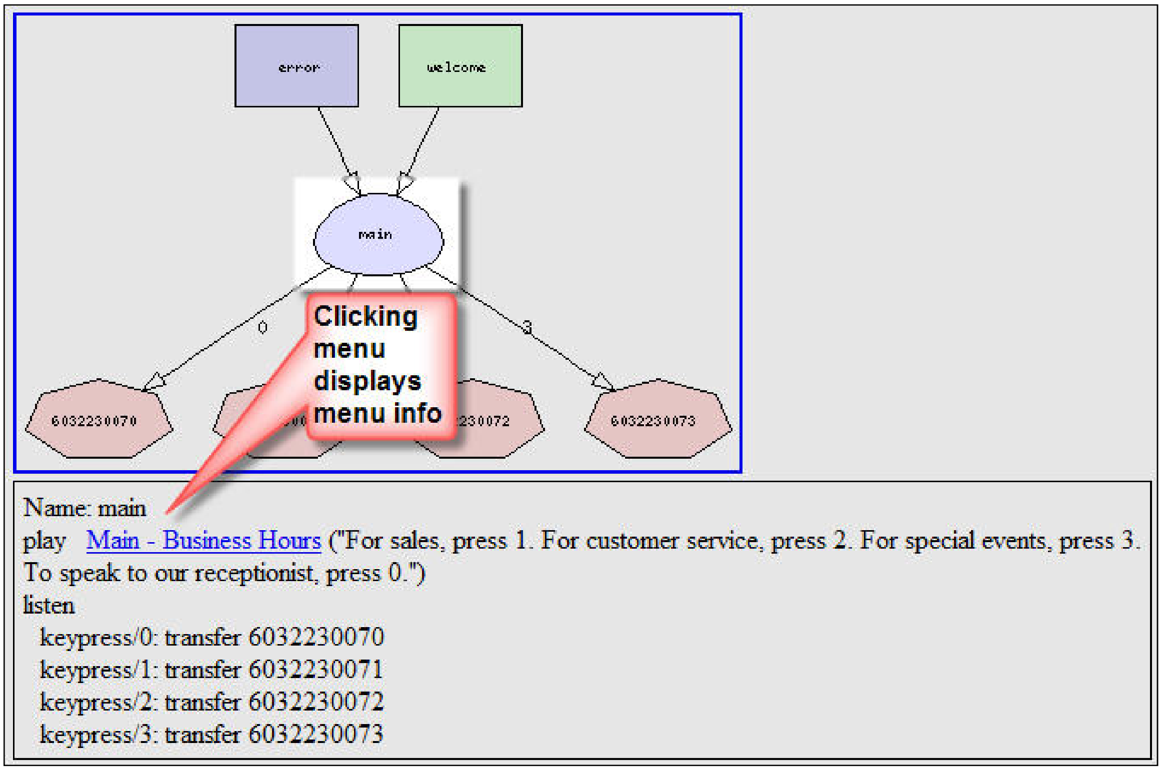
4. Click the **OK** button and pick up the phone when it rings to listen to the prompts and participate in the attendant demo.

Viewing an Attendant Call Flow

A visual view of an attendant's call flow can be displayed by clicking on the **Graph** () icon next to the attendant on the PBX/Overview page or by clicking on the **Graph it** link in the Attendants frame on the Auto Attendant page.







Clicking on one of the menus (in the above example "main"), displays details about the menu call flow.

If a menu was created to play a prompt, clicking the **menu name** link in the call flow details opens your audio player and plays the prompt.

Internal Caller Experience

Some information that you may want to share among your staff include:

- Dialing the attendant's main number from an internal line or an extension is treated as if it was an external call and will be picked up by the attendant. You may want to have the attendant deployed on a dedicated line.
- A phone connected to the line on which the attendant is deployed can be used to make outgoing internal and external calls only. The phone rings each time someone calls the number where the attendant is deployed. You may want to turn off the ringer to silence the phone.

Managing Portal Preferences

Overview

The Phone Manager portal allows you to customize the following portal preferences:

- Time zone, language and country.
- Number of calls to display on the Calls page.
- Mailbox password for accessing voicemail through your phone.

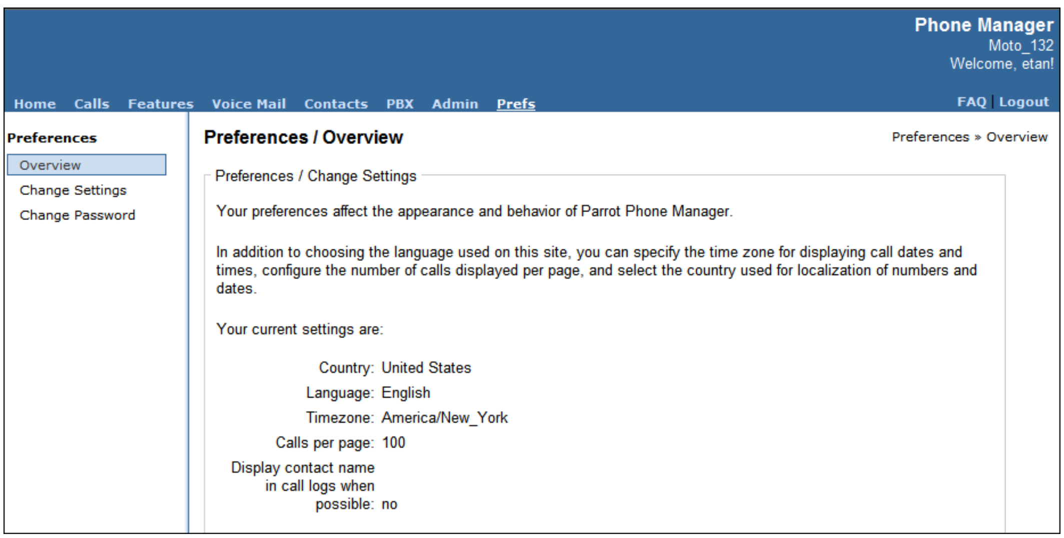
This chapter provides you with information on how to change your preferences and password.

Changing the Preference Settings

Preferences may be changed only when your portal has been configured to accept multiple countries, languages and time zones.

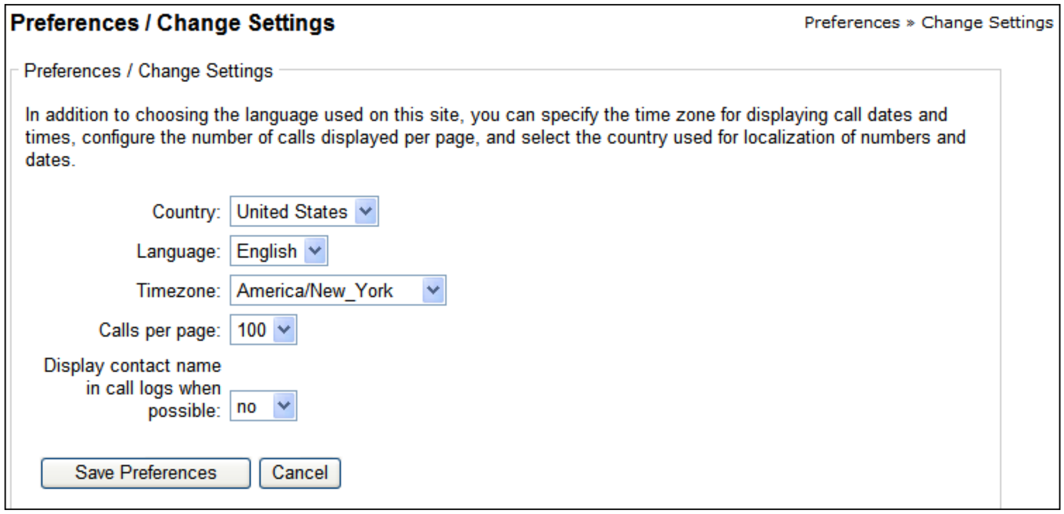
To change your portal settings:

1. Click on the **Prefs** link on the Menu bar to display the Preferences/Overview page.



   The Preferences/Overview page displays your current settings. If you are on a different settings page, you can return to the Preferences/Overview page by clicking the **Overview** link in the left Preferences sidebar menu.

2. Click the **Change Settings** link in the left Preferences sidebar menu to display the Preferences/Change Settings page.



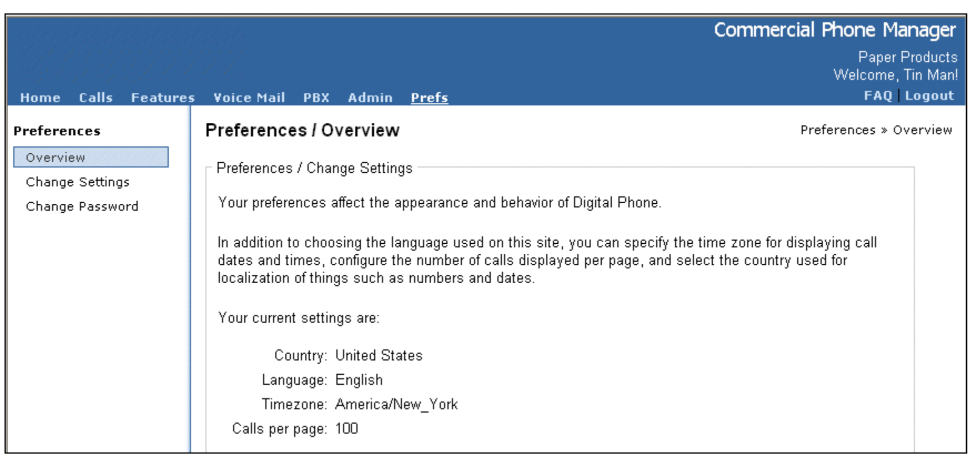
3. Use the drop-down lists to select a different setting. Choices are:
   - **Country** – Select the country where your company is located.
   - **Language** – Select the language that you prefer (English and Spanish are the current supported languages).
   - **Timezone** – Select the time zone where your company is located.
   - **Calls per page** – Select the number of calls to be displayed per page when you view Call History.
   - **Display contact name in call logs when possible** – Select whether or not you want to display names from your address book on the Call History page.
4. Click the **Save Preferences** button to save your changes and return to the Preferences/Overview page.

Changing Passwords

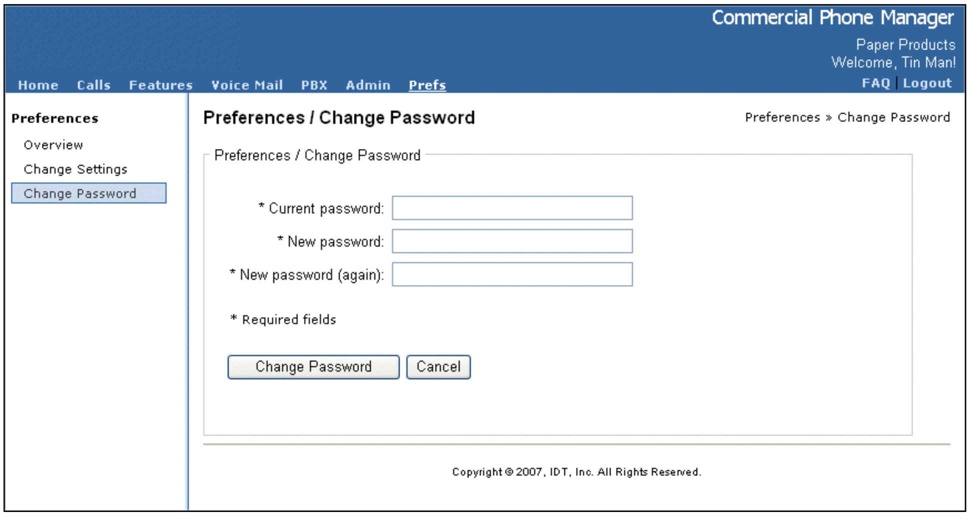
Your mailbox password is required when you dial into the voicemail system to access your messages. You can change your password using your phone or you can use the portal. The following procedures reflect the portal usage.

To change your password:

1. Click on the **Prefs** link on the Menu bar to display the Preferences/Overview page.



2. Click the **Change Password** link in the Preferences sidebar menu to display the Preferences/Change Password page.



3. Enter the current password in the **Current password** field.
4. Enter the new password in the **New password** field.
5. Enter the new password again in the **New password (again)** field.
6. Click the **Save Password** button to save your changes and return to the Preferences/Overview page.

Appendix A. Account Set-up Information

To successfully set-up a user account, you must collect information prior to setting up the account in the portal. Print out this section and use the following table to collect and record the data required to add the user account to your Business Services system.

Data	Value
Your cable provider's web site URL	
Your account number assigned to you by your cable provider The number is listed on the cable invoice.	
Any 1 of the business phone numbers assigned to you by your cable provider.	
Initial Administrator's User ID Unique login ID to be assigned to the initial administrator. The field is case sensitive.	
Initial Administrator's user name	
Initial Administrator's password	
Initial Administrator's email address	
User ID for each employee Unique login ID must be assigned to each subsequent user. The field is case sensitive.	User ID # 1: User ID # 2: . . .
User Name for each employee	Name for User ID # 1: Name for User ID # 2: . . .
User Type levels *Administrator* **–** grants access privileges to the entire portal. No further permission definitions are needed – administrators can create/modify users and hunt groups. *User* – grants standard user privileges to the portal. You must complete the subsequent choices to define the level of access to each of the listed features – standard users are never able to create/modify	Initial Admin: User # 1: User # 2: . . .

Data	Value
users or hunt groups. The **PBX** and **Admin** page links never display for individuals with *user* access.	
Email addresses for each user	User # 1: User # 2: . . .

Next you must decide the level of access beyond the standard user access permissions:

Data	Value
Account levels: *Call detail statement viewer* – grants permission to view billing statements. *No access* – denies access to view billing statements.	User # 1: User # 2: . . .
Phone line feature levels – mandatory for all users: *Settings modifier* – grants view and modify permissions to line feature settings for that user's phone line. *Settings viewer* – grants view only permission to line feature settings for that user's phone line. *No access* – denies access to view or modify line feature settings for that user's phone line.	User # 1: User # 2: . . .
Voicemail Box levels – mandatory for all users: *Box manager* – grants access to view, listen to and delete messages from the portal for that user's phone line. *Message viewer* – grants access to view and listen to messages from the portal. Messages may not be deleted. *No access* – Denies access to view, listen to and delete messages from the portal.	User # 1: User # 2: . . .