INTERNET SOLUTIONS
APTITUDE

Business Cloud Communications Service Guide

Everything you need to set up and manage your Aptitude Business Cloud Communications service.

Aptitude Internet
573-755-0555 • aptitudeinternet.com

Some pages within this guide may contain references to Cymbus®, the platform used to provide Aptitude Business Lines services.

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Welcome to Business Cloud Communications

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

Licenses

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

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

Feature	Standard	Advanced	Professional
Auto-Attendants • Call Groups and Queues • Group Night Forwarding	Yes	Yes	Yes
Cloud PBX	Yes	Yes	Yes
Call Park	Yes	Yes	Yes
Extension Dialing	Yes	Yes	Yes
Find Me/Follow Me	Yes	Yes	Yes
Hold Music	Yes	Yes	Yes
Presence	Yes	Yes	Yes
Voicemail	Yes	Yes	Yes
UC Apps (Mobile & Desktop)		Yes	Yes
Team Messaging		Yes	Yes
Screen Sharing			Yes

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Feature	Standard	Advanced	Professional
Video Conferencing			Yes

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Social & Public Services

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

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

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

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

911 Emergency Services

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

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

Address Validation

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

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

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

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911 for Remote Office Users

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

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

988 Suicide & Crisis Lifeline

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

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

- **United States:** https://988lifeline.org/ (1-800-273-8255)
- **Canada:** https://talksuicide.ca/ (1-833-456-4566)

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

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

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Star Code Features

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

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811	Utility Location Services (US)
811	Canadian Health Services (CAN)
911	Emergency Services
933	Emergency Services Validation
988	Suicide Prevention Hotline

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Caller ID

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

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

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

Caller ID Settings

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

Star Code	Instructions
*65	**Caller ID: Enable Next Call** If caller ID is blocked on the line, this star code will enable caller ID for the current call. Future calls will not be affected. If caller ID was already enabled, it will continue to be enabled. 1. Dial the star code + the number for the party you're trying to reach. • For example: *658015552134 2. Caller ID will be displayed to the party on this call.
*67	**Caller ID: Disable Next Call** If caller ID is enabled on the line, this star code will block caller ID on the current call. Future calls will not be affected. If caller ID was already blocked, it will continue to be blocked. 1. Dial the star code + the number for the party you're trying to reach. • For example: *678012265555 2. Caller ID will be displayed as "BLOCKED" to the party on this call.

Star Code	Instructions
*68	**Caller ID: All Calls** Enable or disable caller ID for all outbound calls. 1. Dial the star code. 2. Enter your 4-digit PIN, followed by #. 3. Choose from the following options: • Press 1 to enable caller ID on all calls. • Press 2 to disable caller ID on all calls.

Call Forwarding

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

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

<table>
<tr><th>Star Code</th><th>Instructions</th></tr>
<tr><td>*72</td><td>

Call Forward: All Calls

When enabled, all incoming calls will be forwarded to a specified phone number, extension, or short dial. Also known as Unconditional Forwarding.

1. Dial the star code.
2. Enter your voicemail PIN followed by #.
3. The audio prompt will tell you if call forwarding is currently enabled or disabled, then ask you to select an option:
    - **Enable:** To forward all calls, press 1, then make a selection.
        - To forward the call to a phone number, press 1.
        - To forward to an extension, press 2.
        - To forward to a short code, press 3.

      Once a selection has been made, please enter your forwarding destination's 11-digit phone number followed by #. You will hear, *"All calls will be forwarded. Goodbye."*
    - **Disable:** To disable forwarding and send calls to your line, press 2. You will hear, *"Calls will ring your line. Goodbye."*

</td></tr>
<tr><td>*90</td><td>

Call Forward: Busy

Choose how calls will be handled when you're on another call.

1. Dial the star code.
2. Enter your voicemail PIN followed by #.
3. Choose an option:
    - **Enable:** To forward calls when your line is busy, press 1, then enter the destination's 11-digit phone number followed by #. You will hear, *"Calls will be forwarded when your line is busy. Goodbye."*
    - **Disable:** To send calls sent to voicemail when your line is busy, press 2. You will hear, *"Calls will be sent to voicemail when your line is busy. Goodbye."*

</td></tr>
</table>

<table>
<tr><th>Star Code</th><th>Instructions</th></tr>
<tr><td>*92</td><td>Call Forward: No Answer
Choose how calls will be handled when the line isn't answered.
Dial the star code.
Enter your voicemail PIN followed by #.
Choose an option:
Enable: To forward calls when not answered, press 1. Enter the destination’s 11-digit phone number followed by #. You will hear, “All calls will be forwarded when not answered. Goodbye.”
Disable: To send calls to voicemail when not answered, press 2. You will hear, “Calls will be sent to voicemail when not answered. Goodbye.”</td></tr>
<tr><td>*94</td><td>Call Forward: Out of Service
Choose how calls will be handled when the line is out of service or not registered.
Dial the star code.
Enter your voicemail PIN followed by #.
Choose an option:
Enable: To forward calls when your line is out of service, press 1, then enter destination's 11-digit phone number followed by #. You will hear, “All calls will be forwarded when your line is out of service. Goodbye."
Disable: To send calls to voicemail when your line is out of service, press 2. You will hear, "Calls will be sent to voicemail when your line is out of service. Goodbye."</td></tr>
<tr><td>*00 +</td><td>Direct to Voicemail
Forward an incoming call directly to another user's voicemail box.
Place the caller on hold. The caller will hear hold music.
Dial the star code + the user’s extension.
For example: *00456
Press Dial > More > Join.
Hang up. The caller will be in the other user’s voicemail box.</td></tr>
</table>

Star Code	Instructions
*28	**Group Night Forwarding (On/Off)** When enabled, calls to the auto-attendant group are redirected to an on- or off-net phone number, which can be for another group, voicemail box, user, etc. Also known as Night Forwarding. 1. Dial the star code. 2. Enter your voicemail PIN followed by #. 3. Choose an option: • Press 1 to enter the destination's 11-digit phone number followed by #. • Press 2 to send calls to voicemail.

Remote Forwarding

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

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

Call Park

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

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Call Park via Feature Key

When a parking spot is assigned to a line on your phone, you can park and retrieve calls with the click of a button. This feature, also known as Directed Call Park, is only available for use on certified IP phones. To create parking spots on the account, see Manage Parking Spots.

Feature	Instructions
Call Park	**Place a call in a parking spot.** 1. While on a call, press the line key assigned to the parking spot. 2. The call will be placed in that parking spot.
Call Park Retrieval	**Retrieve a parked call from a parking spot.** 1. Press the line key on the phone for the parking spot the call has been placed in. 2. You will be connected to the parked caller. When a parked call is retrieved, the caller ID displays the original calling name and number. If caller ID is not available, it is presented as *Not Available* or *Anonymous*.

Call Park via Star Codes

When parking calls using star codes, the system automatically assigns a numbered parking spot, and the call can be retrieved by anyone who knows the parking spot number. The experience is different in the UC app, see Call Park via UC app.

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

Star Code	Instructions
*62	**Call Park** Place a call in a parking spot. 1. While on a call, do one of the following: • **IP phone:** Press **[Transfer]** and dial the star code. If using a Grandstream device, press the **Handset** button after dialing the star code. • **Analog phone:** Press the hook flash to hear the secondary dial tone, then dial the star code. 2. You will hear, *"Call parked at location ##.* Remember this number. 3. Press **[Transfer]** again or hang up to complete the transfer to the parking spot.
*66	**Call Park Retrieve** Retrieve a call from a parking spot. 1. Dial the star code + the parking spot the call was placed in. 2. You are now connected to the parked caller. When a parked call is retrieved, the caller ID displays the original calling name and number. If caller ID is not available, it is presented as *Not Available* or *Anonymous*.

Call Park via UC app

In the UC app, use Directed Call Park to dictate the parking spot in which the call is placed.

Because parking spots are numbered 100 to 199 and the system can't automatically assign calls to a parking spot, coordinate as an organization which parking spots will be used, and then use Shortcuts to quickly transfer calls to the specific parking spot you need. See Shortcuts in the UC App help center for details on setting up and using the feature for parking calls.

Star Code	Instructions
*62	**Call Park** Place a call in a parking spot. 1. While on a call, select **More** > **Transfer to...** on the call screen. The current call is placed on hold. 2. Enter the star code and parking spot. 3. Click **Call** to complete the transfer.
*66	**Call Park Retrieve** Retrieve a call from a parking spot. 1. Go to the **Calls** tab and select **Show Dial Pad**. On the mobile app, the **Dial Pad** icon appears on the bottom right corner. 2. Dial the star code and parking spot. 3. Click **Call**. You are now connected to the parked caller.

Retrieving Parked Calls from any Device

A parked call can be retrieved from any device on the account—whether it was originally parked from the UC app or from a desk phone. Just dial the star code plus the parking spot number.

Example: A call parked in spot 100 by a UC app user can be picked up on a Poly VVX411 phone by dialing *62100.

Call Pick Up

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

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

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Star Code	Instructions
**	**Directed Call Pickup** Pick up a ringing extension for another user. 1. When you hear the call ringing, pick up your phone and dial **** + the extension the call is ringing to. • For example, **4848 2. The call is transferred to your phone.
*40	**Pick Up Group** Pick up a ringing extension for another user in the same Pick Up Group. • When you hear a call ringing on another group member's phone, pick up your phone and dial the group's star code. • If multiple calls are ringing, the call that has been ringing the longest will be answered. • If you belong to multiple groups, the longest ringing call in any of your groups will be answered.

Call Pull

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

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

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

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

Star Code	Instructions
*76	**Call Pull** Seamlessly move a live call from one device to another. 1. While on an active call, pick up the device you want the call moved to and dial the Call Pull star code. 2. The platform will pull the call to this device so you can continue your conversation. • If there isn't a call to pull, you will hear a fast busy signal. • If you have multiple calls across your devices, you will hear *"You cannot use Call Pull when you have more than one active call."*

Call Screening

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

All Other Callers

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

Star Code	Instructions
*74	**All Other Callers: Allow** All other calls (not otherwise specified) will be allowed. 1. Dial the star code. 2. You will hear, "Your selective call accept service has been deactivated."
*64	**All Other Callers: Block** All other calls (not otherwise specified) will be blocked. 1. Dial the star code. 2. You will hear, *"Your selective call accept service has been activated."*

Anonymous Callers

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

Star Code	Instructions
*87	**Anonymous Callers: Allow** Calls without caller ID will be allowed. **1.** Dial the star code. **2.** You will hear, "*Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line.*"
*77	**Anonymous Callers: Block** Calls without caller ID will be blocked. **1.** Dial the star code. **2.** You will hear, "*Your anonymous call rejection service has been deactivated.*"
*95	**Anonymous Callers: Enable Block with Message** Calls without caller ID will be blocked with a message. **1.** Dial the star code. **2.** You will hear, "*Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line.*" **3.** Callers will hear a message indicating anonymous callers are not allowed.
*97	**Anonymous Callers: Disable Block with Message** Calls without caller ID will no longer be blocked with a message. **1.** Dial the star code. **2.** You will hear, "*Your anonymous call rejection service has been deactivated.*"

Custom Callers

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

To create a rule for a group of phone numbers with the same area code and/or prefix, enter the first few digits of the phone number instead.

Star Code	Instructions
*59	**Custom Caller: Allow** Calls from the number specified will be allowed. Use this feature if you are currently blocking all callers and want to allow a specific phone number, or if you would like to allow a specific caller that you've blocked in the past. **1.** Dial the star code. **2.** Enter your 4-digit voicemail PIN followed by #. **3.** Enter the 11-digit phone number followed by #. • For example: 18005551212# **4.** You will hear, *"Calls from [phone number you entered] will be allowed."*
*60	**Custom Caller: Block** Calls from the number specified will be blocked. The caller will hear a busy tone. Use this feature if you have allowed all callers but want to block a specific caller. Using this star code, the blocked caller will hear a busy signal instead of ringing through to your line. **1.** Dial the star code. **2.** Enter your voicemail PIN followed by #. **3.** Enter the 11-digit number followed by #. • You will hear a prompt saying, *"Calls from [phone number] will be blocked."*

Star Code	Instructions
*58	**Custom Caller: Block with Message** Calls from the number specified will be blocked with a message. 1. Dial the star code designated to block specific numbers and to play a message when done. 2. Enter your voicemail PIN followed by #. 3. Enter the 10-digit number to be blocked followed by #. • You will hear, *"Calls from [phone number you entered] will be blocked."* • The caller will hear, *"The number you have dialed is not accepting calls at this time. Please try again later."*
*63	**Custom Caller: Forward** Calls from the number specified will be forwarded. 1. Dial the star code. 2. Enter your voicemail PIN followed by #. 3. Enter the forwarding number followed by #. 4. You will hear a prompt saying, *"Calls from [phone number you entered] will be forwarded."* **Notice** A *screening forward number* **must** be set up in the portal; otherwise, forwarded calls will fail over to the *All Other Callers* setting.

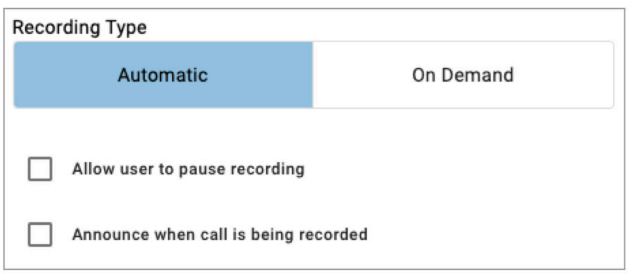
Call Recording

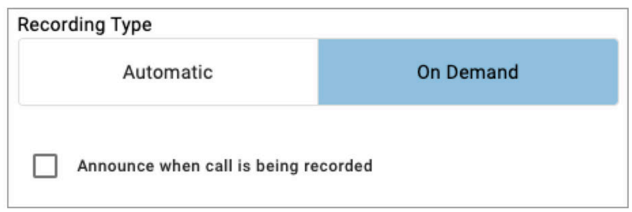
The following information is only for users who have users Advanced and Professional plans.

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

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

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





Automatic Star Codes

The **Automatic** recording type begins recording as soon as the call connects and stops recording when the call disconnects, so using the Start or Stop star codes are unnecessary.

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

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

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On Demand Star Codes

The **On Demand** recording type allows you to dial a star code mid-call to Start, Pause, Resume, or Stop a recording.

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

Star Code	Function
*80	**Start Recording** Opens a new recording file and starts recording. You will hear "Recording started." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."
*81	**Pause Recording** Stops recording and keeps the recording file open. You will hear "Recording paused."
*82	**Resume Recording** Resumes recording on the open file. You will hear "Recording resumed." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."
*83	**Stop Recording** Stops recording and closes the recording file. You will hear "Recording stopped."

See also: Call Recording and Enable Call Recording for a User

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Call Trace

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

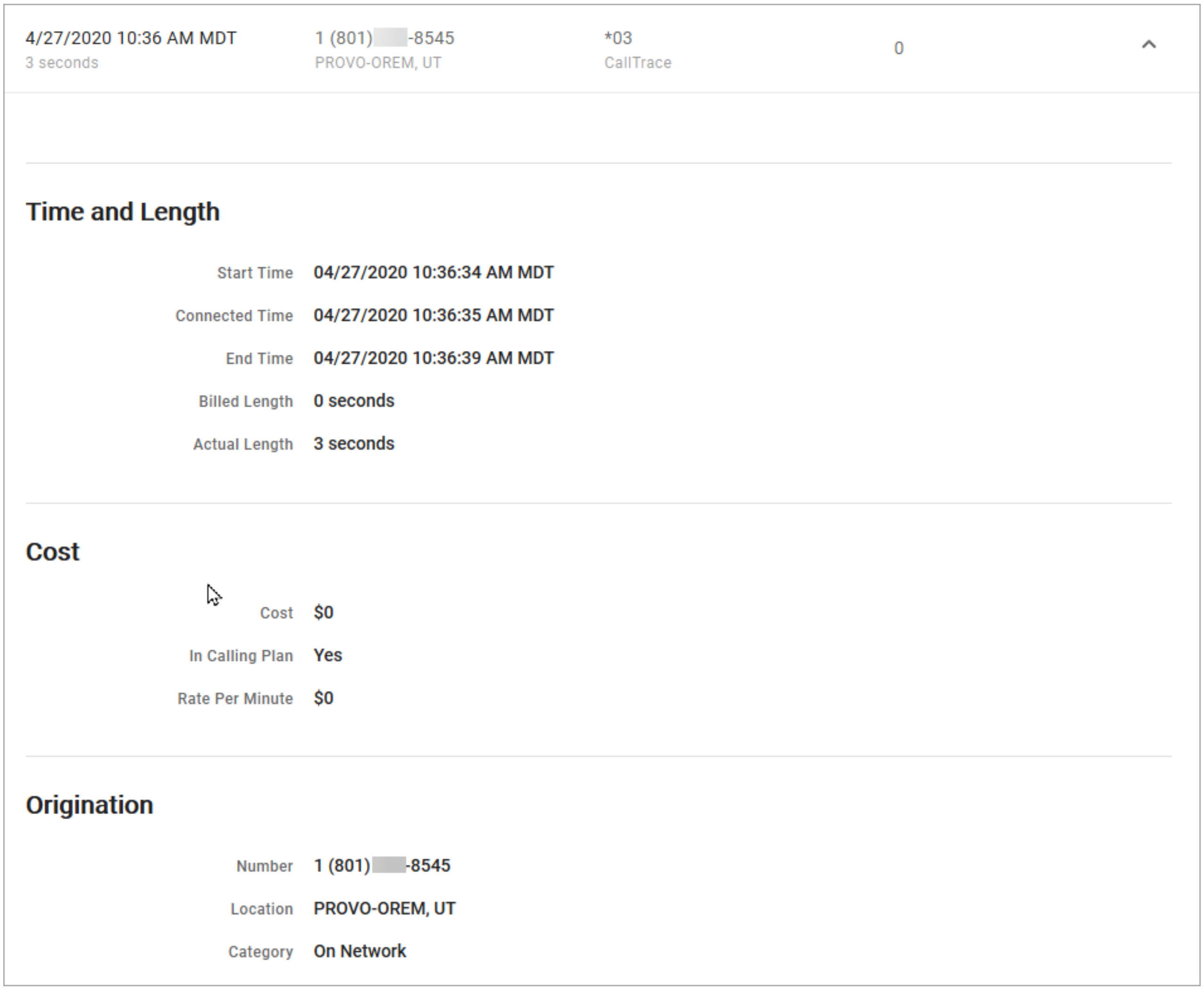
Star Code	Instructions
*57	**Call Trace** Mark a call for a trace in your Call History. Used for troubleshooting. Call Trace does not initiate any law enforcement or actions against the caller. You must take additional actions to establish a case with your local law enforcement agency. **1.** After ending the call, dial the **Call Trace** star code. **2.** You will hear, *"The previous call will be marked in your call history."* **3.** A new line for the trace will be entered in Call History.

Call Trace Example

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

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

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


4/27/2020 10:36 AM MDT
3 seconds
1 (801) -8545
PROVO-OREM, UT
*03
CallTrace
0
Time and Length
Start Time 04/27/2020 10:36:34 AM MDT
Connected Time 04/27/2020 10:36:35 AM MDT
End Time 04/27/2020 10:36:39 AM MDT
Billed Length 0 seconds
Actual Length 3 seconds
Cost
Cost $0
In Calling Plan Yes
Rate Per Minute $0
Origination
Number 1 (801) -8545
Location PROVO-OREM, UT
Category On Network

Call Waiting

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

See Call Handling for how to enable and disable Call Waiting in the portal.

Star Code	Instructions
*43	**Call Waiting: Enable** Enables call waiting for ALL calls to the user. **1.** Dial the star code. **2.** You will hear a message indicating the call waiting service has been activated.
*44	**Call Waiting: Disable** Disables call waiting for ALL calls to the user. **1.** Dial the star code. **2.** You will hear a message indicating the call waiting service has been deactivated.
*70 +	**Call Waiting: Disable Next Call** If call waiting is enabled on the line, this star code will disable caller ID on the current call. Future calls will not be affected. **1.** Dial the star code + the phone number of the party you're trying to reach. • For example: ***70**8015553284 **2.** During this call, incoming calls will follow the "busy" call behavior.

Switching Calls

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

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

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Dial Intercom

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

Star Code	Instructions
*55	**Dial Intercom** Place an intercom call to a user's extension. 1. Dial the star code + the target user's extension. 2. The target user's device beeps twice before automatically answering the call on speakerphone. If the user has multiple devices, the first device to answer the invite takes the call. • If the target user is on an active call, the call follows their Call Waiting settings. • If the target user has Do Not Disturb enabled, the caller is routed to voicemail or hears a busy tone. 3. When the call is finished, either party can hang up to end the call.

Do Not Disturb

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

Star Code	Instructions
*78	**Do Not Disturb: Enable** Turns on DND. All calls will be sent to voicemail. 1. Dial the star code. 2. You will hear, *“Do not disturb enabled.”* 3. Incoming calls are sent directly to your voicemail box.
*79	**Do Not Disturb: Disable** Turns off DND. 1. Dial the star code. 2. You will hear, *“Do not disturb disabled.”* 3. Incoming calls follow your Call Handling settings.

Group Log In/Out

Star Code	Instructions
*89	Users can log in or out of an auto-attendant group they are assigned to. 1. Dial the Group Log In/Out star code + the group number. 2. Do one of the following: • Press 1 to log in. • Press 2 to log out. 3. When prompted, dial the group number. 4. You will be logged in or out of the group.

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Last Call Return

Star Code	Instructions
*69	**Last Call Return** Dial the last caller ID number that rang the line (not the last *outbound* call). 1. Dial the star code. 2. You will be connected to the last number that called you.

Voicemail Access

Your voicemail box can be accessed remotely or from a phone connected to the line it's assigned to. To manage your voicemail settings online, see Voicemail.

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

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

Direct Access

Star Code	Instructions
*98	**Voicemail Management** Access the voicemail box assigned to the phone number. 1. From a phone number assigned to the voicemail box, dial the Voicemail Management star code. 2. If prompted, enter the PIN and press #.

Remote Access

1. From a phone number that is not connected to the voicemail box, dial the 10-digit phone number.
2. When the voicemail greeting plays, press #.

3. Enter the voicemail PIN and press #.

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

Voicemail Menu Options

Listen to Messages

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

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

Personal Options

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

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

Change PIN

For security reasons, the PIN can be changed only when calling the voicemail box from a registered phone number. **See also**: Reset Voicemail PIN.

1. Access the voicemail box and press 8.
2. Press 1 to change the PIN.
3. If prompted, enter the current PIN.

4. Enter a new PIN that is at least 4-digits long, then press the # sign.
5. Hang up or press 0 to go back to the main menu.

Record Greetings

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

Call Forwarding

1. Access the voicemail box and press 8.
2. Press 5 for call forwarding.
3. **Enable:** To forward all calls, press 1.
    - Press 1 to forward calls to a phone number.
    - Press 2 to forward to an extension.
    - Press 3 to forward to a short code.

    Please enter your forwarding destination number followed by the # sign.
4. **Disable:** To send calls to your line, press 2.
    - Calls will ring to your line.
5. Hang up or press 0 to go back to the main menu.

Call Forwarding Destination

Configure the phone number calls are forwarded to when Call Screening is enabled.

1. Access the voicemail box and press 8.
2. Press 6 to set your call forwarding destination number.
3. Enter your forwarding destination number followed by the # sign.
4. Hang up or press 0 to go back to the main menu.

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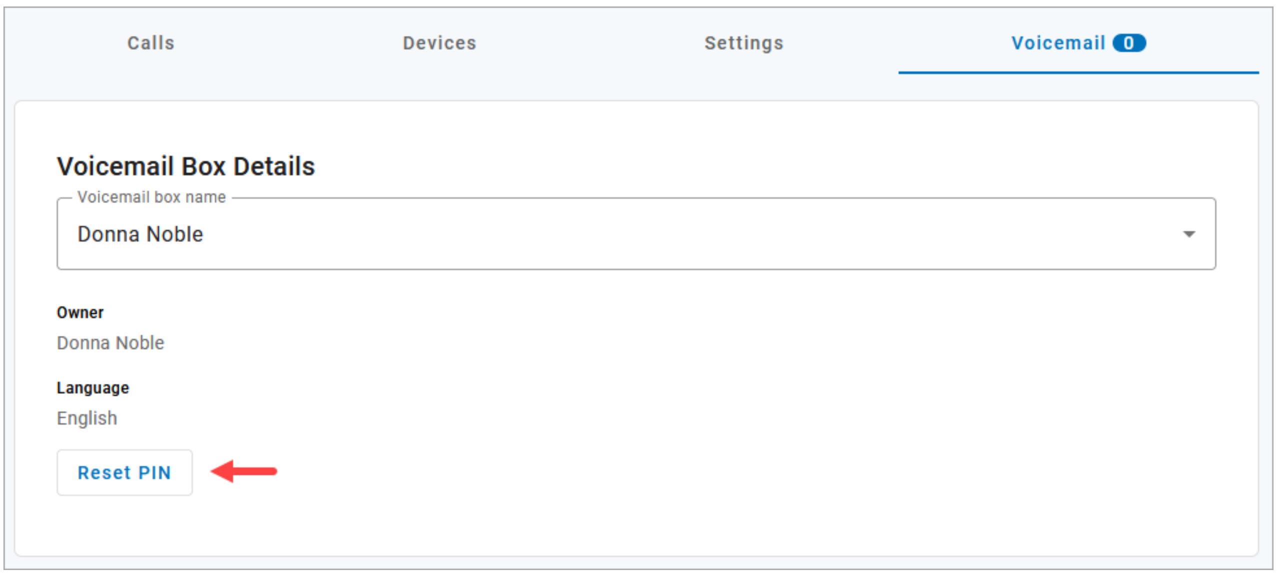
Reset Voicemail PIN

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

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

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

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



Access the Voice Portal

The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can be managed via star codes, but some things are easier to manage online. As an Account Manager or Admin user, you have access to manage not only your own services but also those of other users on the account.

Access the Portal with Single Sign-On

Customer Support will have provided you with details on how to access the voice portal using the same credentials used for the other services they provide. You may be redirected to your portal via your telecom account or via a direct URL.

1. Go to https://user.cymbus.com/.
2. Click **[Sign in with SSO]**.
3. Enter your email.
4. Click **[Sign In]**.

For any issues accessing the portal, contact Customer Support.

Access the Portal with Local Authorization

When your account was created, you were sent an email that contains your login information. Keep that email safe so you can refer to it later. If you haven't received it, or if you don't have an email address on your account yet, please contact Customer Support.

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

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

Language Setting

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

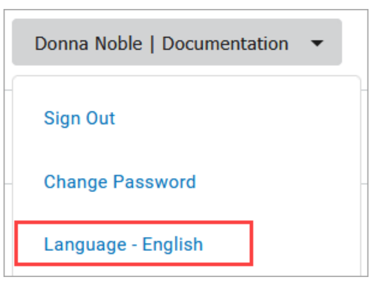
All users can change the language for their current session from the menu in the top right corner of the screen. Additionally, Admin end users can also set a default language for the account and each user. The language setting for each voicemail box is separate from the user's setting, so be sure to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

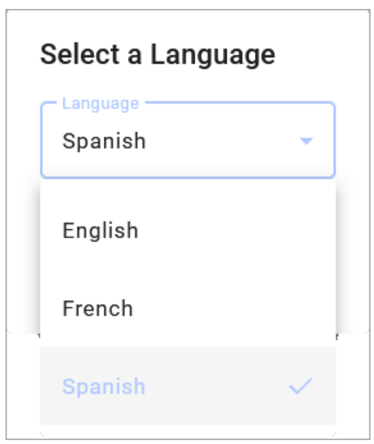
Change Session Language

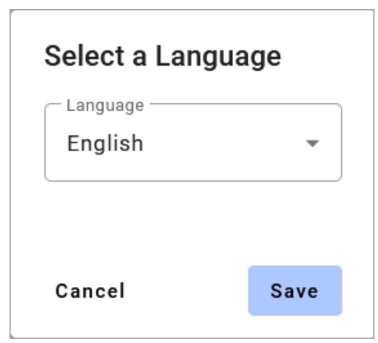
Follow the steps below to change the language used in the web portal for your active session:

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

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







Change Default Language

A language can be set in the following locations:

- **Account.** The language setting assigned to the account applies to all users by default.
- **Account Managers and End Users.** The user's language setting applies to the web portal, IP phone (if the phone supports the language), telephone user interface (TUI) audio prompts, and system-generated emails. It does not affect the user's voicemail box, which is configured separately.

  See Manage a User's Settings.

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- **Voicemail Box.** The language for a voicemail box applies to the voicemail menu audio prompts and forwarded Voicemail-to-Email messages. This is separate from the language set for a user. See User's Voicemail.
- **UC App.** The language displayed in the UC app is controlled by end users in the app itself. By default, the app displays the language set on the user's device (desktop or cell phone), and it can be changed manually in the app settings.

Account Codes

Account Codes are managed by Admin users only. See End User Feature Access to learn more.

Account Codes, also known as authorization codes, are used to tag (classify) calls for billing and reporting purposes and/or require authorization for calls to international locations, directory assistance, and premium toll numbers.

Admin users will create specific codes that end users can dial to associate call activity with a department, project, client account, and more. For example, if an agency needs to keep track of billable client calls, they can dial the code that corresponds to the client, and the code will be tagged in the Call History record. Later, the billing department can review the call records and bill each client appropriately.

Additionally, if an organization wants to require authorization for international calls, they can create codes for each user, then configure the account and/or user's settings to require a valid account code for international calls. When a caller places a call to a country code that is different from their own, they will be asked to enter their code to authorize the call.

For additional use cases and how to set them up, see Account Codes Settings.

How to Use Account Codes

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

- **Outbound Calls:** Dial a phone number. When prompted, enter an account code (for example, 123).
- **Inbound Calls:** Answer an inbound call, then dial the star code + the account code (for example, *50123). The other party can hear the dial tones, so let them know what you're doing first.

See Account Codes Setup to enable it for the account and configure the default settings.

Mid-Call Star Code
If you don't know which star code is assigned to Account Codes, ask Customer Support. The star code allows users to tag inbound calls or outbound calls that don't require an account code.

Account Codes Settings

Account Codes settings can be configured for a variety of use cases. The default settings determine if codes are optional (used for tracking) or required (used for authorization), and the second group of settings determine what type of calls require them.

These settings are configured at the account level and can be modified for individual users as needed. See Account Codes Setup for details.

Default Settings

Require Account Codes for Internal Calls

If this setting is enabled, users are prompted to dial an account code on every outbound call that originates and terminates on this account.

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

Validate Account Codes When Dialed

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

- **On (Validated):** The account code is checked against the codes on the account. Outbound calls are not connected unless the caller enters a valid code. Inbound calls, however, will continue even if the user enters invalid codes up to the max retry limit.
  - If the code is valid, the user hears a splash tone to indicate the account code was accepted. The call continues and the code is added to the Call History record.
  - If the code is not valid, the user hears, *"Invalid entry. Please enter an X-digit account code."*
- **Off (Not Validated):** The user can enter any code they want as long as it's the right length.
  - If the code is valid, the user hears a splash tone to indicate the account code was accepted. The call continues and the code is added to the Call History record.
  - If the code is too long or too short, the caller hears, *"Account codes must be X digits. Please re-enter your X-digit account code."*

Allow Call to Proceed After Max Retries

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

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

Call Types

Choose which specific call types require an account code. These optional settings are typically used to ensure that only authorized personnel can place certain types of calls that may incur additional charges.

If one or more call types are enabled, only those call types require an account code. However, if no call types are enabled, all calls require an account code.

- **International.** Require a code to authorize calls to country codes that are different than the caller's. Since the US and Canada have the same country code, calls between the countries are not considered international.
- **Directory assistance.** Require a code to authorize calls to directory assistance (411 and 0).
- **Premium toll.** Require a code to authorize calls to 1-900 numbers.

Validation Setting
To prevent users from placing these call types without a valid code, ensure the *"Validate account codes when dialed"* setting is enabled; otherwise, the call will go through even if the number dialed doesn't match a code on the account.

Use Cases

Settings	Results
Account Codes is not yet live. • Account Codes is enabled for the account. • Account Codes is not enabled for the user.	• Account codes are not prompted for outbound calls. • Account codes are not allowed for inbound calls.
Account codes are optional. • Account Codes is enabled for the account and user. • Require account codes for internal calls: OFF • Calls requiring account codes: OFF	• Account codes are not prompted for calls that originate and terminate on the same account (internal calls). • Account codes are prompted for outbound calls to the PSTN. • Account codes are allowed for inbound internal calls.

Settings	Results
Account codes are required. • Account Codes is enabled for the account and user. • Require account codes for internal calls: OFF • Validate account codes when dialed: ON • Calls requiring account codes: OFF	• Account codes are prompted for outbound calls to the PSTN. • Account codes are not prompted for calls that originate and terminate on the same account (internal calls). • Account codes are allowed for inbound internal calls. • A valid account code is required. If the code dialed is invalid, the call will not proceed.
Track internal calls only. • Account Codes is enabled for the account and user. • Validate account codes when dialed: OFF • Require account codes for internal calls: ON • Calls requiring account codes: OFF	• Account codes are prompted for outbound calls to the PSTN. • Account codes are not prompted for calls that originate and terminate on the same account (internal calls). • The account code dialed can be any number, so long as it is the correct length. • Account codes are allowed for inbound calls.
Track all outbound calls. • Account Codes is enabled for the account and user. • Validate account codes when dialed: OFF • Require account codes for internal calls: OFF • Calls requiring account codes: OFF	• Account codes are prompted for all outbound calls. • Account codes are allowed for inbound calls. • The account code dialed can be any number, so long as it is the correct length.

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Settings	Results
Require authorization for all outbound calls. • Account Codes is enabled for the account and user. • Validate account codes when dialed: ON • Calls requiring account codes: OFF	• Account codes are prompted for all outbound calls. • Account codes are allowed for inbound calls. • A valid account code is required. If the code dialed is invalid, the call will not proceed.

Require authorization for international calls.
• Account Codes is enabled for the account and user.
• Validate account codes when dialed: ON
• Calls requiring account codes:
    • International: ON
    • Directory assistance: OFF
    • Premium toll: OFF
	• A valid account code is required to place a call to international locations. If the dialed code is invalid, the call will not proceed.
	• All other calls are *not* prompted for an account code.
	• Account codes are allowed for inbound calls.

Require authorization for calls to 1-900 numbers.
• Account Codes is enabled for the account and user.
• Require account codes for internal calls: OFF
• Validate account codes when dialed: ON
• Calls requiring account codes:
    • International: ON
    • Directory assistance: ON
    • Premium toll: ON
	• Account codes are not prompted for outbound calls to the PSTN.
	• Account codes are not prompted for calls that originate and terminate on the same account (internal calls).
	• A valid account code is required to place a call to an international location, directory assistance, or a premium toll number.
	• Calls to local and national long-distance numbers are *not* prompted for an account code.

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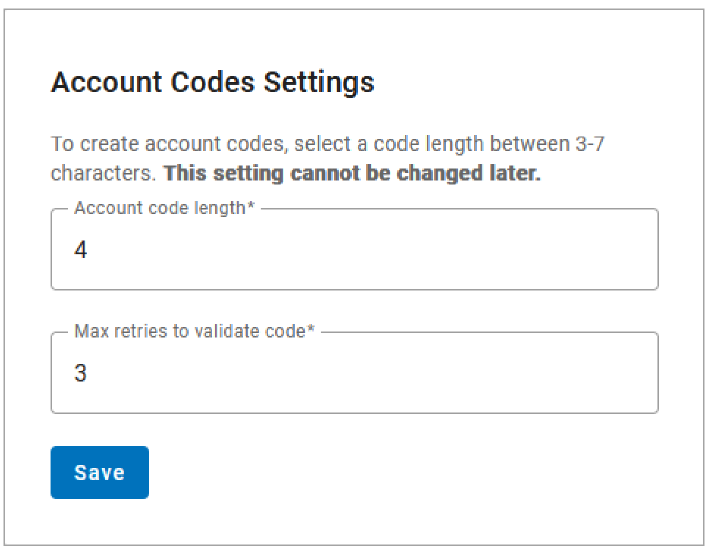
Account Codes Setup

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

Enable Account Codes on Account

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

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



Account Settings

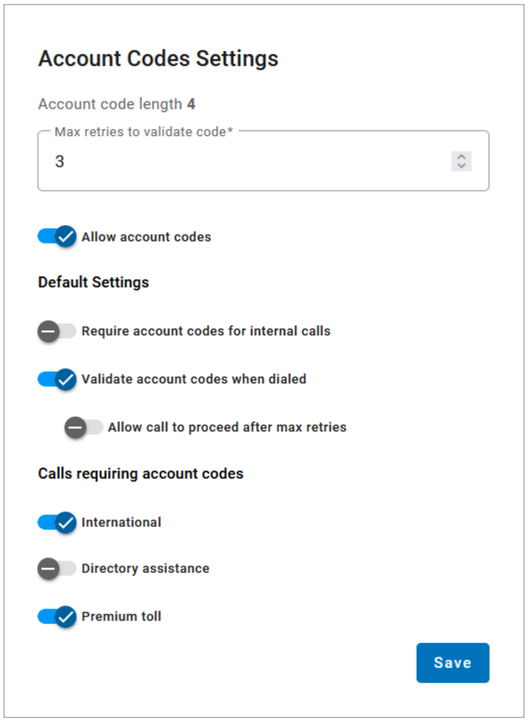
Once Account Codes is enabled on an account, the account-level settings must be configured before enabling it for users. These settings are applied to all users who have account codes enabled, except those with custom settings.

Account Codes work differently depending on the settings. For details about how to configure your settings for different use cases, see Account Codes Settings.

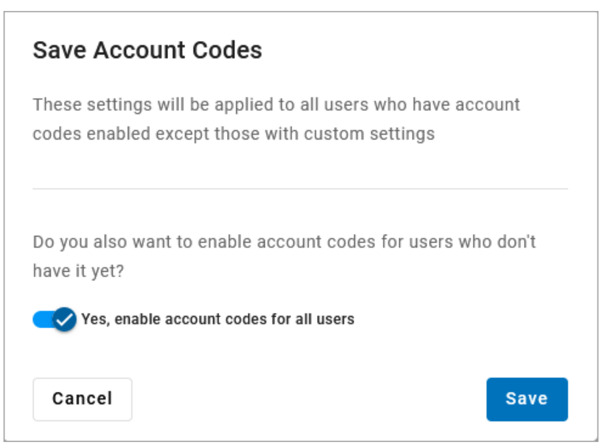
1. Go to **Account > Account Codes**.
2. Under **Account Codes Settings**, switch on *Allow account codes*. Once these settings are saved (see step 6), Account Codes can be enabled or disabled at the user level as needed.
3. **Default Settings.** Choose which settings to enable (optional). To see how each of these settings changes the flow of a call, see Account Codes Settings.
    - **Require account codes for internal calls.** If enabled, users are prompted to dial an account code on every outbound call to other users on the account. If disabled, the user can dial a star code + account code during a call if they want to tag it.
    - **Validate account codes when dialed.** If enabled, the account code is validated against codes on the account. If disabled, the user can dial any number as an account code, as long as it's the right length. At least one account code must be added before enabling this option.
    - **Allow call to proceed after max retries.** If account codes are validated and the user enters multiple invalid codes, this setting determines whether the call will proceed as intended or end once the user reaches the max retry limit. This setting can only be customized at the user level if it's enabled at the account level first.
4. **Calls requiring account codes.** Choose which specific call types require an account code. These settings are typically used to ensure that only authorized personnel are able to place certain types of calls that may incur additional charges.

    To prevent users from placing these call types without a valid code, ensure "Validate account codes when dialed" (above) is enabled. Otherwise, the call will go through even if the number dialed doesn't match a code on the account.
    - **International.** Require a code to authorize calls to country codes that are different than the caller's. Since the US and Canada have the same country code, they're considered local.
    - **Directory assistance.** Require a code to authorize calls to directory assistance (411) and operator assistance (0).
    - **Premium toll.** Require a code to authorize calls to 1-900 numbers.

    > **Important**
    > If one or more call types are enabled, only those call types require an account code. However, if no call types are enabled, *all calls* require an account code.
5. Click **[Save]**.



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



> **About User Settings**
>
> Account Codes is *not enabled by default* for new users added to the account after these settings are saved. There are two ways to enable it for users after this point:
>
> 1. Re-save the **Account Codes Settings** (even if you haven't changed the settings) and choose *Yes* to enable it for all users who don't have it yet.
> 2. After a new user is created, go to their **Settings** tab and turn it on.
>
> All users who have Account Codes enabled follow the account-level settings by default. However, these settings can be customized for individual users who have different requirements. See Account Codes User Settings for details.

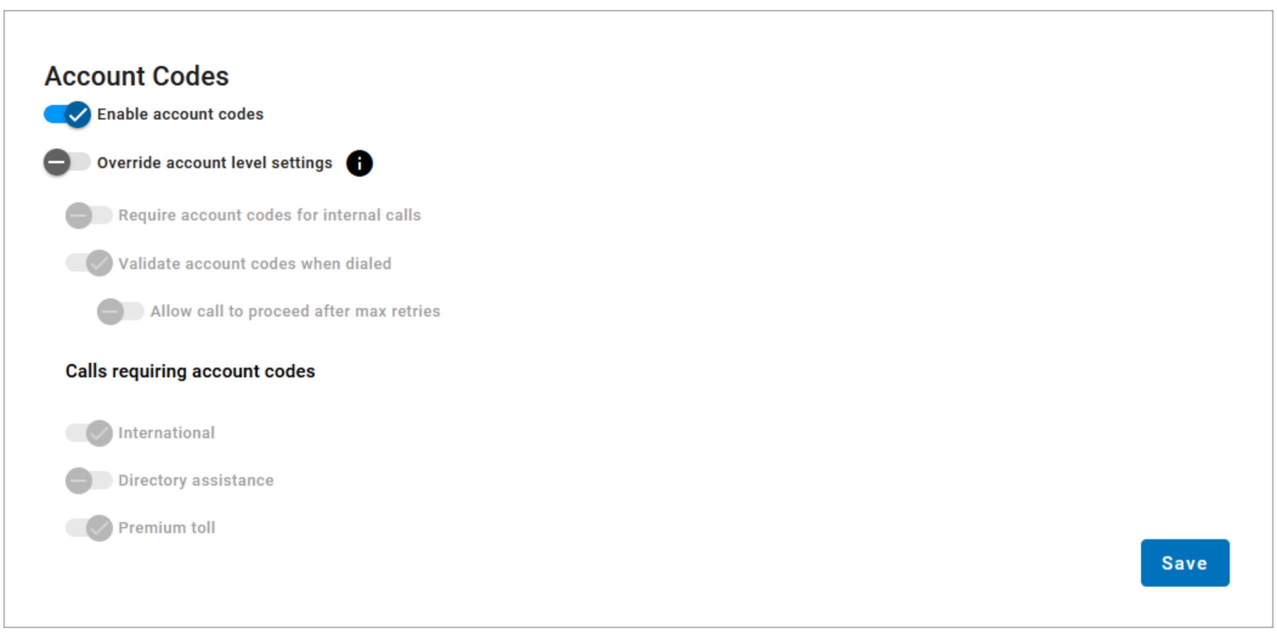
Account Codes User Settings

The default settings configured at the account level apply to all users who have Account Codes enabled. However, those settings, including whether the feature is enabled or disabled, can be customized for individual users as needed.

Enable Account Codes for a User

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

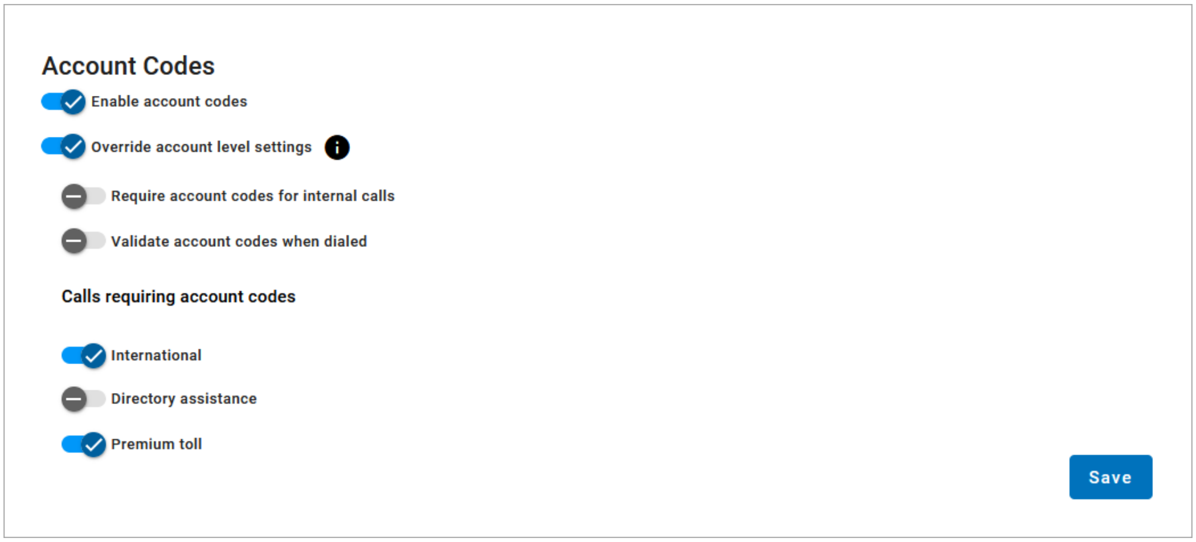
1. Go to the **Users** page and select the user whose settings you want to customize.
2. In the **Settings** tab, scroll down to **Account Codes**.
3. Switch ***Enable account codes*** on.
4. Click **[Save]**. Account Codes is now enabled with the default settings, which are greyed out below. If this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



Override Account Settings

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

1. Go to the **Users** page and select the user whose settings you want to customize.
2. Select the **Settings** tab and scroll down to **Account Codes**.
3. Toggle on ***Override account level settings***. The account default settings are displayed below.



4. Modify the settings as needed.
   - **Require account codes for internal calls.** If enabled, users are prompted to dial an account code on every outbound call to other users on the account. If disabled, the user can dial a star code + account code during a call if they want to tag it.
   - **Validate account codes when dialed.** If enabled, the account code is validated against codes on the account. If disabled, the user can dial any number as an account code, as long as it's the right length. At least one account code must be added before enabling this option.
   - **Allow call to proceed after max retries.** If account codes are validated and the user enters multiple invalid codes, this setting determines whether the call will proceed as intended or end once the user reaches the max retry limit. This setting can only be customized at the user level if it's enabled at the account level first.
5. Modify the types of calls that require account codes as needed.

   To prevent users from placing these call types without a valid code, ensure "Validate account codes when dialed" (above) is enabled. Otherwise, the call will go through even if the number dialed doesn't match a code on the account.

- **International.** Require a code to authorize calls to country codes that are different than the caller's. Since the US and Canada have the same country code, they're considered local.
- **Directory assistance.** Require a code to authorize calls to directory assistance (411) and operator assistance (0).
- **Premium toll.** Require a code to authorize calls to 1-900 numbers.

> **Important**
> If one or more call types are enabled, only those call types require an account code. However, if no call types are enabled, *all calls* require an account code.

6. Click **[Save]**. If the account's default settings are ever updated, this user's settings will not be affected.

Disable Account Codes for a User

To disable Account Codes for a user who doesn't need it, follow the steps below:

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

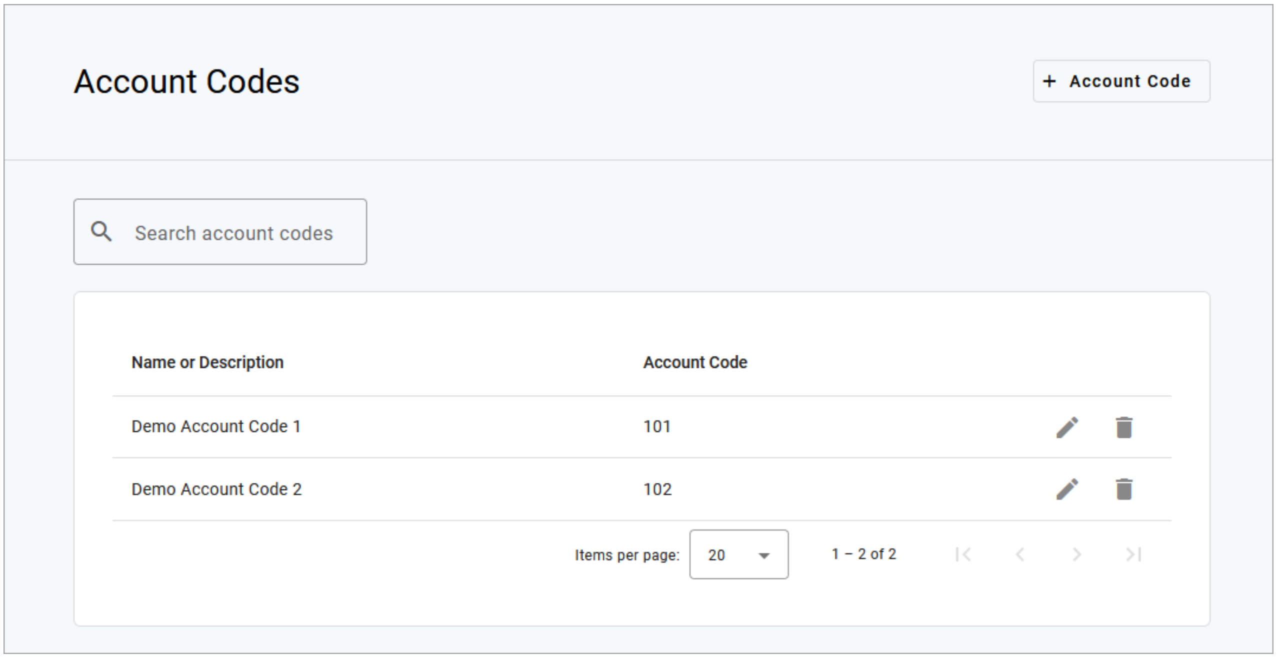
> **About Disabling Account Codes**
> Because disabling this feature at the user level is not technically an override setting, if the account-level settings are ever updated and Account Codes is enabled for all users who don't have it, it will also be enabled for users who had manually disabled it.

Manage Account Codes

Account Codes allow users to tag calls for billing purposes or authorize calls to international locations, directory assistance, or premium toll numbers. Create as many account codes as needed.

For calls that are prompted for an account code, if the "*Validate account codes when dialed*" setting is enabled, the user must dial a code that is set up on the account or the call will not proceed. However, if this setting is not enabled, the user can dial any code they want, whether or not it's set up on the account, as long as it's the right number of digits.

At least one code must be added to the account to enable this setting; otherwise, users won't be able to place outbound calls. Unless Account Codes are being used to authorize certain calls, we recommend creating at least one account code, such as 1000, that can be used as a default option.



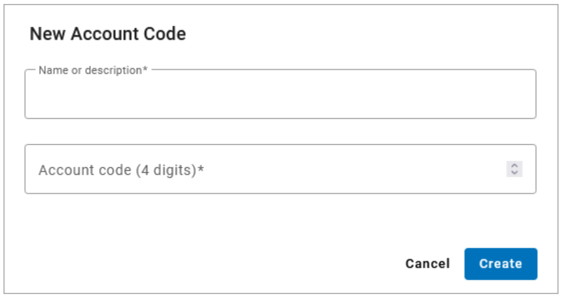
Important
Account codes cannot start with zero (0).

End User Access
End users don't have access to the list of account codes, so you'll need to provide them manually. Since codes cannot be assigned to specific users or for specific purposes, only give users the code(s) you want them to have.

Add Account Code

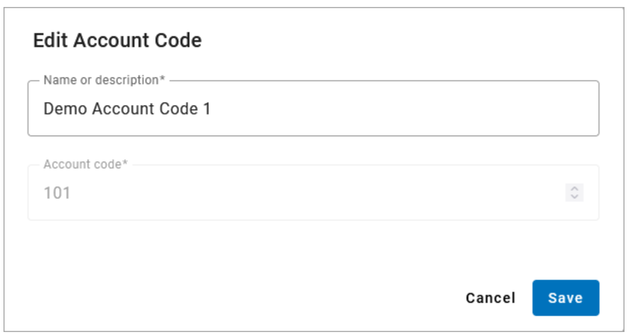
1. Go to the **Account Codes** page.
2. Click **[+ Account Code]** in the top right.
3. Enter a name or brief description to remember what the code is assigned for.
4. Enter the code that will be dialed.

5. Click **[Create].**
6. Repeat steps 2–5 for any additional codes.



Edit Account Code

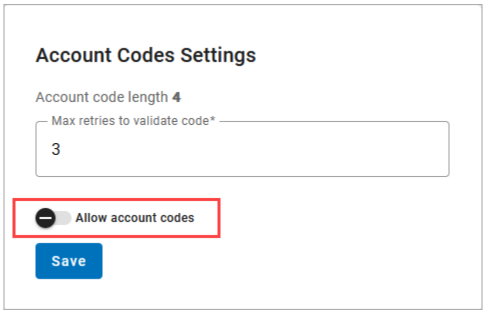
Click the edit icon to update the name or description of an existing account code. To change the number, create a new one and then delete the old one.

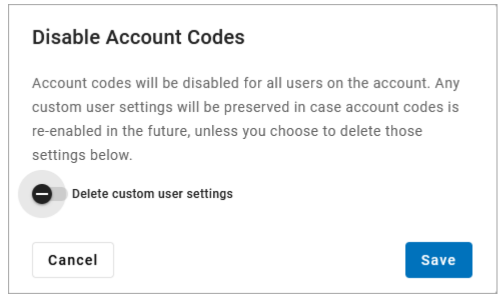


Disable Account Codes

When Account Codes is disabled at the account level, it is also disabled for all users, regardless of their previous settings. To disable Account Codes for a user, see User Settings. To disable it for the account, follow the steps below:

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


Account Codes Settings
Account code length 4
Max retries to validate code*
3
Allow account codes
Save


Disable Account Codes
Account codes will be disabled for all users on the account. Any custom user settings will be preserved in case account codes is re-enabled in the future, unless you choose to delete those settings below.
Delete custom user settings
Cancel
Save

Auto-Attendant

The following information is for Admin users only.

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

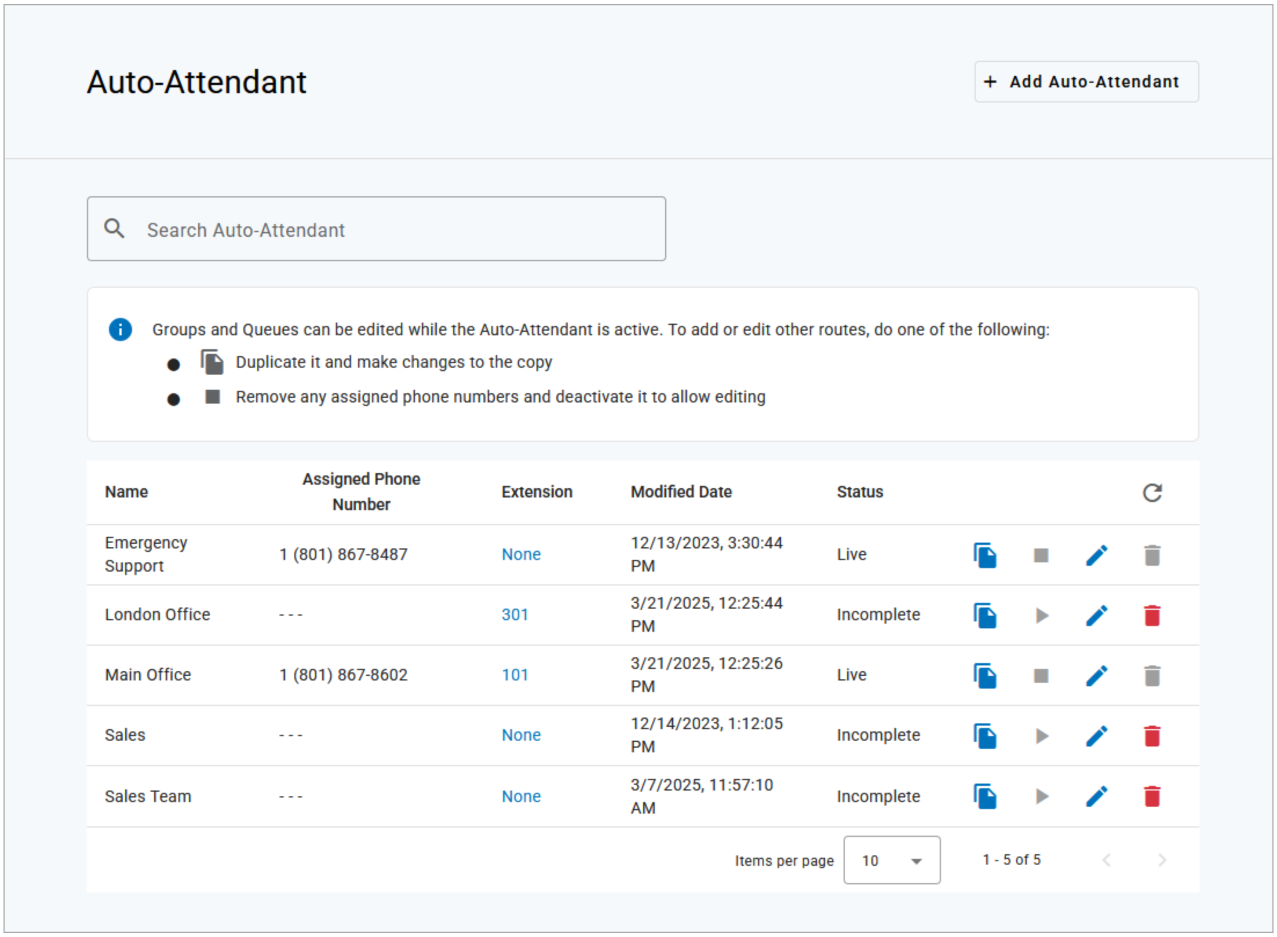
Auto-attendants are easy to build and modify. The editor lays out your routes into clear columns and rows so you can see exactly what you're building and how it all fits together. Changes are saved in real time, so you won't lose any edits — even if you close the window. Incomplete auto-attendants will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

Manage Auto-Attendants

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

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

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



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

Field	Description
Status	• **Incomplete:** There are open routes that need to be closed before the auto-attendant can be launched. • **Ready to Activate:** All routes are closed and it's ready to be launched (activated). • **Activated:** The route has been launched and it can now be assigned to a phone number. • **Live:** A phone number is assigned, the auto-attendant is receiving calls.
Tools	The tools available are different for each status. For example, an incomplete auto-attendant cannot be launched, and a live auto-attendant cannot be deleted. • **Duplicate**. Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one. Extensions cannot be duplicated. The extension must be removed from the original before it can be assigned to the duplicate. See Edit Auto-Attendants for details. • **Deactivate**. Deactivate the auto-attendant and downgrade the status to *Ready to Activate*. To deactivate a *Live* auto-attendant, unassign the phone number first; the status will be downgraded to *Activated, Assign TN*. • **Activate**. When the status is *Ready to Activate*, click the *Activate* icon to make the auto-attendant available as a destination in the Phone Number menu. Then go to Phone Numbers > Edit to assign a number to this auto-attendant. • **Edit**. Open the editor to make changes to an inactive auto-attendant in *Incomplete* or *Ready to Activate* status. *Activated* and *Live* auto-attendants are view only. • **Delete**. Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.

Auto-Attendant Setup Guide

Building Basics

- **Prep.** Before building the auto-attendant, create any schedules, hunt groups, and queues that you'll need.
- **Build.** As routes are added to the builder, they are arranged in neat rows and columns, so you can see how it all fits together.
- **Save.** When you're done configuring a route, click **[Save]**, and it will be added to the Auto-Attendant builder canvas. Each route that has an **Add** icon after it requires an additional route.
- **Edit.** To edit a route, click on the primary card to open the editor for that route on the right side of your window.

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

1. Add an Auto-Attendant

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

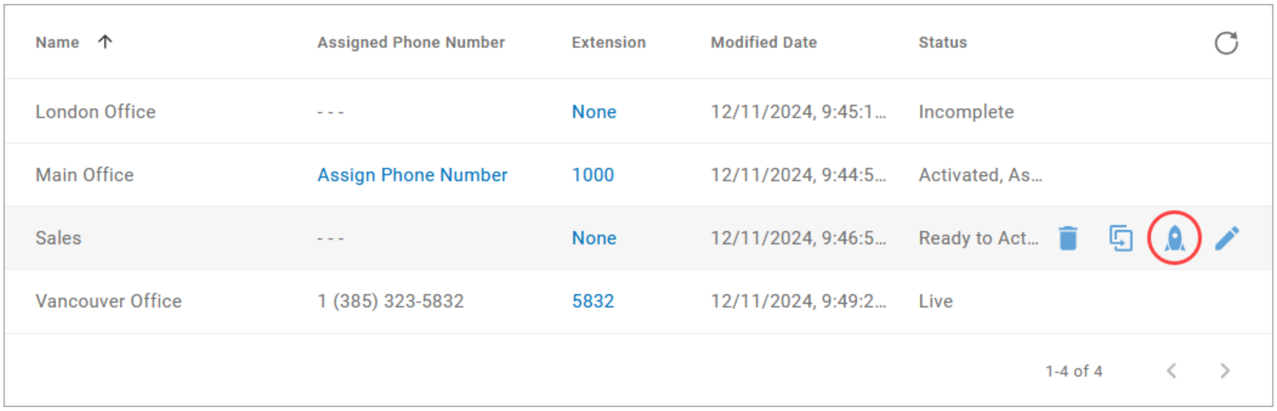
The auto-attendant saves automatically. When you're done, go back to the Auto-Attendant tab and refresh the screen to see it.

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

2. Activate an Auto-Attendant

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

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



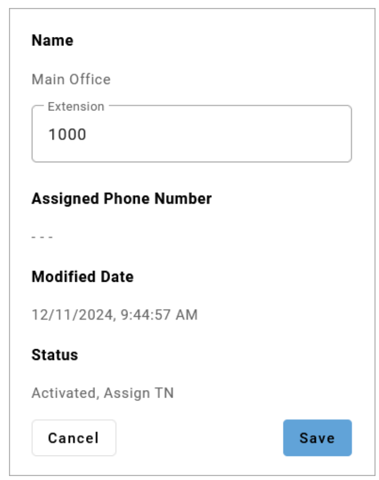
Name ↑	Assigned Phone Number	Extension	Modified Date	Status
London Office	- - -	None	12/11/2024, 9:45:1...	Incomplete
Main Office	Assign Phone Number	1000	12/11/2024, 9:44:5...	Activated, As...
Sales	- - -	None	12/11/2024, 9:46:5...	Ready to Act...
Vancouver Office	1 (385) 323-5832	5832	12/11/2024, 9:49:2...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

1-4 of 4

3. Assign an Extension (Optional)

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

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

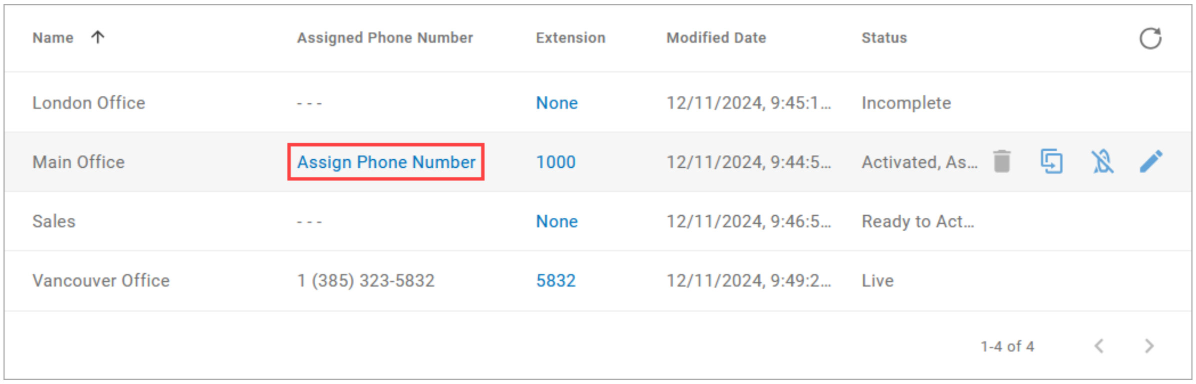


4. Assign Phone Number

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

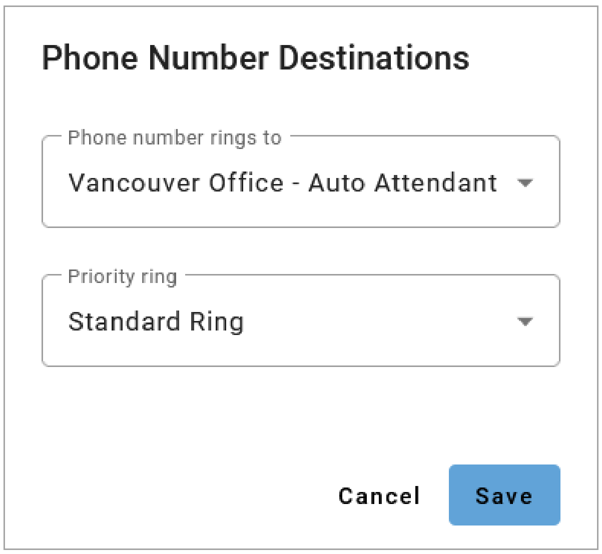
If the auto-attendant is activated but you do not see the *Assign Phone Number* link or have access to the Phone Numbers page, please contact Customer Support for assistance.

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

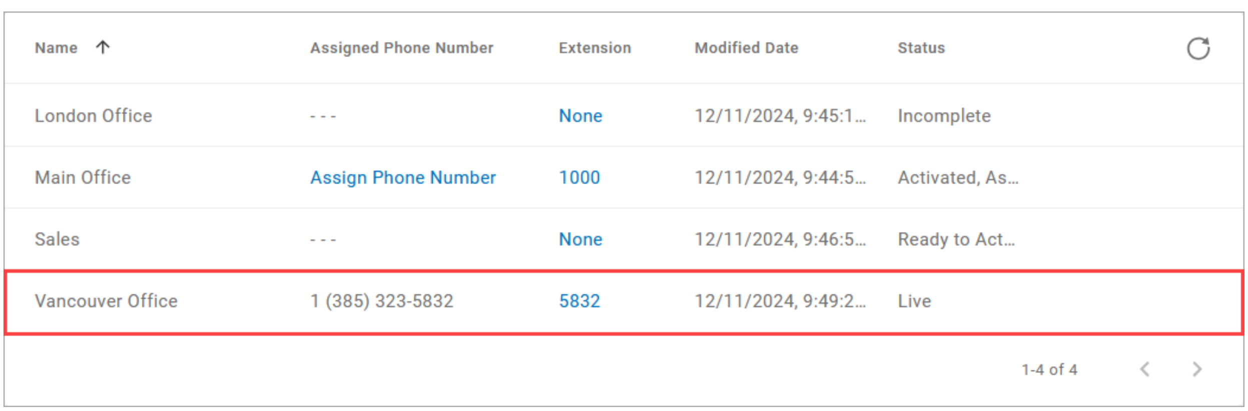


Name ↑	Assigned Phone Number	Extension	Modified Date	Status
London Office	- - -	None	12/11/2024, 9:45:1...	Incomplete
Main Office	Assign Phone Number	1000	12/11/2024, 9:44:5...	Activated, As...
Sales	- - -	None	12/11/2024, 9:46:5...	Ready to Act...
Vancouver Office	1 (385) 323-5832	5832	12/11/2024, 9:49:2...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

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



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



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

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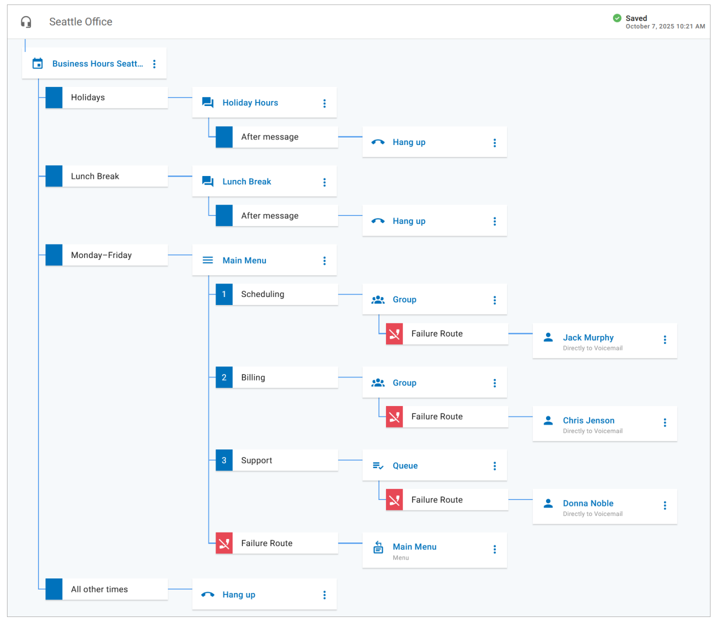
Routes Guide

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

- Schedule Route
- Menu Route
- Message Route
- Group Route
- User Route
- Forward to Phone Number Route
- Directory Route
- Hang Up Route
- Reference Route

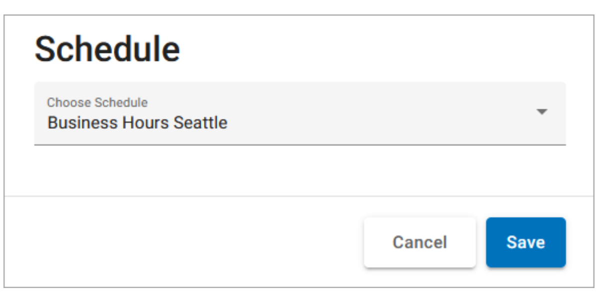


Schedule Route

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

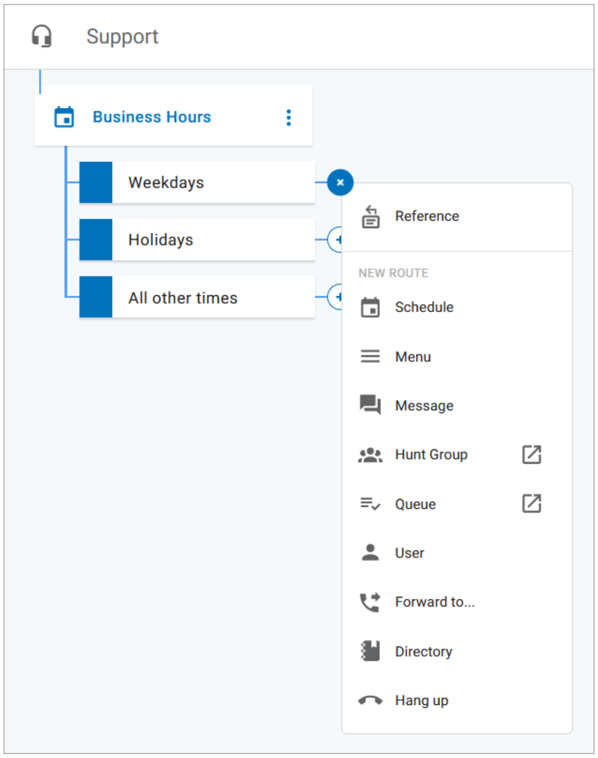
Schedules are configured separately in the **Auto-Attendant > Schedules** tab and are assigned to auto-attendants as needed. One schedule can be assigned to multiple auto-attendants or multiple schedules can be configured in a single auto-attendant.

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

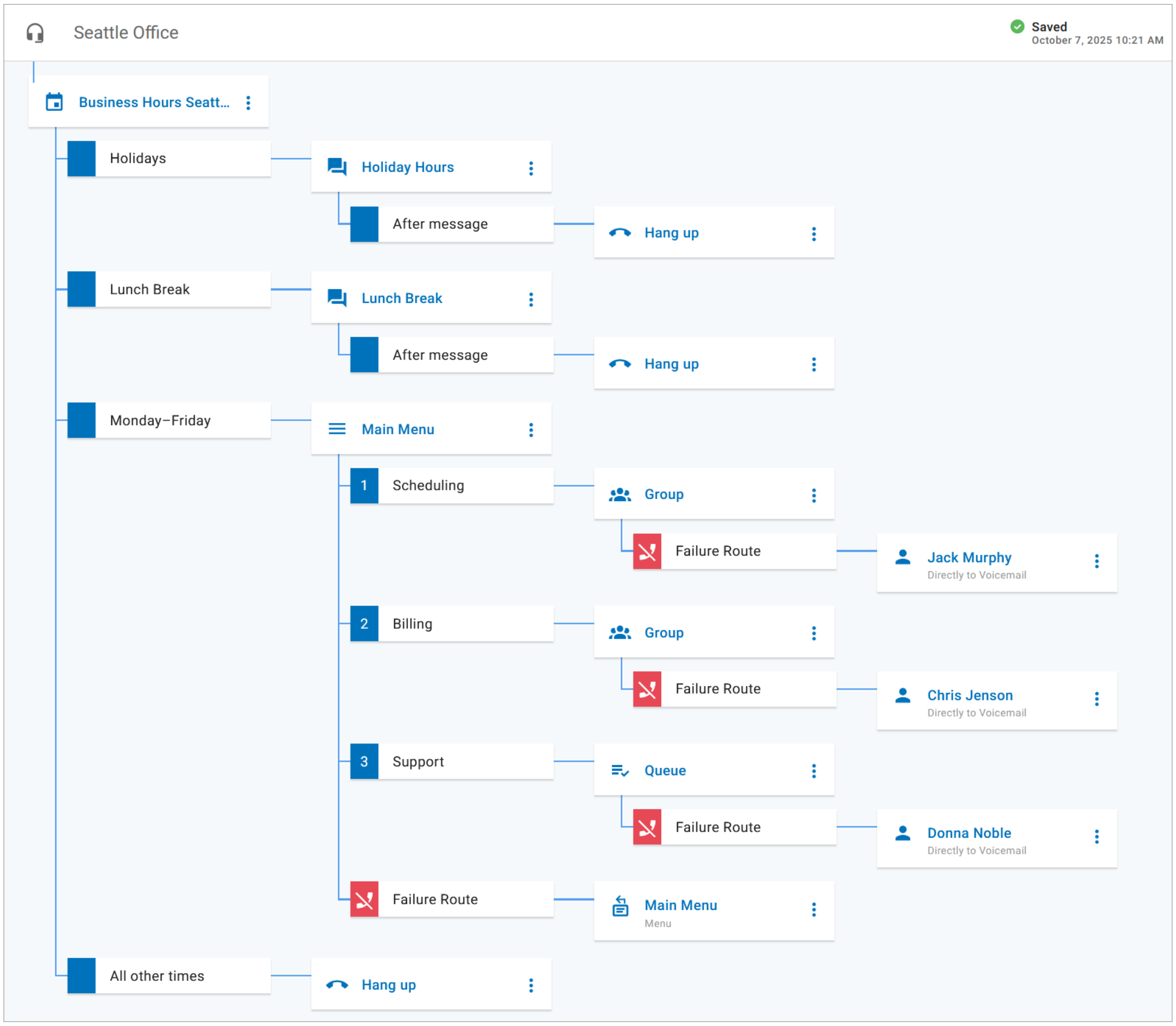


The schedule and each of its rules are added to the auto-attendant. By default, an *All other times* rule is also added to identify where calls are routed during times that are set to *Unavailable all day* or are not specified by a rule.

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



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



Change Schedule

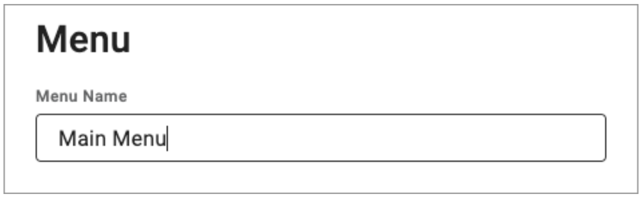
To avoid breaking the call flow, the schedule assigned to a route can be changed only if the routes assigned to each rule are removed first. You can, however, modify existing rules in the schedule. See Schedules for details.

Menu Route

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

Menu Name

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



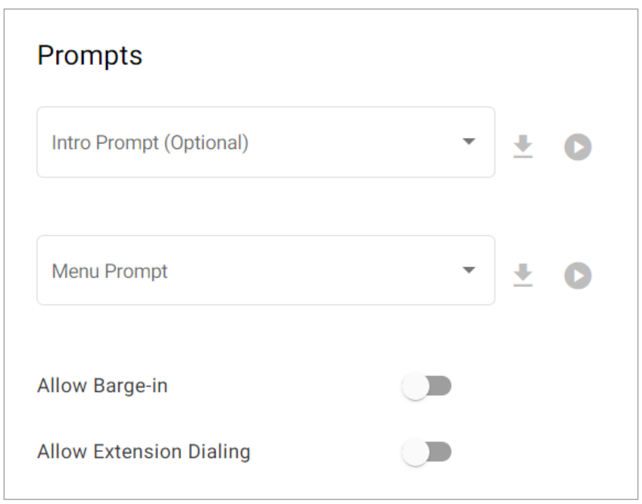
Prompts

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

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

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

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



Allow Barge-In

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

Allow Extension Dialing

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

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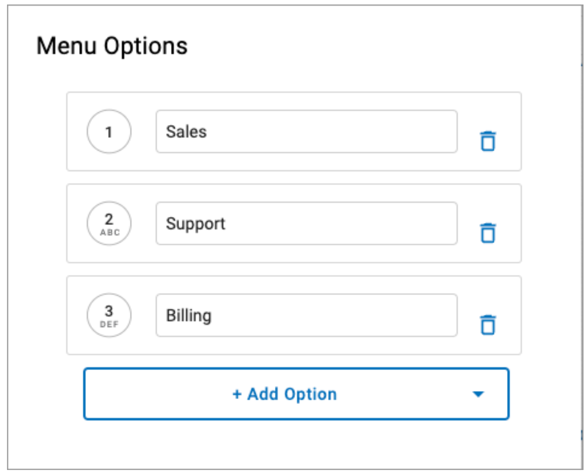
If "Allow Barge-in" is also enabled, callers can interrupt the Intro prompt as well. Because an extension may start with the same number as a menu option, there is a two second delay after a number is dialed before the call is transferred. If the dialed extension is invalid, the caller will hear "invalid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

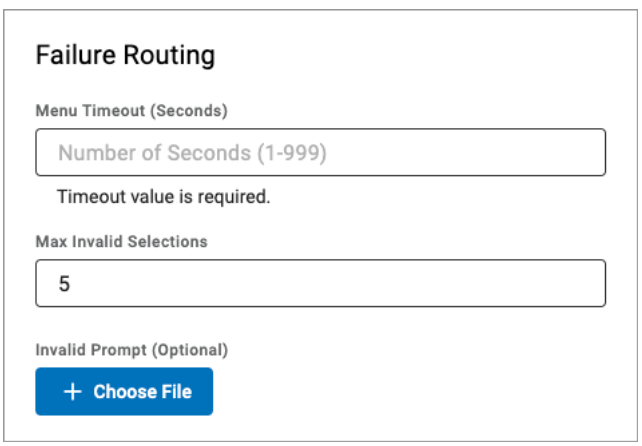
Menu Options

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

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



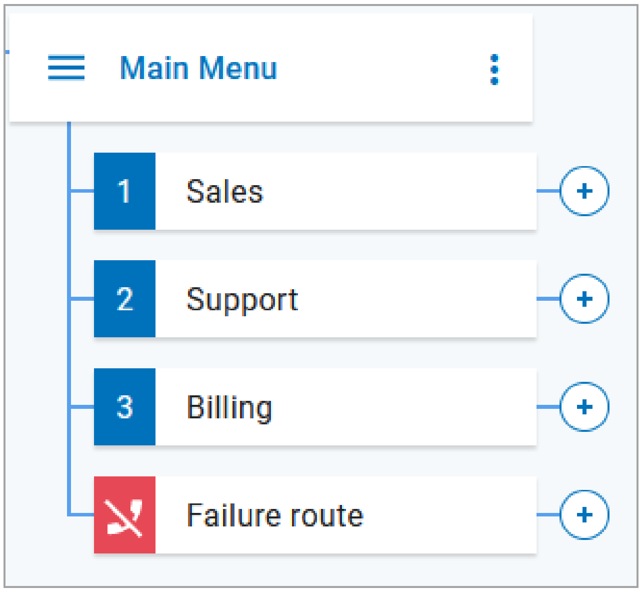
Failure Routing



Field	Description
Menu Timeout	Set the delay time (1–999 seconds) before the menu times out and an invalid selection is registered. If the timeout occurs, the call will loop back to the menu. Once the maximum number of invalid selections is reached, the call will be routed to the failure destination.
Max Invalid Selections	Enter the number of invalid selections or menu timeouts that will be allowed prior to directing the call into the failure route.

Field	Description
Invalid Prompt	Upload a .wav or .mp3 file under 5 MB that the caller will hear after dialing an invalid option (required). For example: *"The number you entered was invalid. Please try again."*

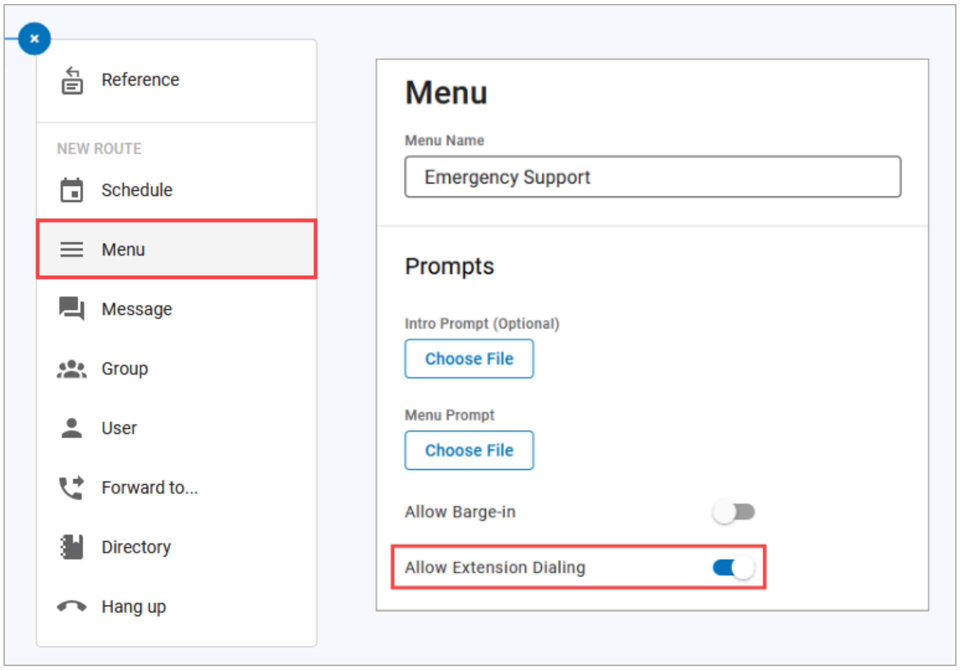
When you're done configuring the menu, click **[Save]**. The menu will be added to the auto-attendant builder canvas.



Dial By Extension

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

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



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

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

Invalid Selections

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

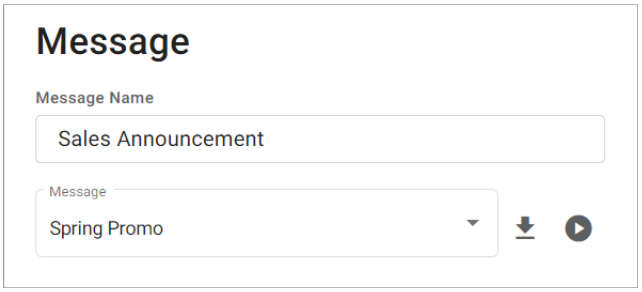
Message Route

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

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

- To confirm you have the right one, you can play the file in your browser or download it to your computer.

- If the file you need isn't listed, you can upload or record a new one in Media Files.



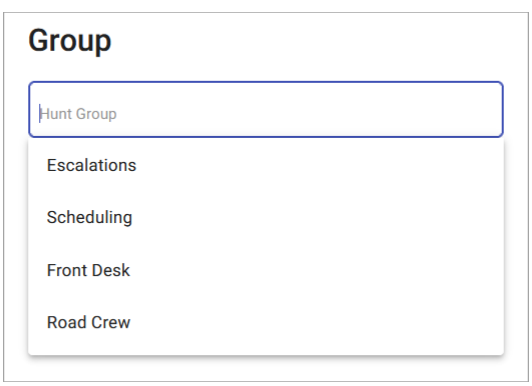
Hunt Group & Queue Routes

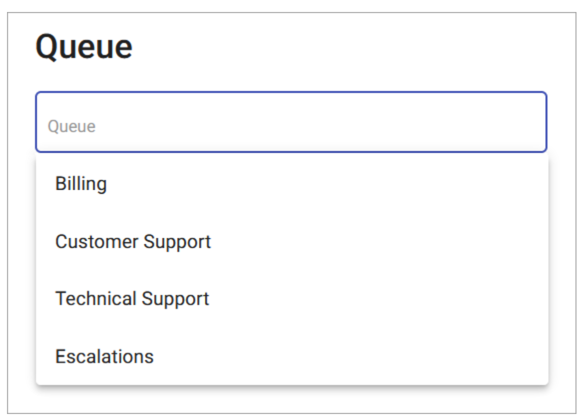
Hunt Group and Queue routes distribute calls to a group of users based on predefined settings. Rather than following each user's call handling rules, calls follow the group's ring strategy to ensure calls are distributed properly. The first user to answer takes the call. If no one answers, the call follows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

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

- **Hunt Groups** distribute calls among a group of users based on a predefined call distribution strategy. If a call isn't answered, the system will "hunt" the next available agent with the same consideration. Supported features include Music On Hold, Night Forwarding, User Ring Strategy, and User Log In/Out.
- **Queues** are similar to Hunt Groups in supported features and call distribution methods but also allow for more complex management of high call volumes. When all users are busy, callers are placed in a queue where they listen to announcements or hold music until an agent is available. Queue Announcements can be added to provide a more engaging experience and help minimize missed or abandoned calls.

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





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

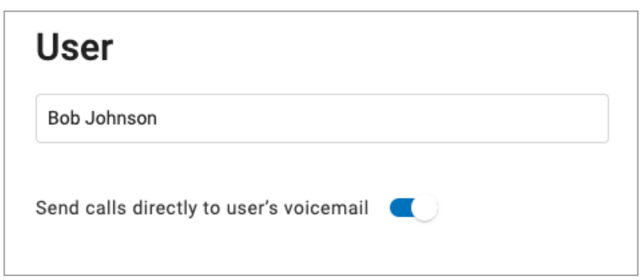
Swap Hunt Group or Queue

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

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

User Route

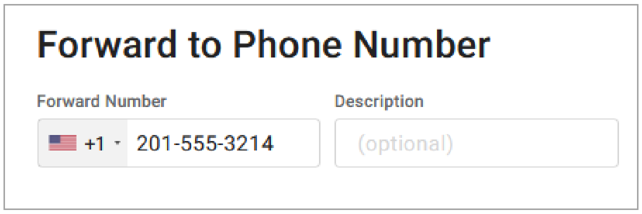
The **User** route directs calls to a single user, whose personal call handling settings will then apply as normal (unless "Send calls directly to voicemail" is selected).



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

Forward to Phone Number Route

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

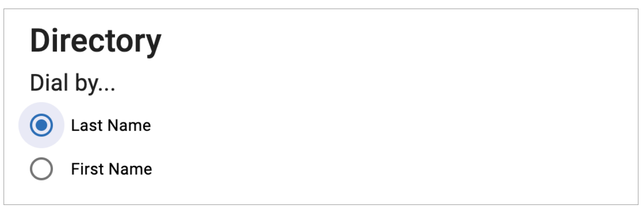


Directory Route

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

Dial by...

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

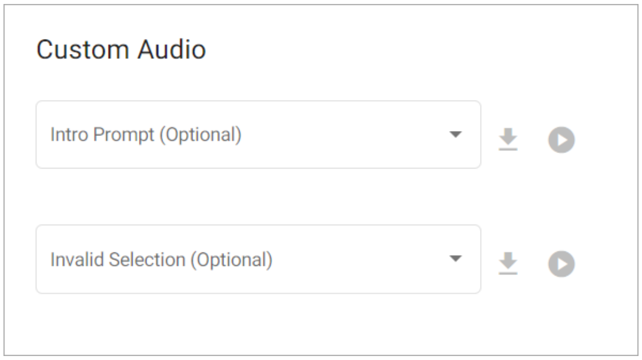


Custom Audio

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

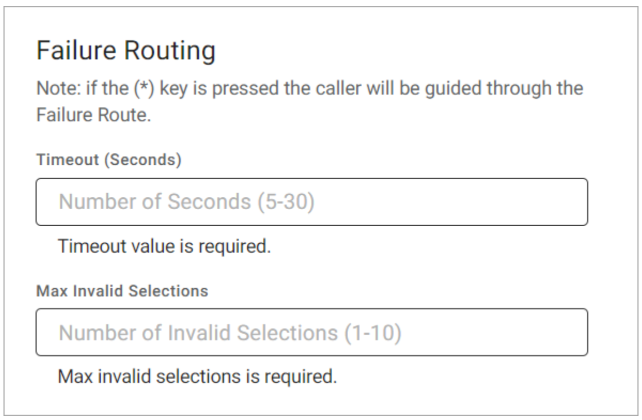
- To confirm you have the right one, you can play the file in your browser or download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in Media Files.

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



Failure Routing

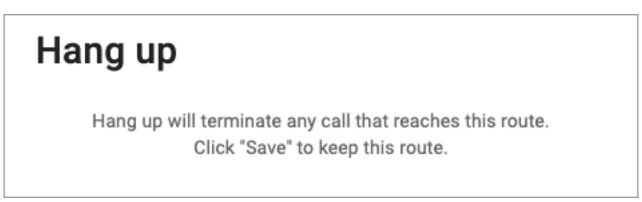
A failure route is required in case the caller is unable reach the user they were looking for.



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

Hang Up Route

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



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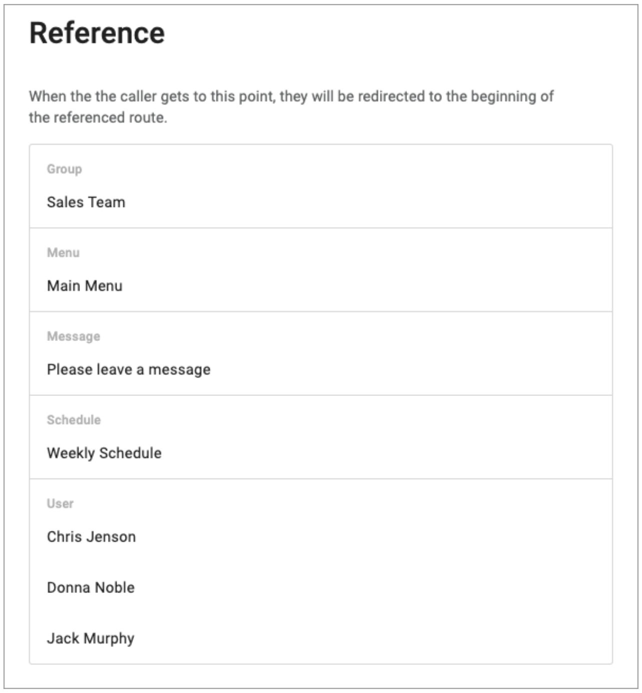
Reference Route

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

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



Schedules

Business Cloud Communications > Auto-Attendant > Schedules

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

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

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

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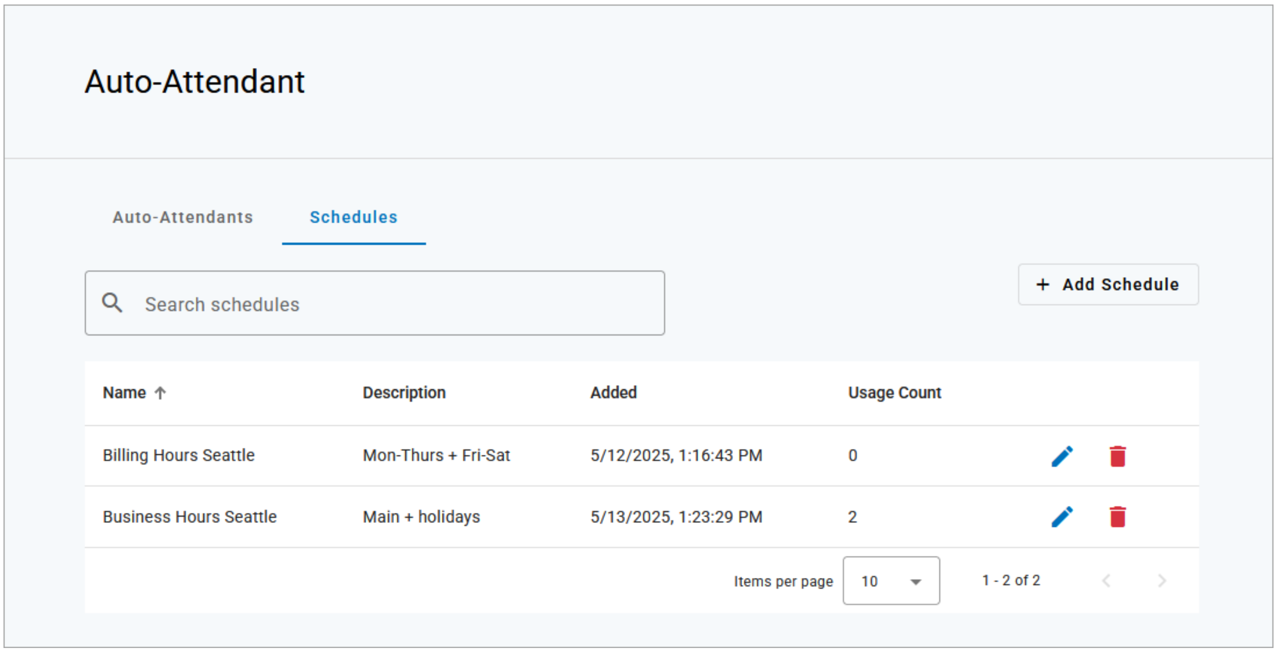
Manage Schedules

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

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

Select an existing schedule to modify it or click **[+ Add Schedule]** to create a new one.



Use Cases & Examples

Schedule 1: Doctor's Office

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

- **Schedule:** Main Hours
  - **Custom Rule:** Holidays
    - US Holidays: *Unavailable all day*
    - New Years Eve: 8:00 AM to 2:00 PM
    - Day After Thanksgiving: *Unavailable all day*
    - Christmas Eve: 8:00 AM to 2:00 PM
  - **Custom Rule:** Weekly

        - Every 2 weeks on Saturdays from 10:00 AM to 2:00 PM
    - **Weekly Rule:** Weekdays
        - Monday–Friday from 8:30 AM to 5:00 PM

Schedule 2: Middle School

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

- **Schedule:** Office Hours
    - **Custom Rule:** Holidays

      All school holidays: *Unavailable all day*
    - **Custom Rule:** Summer Hours

      Weekly, Monday–Friday 8:00 AM to 12:00 PM. Starts May 26 and repeats every week until July 31.
    - **Custom Rule:** School Hours

      Weekly, Monday - Friday from 7:30 AM to 3:30 PM. Starts August 1 and repeats every week until May 25.

Create Schedule

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

holidays in which you are closed for all or part of the day. See Configure Custom Rules for details.

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

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

6. **Save.** When you're done, click **[Create Schedule]** to save it.
7. **Assign.** Once the schedule is saved, assign it to one or more auto-attendants. In the auto-attendant builder, add a **Schedule** route, select the schedule you want to apply at that point in the call flow, then configure the call flow for each route. See Schedule Route for details.

Priority Order

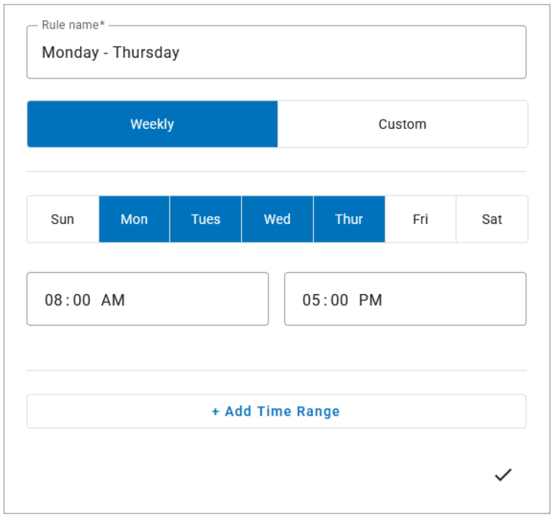
When a schedule is assigned to an auto-attendant, calls are routed to the first rule that matches the time of the incoming call, based on the order in which the rules are defined in the schedule. This means rules for holidays and other non-standard hours **MUST BE FIRST** to ensure calls go through those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

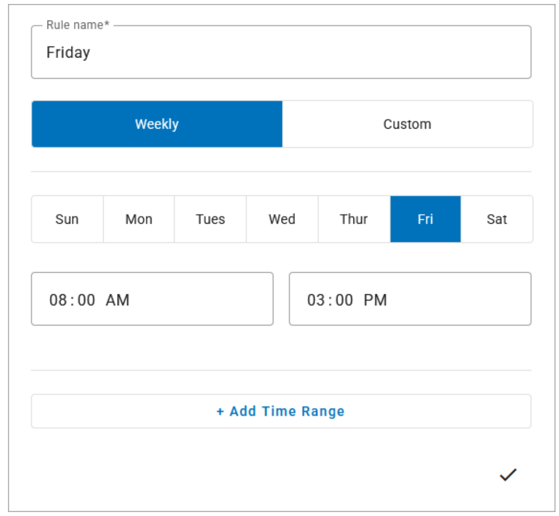
To change the order of your rules, click the ═ icon to the right of the rule and drag it to the correct position.

Configure Weekly Rules

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

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





Tip

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

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

Configure Custom Rules

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

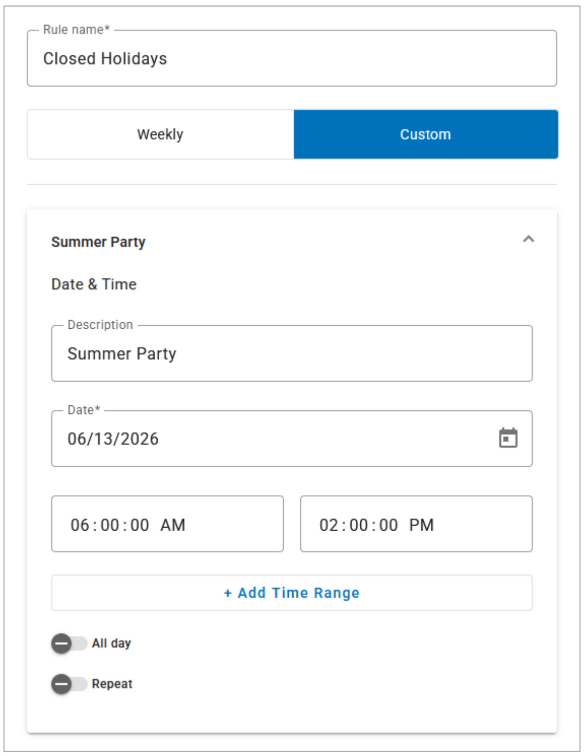
To configure a custom rule, select the **Custom** tab and fill out the first *Date & Time* period:

- **Description:** Enter a description to identify the date.
- **Date:** Enter the date it will occur. If the rule will repeat (below), this is the start date.
- **Time Range:** For rules that are not all day, enter the start and end time during which calls will follow this custom rule. Add additional time ranges as needed.
- **All day.** When enabled, the entire 24-hour day is considered off-hours, and calls will follow the rule selected below.
  - **Calls follow the "All other times" rule.** Calls will be routed to the "All other times" route configured in the auto-attendant.

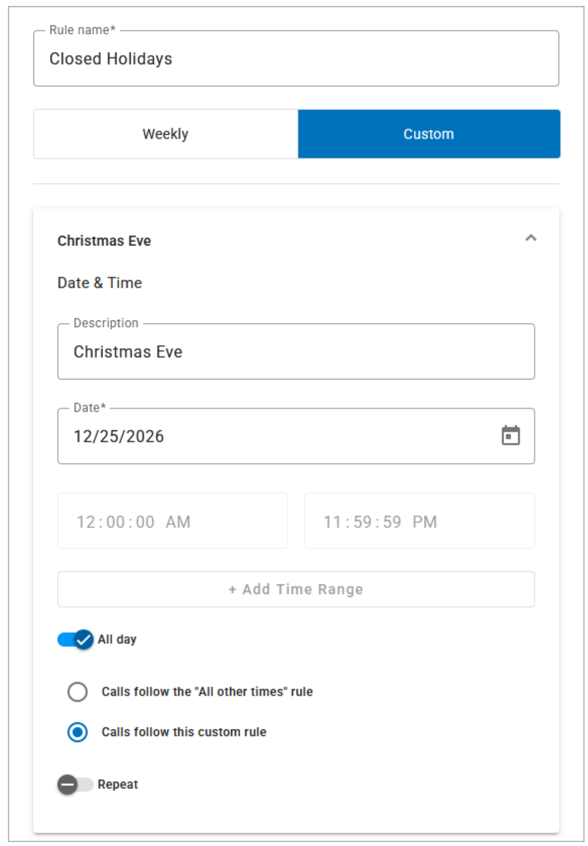
    This rule is typically used to route calls when the date and time of the call does not match any defined rule in the schedule.
  - **Calls follow this custom rule.** Calls will be routed to the flow configured for this custom rule.

To route calls during specific hours only, toggle this off and enter the start and end times in the fields above.

- **Repeat.** When disabled, the event will occur once. Toggle on to configure the rule to repeat on a daily, weekly, monthly, or yearly basis. See Recurring Schedules for details.
- **Add Custom Date.** Click to add another date to the rule.
- **Add Holidays.** Add multiple US or Canadian holidays at once. See Add Holidays for details.



Time Range: Calls will be routed to the "Closed Holiday" rule between 6:00 AM and 2:00 PM.



All Day: Calls will be routed to the Closed Holidays rule all day, from 12:00 AM to 11:59 PM.

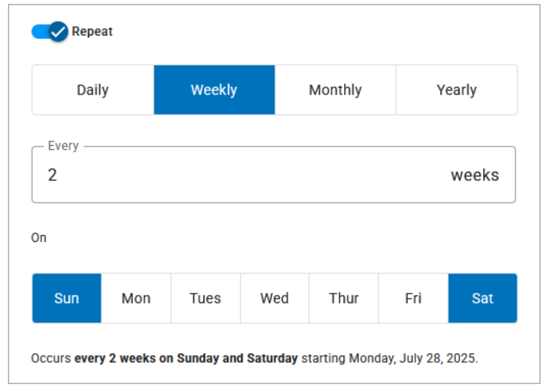
Recurring Schedules

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

1. Select the interval type (Day, Week, Month, or Year), then enter how often it will recur.

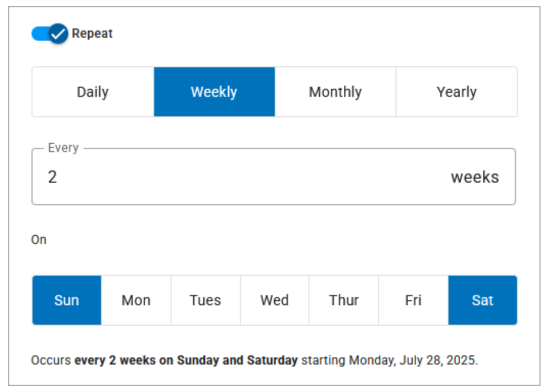
- **Daily:** Repeat every X days.

  Enter 1 for every day, 2 for every other day, etc.



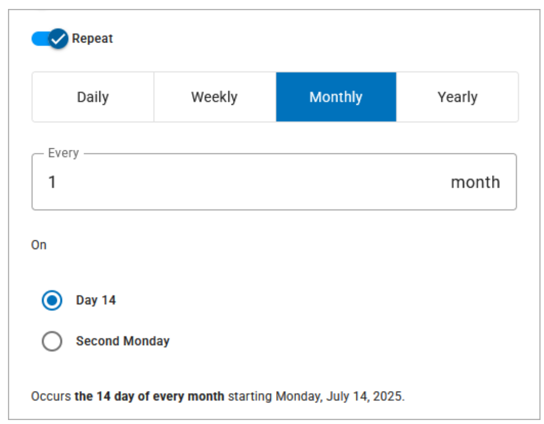
- **Weekly:** Repeat every X weeks.

  Specify the number of weeks between each occurrence and the day(s) it will repeat.



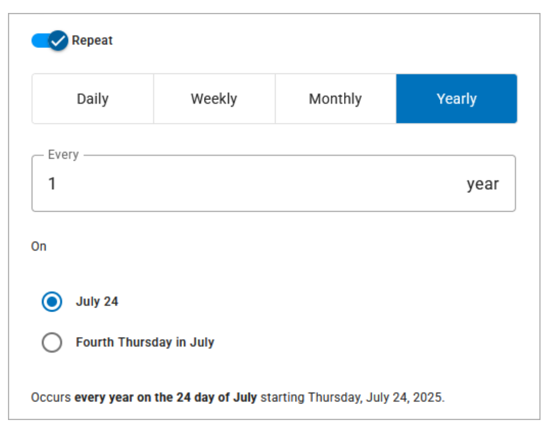
- **Monthly:** Repeat every X months.

  Specify the number of months between each occurrence and on which day or week of the month it occurs. For example, Day 10 or Second Tuesday.



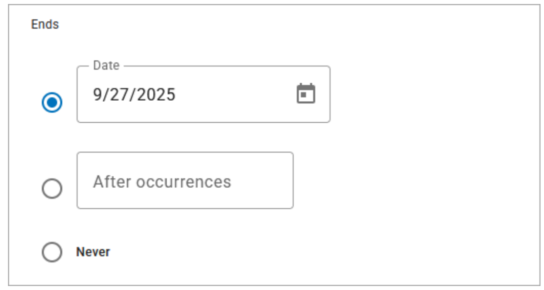
- **Yearly:** Repeat every X years.

  Specify the number of years between each occurrence and on which day or week of the month. For example, September 30 or Last Tuesday in September.



2. Choose when the recurrence pattern will end:

    - A specific date
    - After a number of occurrences
    - Never



Add Holidays

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

US Holidays

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

Canadian Holidays

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

1. At the bottom of a custom rule, click **[+ Add Holidays]**, then select either **US Holidays** or **Canadian Holidays**.

    The dates for each holiday are automatically generated for the current calendar year (even if those dates have already passed), default to *All day*, route to the custom rule, and do not repeat.

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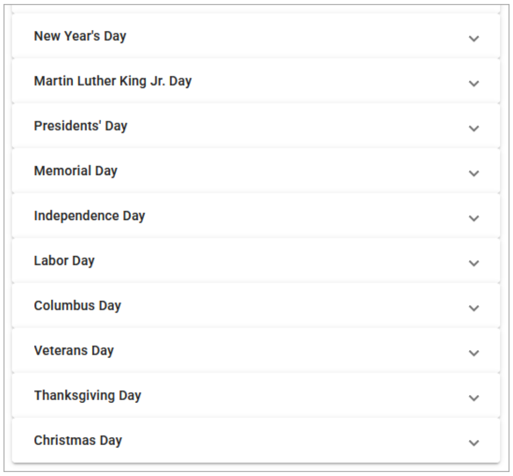

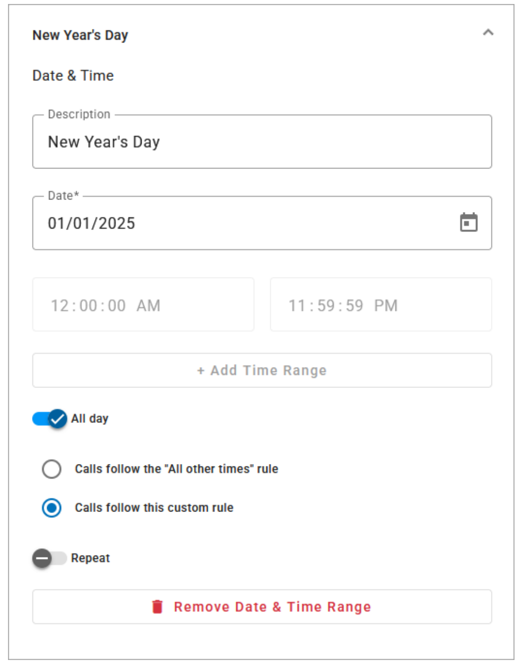

2. Expand each holiday entry and customize the settings as needed. To collapse a holiday, click the ✓ checkmark in the bottom right.
    - **Date.** The date is generated for the current year only. If the organization observes the holiday on a different date, enter it here.
    - **Availability.** Each holiday defaults to *All day* and routes to the flow configured for this custom rule. To route calls to the *All other times* rule instead, select that option below. To route calls during specific hours, toggle this off and enter the start and end times in the fields above.
    - **Repeat.** Holidays are one-time dates by default. If the holiday will be observed every year, toggle this on and configure the recurrence pattern below.
    - **Delete.** If a specific holiday isn't required, click **[Remove Date & Time Range]** or update it to a date you need.
3. To add custom holidays, scroll to the bottom of the rule and click **[+ Add Custom Date]**, then configure it as needed.

Schedule Best Practices

List Custom Rules First

When a call reaches an auto-attendant schedule, it is routed to the first rule that matches the date and time of the call. This means custom rules for holidays and other non-standard hours **MUST BE FIRST**; otherwise, calls will always match with a weekly rule and may not ever reach the custom rule.

To change the order of your rules, click the icon to the right of the rule and drag it to the correct position in order of most to least restrictive (custom rules before weekly rules).

For example, if you have rules for standard weekly hours, lunch breaks, and holidays, holidays should be listed first. When a call comes in, the auto-attendant will first check to see if the date and time of the call is during a specified holiday, then it will check lunch hours, and finally it will check your weekly rules. If the date and time do not match any rule, the call is routed to the "All other times" rule.

Add Extra Rule(s)

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

You don't always know what your future holds, so we recommend always including a Holiday route in your schedules, so you can add custom Date & Time period for days off as needed. Additionally the schedule should be listed very first in the auto-attendant to ensure calls go through that check before routing the call to normal business hours.

For even more flexibility, you could also create an "extra" rule that can be configured later, just in case you need it. To save a rule that doesn't need to be active, add a Date & Time period for a date in the past and then assign the rule to your failover route in the auto-attendant.

Review Holidays Yearly

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

Modify Schedules

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

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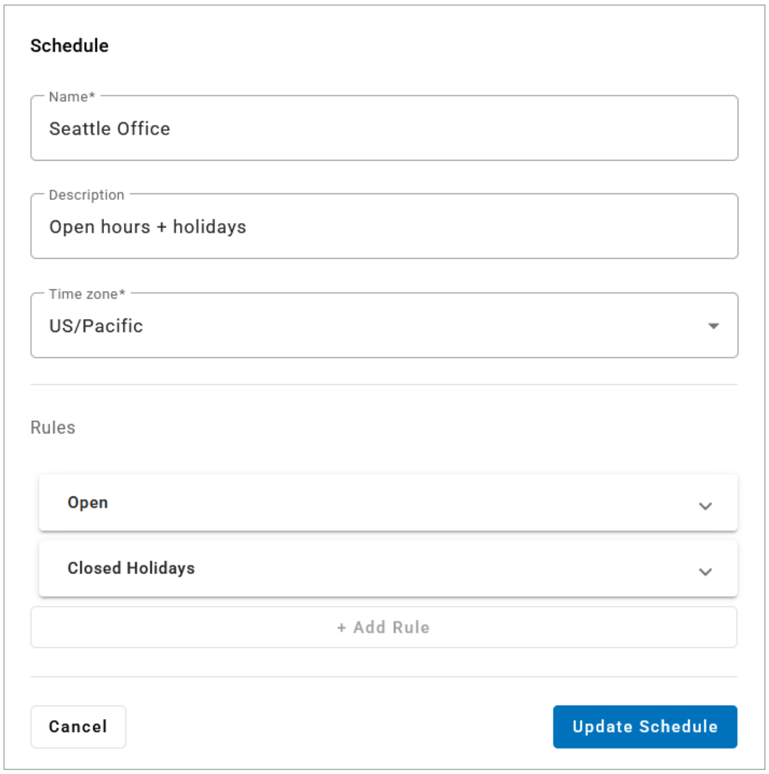
For example, if your schedule has a custom rule for holidays (or dates in which you are closed), and this year the company is closing early for a party, you can add a new *Date & Time* period to account for it. Or if the party was on June 16 last year, but it's planned for July 12 this year, you can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

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



Edit Auto-Attendants

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

Here's what you can do:

- Change the Call Flow
- Change Schedules
- Change an Extension

- Remap Migrated Hunt Groups or Queues

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

Change the Call Flow

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

Option 1: Duplicate, Edit, Switch

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

Option 2: Deactivate, Edit, Reactivate

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

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

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

Change Schedules

Once a schedule is assigned to an auto-attendant, call flows are assigned to each rule, so it knows where to send calls during the specified times. For this reason, when a schedule is swapped out for another, all routes following the schedule will be deleted and must be rebuilt before the auto-attendant can be launched.

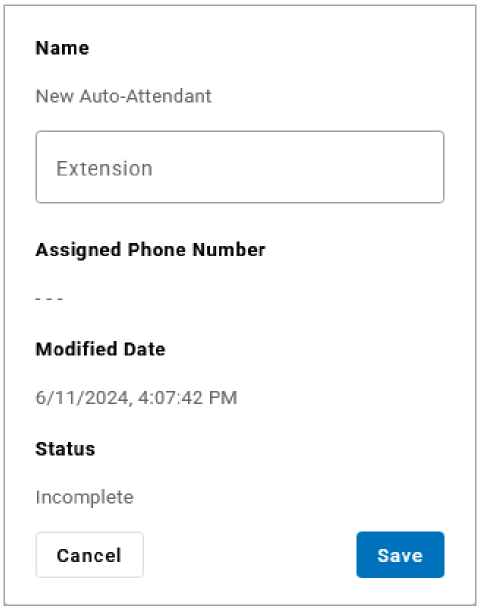
1. **Duplicate.** Copy the auto-attendant to enable editing.
   - To the right of the auto-attendant that needs to be updated, click **Duplicate**. A copy will be made with "copy of" at the beginning of the title.
   - Locate the "copy of" auto-attendant you just created, then click **Edit** to open the builder.
2. **Swap Schedules.** Assign the new schedule to the auto-attendant.
   - In the top left of the builder, update the name to identify it as the new version.
   - Click the **Schedule** route in the builder, then select the recently updated schedule from the menu that appears on the right.
   - Click **[Save]**. All routes following the schedule, except for those following the *All other times* rule, will be cleared.
3. **Rebuild.** To the right of each rule, click **Plus** to add a new route, then rebuild the auto-attendant as you had it before. See Auto-Attendant Setup Guide and Auto-Attendant Routes Guide for more information.
4. **Activate.** Back on the Auto-Attendant page, locate the new auto-attendant and click **Activate**. The auto-attendant routes are now locked and cannot be edited.
5. **Launch.** To avoid breaking active call flows, we recommend performing this step after hours, when there are no calls in the auto-attendant.
   - Click **[Assign phone number**] to go to the Phone Numbers page.
   - Locate the phone number assigned to the original auto-attendant, then click **Destination** on the right and change it to the new auto-attendant.

- Finally, click **[Save]** to go live.

Change Extension

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

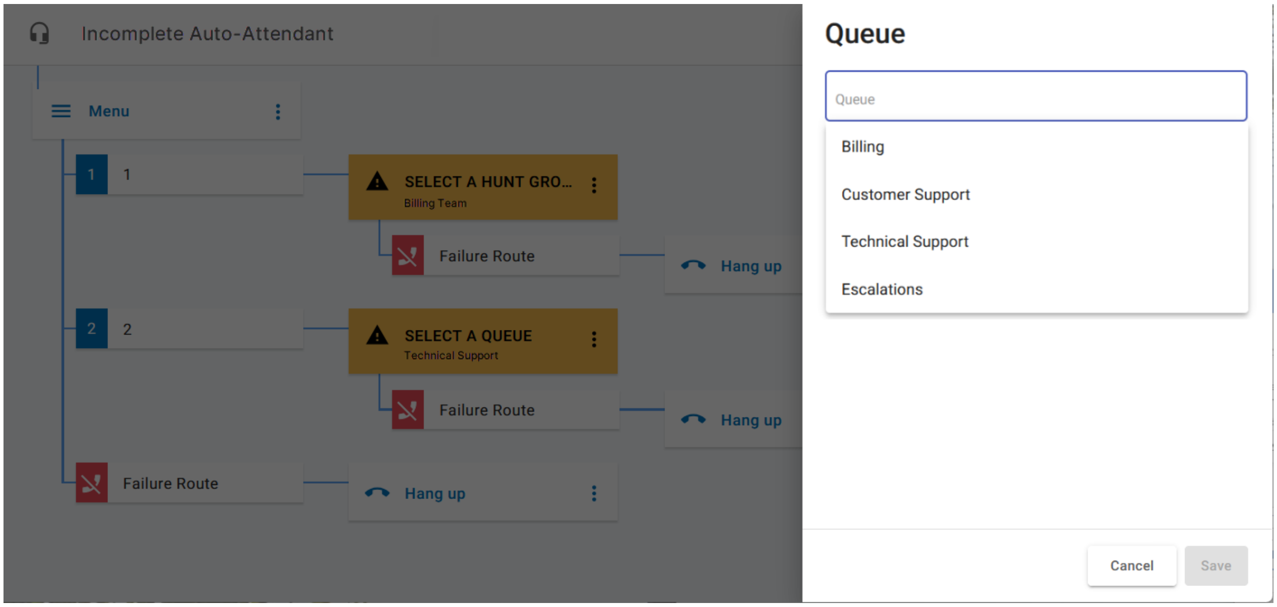
1. Go to the **Auto-Attendant** page.
2. From the list of auto-attendants, locate the one you're looking for and click the *Extension* field.
3. Add, change, or remove the extension, then click **[Save]**.



Remap Migrated Hunt Groups or Queues

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

1. First, go to Call Groups and create a new hunt group or queue.
2. Next, go to Auto-Attendant and select the one you want to modify to open the builder.
3. A yellow alert is displayed where a hunt group or queue configuration used to be. Click that box and select a hunt group or queue from the list.
4. Click **[Save]** to assign the call group to the route.



Holiday Troubleshooting

Auto-Attendant Schedules determine where to route calls based on the time and date of the incoming call. Previously, schedules were configured directly within auto-attendants, making it easy to see the relationship between each rule and the call flows. Now that schedules are managed separately, it can be harder to understand the impact—sometimes leading to unexpected routing issues.

For example, the most common issue seen in auto-attendants is that calls are not routing properly during scheduled holidays. There are two reasons this might happen:

1. The custom rule with holidays is listed *after* the rule for weekly business hours.
2. *All day* is enabled and *Calls follow the "All other times" rule* is selected.

   This was the previous default setting and may not be what you intend. To route calls to the custom rule instead, select that option below and click **[Save]**.

Review Your Auto-Attendants
Double-check that your auto-attendants are configured to route calls exactly as you expect. A quick review today can prevent missed calls and confusion later.

List Custom Rules First

When a call reaches an auto-attendant schedule, it is routed to the first rule that matches the date and time of the call. If calls are following your standard business hours during holidays, your rules are probably out of order.

Check your auto-attendant schedules that are in use to make sure holiday rules are listed first. If they're not, there are a few things you'll need to do:

Update Schedules

1. Log in to the portal and go to **Auto-Attendant > Schedules**.
2. Locate the schedule that needs to be updated.
   - If the usage count is zero (0), click **Edit**.
   - If the usage count is 1 or more, click **Duplicate**, then locate the copy and click **Edit**.
3. Update the name of the schedule, so you can differentiate between this and the original in a list. For example: *Business Hours (NEW)*.
4. Scroll down to **Rules** to see how each one is organized. Expand each rule to identify it's set up as **Weekly** or **Custom**, then use the bars on the left to drag each rule into the correct position from most to least restrictive, with custom rules before weekly rules.

   For example, if you have rules for standard weekly hours, lunch breaks, and holidays, holidays should be listed first. When a call comes in, the auto-attendant will first check to see if the date and time of the call is during a specified holiday, then it will check lunch hours, and finally it will check your weekly rules. If the date and time do not match any rule, the call is routed to the "All other times" rule.

> **All day**
> While you're here, you may also want to check the "All day" setting to ensure calls will be routed as expected. However, settings within Date & Time periods can be modified while the auto-attendant is live, so you can check on it later.

Update Auto-Attendants

Once the schedule has been modified and saved, the new schedule must be assigned to the auto-attendant. However, *Live* and *Activated*auto-attendants cannot be modified to avoid breaking the flow for active calls; so, you must duplicate the auto-attendant first and then rebuild the routes. See also: Edit Auto-Attendants

1. **Duplicate.** Copy the auto-attendant to enable editing.

- To the right of the auto-attendant that needs to be updated, click **Duplicate**. A copy will be made with “copy of” at the beginning of the title.
- Locate the “copy of” auto-attendant you just created, then click **Edit** to open the builder.

2. **Swap Schedules.** Assign the new schedule to the auto-attendant.
   - In the top left of the builder, update the name to identify it as the new version.
   - Click the **Schedule** route in the builder, then select the recently updated schedule from the menu that appears on the right.
   - Click **[Save]**. All routes following the schedule, except for those following the *All other times* rule, will be cleared.
3. **Rebuild.** To the right of each rule, click **Plus** to add a new route, then rebuild the auto-attendant as you had it before. See Auto-Attendant Setup Guide and Auto-Attendant Routes Guide for more information.
4. **Activate.** Back on the Auto-Attendant page, locate the new auto-attendant and click **Activate**. The auto-attendant routes are now locked and cannot be edited.
5. **Launch.** To avoid breaking active call flows, we recommend performing this step after hours, when there are no calls in the auto-attendant.
   - Click **[Assign phone number**] to go to the Phone Numbers page.
   - Locate the phone number assigned to the original auto-attendant, then click **Destination** on the right and change it to the new auto-attendant.
   - Finally, click **[Save]** to go live.

Cleanup
Before you're done, clean up your auto-attendant list. Back on the Auto-Attendants page, locate the old one you just replaced, which should be in the *Activated, Assign TN* status. To permanently remove it from the list, click **Deactivate** then **Delete** .

“All Day” Routing

For custom rules, when a **Date & Time** period has ***All day*** enabled, the entire date (12:00 a.m. to 11:59 p.m.) is considered off-hours, and calls will be sent to the rule selected below.

- **Calls follow the "All other times" rule.** Calls will be routed to the "All other times" route configured in the auto-attendant.

  This rule is typically used to route calls when the date and time of the call does not match any defined rule in the schedule.
- **Calls follow this custom rule.** Calls will be routed to the flow configured for this custom rule.

To route calls during specific hours only, toggle this off and enter the start and end times in the fields above.

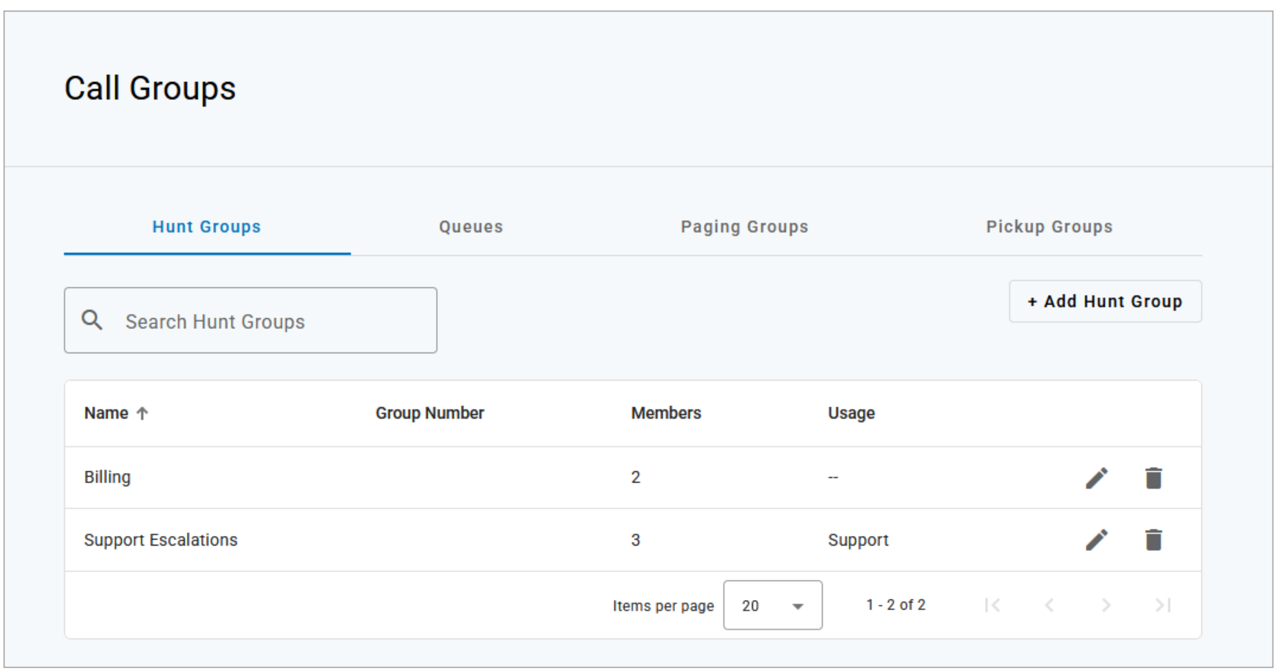
Call Groups

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

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

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

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



Route to Auto-Attendants
Hunt groups and queues can be assigned to one or more auto-attendant routes. See Hunt Groups and Queue Routes for details.

Hunt Groups

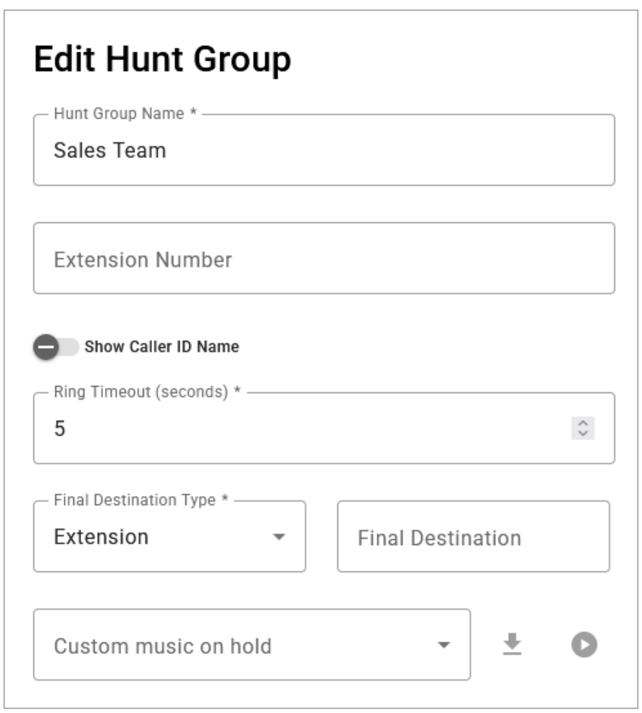
Hunt groups distribute incoming calls among a group of users based on predefined settings. Rather than following each user's call handling rules, the group follows its own User Ring Strategy to ensure calls are distributed as intended. The first user to answer takes the call. If no one is available or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

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

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

Add or Edit a Hunt Group

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



Follow these steps to create or modify a hunt group:

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

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

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

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

See also: Route Calls to Hunt Group or Queue

Queues

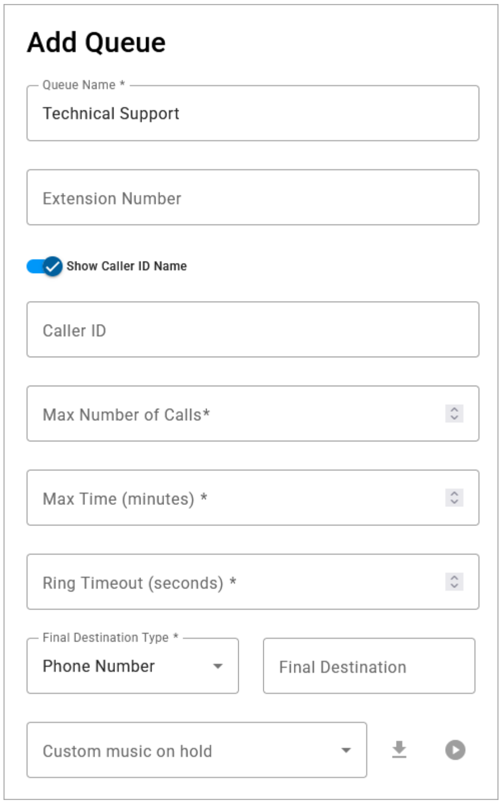
Long calling waits have an undeniably negative impact on your customer's experience. For 66% of callers, two minutes on hold is their breaking point. Queues are fundamental in managing high call volumes to ensure no customer goes unattended. They offer the same call routing features as hunt groups but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

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

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

Add or Edit a Queue

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



Follow these steps to create or modify a queue:

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

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

Setting	Description
Show Caller ID Name	Toggle on to show a name for this group in caller ID, then enter a custom name in the field below. It can, but does not have to be, the same as the group name. When the call is delivered to a user, the caller ID will show this name before the caller's name and phone number. For example: *Sales JANE SMITH 18015551234*. If the call is routed through multiple call groups, only the most recent group's name is displayed. There are no character limitations for the caller ID name, but a shorter name will allow more to be shown on the device screen.
Max Number of Calls	Enter the number of calls that can be in the queue at one time (1–50).
Max Time (minutes)	Enter the number of minutes that a call is allowed to be in the queue (1–360). Once the max time is reached, the call is sent to the *Final Destination* or auto-attendant failure route.
Ring Timeout (seconds)	Enter the number of seconds a call will ring to a user or group before it is pushed back to the front of the queue (5–120). Keep this low to ensure calls are answered quickly. See User Ring Strategy for details.
Final Destination	Enter the failure route for calls that reach the group directly (via phone number or extension) and are not answered. Select *Phone Number* or *Extension*, then enter the number in the field to the right. Calls that reach this call group from an auto-attendant follow the auto-attendant's failure route, not the *Final Destination*.
Custom music on hold	Select a custom Music On Hold file from the Media Files library that will play when a call is answered and then placed on hold. If this is not configured, the caller will hear the hold music assigned to the user (if configured) or the account.
Queue Announcement	Queue Announcements are a series of prompts and messages that callers hear when they reach the queue. To customize the caller experience, choose an Intro Prompt, Primary Message, and an Interrupt message from the Media Files library. Each prompt is optional, though a *Primary message* is recommended. If a *Primary message* is not selected, the caller will hear Music On Hold.

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

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

See also: Route Calls to Hunt Group or Queue

Queue Announcements

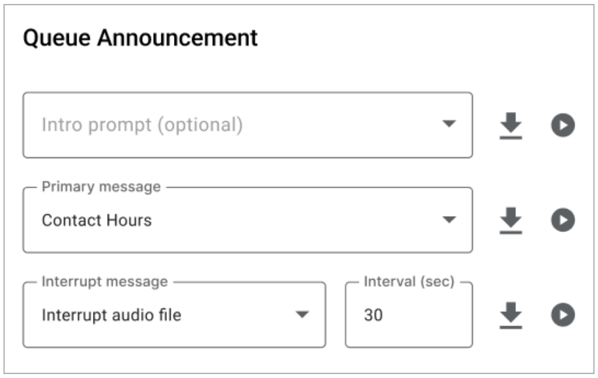
Queue Announcements are a series of prompts, messages, or music that callers hear when they reach a hunt group or queue. You can assign up to three custom announcements to each queue, allowing you to fully customize the caller experience. The right message, voice, and background music can turn an annoying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

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

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

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

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



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

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

4. Click **[Save]**.

Night Forwarding

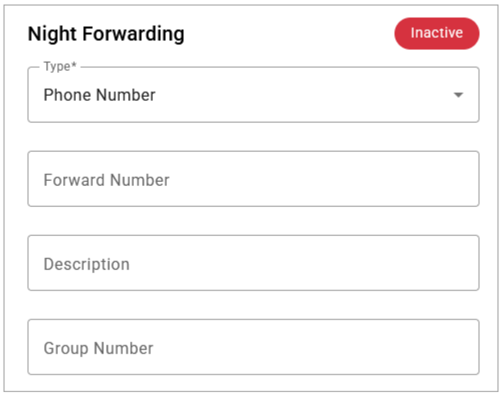
Night Forwarding, also known as Night Mode, allows users in a hunt group or queue to turn their calls on in the morning and off at night by dialing a star code.

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

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

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

  Be careful what you enter here — this field is not verified to ensure the number is valid.
- **Description:** A description to identify the forwarding location (optional).
- **Group number:** A three-digit identifier that will be used with the star code to enable or disable Night Forwarding for the associated group(s).



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

Shared Group Numbers

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

Enable or Disable Forwarding

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

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

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

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

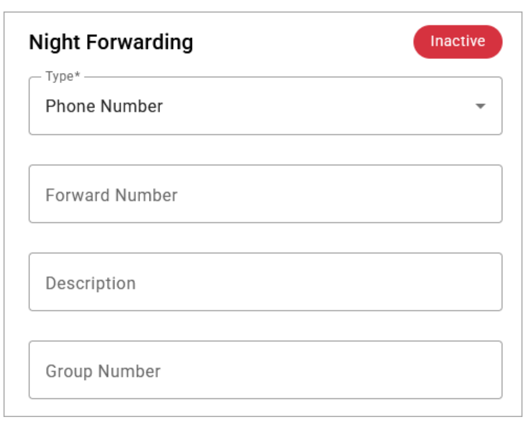
Change Forwarding Number

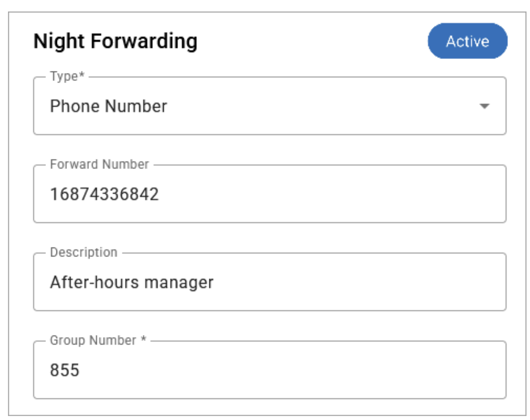
A user assigned to the hunt group or queue can change the forwarding number by dialing the star code and pressing 3. Alternatively, Admin users can change the forwarding number in the Voice Portal:

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

Check Forwarding Status

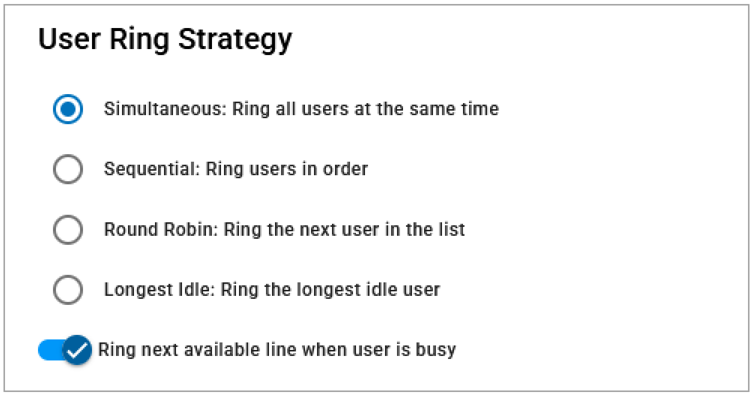
To find out if Night Forwarding is currently enabled (actively forwarding to the destination specified below), open the group and scroll down to Night Forwarding. The flag to the right of the heading will say either *Inactive* or *Active*.





User Ring Strategy

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



- **Simultaneous:** Rings all devices for users in the group at the same time; the first user to answer gets it. Additional setting required.
- **Sequential:** Rings one device in the group at a time in a specified order until the call is answered.
- **Round Robin:** Rings the next user in the group based on which user received the last call. This ensures that all users in the group receive an equal number of calls.
- **Longest Idle:** Rings the user who has been idle (not on a call) the longest, to evenly distribute incoming calls among users in the group.

For a Simultaneous strategy only, configure the following setting:

- **Ring next available line when user is busy:** For the Simultaneous ring strategy only, toggle this setting on or off:
    - **Disabled:** Incoming calls to the group will *not* ring to users who are busy.
    - **Enabled:** Incoming calls will ring to all users, regardless of their status.
        - If the user has a single line with Call Waiting enabled, they will hear the Call Waiting tone for the call on the same line as the existing call.
        - If the user has multiple lines for their number and are busy, the call will ring on an idle line.

User Log In/Out

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

Keep Users Logged In (or Don't)

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

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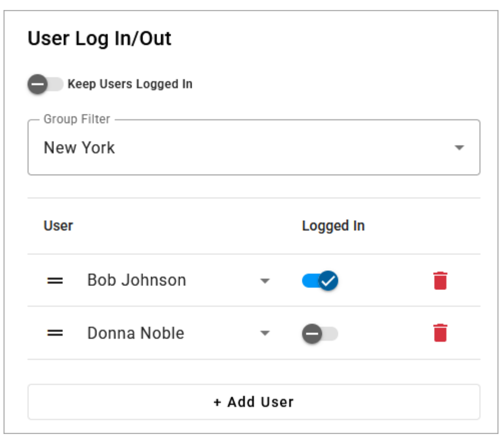
- **Enabled:** Users will remain logged in to the group and will receive calls according to the auto-attendant's schedule. They cannot use the star code to log out.
- **Disabled:** Users assigned to this group can log in and out by dialing the **Group Log In/Out** star code + group number from their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

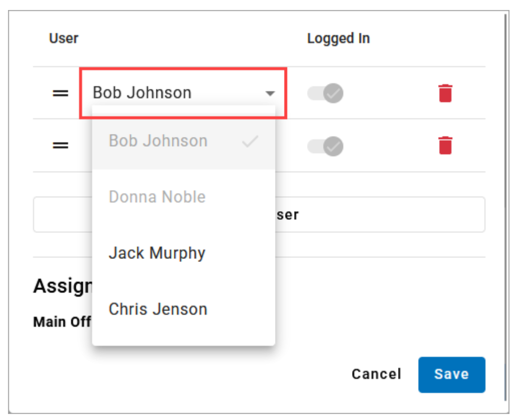
Star Code Required
Ask Customer Support about setting up a **Group Log In/Out** star code, so you can take advantage of this feature.

Add Users

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

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





Route Calls to Hunt Group or Queue

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

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

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

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

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

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

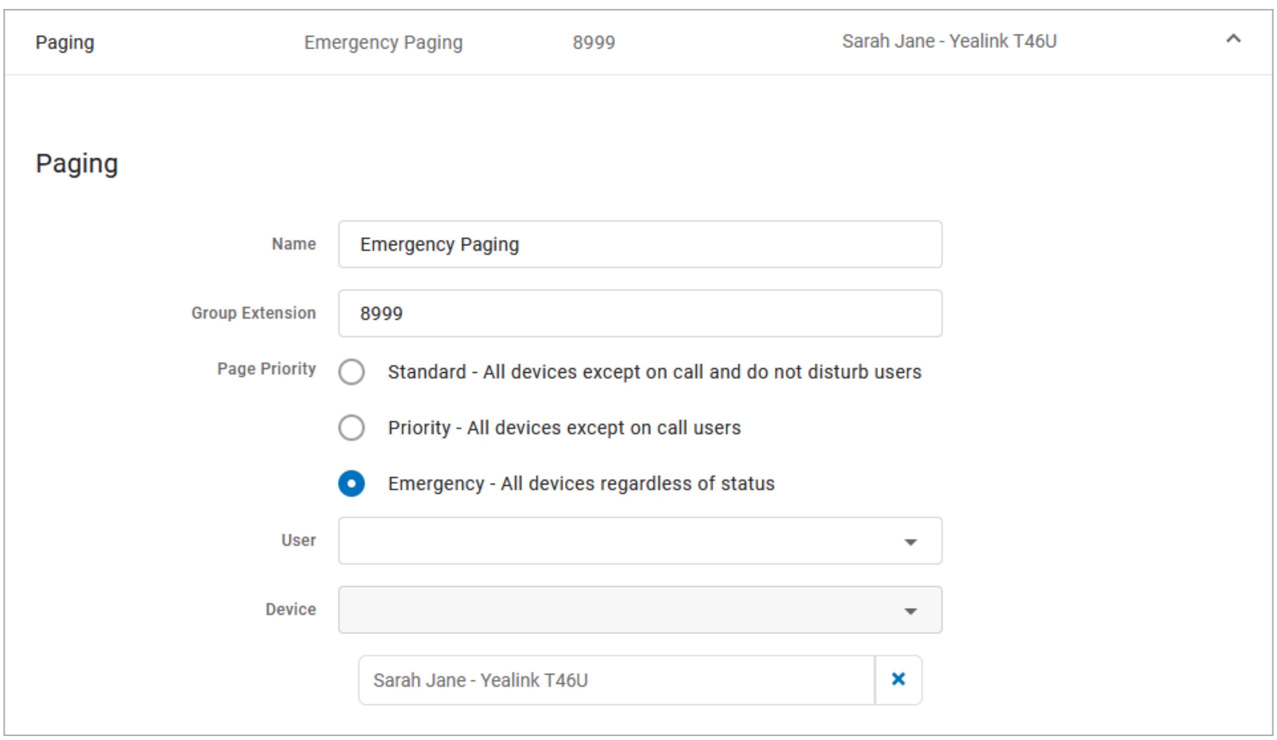
  The group assigned to the route can be hot-swapped at any time, even while the auto-attendant is live and processing calls, allowing you to quickly update the call flow at a moment's notice. For example, if power goes out at the London office and the New York office needs to take over their call load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

Paging Groups

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

Add or Edit Paging Group

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

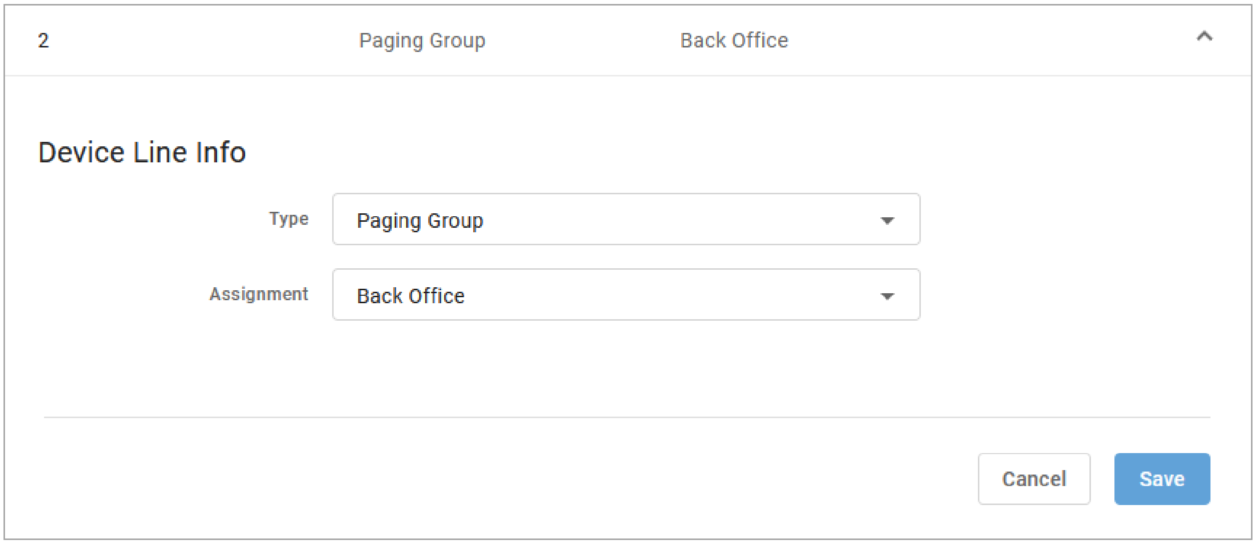


Field	Description
Name	Enter a name for this group. This name will appear on devices that are assigned to this Paging Group.
Group Extension	Enter the extension that will be dialed to page the group.
Page Priority	Assign a priority to ensure proper handling of incoming pages as an attempt to not interrupt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

Assign Paging Group to Device Line

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

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

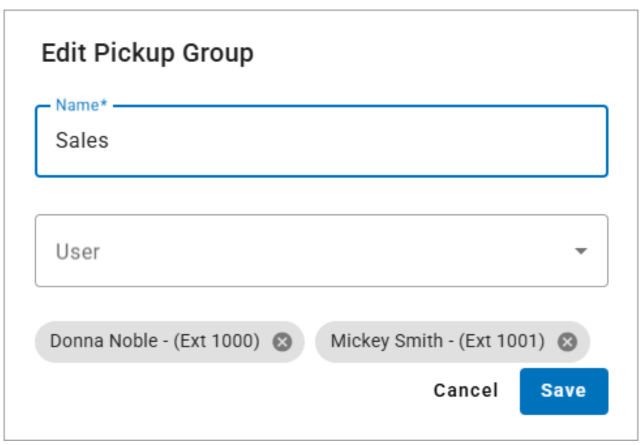


Make an Announcement

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

Pick Up Groups

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



Edit a Pick Up Group

Select a group to edit the name and assigned users.

1. Go to **Business Cloud > Call Groups > Pickup Groups**.

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

Answer a Pick Up Group Call

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

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

Answer with Speed Dial

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

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

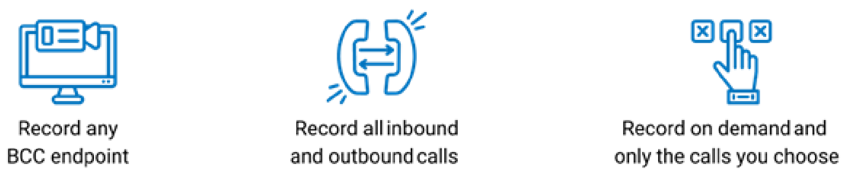
See Feature Key Configuration for details.

Call Recording

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

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

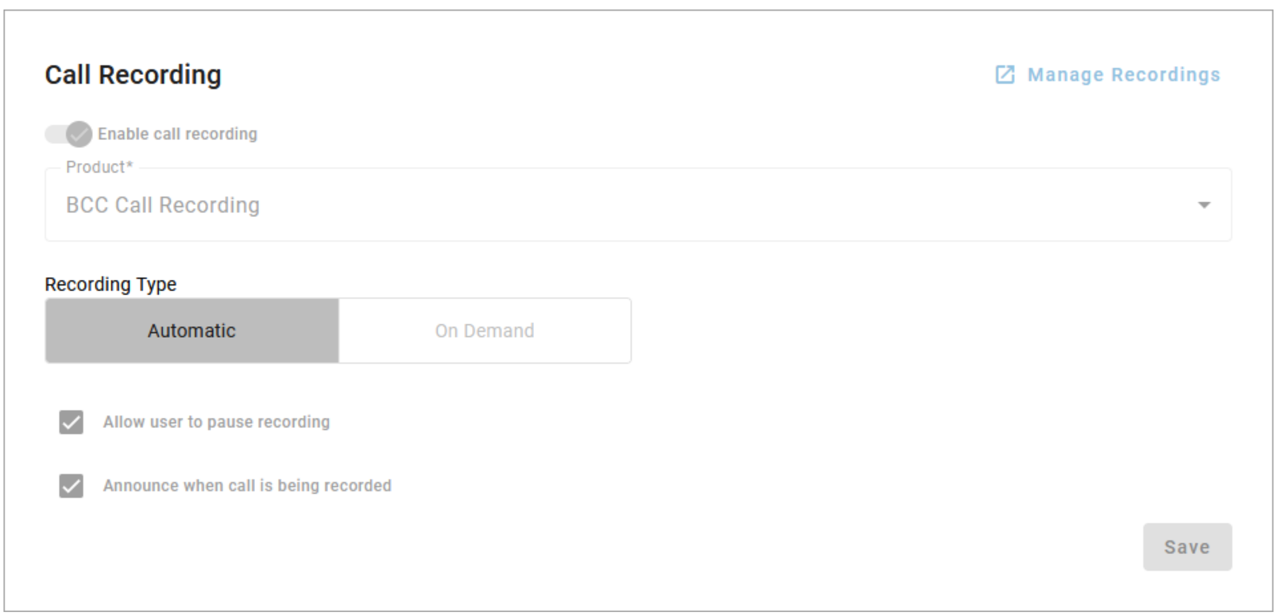
Call Recording is included with Business Cloud Communications Advanced and Professional licenses.



Dubber Partnership

Dubber is the world's leading provider of cloud-based call recording and voice intelligence solutions. Learn more at www.alianza.com/partners/dubber or download the Call Recording Solutions Brief.

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



Product

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

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

Recording Type

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

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

See also: Call Recording Star Codes

Recording Features

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

- **Allow user to pause recording.** When checked, you can pause or resume the recording by dialing a star code. This feature can be used while gathering sensitive information from the caller, like a credit card.
  - This setting is only available for the Automatic recording type; On Demand includes this functionality by default.
- **Announce when call is being recorded.** Announces “Your call is being recorded” to the caller whenever you dial the Start or Resume star codes. If enabled for the Automatic recording type, the message will automatically play at the beginning of each call.
  - The message will play only once, even if the call is transferred or forwarded to another party.
  - While this setting is optional, it is strongly recommended if you might make calls to areas that require two-party consent.

See also: Manage Call Recordings

Enable Call Recording for User

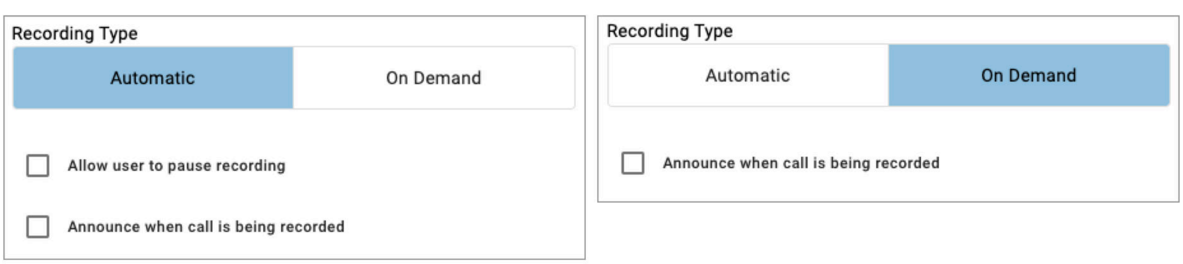
The following information is for Admin users only.

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

1. Log in to the Voice Portal and go to **Business Cloud > Users**.
2. Locate and select the user from the list.
3. Navigate to the **Settings** tab.
4. Under **License & User Type**, confirm the user's license is set to *Advanced* or *Professional*. Users with a Standard license must upgrade if they want to use this feature.

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

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



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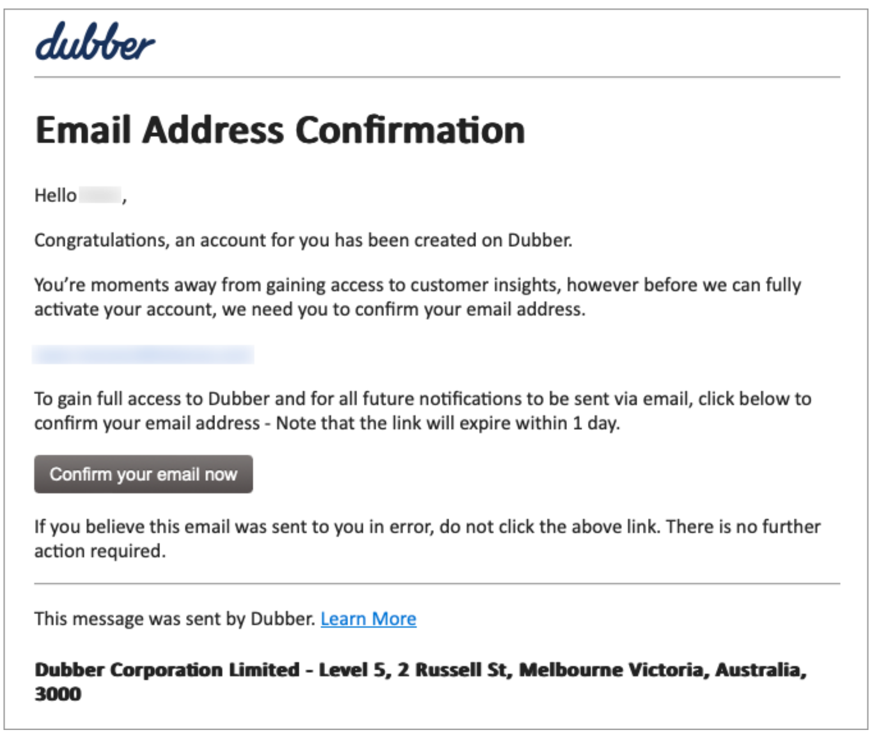
- **Announce when call is being recorded.** The caller hears "This call is being recorded for quality and training purposes" at the beginning of each call for Automatic recording, or when the user dials the Start or Resume star codes Start or Resume star codes for On Demand recording.
    - The message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

9. Click **[Save]**.

   A *Welcome* email is sent to the user with a verification link to confirm their email address. Once confirmed, the user will be prompted to create a password to access their new Dubber account.



dubber

Email Address Confirmation

Hello ,

Congratulations, an account for you has been created on Dubber.

You're moments away from gaining access to customer insights, however before we can fully activate your account, we need you to confirm your email address.

To gain full access to Dubber and for all future notifications to be sent via email, click below to confirm your email address - Note that the link will expire within 1 day.

Confirm your email now

If you believe this email was sent to you in error, do not click the above link. There is no further action required.

This message was sent by Dubber. Learn More

Dubber Corporation Limited - Level 5, 2 Russell St, Melbourne Victoria, Australia, 3000

Disable Call Recording for User

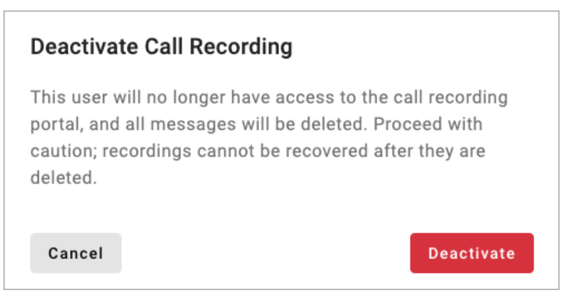
The following information is for Admin users only.

Admin users can disable a user's call recording capabilities, if needed. This can be completed by navigating to the user's Settings tab and toggling off Call Recording.

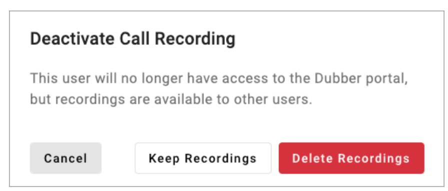
1. Log in to the Voice Portal and go to **Business Cloud > Users**.
2. Locate and select the user from the list.
3. Navigate to the **Settings** tab, then scroll down to **Call Recording**.
4. Toggle off *Enable call recording*. The feature will be grayed out.

5. Click **[Save]**.
6. In the **Deactivate Call Recording** modal, choose whether to keep or delete the user's recordings. The options here may vary depending on which product is being disabled.
   - **Keep Recordings (Dubber products).** Select this option to delete the user from Dubber but keep their recordings in the Dubber Portal. The user's recordings can only be accessed by a Dubber Administrator.
   - **Deactivate/Delete Recordings.** Depending on your product, select **[Deactivate]** or **[Delete Recordings]** to delete the user and all their recordings from the Dubber Portal. Proceed with caution; recordings cannot be recovered after they are deleted.

BCC Call Recording



Dubber Products



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

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

See also: Enable Call Recording

User Types & Video Tutorials

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

Standard Users

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

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

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

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

Dubber Administrators

Not available in BCC Call Recording.

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

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

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

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

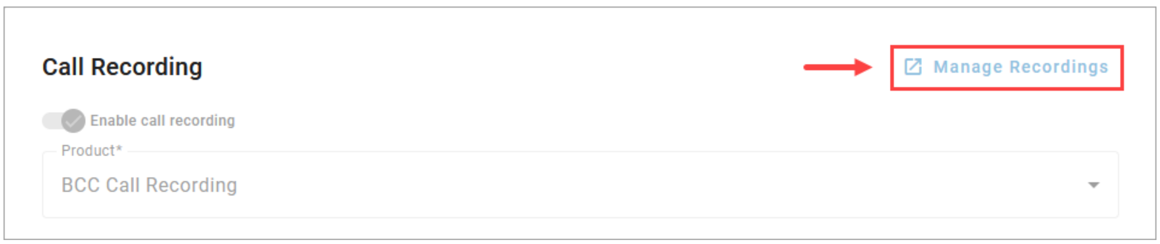
See also: Manage Call Recordings and Dubber Administrators

Manage Recordings

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

Access the Dubber Portal

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



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

Manage Recordings

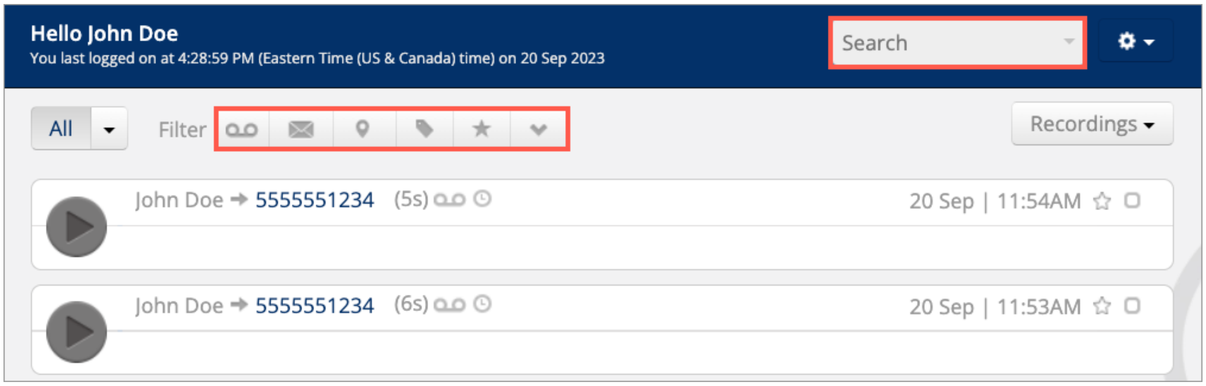
The **Call Recording** page in the Dubber Portal displays all your available recordings and several management tools allowing you to listen to your recordings, add tags, favorite them, share them via email, or even download a copy of the .mp3 file.

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

Search

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

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



Listen

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

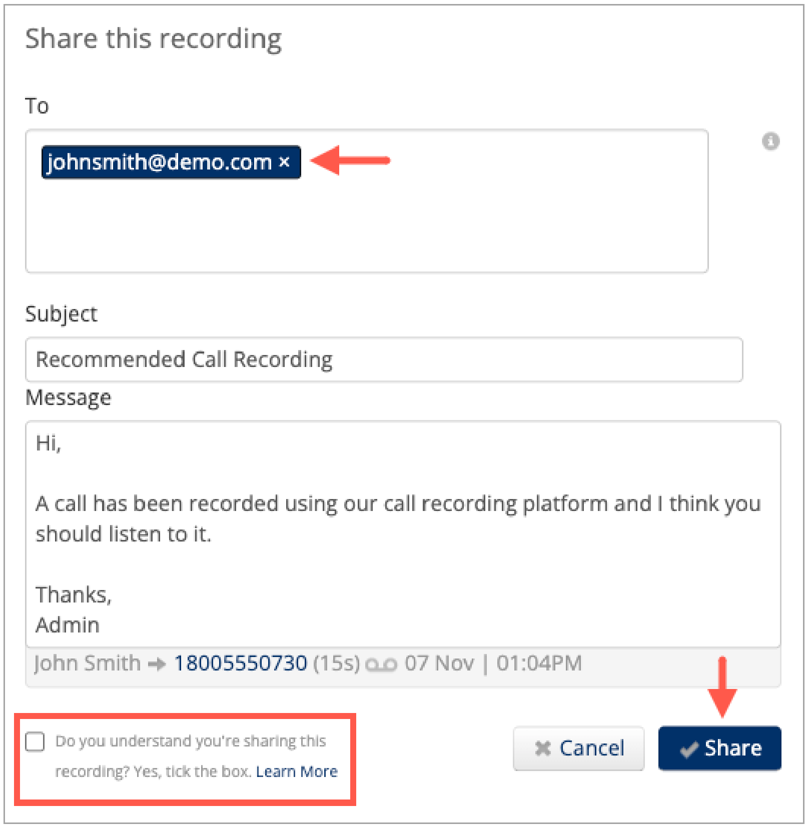
You can also adjust the playback speed by clicking 1.0x **Set playback speed** and selecting an option from the menu. Options include 0.5x, 1.0x (default), 1.5x, and 2.0x speed.

Share

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

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

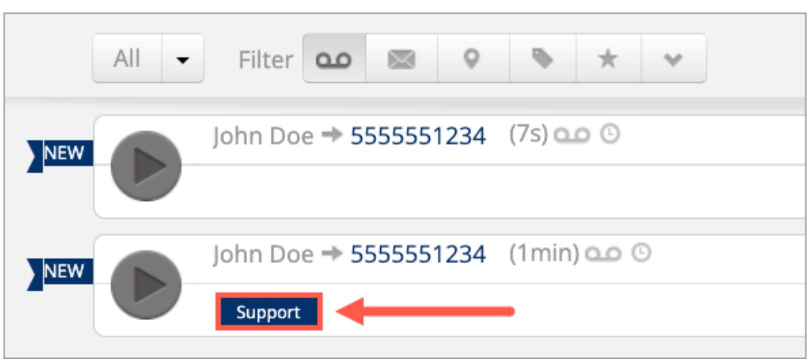
2. In the **Share this recording** modal, enter the recipient's email address.
3. Optionally, edit the Subject and Message fields. By default, these fields are pre-populated with generic text.
4. Check *Do you understand you're sharing this recording?* to accept the terms and conditions.



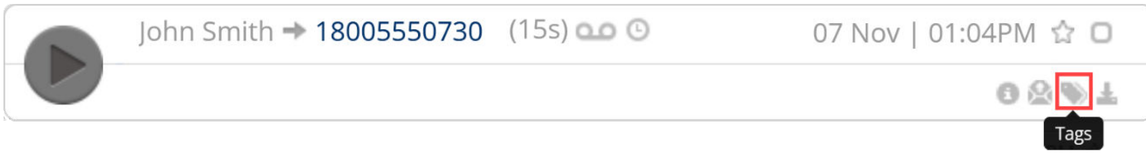
5. Click **[Share]**. The recipient will receive an email containing a link to the audio file. The recording will be available for 24 hours or 50 plays, whichever comes first.

Tag

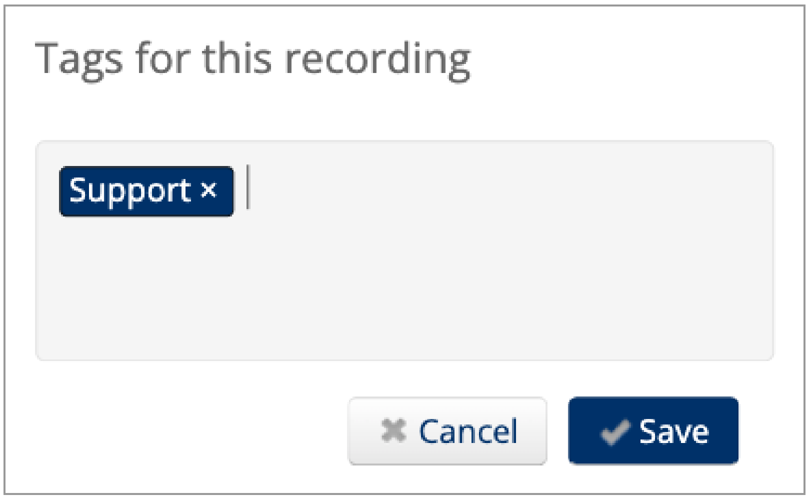
Tags add an extra layer of discoverability by attaching a searchable label to the recording file. Use tags to categorize recordings by department, team, or call type for example. After a tag has been added, it will display at the bottom of the recording.



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



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

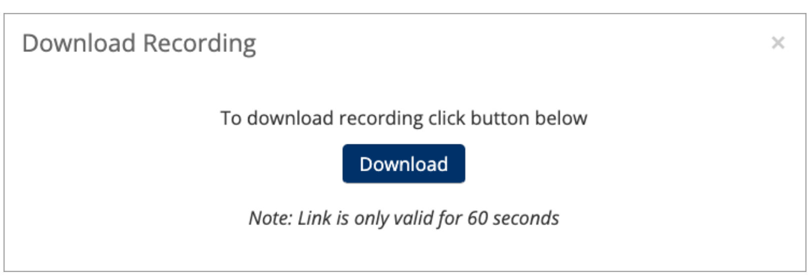


3. Click **[Save]**.

Download

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

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

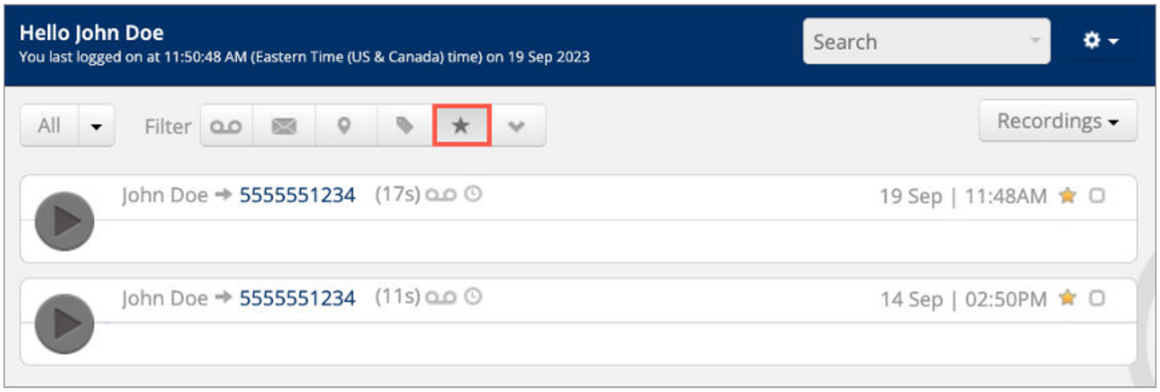


Favorite

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

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

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



For more information, refer to Call Recording Page in the Dubber Support Center.

See also: Disable Call Recording

Dubber Administrators

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

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

Proceed with Caution

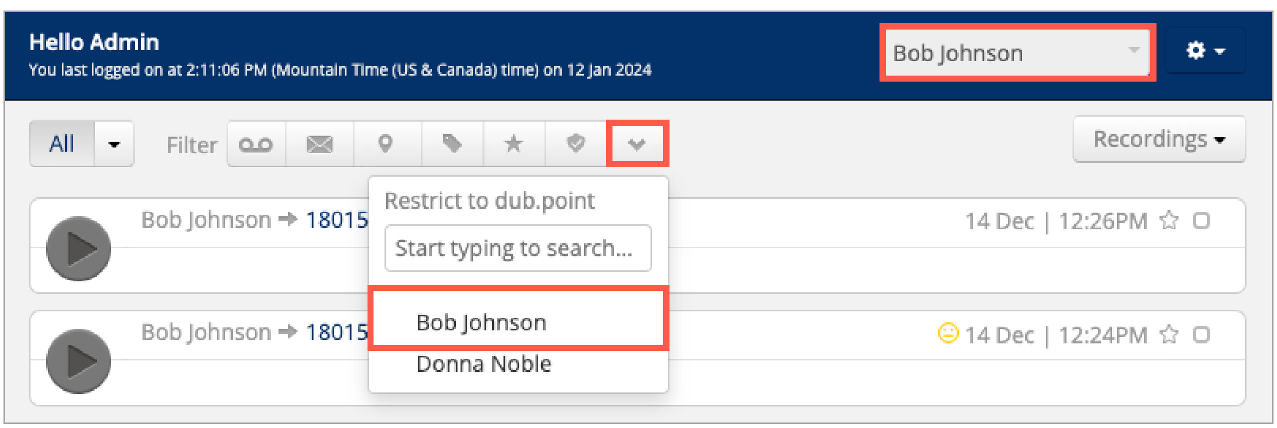
This integration is designed to sync your voice services to Dubber, but not the other way around. We do not recommend performing any action in Dubber outside of what is described below. Your changes will not sync.

Search for Recordings

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

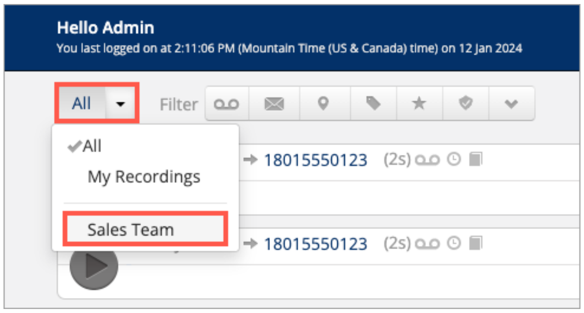
Search by User

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



Search by Team

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



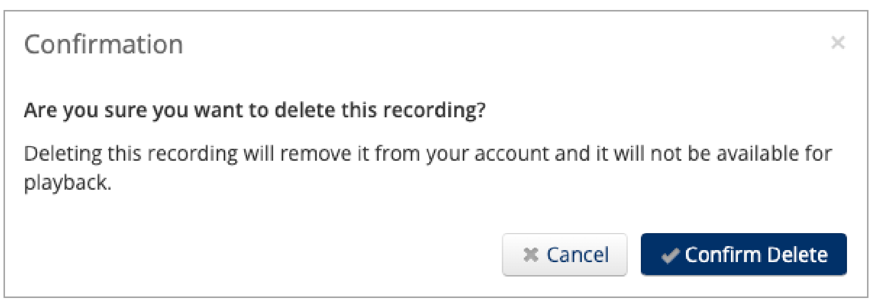
For more information, refer to Search Your Recordings in the Dubber Support Center.

Delete Recording

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

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

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



User Management

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

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

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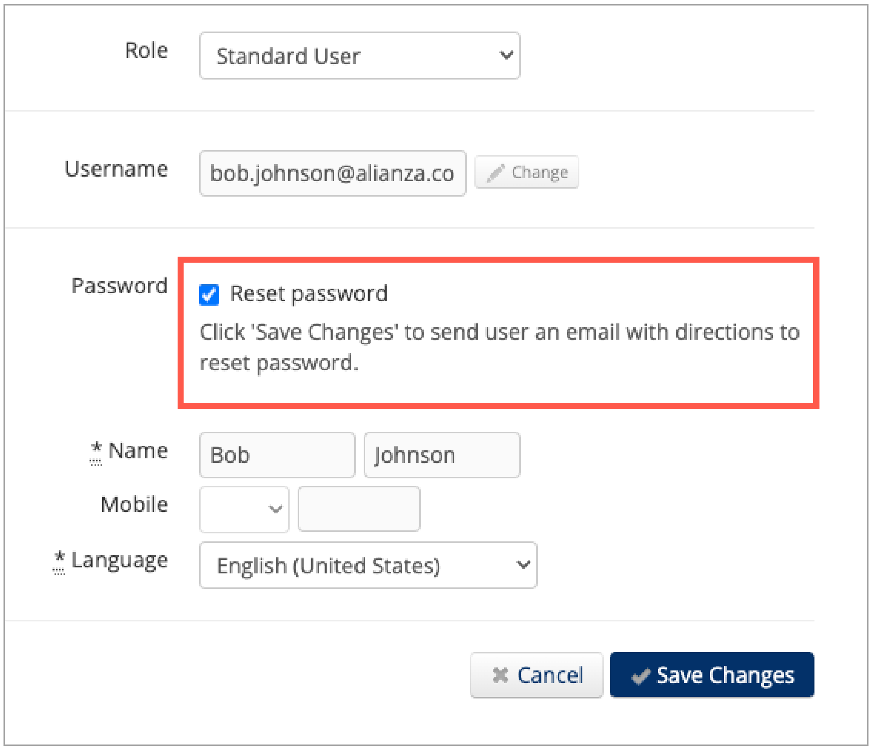
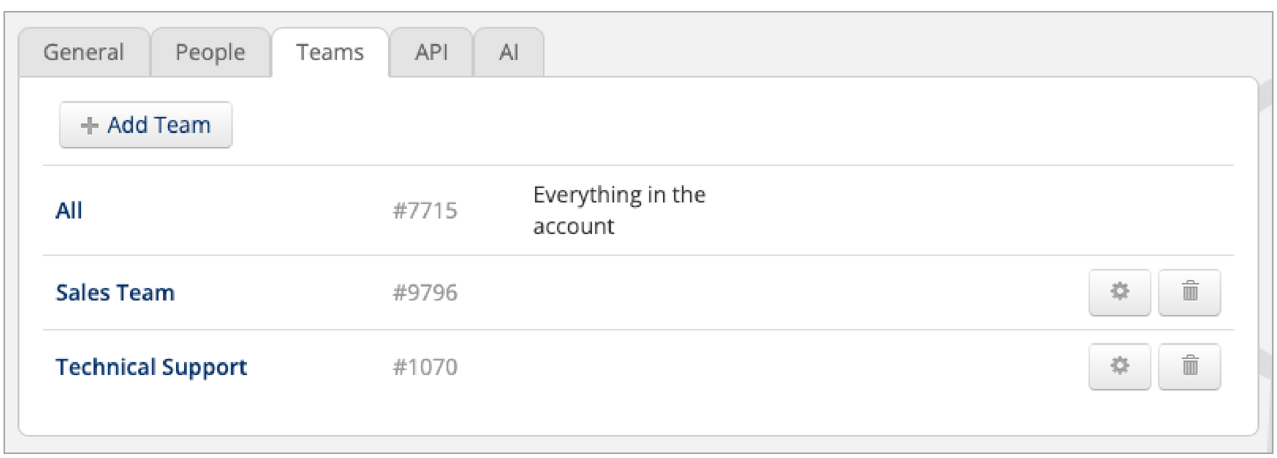


For more information, refer to Reset User Password in the Dubber Support Center.

Manage Teams

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

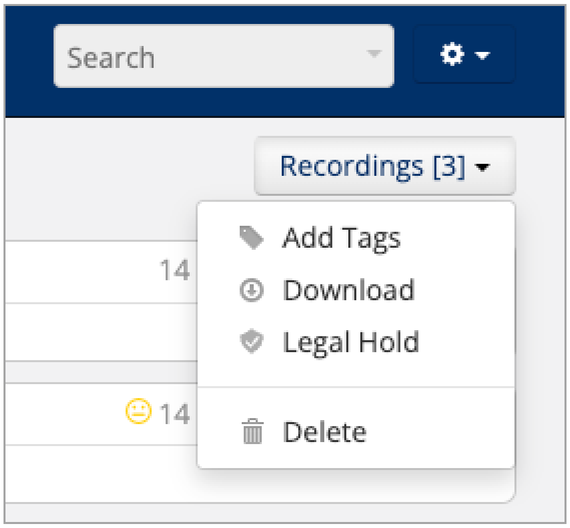


For more information, refer to Teams in the Dubber Support Center.

Bulk Actions

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

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



For more information, refer to Multi Download and Multi Delete in the Dubber Support Center.

Dubber Insights

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

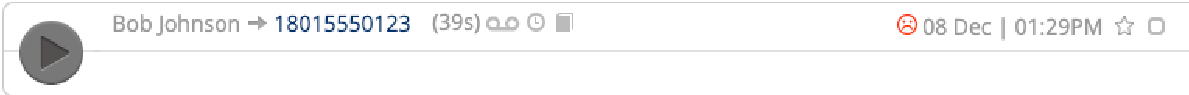
Dubber Insights — the latest and greatest call recording product from Dubber — includes call transcription capabilities and sentiment analysis — a powerful AI tool that rates the overall tone of the call as either Positive, Negative, or Neutral.

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

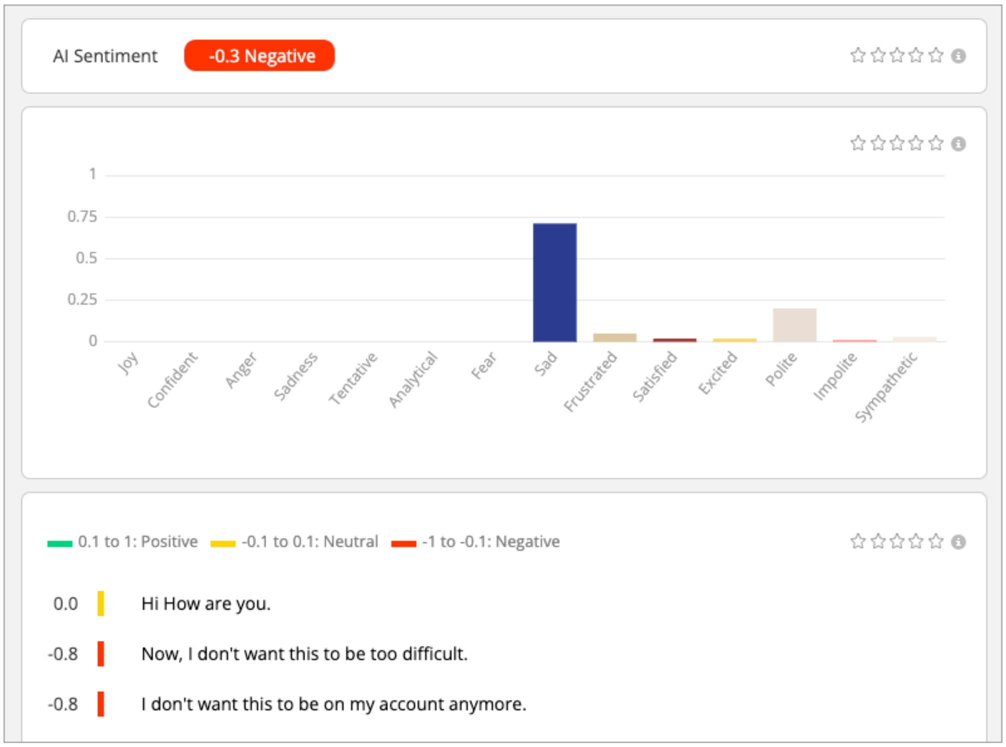
Call Transcription and Sentiment Analysis

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

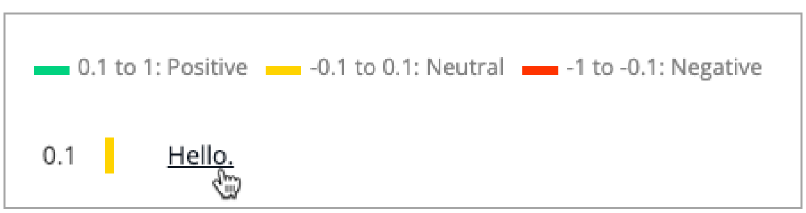
1. Log in to the Dubber Portal.
2. On the Call Recording page, locate the recording from the list and click the **Book** or **Sentiment** icon.



3. On the following page, recording data is organized into the following sections:
    - **AI Sentiment.** Displays an overall score or rating for the recording.
    - **Tone.** Displays tones that were detected on the call in the form of a graph.
    - **Call Transcription.** Displays the full text conversion of the audio recording.



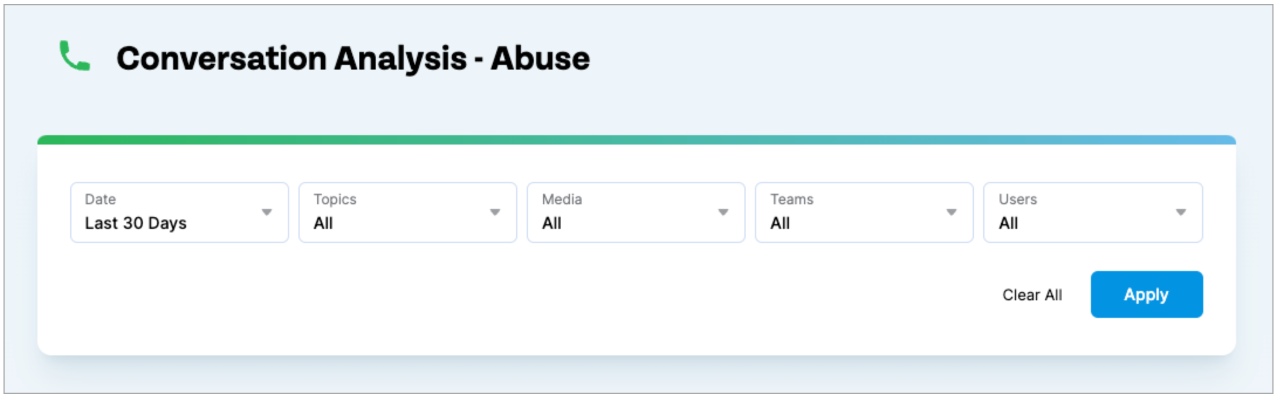
4. To search for a word or phrase within the recording, press CTRL + F on your keyboard, then enter the term you are searching for. Once located, click the text within the transcription to navigate to that point in the call.



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

Insights Dashboard

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



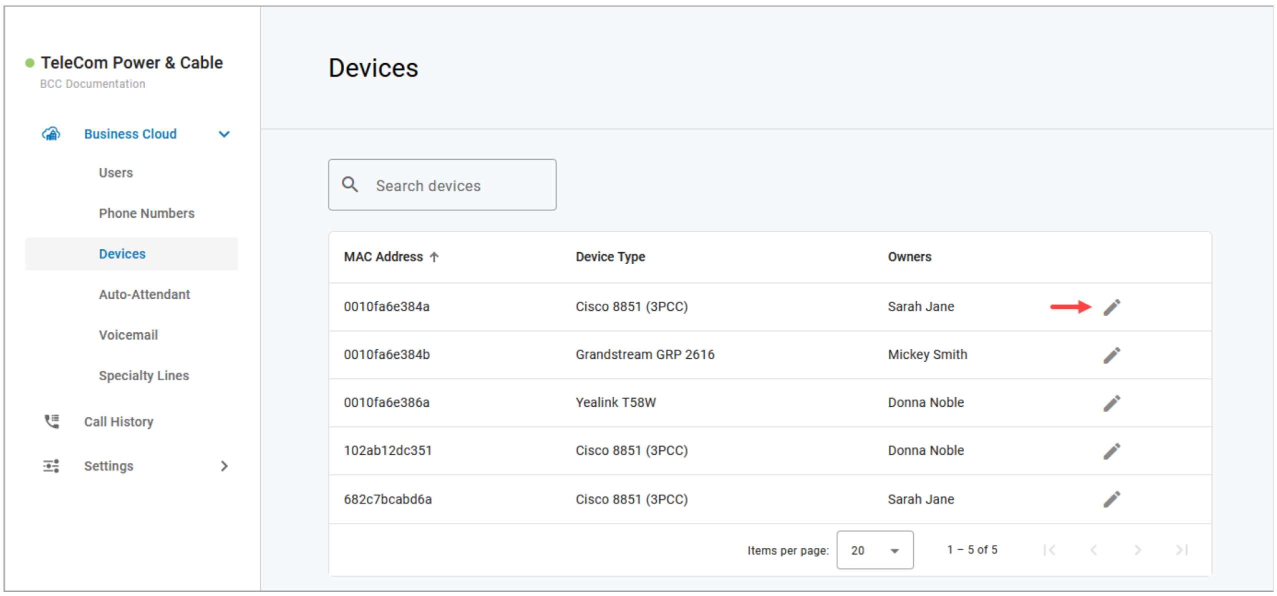
For more information, refer to Viewing and Navigating Dubber Insights in the Dubber Support Center.

Devices

The devices on your system—like all of your phones—are a key component to communicating in your organization. The more people you have, the more devices you'll need. However, all of this can be easily managed, from resetting encryption keys, to swapping devices, to configuring a device's line settings.

To view and manage all devices on an account, go to **Account > Devices**.

Here you can see all the devices on the account without having to go to the specific user. To locate a particular device, you can search for the owner's name, or MAC address. The list can also be sorted by MAC address or device type.



Field	Description
Search devices	Search for a device here to filter the list displayed below.
MAC Address	Sort the table via the available devices' unique identifiers on our network.
Device Type	The device's make and model.
Owners	User(s) to which the device is assigned.
Edit	Hover over a device and click **Edit** to manage the device's info, reset the encryption key, change line assignment information, etc.

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

Edit a Device

To view and manage device settings:

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

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

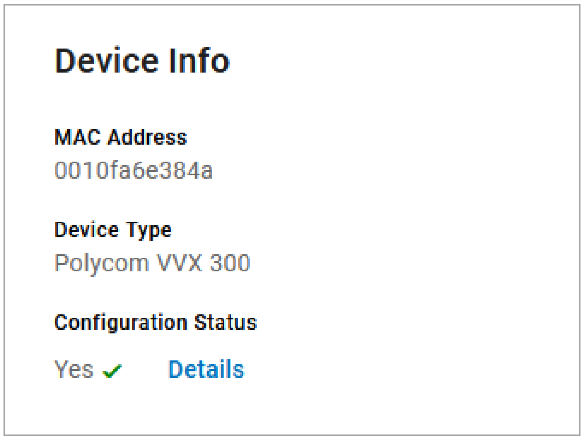
Other Features

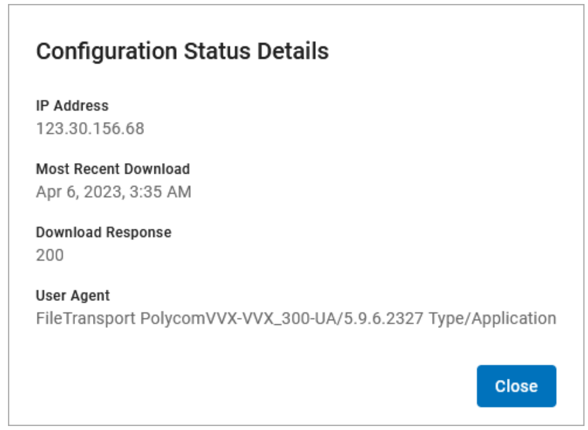
The additional features and settings displayed for each device depends on the device type, status, and other factors. For more information, see:

- Line Key Features
- Bulk Line Configuration
- Sidecar Management
- Swap Devices

Device Info

Device information—including the MAC address, device type (make and model), and configuration status—can be managed from the main Devices page or in the user's Devices tab. Locate and select the device you want to edit to view the details.





Feature	Description
MAC Address	A unique identifier for the device on your system.
Device Type	The make and model of the device in use.
Configuration Status	Indicates if the device is configured and registered on the voice server. • **Yes.** The device is online and available for use. Click **[Details]** for more information. • **No.** The device is not online. Make sure it is turned on and the MAC address is correct. If necessary, please contact Customer Support to update it.

Other Features

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

- Line Key Features
- Bulk Line Configuration
- Sidecar Management
- Swap Devices

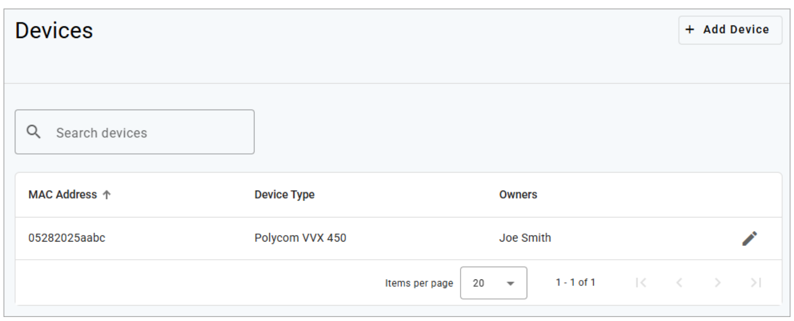
Line Configuration

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

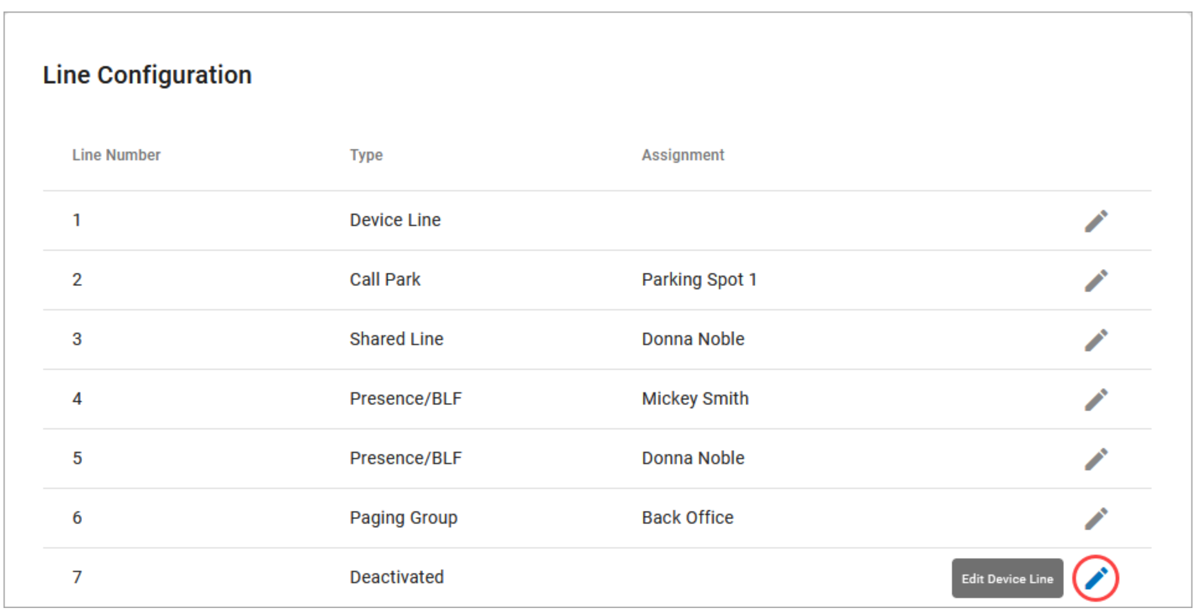
For device changes outside of the IP phone line features, please contact Customer Support.

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

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



3. Under **Line Configuration**, select the line you want to assign a feature to.



4. Open the menu and select one of the following features:

- Advanced Shared Line
- Call Park
- Custom[i]
- Deactivated
- Device Line
- Intercom
- Paging Group
- Presence/BLF
- Shared Line
- Speed Dial

5. Click **[Save]** to apply your changes.

See also: Bulk Line Configuration

Advanced Shared Line

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

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

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

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

[i]Only shown if a custom configuration has been set for this line via Phonism, a third-party device configuration service. Contact your service provider for details.

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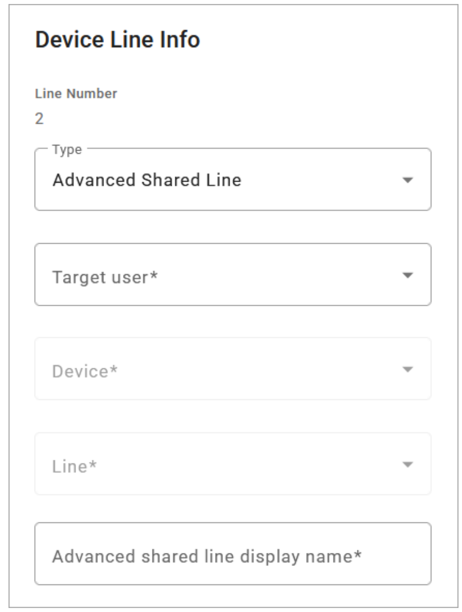
- **Type:** Advanced Shared Line
- **Target user:** Select the user whose line will be referenced on this device.
- **Device:** Select a device assigned to the target user. Users can have multiple devices, so be sure to select an active device with the line you intend to share.
- **Line:** Select an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



Shared Line vs Advanced Shared Line

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

Key System Emulation

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

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

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

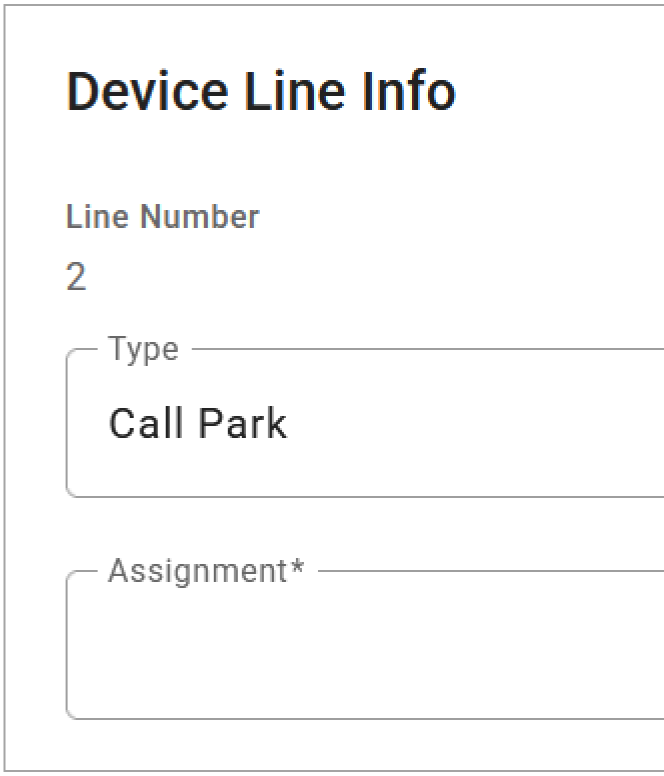
	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
Line 1	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
Line 2	Phone 2 — Rose	Phone 3 — Donna	Phone 1 — Sarah
Line 3	Phone 3 — Donna	Phone 1 — Sarah	Phone 2 — Rose
Line 4	Parking Spot (Target)	Parking Spot (ASL)	Parking Spot (ASL)

Call Park

Parking spots can be assigned to a line on the device. This allows a user to take an active call and put the caller in a designated parking spot at the press of a button. The call can then be picked up on any phone that has the parking spot set up in its line configuration by picking up the phone and pressing the line key assigned to the Call Park feature.

To add parking spots to the account, please contact Customer Support.

- **Type:** Call Park
- **Assignment:** Choose a parking spot.



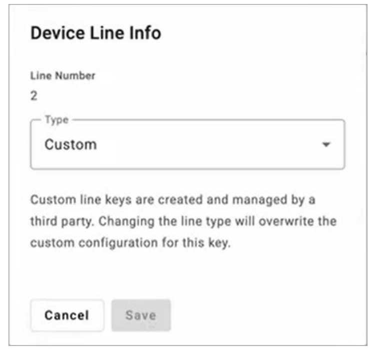
Note
Yealink devices use Blind Transfer as the default mode for Call Park.

See also: Call Park Settings and Call Park Star Codes

Custom Configuration with Phonism

When a custom configuration for a line is set in Phonism, the custom line type is automatically set and displayed.

Changing the line type to another feature will override the custom configuration.



Deactivated

If you have assigned a device's line type to "Deactivated," this line will be deactivated and not be of any use until otherwise assigned.

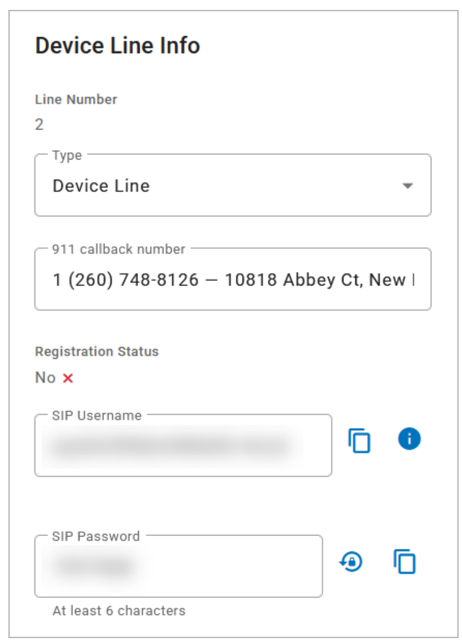
- **Type:** Deactivated

Device Line

A Device Line functions as an additional line assigned to the owner of the device. It is a traditional line, able to place calls with the user's outbound caller ID as well as receive or pick up calls sent to the user.

- **Line Number:** The line this feature is assigned to.

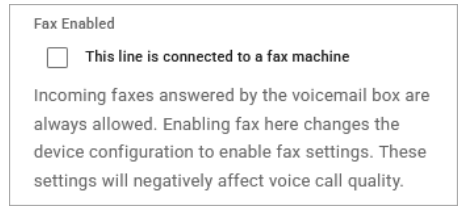
  Line 1 is always set to Device Line; it cannot be changed. This is the primary line belonging to the device's owner.
- **Type:** Device Line
- **911 callback number:** The phone number sent with 911 calls.
- **Registration Status:** Whether or not the device is registered with the voice server.



Faxing on ATAs or EMTA

On an ATA or EMTA, below the Registration status, check the **Fax Enabled** box to indicate the line is connected to a fax machine.

Fax should only be enabled if this line is primarily for receiving faxes as these settings will *negatively* affect voice quality.



Multi-Line Call Handling

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

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

Intercom

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

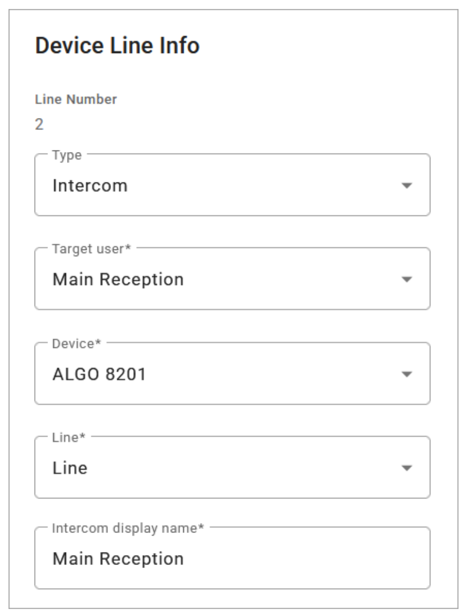
There are two types of intercom feature keys:

- **Intercom** dials one user and one device. Use this feature key to reach a specific user or location every time.
- **Dial Intercom** asks for the user's extension to place the call. Use this feature key to reach any user on the account as long as you know their extension.

Intercom Feature Key

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

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



Use the Intercom Feature Key

1. Press the line key assigned to dial the target user's device.
2. The target user's device beeps twice before automatically answering the call on speakerphone.
   - If the target user is on an active call, the call follows their Call Waiting settings.

- If the target user has Do Not Disturb enabled, the caller is routed to voicemail or hears a busy tone.

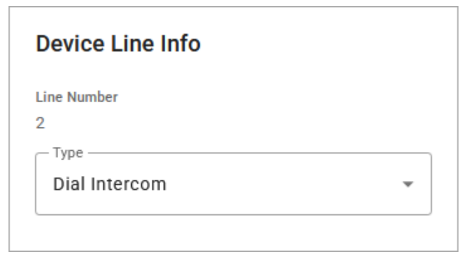
3. When the call is finished, either party can end the call.

Dial Intercom Feature Key

The Dial Intercom feature key is used to place an intercom call to a user's extension. The user's device will beep twice before automatically answering on speakerphone. If the user has multiple devices, the first to accept the auto-answer call will take it.

This feature can also be accessed via star code.

- **Type:** Dial Intercom



Use the Dial Intercom Feature Key

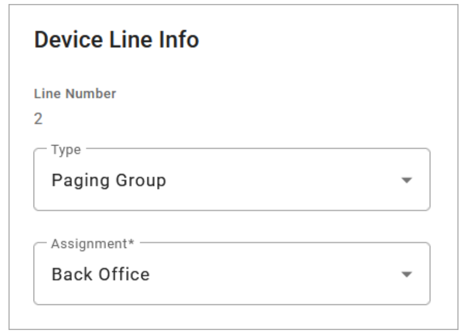
1. Press the line key assigned to place an intercom call.
2. You will hear, "Please enter the user's extension followed by the pound sign."
3. Enter the target user's extension followed by #.
4. The target user's device beeps twice before automatically answering the call on speakerphone.
    - If the target user is on an active call, the call follows their Call Waiting settings.
    - If the target user has Do Not Disturb enabled, the caller is routed to voicemail or hears a busy tone.
5. When the call is finished, either party can end the call.

Unsupported Devices
Not all devices support auto-answer. If the target user's device does not support auto-answer, the device will ring like a normal call.

Paging Group

Paging Groups are used to make one-way announcements to one or more devices. See Paging Groups for details.

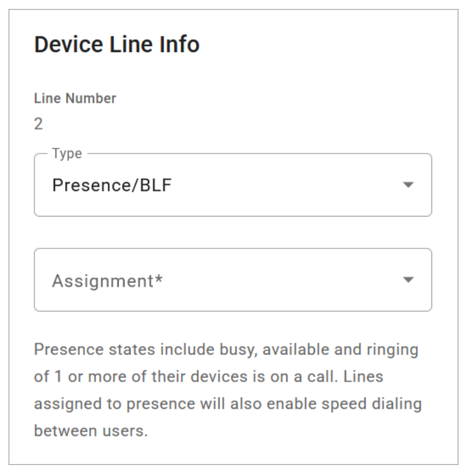
- **Type:** Paging Group
- **Assignment:** Select a group from the list.



Presence/BLF

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

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

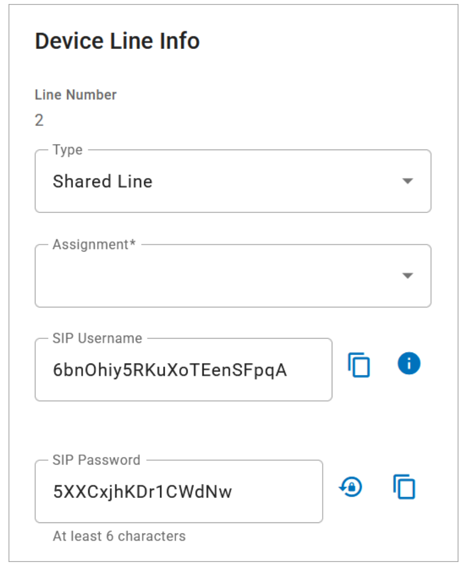


Shared Line

A shared line allows this user to receive and place calls as another user from their own phone. Inbound calls ring on both devices and either user can answer it on their IP phone. Outbound calls from the shared line sends the shared user's caller ID. Dialing a star code (for forwarding calls, accessing voicemail, etc.) while on the shared line also affects the assigned user.

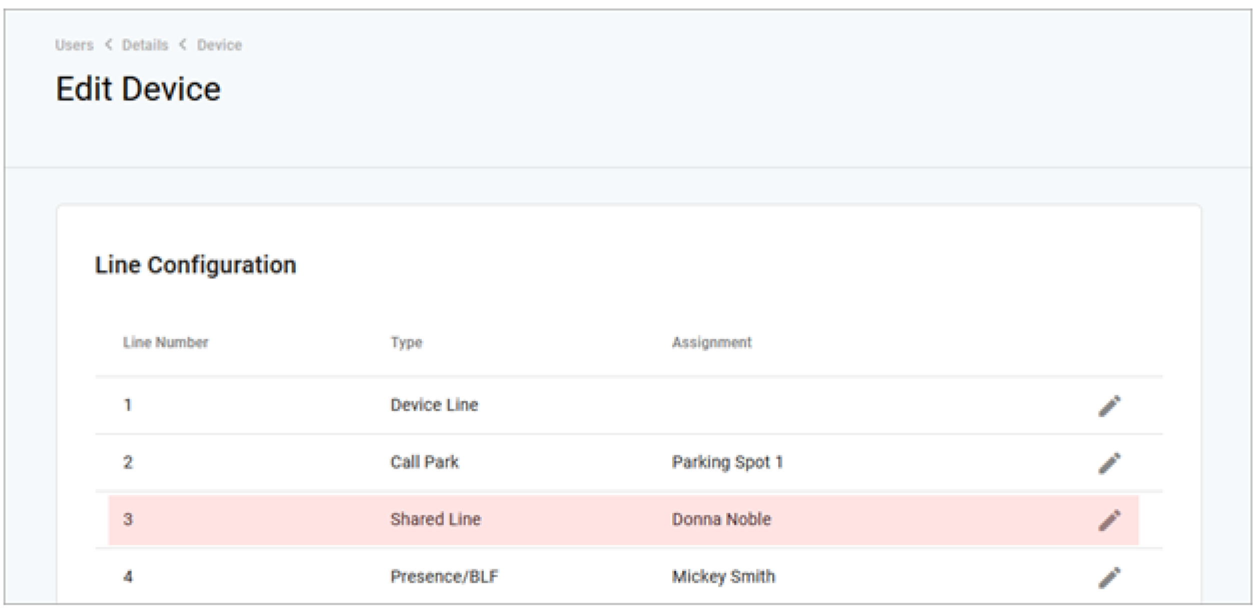
For users that have been assigned a shared line on another device, that device will be listed in the user's Devices tab under Referenced Devices.

- **Type:** Shared Line
- **Assignment:** Select a user

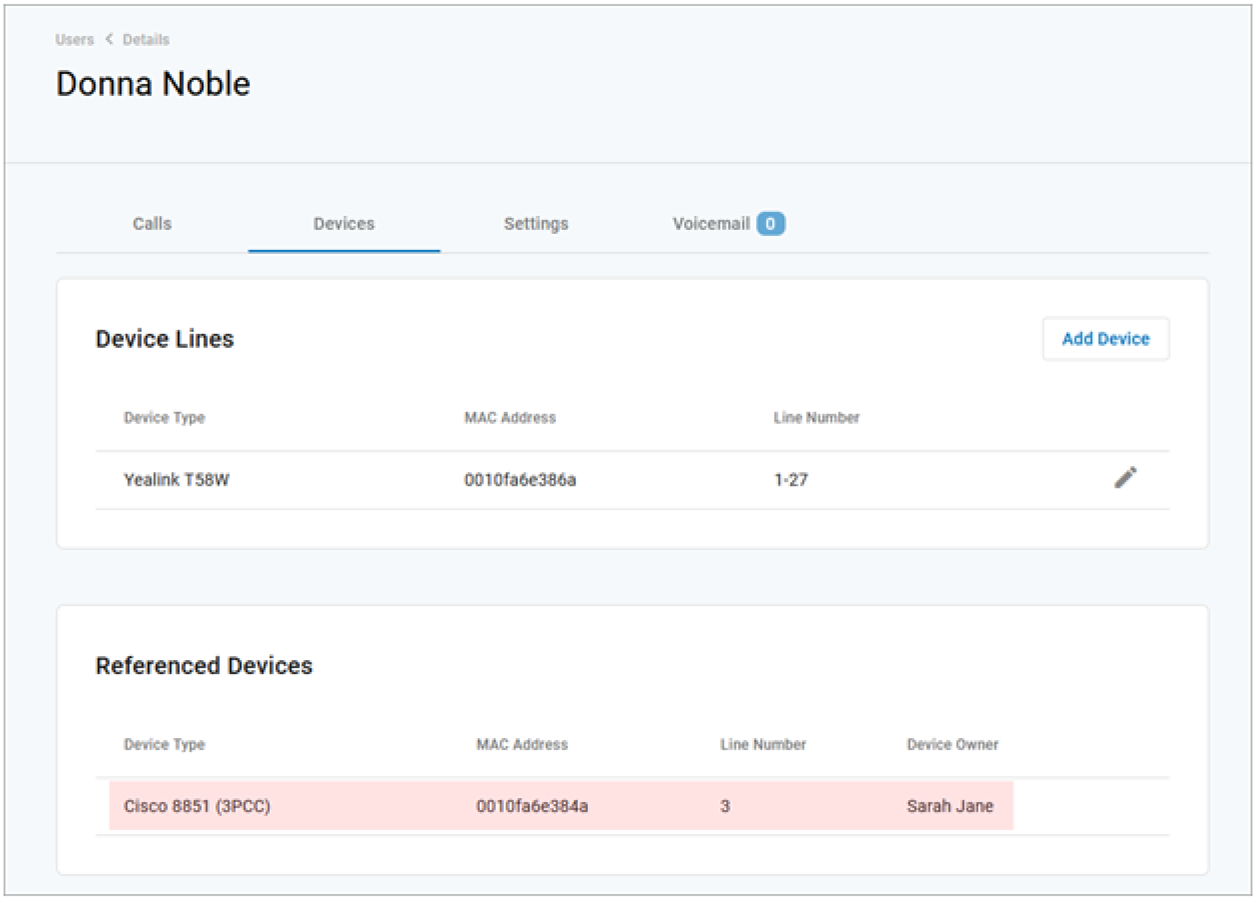


Example of a Shared Line

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



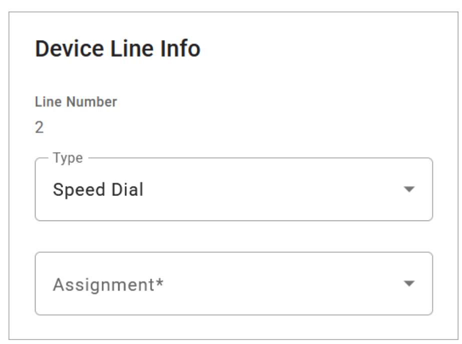
In the second image, we see in Clara's Devices tab that the Cisco 8851 belonging to Sarah Jane is shown in the Referenced Devices section.



Speed Dial

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

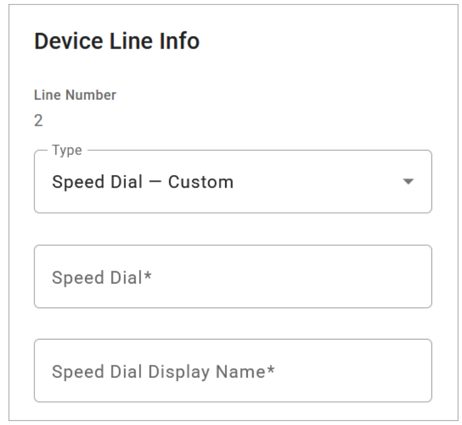
- **Type:** Speed Dial
- **Assignment:** Choose a user from the list



Custom Speed Dial

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

- **Type:** Speed Dial
- **Assignment:** Custom Speed Dial
- **Speed Dial:** Enter a star code or a phone number or star code + phone number (*0018005551234). Up to 30 digits max.
- **Speed Dial Display Name:** Enter a name for the group that will be displayed on your phone for the line.



Bulk Line Configuration

Using Bulk Line Configuration, you can import (upload) a CSV file to quickly set up the lines on an IP phone, or export (download) the current line configuration.

To configure multiple IP phones in basically the same way, upload a single CSV file with the standard configuration to each device. When necessary, you can make minor changes to the CSV file to give a user a unique setup. It's an easy way to configure multiple IP phones quickly and easily.

To configure lines in bulk:

1. Go to either:
    - **Account > Users > Devices tab**
    - **Account > Devices**
2. Locate the device you want to manage and click **Edit** on the right.
3. Under **Device Line Info**, expand **Bulk Line Configuration**.

- **Export:** Download a CSV file of the current configuration.
- **Import:** Upload a CSV file with a new configuration. The file must follow the format below.

Import File Format

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

Header Row Values	Field Values
LINE_NUMBER	The numeric line number on the device. The import does not accept line numbers that don't exist on the device.
LINE_TYPE	Enter one of the following values to assign a feature to that line: • *Line*. Device line assigned to the owner of the IP phone. Line 1 must be set to *Line*; it cannot be set to another type. • *ReferencedUser*. Shared line with another user on the account. • *PresenceBlfUser*. Assignment of the device line to monitor the state of another user on the same account. • *SpeedDialUser*. Assignment of the device line to another user on the account as a speed dial. • *SpeedDialTn*. Assignment of the device line to an external number or star code. • *CallParkingSpot*. Assignment of the device line to a parking spot. • *SipPaging*. Assignment of the device line to a paging group. • *Blank*. Device Line is *Deactivated*.
REFERENCE	The 3- to 6-digit extension of other users on the account (*SpeedDialUser*), or a speed dial phone number (*SpeedDialTN*).
REFERENCE_NAME	The user or object that owns the *Reference*. This field is listed on an export but is not required for an import.

Example Import File

LINE_NUMBER	LINE_TYPE	REFERENCE	REFERENCE_NAME
1	Line		

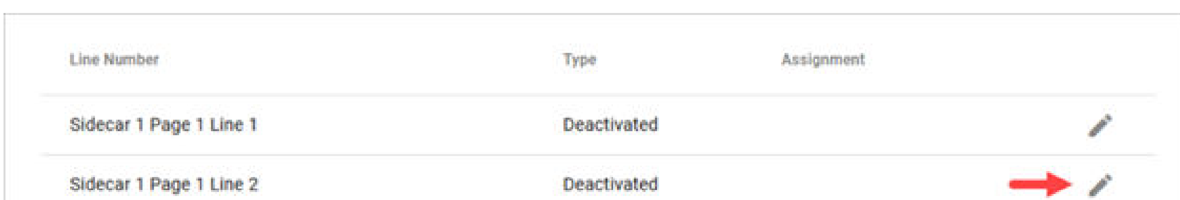
LINE_NUMBER	LINE_TYPE	REFERENCE	REFERENCE_NAME
2	ReferencedUser	4000	Gary Summers
3	SpeedDialUser	4000	Gary Summers
4	PresenceBlfUser	8888	Doug Manager
5	SpeedDialTn	18014403529	Higgins Mobile
6	CallParkingSpot	103	Parking Spot 4

Sidecar Management

Sidecars, also called expansion modules, can be provisioned on an IP phone for additional line keys and functionality.

1. Edit an IP phone device and scroll down past **Line Configuration** to the **Sidecar** section.

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



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

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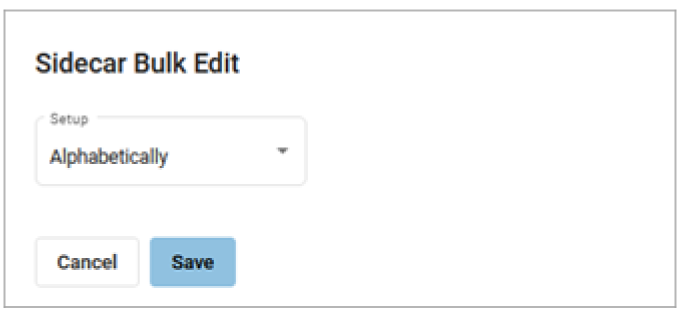
Bulk Sidecar Bulk Edit

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

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

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

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



Alphabetically

Users are assigned to lines in alphabetical order.

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

By Extension

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

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

Custom

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

Sidecar Bulk Edit

Setup: Custom

Select	Username
☑	John Miller
☑	Zack Davis
☑	Jack Murphy
☐	Ron Williams
☐	Donna Noble
☐	Bob Johnson
☐	Chris Jenson
☐	Timothy Lee
☐	Mickey Smith

Cancel Save

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

Swap Devices

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

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

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

4. Enter the information for the new device in the fields provided.
   - **Device Type.** Select the new device type. If the device you're trying to use isn't listed here, please contact Support.
   - **MAC Address.** Enter the device's MAC address.
   - **Device Name.** Optionally, enter a name for the device.
5. Double-check the list of Affected Device Lines to make sure you won't break anything. Once the switch is complete, you may need to set up these lines again.
6. Click **[Save]** to complete the switch.

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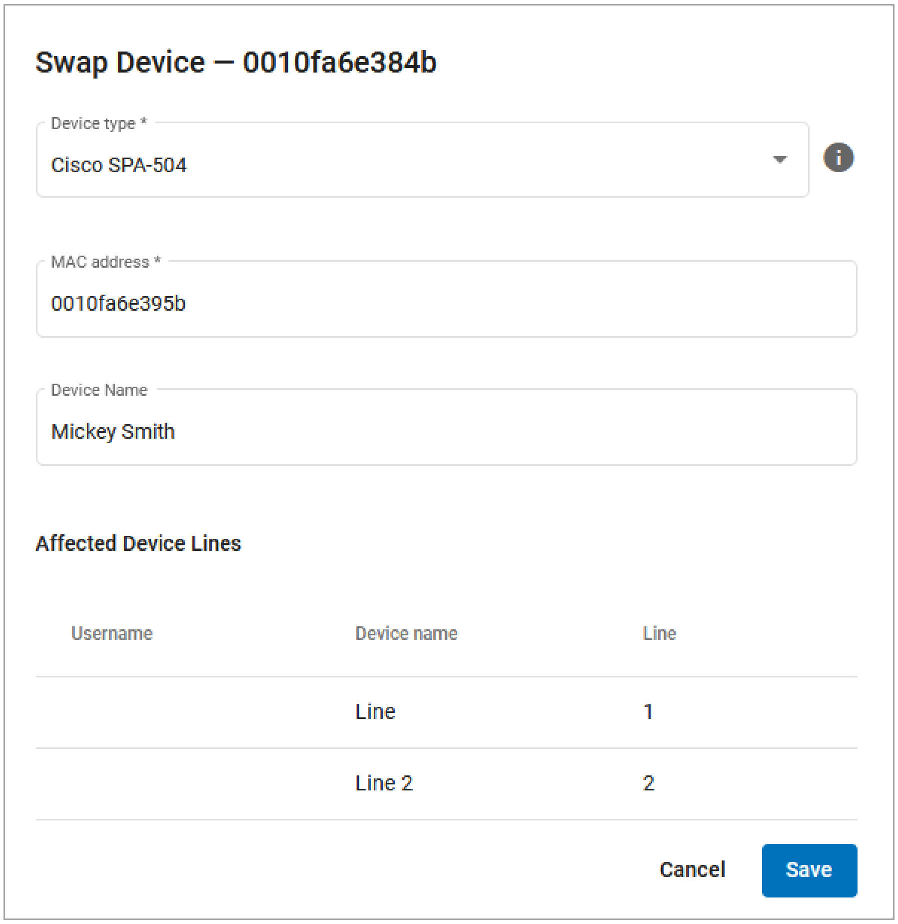

Swap Device — 0010fa6e384b
Device type *
Cisco SPA-504
MAC address *
0010fa6e395b
Device Name
Mickey Smith
Affected Device Lines
Username
Device name
Line
Line
1
Line 2
2
Cancel
Save

Media Files

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

Rather than uploading a new prompt or message for Music On Hold for each auto-attendant route, you will select an existing audio file from the library. New audio files can be uploaded to the account or recorded directly from a browser, making it easier than ever to provide customized experiences for callers.

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

Add Media Files

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

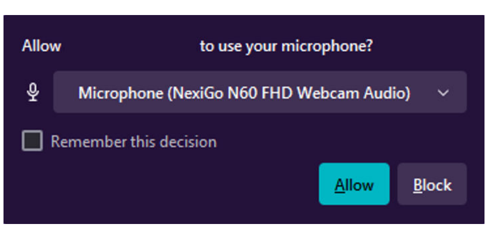
1. Record new prompts and messages in a browser.
2. Upload one or more MP3 or WAV files.

See also: Manage Media Files and Assign Media Files

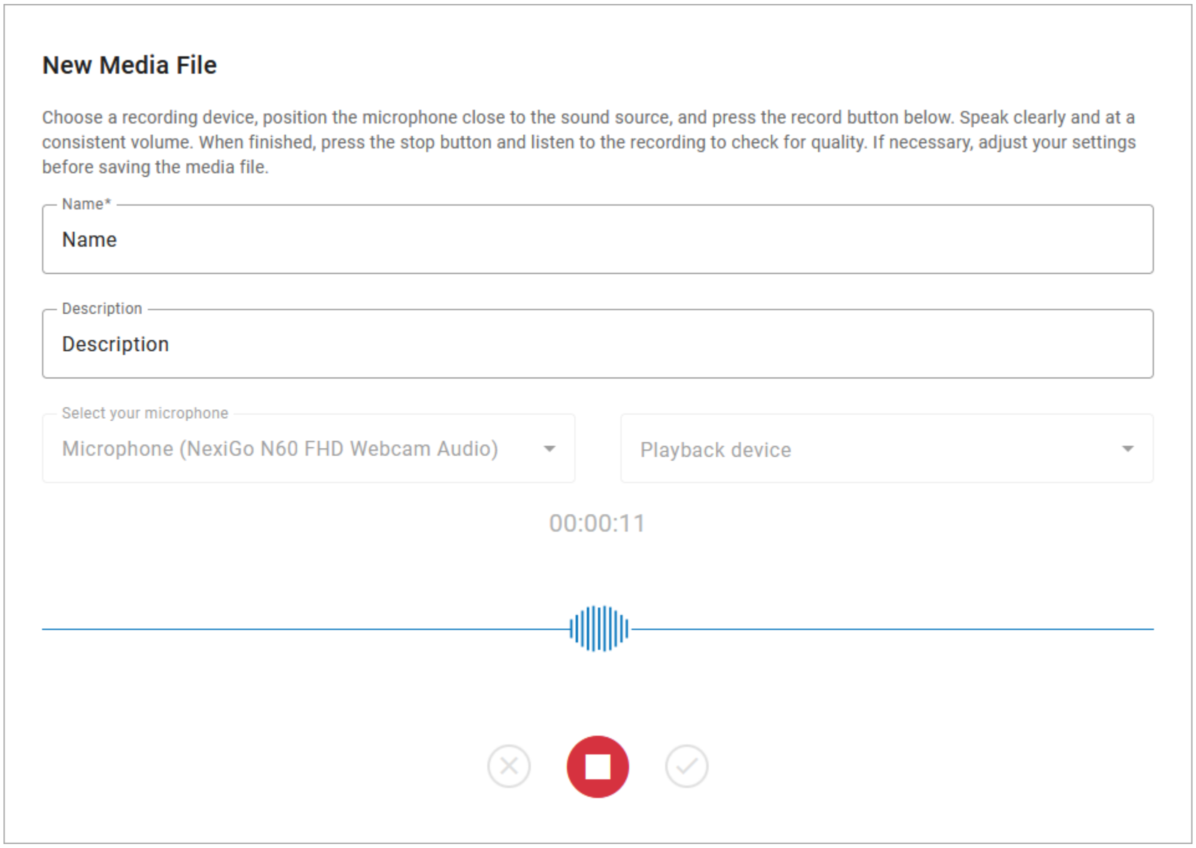
Record Media Files

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

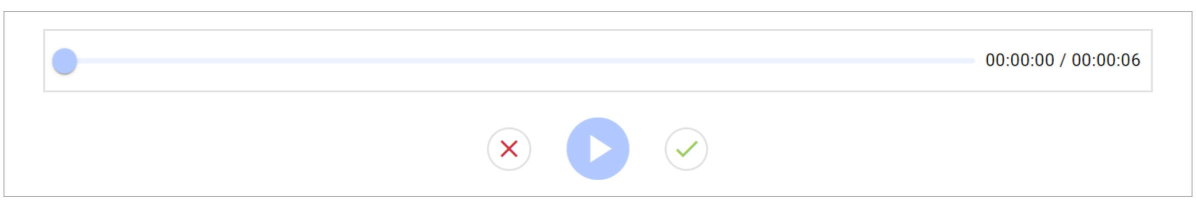
1. Go to **Business Cloud > Media Files**.
2. Click **[New Recording]** in the top right.
3. If prompted, allow the browser to use your microphone.



4. Enter a name and description for this recording. The file name must be unique.
5. Select a microphone and playback device.



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



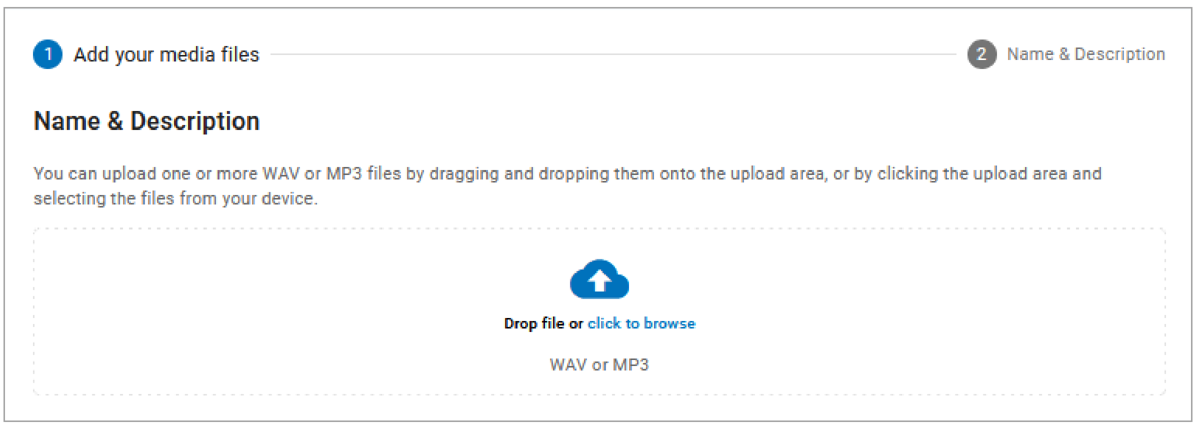
Once saved, the recording is added to the Media Files library.

Upload Media Files

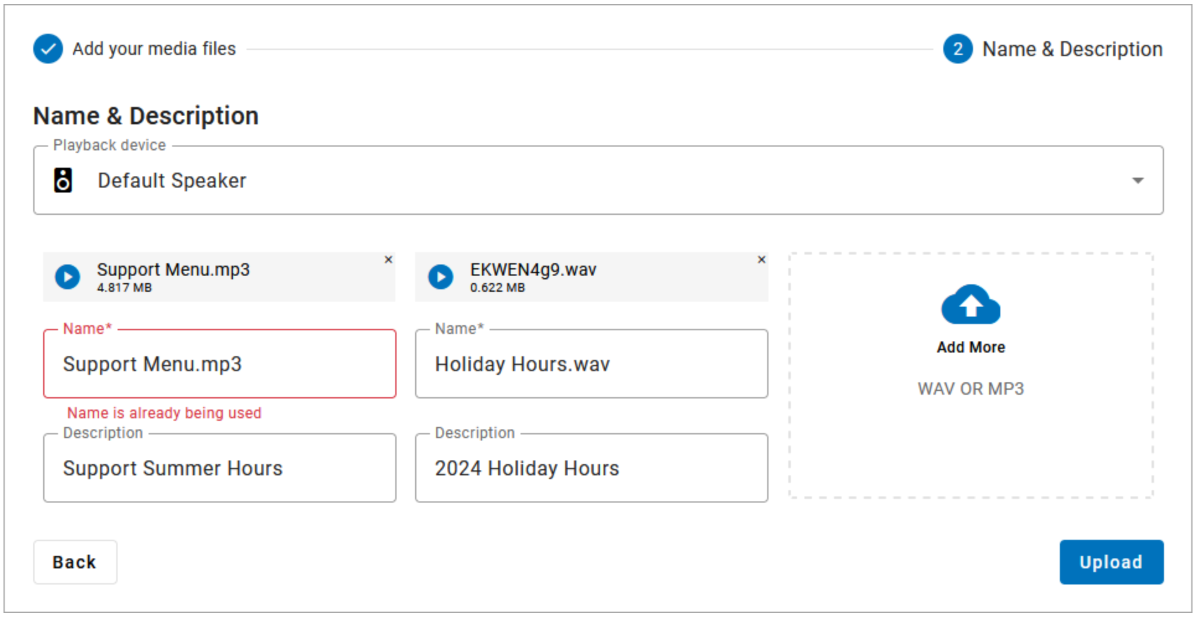
Media Files supports MP3 and WAV files under 10 MB each. Up to 50 audio files can be uploaded at a time.

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

3. Click the **Media Type** menu and select how the file will be used:
   - **AA Prompts** can be used in auto-attendant Menu, Message, and Directory routes. See the Routes Guide for details.
   - **Music On Hold** files can also be assigned to the account, individual users, hunt groups, and queues to give callers a custom experience.
   - **Queue Announcements** are prompts, messages, or music that callers hear when they reach a queue to customize the experience. See Queues and Queue Announcements for details.
4. **Add Media Files.** Drag and drop up to 50 MP3 or WAV files into the upload area, or click the link to select the file(s) from your computer.



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



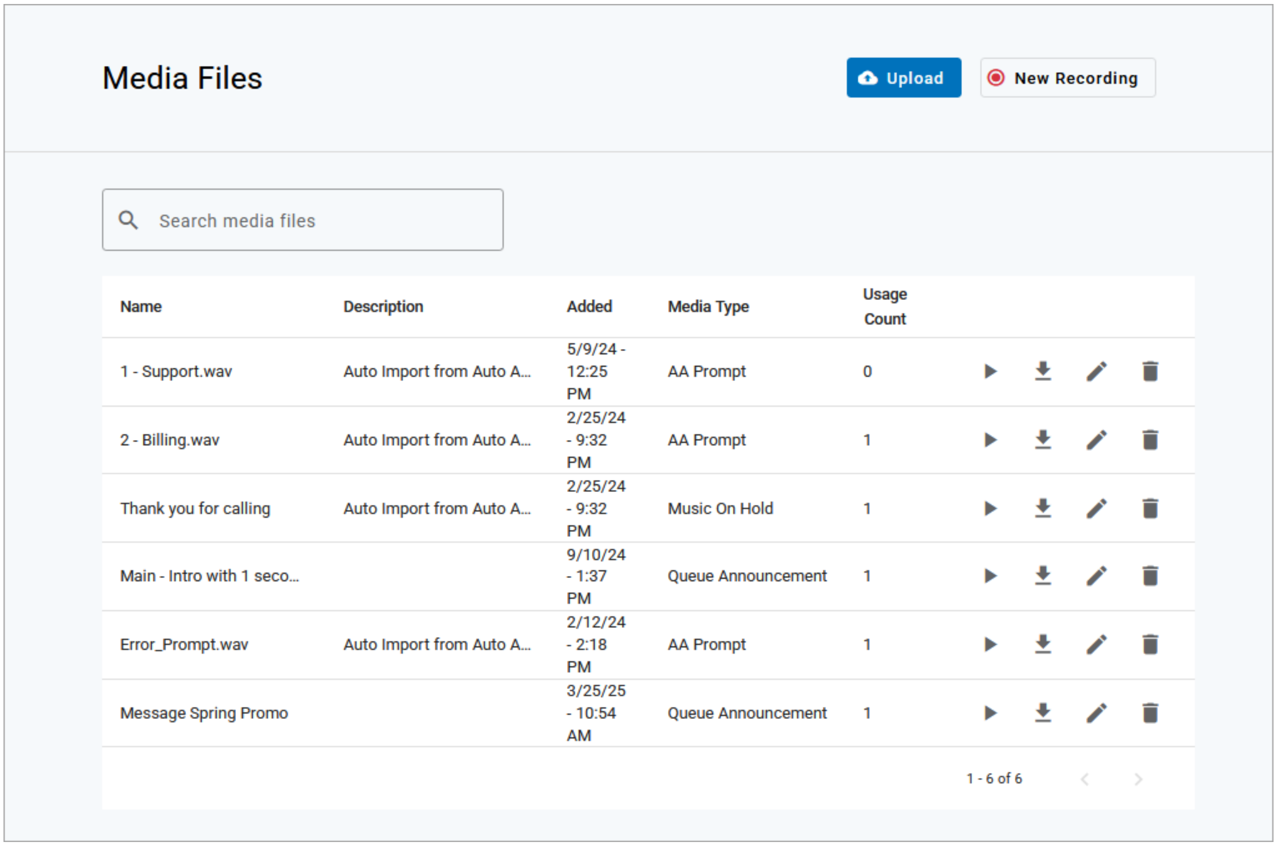
Once the upload is processed, the audio files are added to the Media Files library.

Audio Quality

Music On Hold files are optimized for use by the phone system, which will result in some degree of quality loss. To hear what it sounds like, click the play button on the right or call a phone number on your account and ask to be placed on hold.

Manage Media Files

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



Media Files

Upload | New Recording

Search media files

Name	Description	Added	Media Type	Usage Count
1 - Support.wav	Auto Import from Auto A...	5/9/24 - 12:25 PM	AA Prompt	0
2 - Billing.wav	Auto Import from Auto A...	2/25/24 - 9:32 PM	AA Prompt	1
Thank you for calling	Auto Import from Auto A...	2/25/24 - 9:32 PM	Music On Hold	1
Main - Intro with 1 seco...		9/10/24 - 1:37 PM	Queue Announcement	1
Error_Prompt.wav	Auto Import from Auto A...	2/12/24 - 2:18 PM	AA Prompt	1
Message Spring Promo		3/25/25 - 10:54 AM	Queue Announcement	1

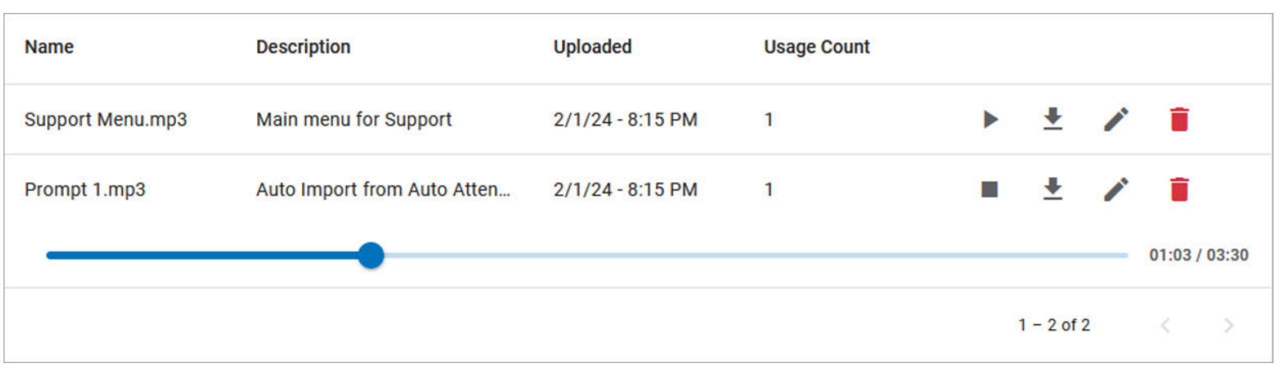
1 - 6 of 6

Auto-Import

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

Play Audio

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



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

01:03 / 03:30

1 – 2 of 2

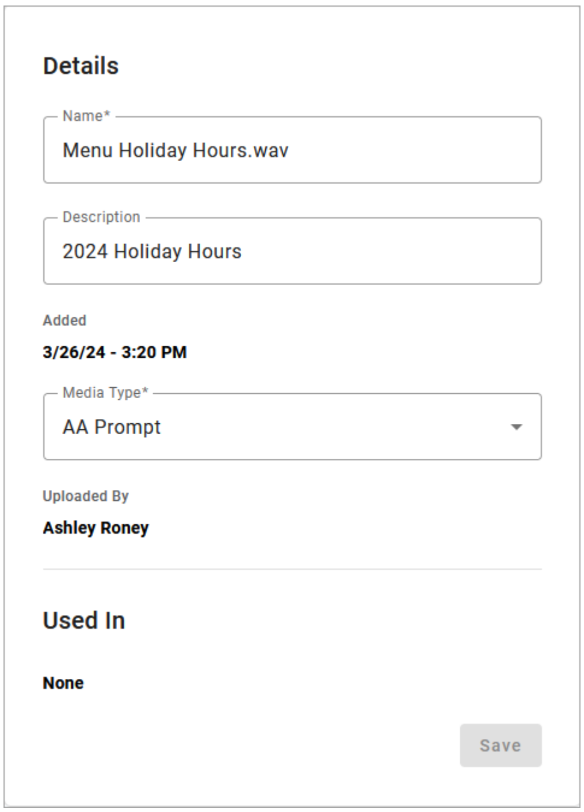
Download File

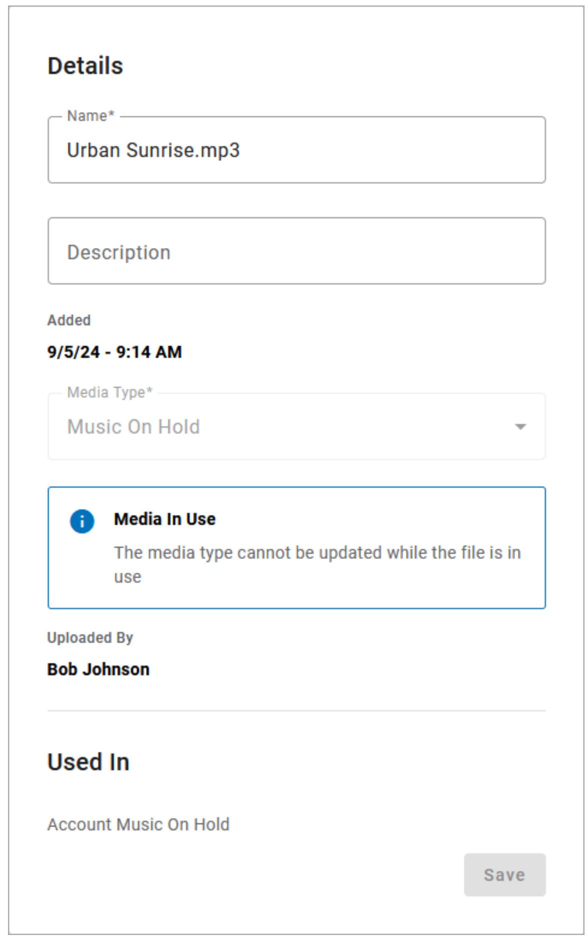
To save a copy of the file to your computer, click **Download.**

Edit Details

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

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





Field	Description
Name	The file name which is displayed on the Media Files page and in the file selection menus throughout the portal. The name must be unique and can include the file type.

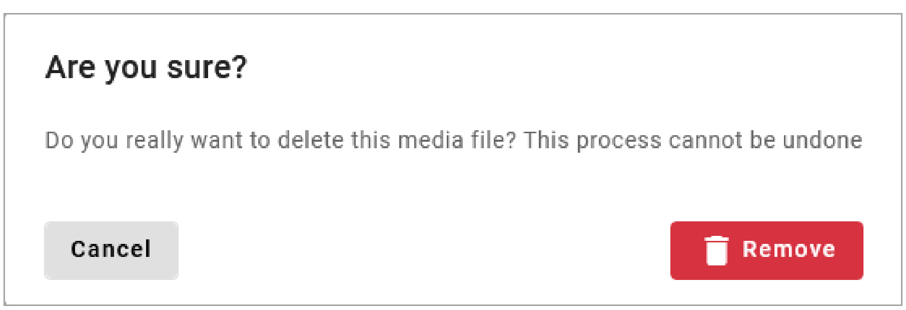
Field	Description
Description	A description of the file or search terms to help identify the audience, language, purpose, etc. The description is displayed on the Media Files page and included in the search results (up to 1,024 characters).
Added	The date and time the file was added to the account.
Media Type	Where the file can be used in the portal: • **AA Prompts** can be used in auto-attendant Menu, Message, and Directory routes. See the Routes Guide for details. • **Music On Hold** files can also be assigned to the account, individual users, hunt groups, and queues to give callers a custom experience. • **Queue Announcements** are prompts, messages, or music that callers hear when they reach a queue to customize the experience. See Queues and Queue Announcements for details.
Uploaded By	The name of the person who added the file to the account. If the file was automatically imported from an existing auto-attendant, it will say "Unknown."
Used In	The name of the users, auto-attendants, hunt groups, and queues the file is assigned to.

Delete Media File

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

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

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



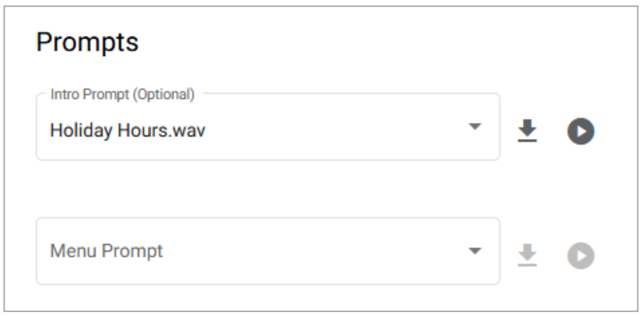
Assign Media Files

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

Auto-Attendant Prompts

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

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



Music On Hold

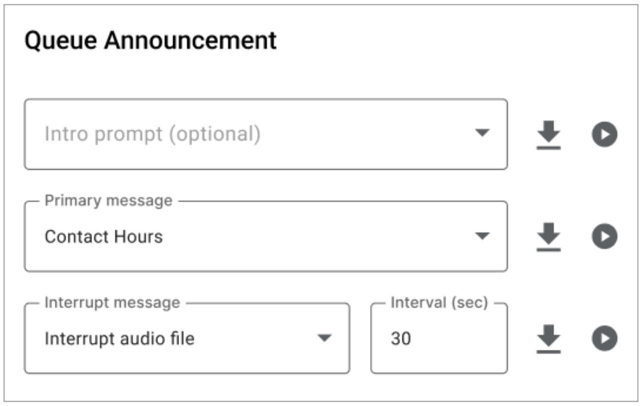
Custom Music On Hold files can be used in the following locations:

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

Queue Announcement

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

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



Tip

Queue configurations can be modified at any time, without interrupting call flows or duplicating the auto-attendant. See Queues for details.

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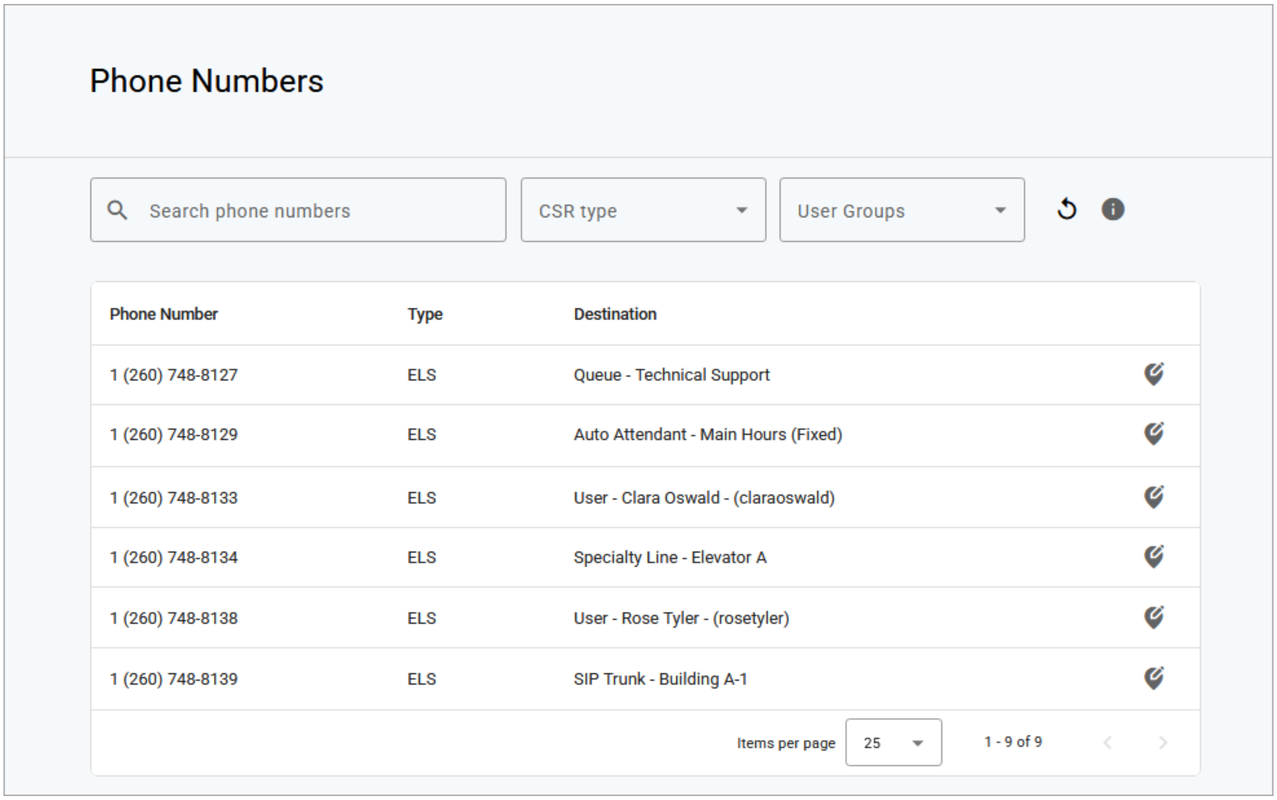
Phone Numbers

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



Phone Numbers Table

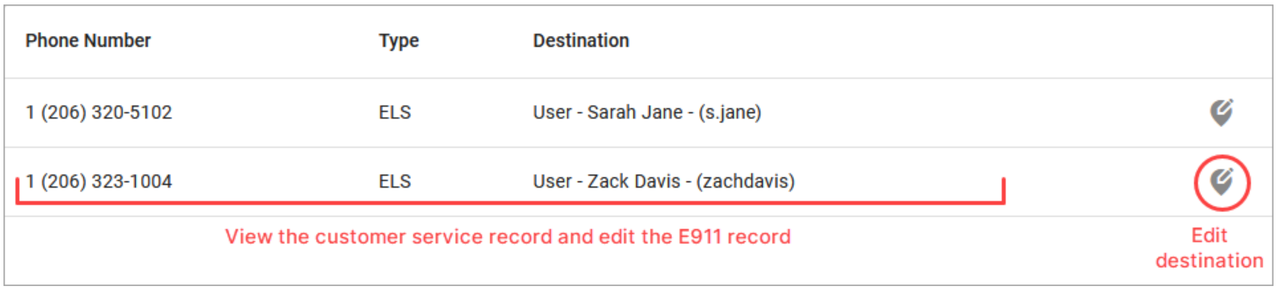
The table here lists all the phone numbers on the account. If you're looking for a particular number, use the search filters above the table to narrow the list.

Search Filters

- **Search phone numbers.** Search by phone number, destination (including *none*), address (including the city, state, and postal code) associated with the customer service record or E911 record.

- **CSR type.** Filter the phone numbers in the table by the type indicated on the customer service record (CSR): Company or Individual.
- **User Groups.** Select a user group to display only phone numbers assigned to users in that group. This option will only appear if there is at least one user group on the account.

Phone Numbers List



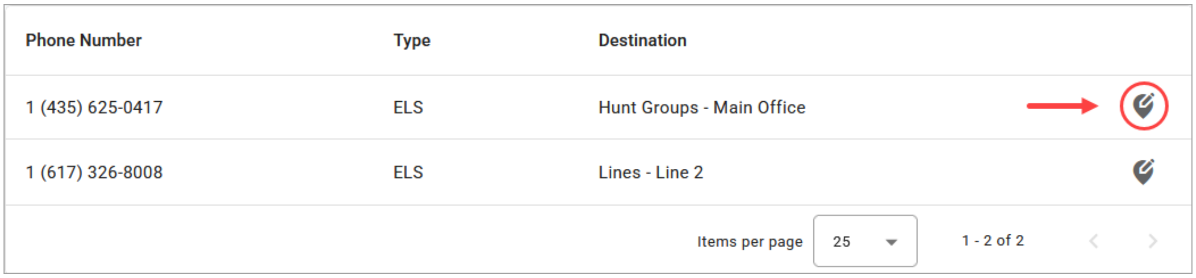
- **Phone Number.** Lists the phone number(s) connected to the account. Select aphone number to view the customer service record and edit the E911 record.
- **Type.** Indicates if the phone number is a standard "ELS" (Enhanced Local Service), "toll-free", or "temporary" number.
- **Destination.** Identifies where the phone number rings to: Auto-Attendant, Hunt Group, Queue, User, Virtual Fax, or None. To change the destination, click the **map** icon on the right.

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

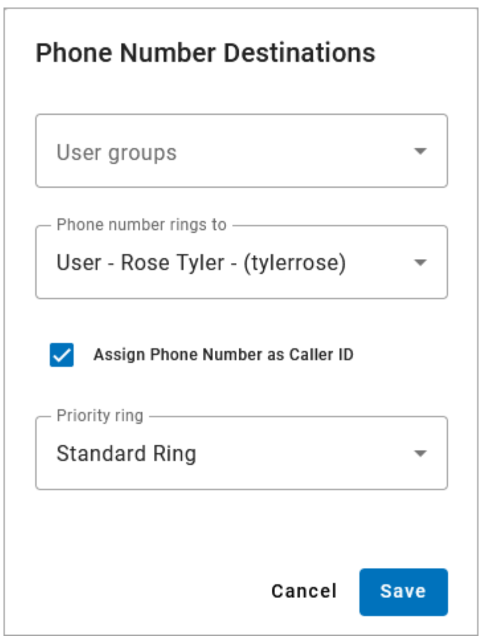
Assign Phone Number to User

If there aren't any phone numbers on the account yet, refer to first.If you do not have access to this page or the number you're looking for is not there, contact your service provider for assistance.

1. Go to **Accounts > Phone Numbers**.
2. Locate the phone number you want to modify and click the **Edit destination** icon on the right.



3. In the **Phone Number Destinations** popup, fill out the following:
   - **User Groups:** Select a group to narrow the *Phone Number Rings To* options below to only those users (optional), or leave it blank to show all possible destinations.
   - **Phone number rings to:** Select the user who will be assigned to this number.
   - **Assign Phone Number as Caller ID:** Choose whether to assign this phone number as the user's caller ID. Leave it unchecked if a different number is or will be assigned as their caller ID.
   - **Priority ring:** Select a priority ring tone (optional).
4. Click **[Save]**. The phone number will be assigned to the user and can be viewed in their Calls tab.



Change Phone Number Destination

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

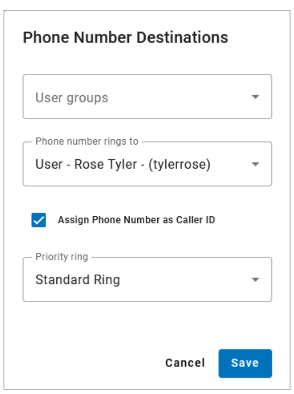
To change the destination of a phone number:

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

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

3. Below **Phone Number Destinations**, fill out the following:
   - **User Groups:** Select a group to narrow the *Phone Number Rings To* options below to only those users (optional) or leave it blank to show all possible destinations.
   - **Phone Number Rings To:** Select a new destination. Supported destinations include auto-attendants, hunt groups, queues, users, and virtual faxes.
   - **Assign Phone Number as Caller ID:** If the destination is to a user, choose whether to assign this phone number as the user's caller ID. If unchecked, caller ID will be sent as .

     To assign a different number as the user's caller ID, go to the user's Calls tab and select a number from the *Caller ID* field.
   - **Priority Ring:** Select a priority ring tone (optional). For more details, see Priority Ring.
4. Click **[Save]**. The changes will be applied immediately.



Note

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

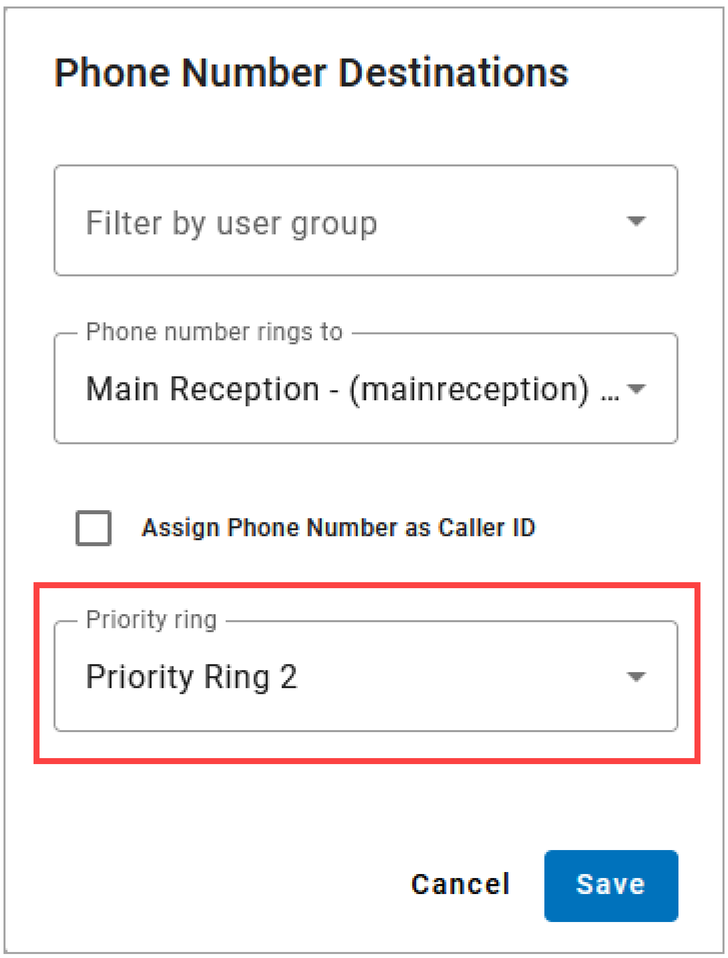
Priority Ring

Priority Ring applies a unique ringtone to incoming calls placed to a particular phone number, causing the user's device(s) to ring differently. This is also called *Distinctive Ring*.

When enabled, the call's SIP header contains the value telling the configured device to ring a certain way. Every device will have different ring patterns based on the manufacturer.

Priority Ring can also be enabled based on the caller ID of the inbound caller. See Priority Ring in Call Screening.

1. In the portal, go to **Phone Numbers**.
2. Locate the phone number and click the **destination** icon on the right.
3. From the **Priority Ring** menu, select a ring type.
4. Click **[Save]**. All calls to that phone number will now ring user devices accordingly.



Manage E911 Address

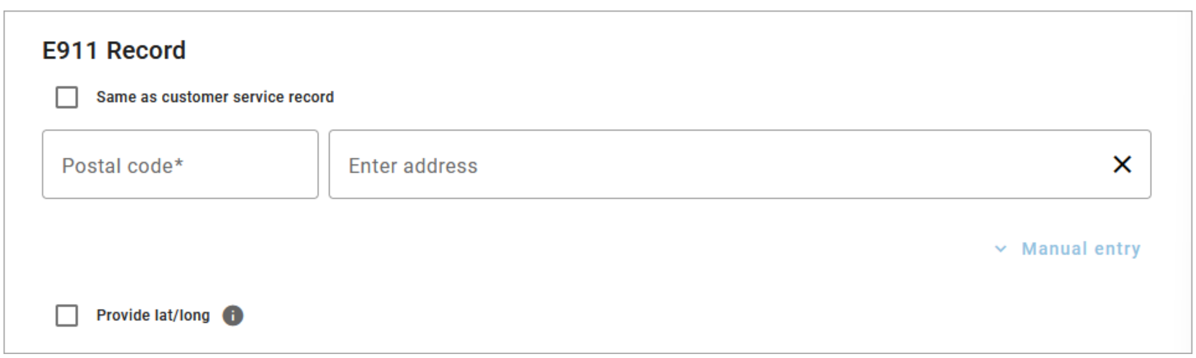
An E911 address allows emergency services to determine the location of the caller when a call to 911 is placed. The registered address must be the physical address where the device is located and include any additional information (such as a suite, apartment, building, etc.) necessary to identify the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

Follow these steps to view and/or update an E911 record.

1. Go to the **Phone Numbers** page.
2. Locate the number to be updated, then click the phone number to open the record.
3. **Review the CSR.** The customer service record (CSR) includes the person's or company's name, postal code, and street address. This information is entered when the phone number is added to the account and can only be changed by the service provider.

4. **Review the E911 Record.** If the E911 address is the same as the CSR, check the **Same as customer service record** box. If not, **uncheck the box** and enter the correct information in the fields below.

   If the address does not appear as you're typing, use the *Manual entry* option below and fill in all applicable fields.



Field	Description
Postal code	The postal code of the address.
Enter address	The address associated with the phone number. Start typing an address and options will populate below. Select the correct address.

Field	Description
Manual entry	Enter the address manually. These fields automatically populate with the existing information and are optional unless otherwise indicated. If the address is for a multi-unit building, you can add the Unit Type and Unit Number here.
Provide lat/long	Check this box to view and/or modify the latitude and longitude coordinates for the E911 address. **These coordinates determine the PSAP responsible for receiving the 911 call, not the ambulance dispatch location.** This additional information is useful for new addresses that haven't yet been registered with the Master Street Address Guide (MSAG). When checked, the coordinates are automatically generated using the provided address. Click **View Lat/Long in Google Maps** to see the approximate location. If you have more exact coordinates, enter them here and click **[Save]**.

5. When you're done, click **[Save]**. It may take several hours for the changes to take effect.

Cannot Edit?
If any of your account information is NOT correct and you cannot edit your E911 record, please contact Customer Service right away to get it updated.

Note
This feature must be enabled by your service provider. If you don't see Phone Numbers in the menu, please contact Customer Support for assistance.

Short Dials

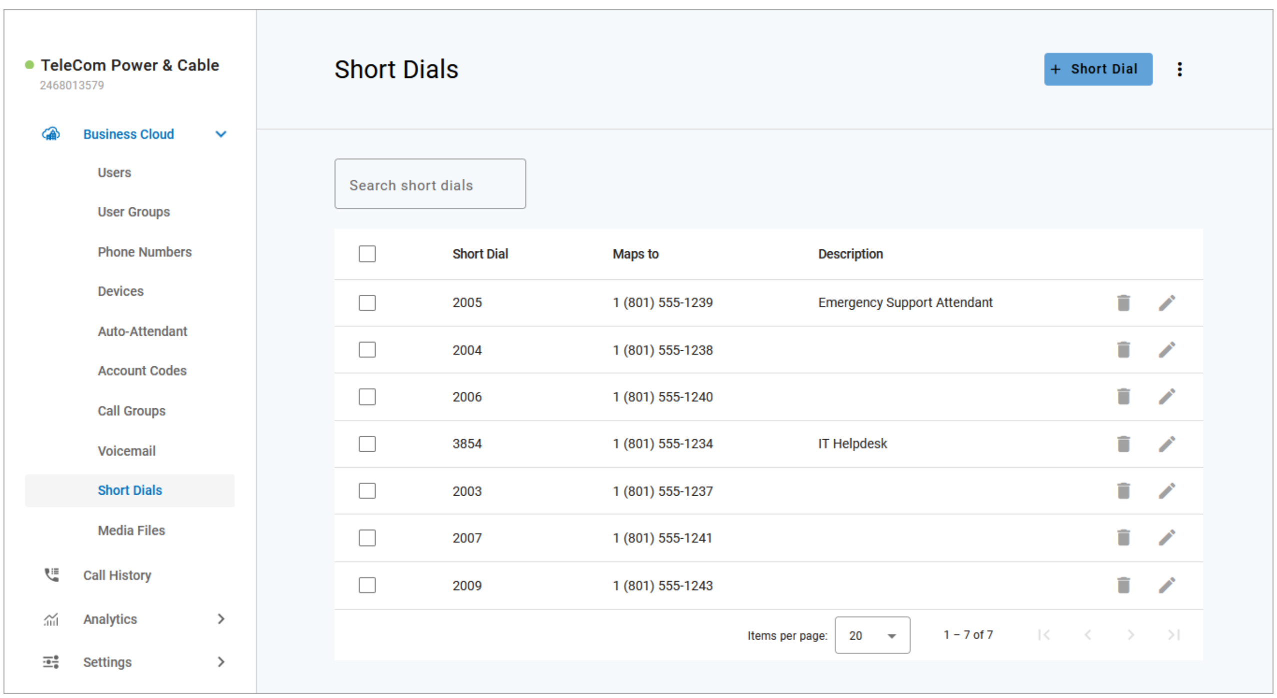
Short dials are an easy way for everyone on the account to access frequently used internal or external phone numbers. They're like account-wide speed dials or extensions, except short dials can be routed to *any* phone number that is allowed by the calling plan, even international numbers.

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

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

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

Go to **Business Cloud > Short Dials**. Short dials can be added individually, to a range of sequential phone numbers, or by importing a .csv file. See the individual articles to learn more. To edit or delete existing short dials, see Manage Short Dials.



Short Dial vs Short Code

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

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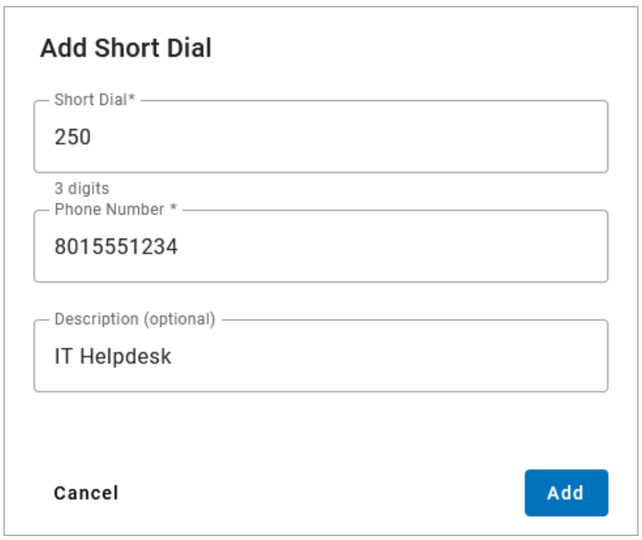
Add Short Dial

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

1. Go to **Business Cloud > Short Dials**.
2. Click **[+ Short Dial]** on the right.
3. In the **Add Short Dial** popup, enter the following information:
    - **Short Dial:** The number that will be dialed. It must be the same length as extensions on the account (3–6 digits), as indicated by text below the field.
    - **Phone Number:** The phone number the short dial will route to, without any spaces or special characters. For example, 18015551234.
    - **Description:** A brief description for the short dial, such as the name of the destination (optional). For example: IT Helpdesk.
4. Click **[Add]**. The short dial is added to the account.



Troubleshooting

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

The most common errors include:

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

Add Short Dial Range

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

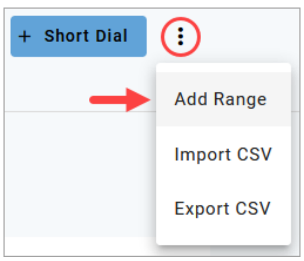
- (214) 555-8536: 2000
- (214) 555-8537: 2001
- (214) 555-8538: 2002
- (214) 555-8539: 2003
- (214) 555-8540: 2004

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

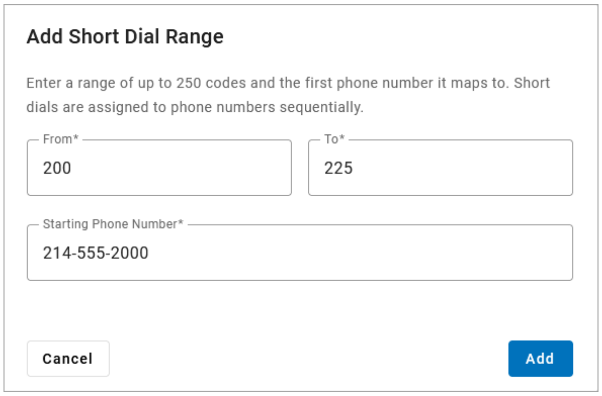
Short dials can be mapped to any on- or off-net phone number, so be sure that you own the complete range of sequential phone numbers to avoid routing calls to an unknown third party.

Follow the steps below to add a short dial range:

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



3. In the **Add Short Dial Range** popup, enter the starting and ending short dials. The range must have less than 250 numbers. In the example below, 25 short dials will be created starting with 200 and ending with 225.



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

Troubleshooting

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

The most common errors include:

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

Add Description
To add a description to any of these short dials, click the pencil icon on the right, enter a description, then click **[Save]**. This step is optional. See Manage Short Dials for details.

Import Short Dials

Rather than adding one at a time, you can migrate short dials from a previous account or provider using a .csv file. Up to 250 short dial numbers can be imported to the account at a time.

Imports are strictly additive; they cannot replace or edit short dials that are already on the account.

Create CSV

1. Create a .csv file with columns in the following order: Short Dial, Maps to, Destination, and Description.

- Alternatively, export a list (CSV) of your current short dial numbers to use as a template. Remember to remove all existing numbers before importing it to the account.

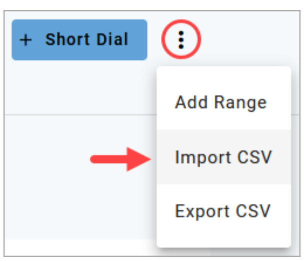
2. Fill out the fields for every short dial you want to add, then save the file.
    - **Short Dial:** The code that will be dialed. It must be the same length as extensions on the account (3–6 digits).
    - **Maps to:** PHONE_NUMBER
    - **Destination:** The phone number this code will route to, without any spaces or special characters. For example, 18015551234.
    - **Description:** A brief name or description, such as the name of the destination. For example: *IT Helpdesk*. This field is optional.

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

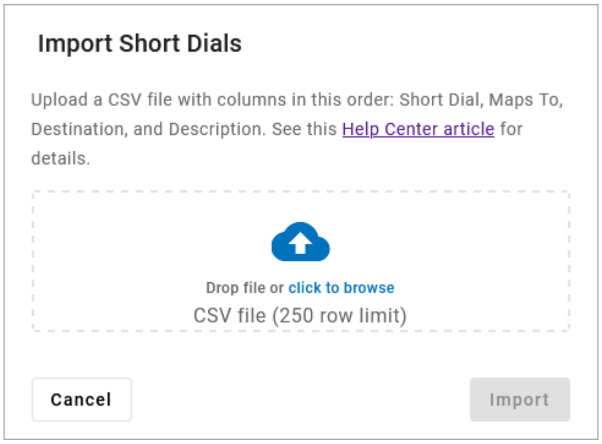
3. Save the completed spreadsheet as a .csv file.

Import File

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



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



Troubleshooting

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

The most common errors include:

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

Troubleshooting

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

The most common errors include:

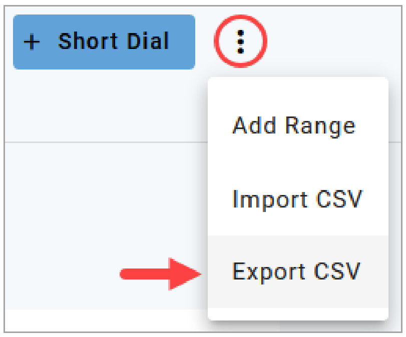
- Short dial overlaps with an existing short dial or extension.
- Short dial begins with an N11 service number, such as 311, 411, 911, etc.
- Short dial numbers are too long or too short; they must be the same length as extensions on the account.

Export Short Dial List

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

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

1. Go to **Business Cloud > Short Dials**.
2. Click the ⋮ menu on the right and select **Export CSV.**
3. The .csv file is downloaded to your computer.

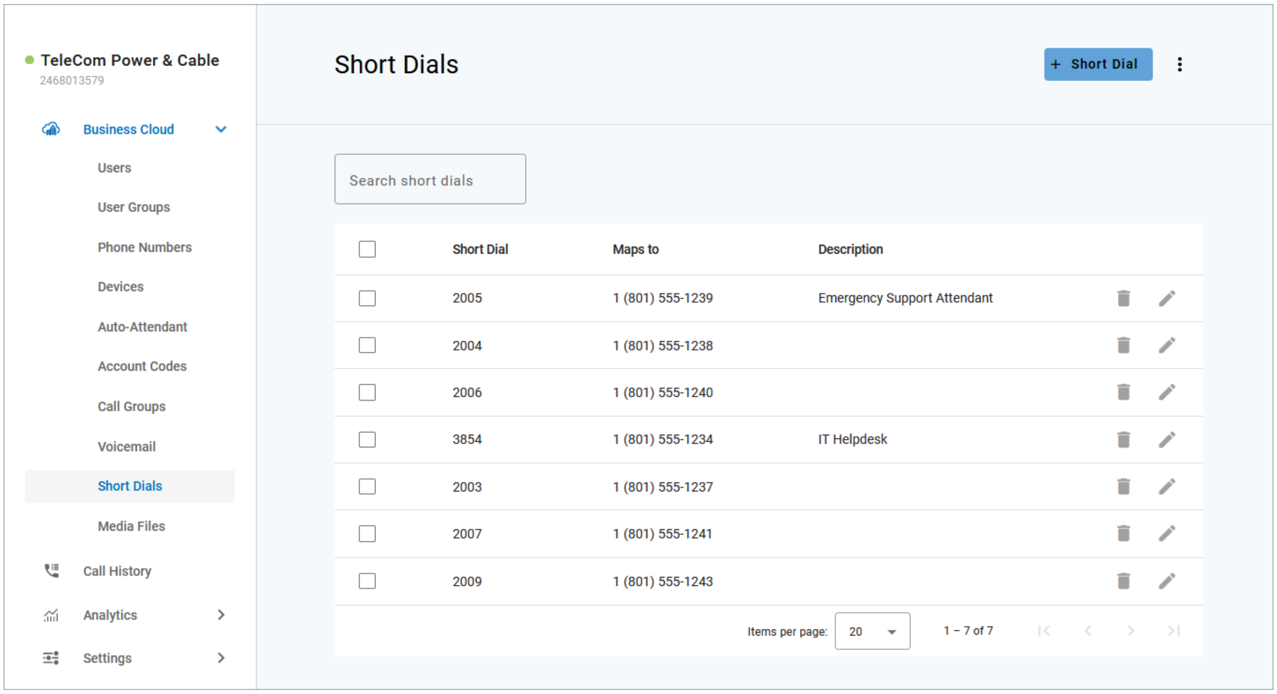


Notice
If you choose to use this file as a template to import new short dials, remove the existing short dials first. Imports are strictly additive and cannot be used to edit or remove existing numbers.

Manage Short Dials

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

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

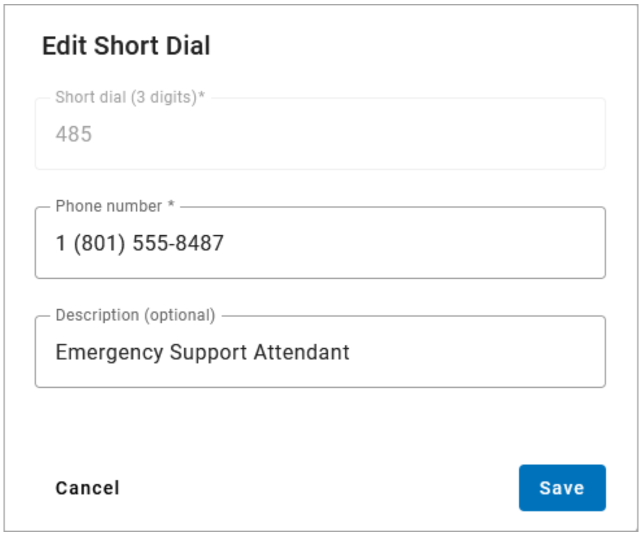


Edit Short Dial

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

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

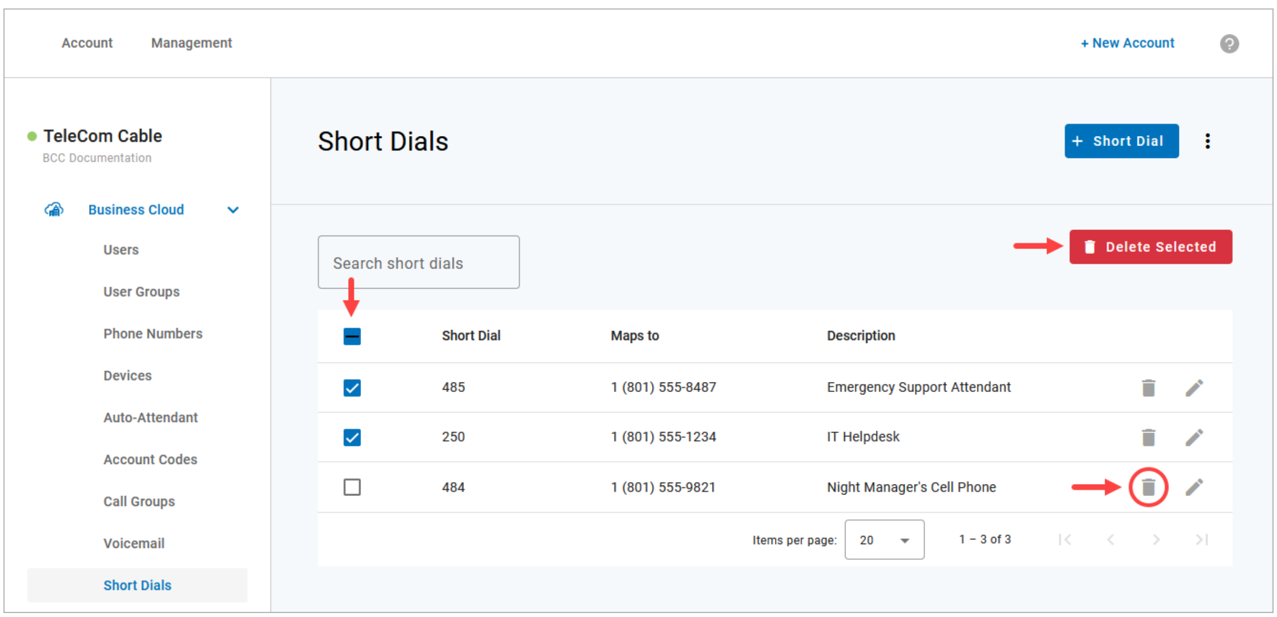
The short dial number cannot be edited. However, multiple short dials can be routed to the same phone number. If you need to change a short dial number, create a new one and then delete the old one, or keep both to give users more options.



Delete Short Dials

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

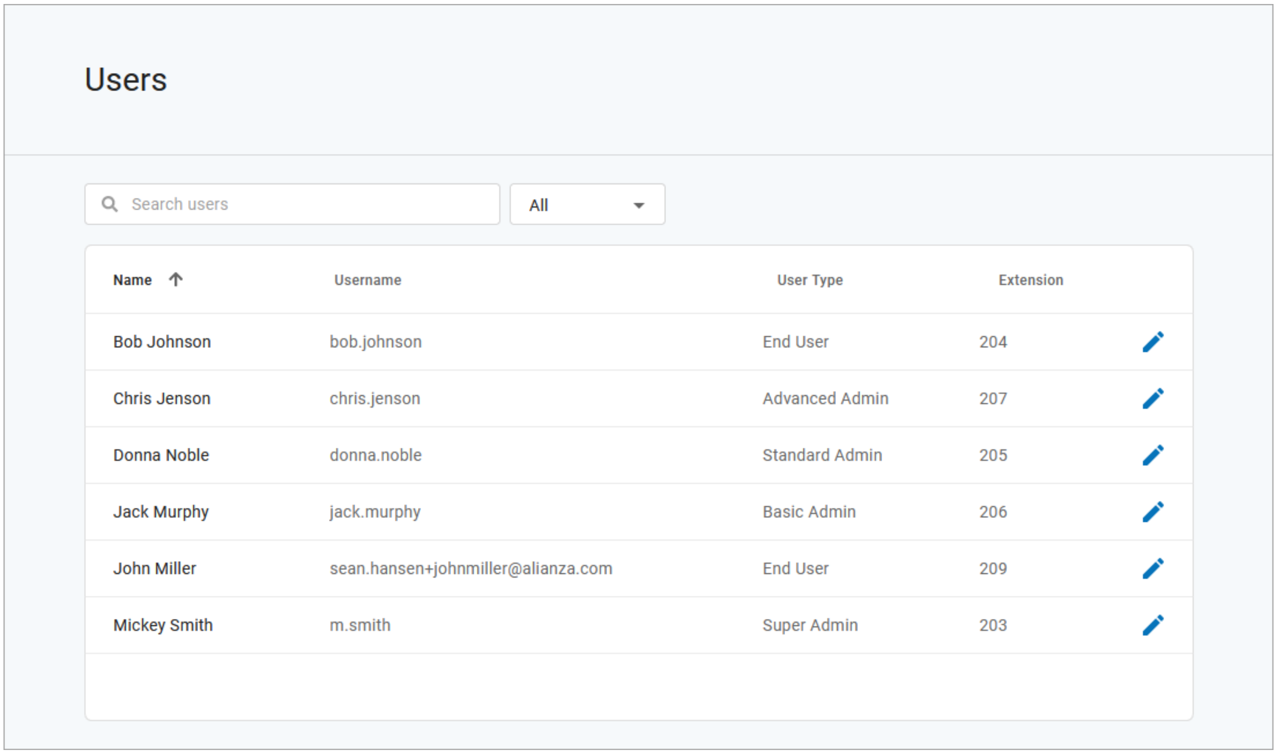
1. **Delete One:** Locate the short dial, then click the **trash** icon on the right.
2. **Delete Multiple:** Check the box on the left for each short dial you want to delete or check the top box to select them all, then click **[Delete Selected]**.



Users

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

To view and manage the settings for a specific user, locate and select their name in the table below.



Field	Description
Search Filter	Filter the displayed users by username, first or last name, extension, device, MAC address, phone number, caller ID number, or user tag.
User Type Filter	From the menu next to the search bar, select a user type to filter the list by.
Name	The user's first and last name.
Username	Their Voice Portal username or email address, if it's being used as their username. If this is blank, the user does not have access to the Voice Portal.

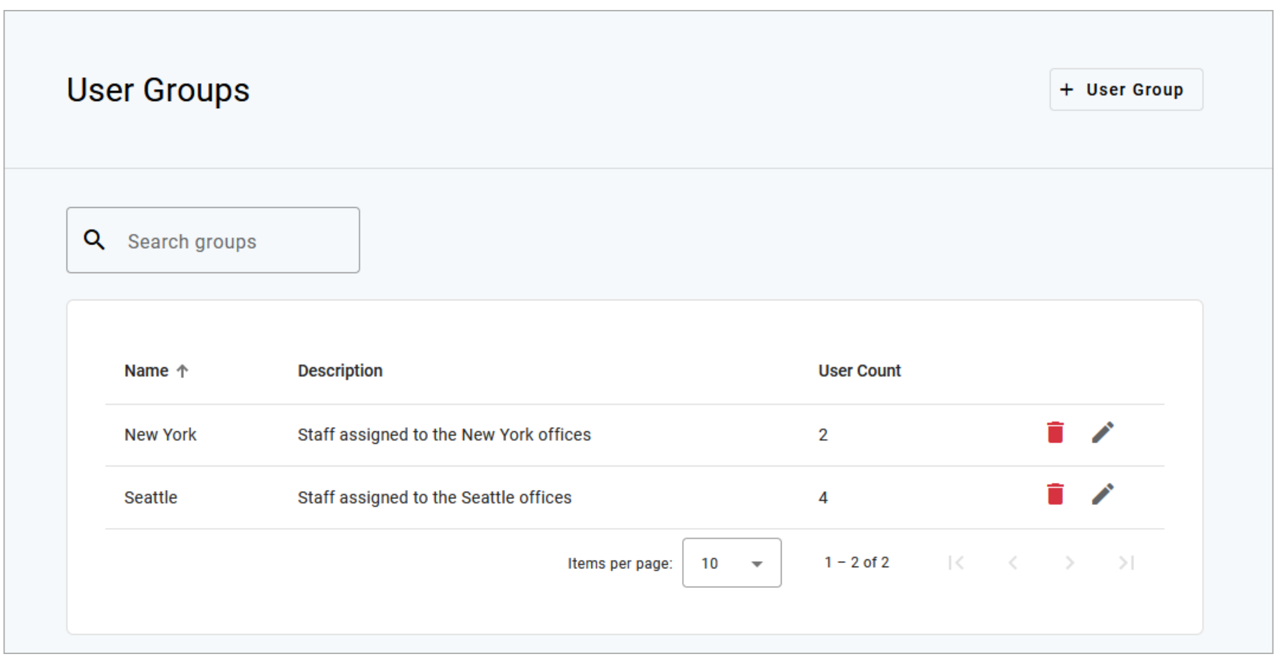
Field	Description
User Type	Identifies whether the user is a Super Admin, Advanced Admin, Standard Admin, Basic Admin, or End User. This determines the level of access the user has to the Voice Portal. **See also:** BCC Admin User Types
Extension	The dialable extension assigned to the user on the account.
Edit	Select a user or click **Edit** to view and manage their settings in each tab: Calls, Devices, Settings, and Voicemail.

User Groups

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

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

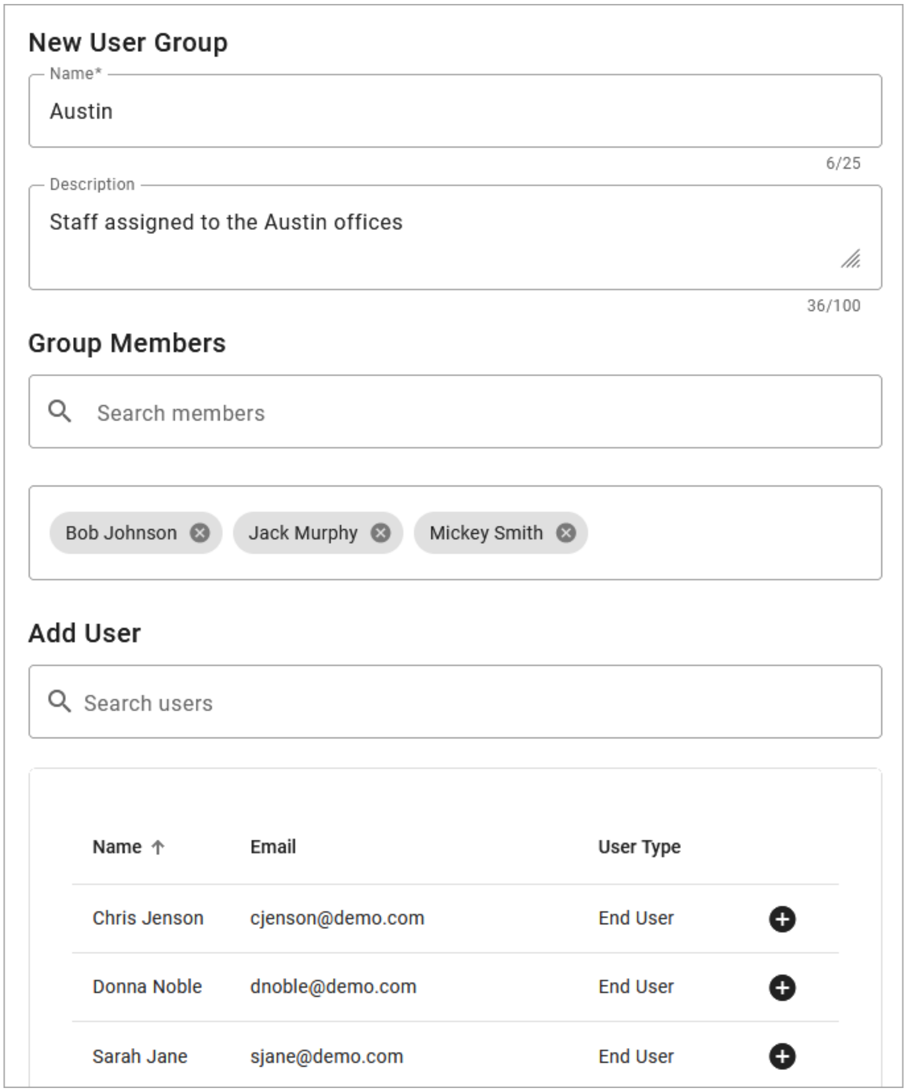
To see which group a user is assigned to, go to the user's Settings tab.



Add a User Group

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

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



Add or Remove Users in a Group

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

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

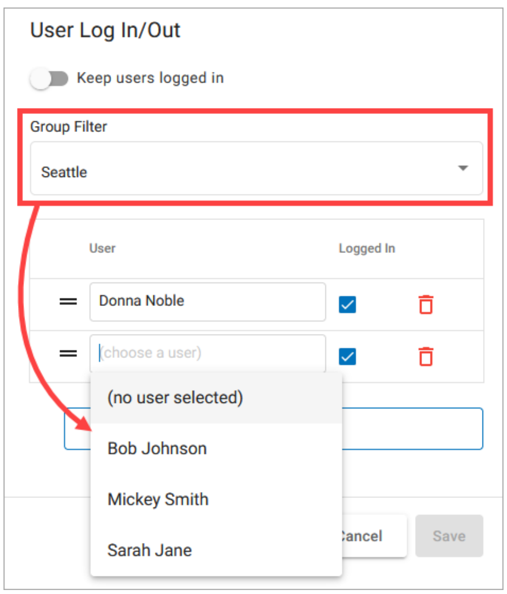
Filter by Group

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

- Phone number search
- Phone number destinations
- Auto-Attendant Group user list

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

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

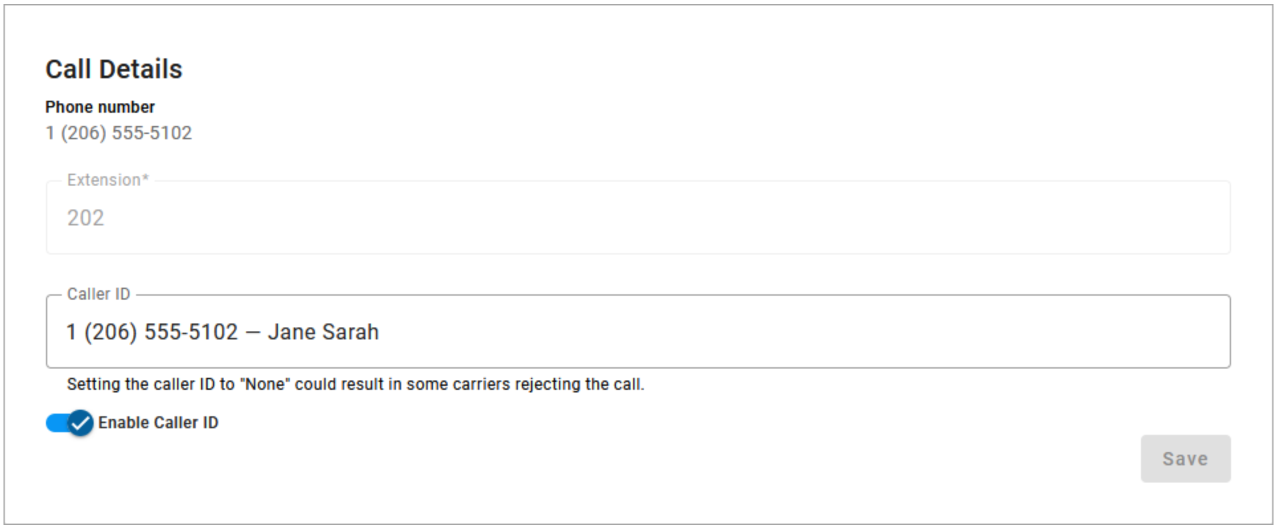


Manage a User's Calls

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

Call Details

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



Field	Description
Phone number	The phone number routed to this user to contact them directly, if any. If a number has not yet been assigned, see Assign Phone Number to User or contact your service provider for assistance..
Extension	The dialable extension the user can be reached at on the account. This field is required.
Caller ID	Select the phone number and name that will be sent with outbound calls from this user to be displayed on the phone of the person being called. Start typing to filter the list. Users can choose the main account number, their phone number, or choose *None* to not send out any caller ID at all. This field is required. The same phone number can be assigned as caller ID for multiple devices, which can be ideal for in-office workers who are all in the same location. However, those users will be unable to customize their E911 address in the end user portal, since changing the address for one would change it for everyone. **Important** It is important to choose a **number** here, even if you choose to disable caller ID (below). If this field is set to *None*, outbound calls — even to 911— will be sent out as *Anonymous*, and the carrier may reject the call Additionally, a number is **required** for all users whose calling plan(s) allow ***Unlimited Local Calling***, even if their caller ID is disabled, in order to rate local calls as local.

Field	Description
Enable Caller ID	This toggle determines if the caller ID name is or is not sent with outbound calls. This setting can also be managed in the user's portal or via star codes. • **On:** Caller ID will be sent on all outbound calls. • **Off:** Caller ID will be sent as BLOCKED. The phone number selected in the *Caller ID* field will still be sent with calls to 911.

Change Caller ID on Phone Number

To change the caller ID assigned to a specific phone number, the Customer Service Record must be updated. The CSR details the legal ownership attributes of a number. Contact your service provider for assistance.

Caller ID for Softphone Users

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

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

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Call Screening

Call Screening can help block unwanted calls, and you can decide what happens to the calls turned away. Are they hung up automatically, or do they hear a message first? Are they forwarded to another number, or are they sent to voicemail?

For each category, choose a screening action from the menu. The options for each category are *Allow*, *Allow with Priority Ring*, *Block*, *Block with Message*, *Forward*, and *Voicemail*.

Call Screening settings can also be managed by dialing star codes.

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

Custom Screening

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

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

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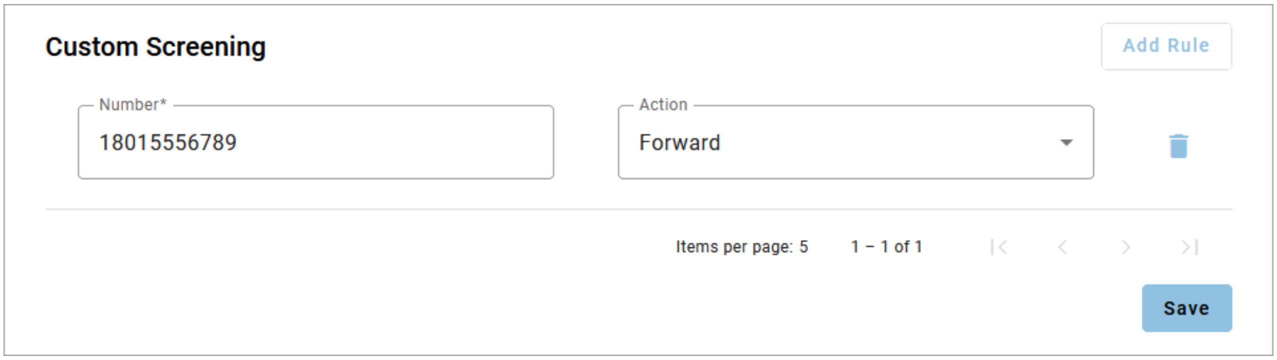


Custom Screening Rule by Digit Pattern
To create a rule for a group of phone numbers with the same area code and/or prefix, enter the first few digits of the phone number instead.

Call Screening Actions

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

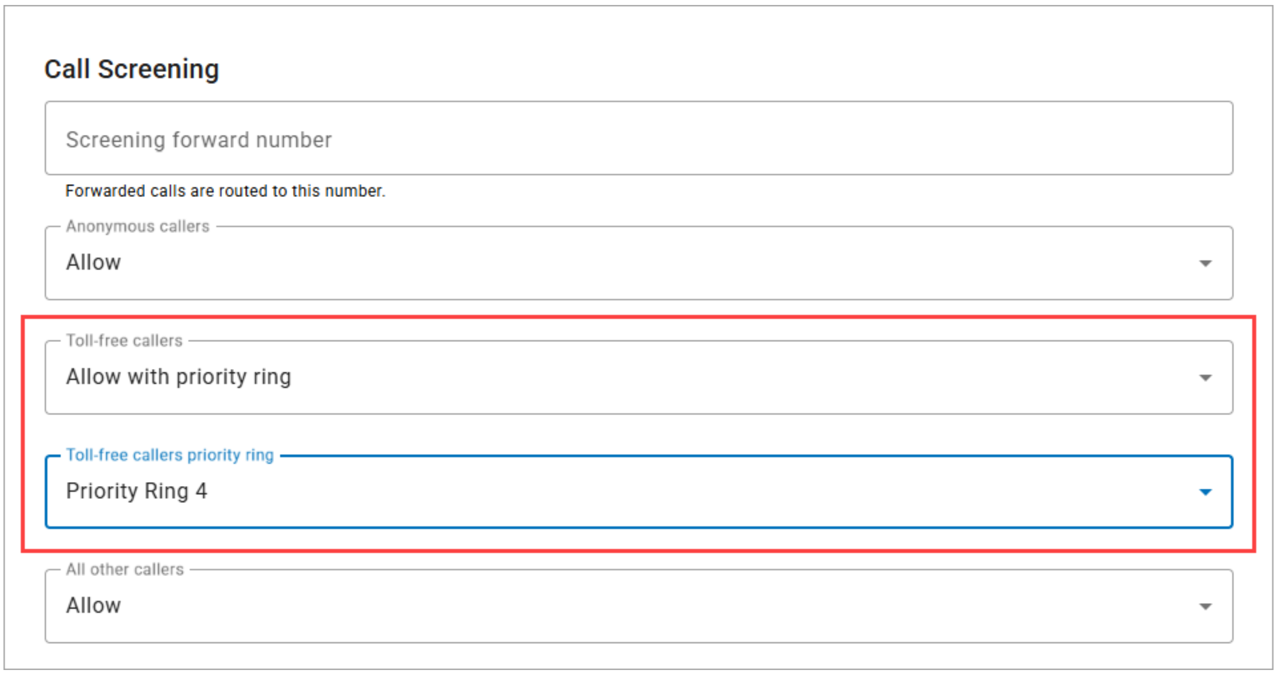
Field	Description
Allow	Allow the caller to ring through.
Allow with Priority Ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns. See Priority Ring for details.
Block	Block the caller from ringing through. Callers hear a busy signal.
Block with Message	Block the call with a message: • **Custom Callers: "***The number you have dialed is not accepting calls at this time."* • **Toll-Free Callers:** *"The number you have dialed is not accepting calls from toll-free numbers at this time."* • **Anonymous Callers:** *"The number you have dialed is not accepting calls from anonymous numbers."*
Forward	Forward the caller to a specific number. If you choose this option, you **must** enter the number those calls are forwarded to in the *Screening Forward Number* field.
Voicemail	Send the caller directly to voicemail.

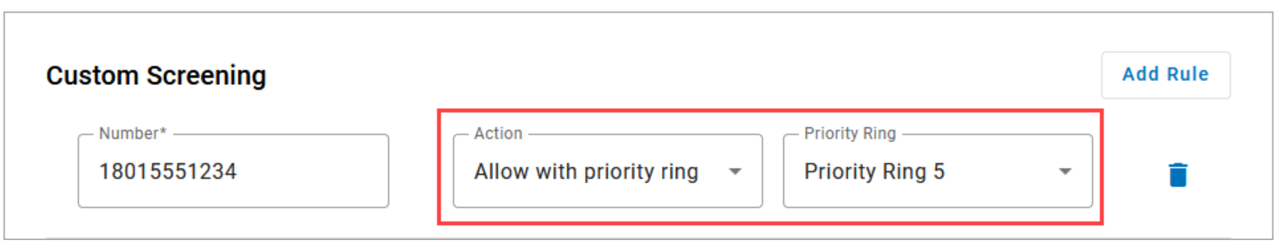
Priority Ring

Priority Ring causes the customer's device to ring in a different pattern based on the caller ID of the inbound caller, such as calls from anonymous callers, toll-free callers, or calls from a particular phone number. Priority Ring is enabled in the user's Call Screening settings.

When enabled, the call's SIP header contains the value telling the configured device to ring a certain way. Every device will have different ring patterns based on the manufacturer.

Priority Ring can also be enabled based on the phone number called. See Priority Ring in Phone Number Destinations.





Call Handling

Call Handling determines how incoming calls are routed under various circumstances. In the first section, create or manage Call Waiting and Do Not Disturb settings. Just below that, select and configure a ring strategy.

Call Handling Schedules

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

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

Call Waiting

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

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

Call Waiting can also be managed via star code. See Call Waiting for details.

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

Do Not Disturb

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

- **On:** Incoming calls are routed directly to your voicemail box.
- **Off:** Incoming calls follow your call handling settings.

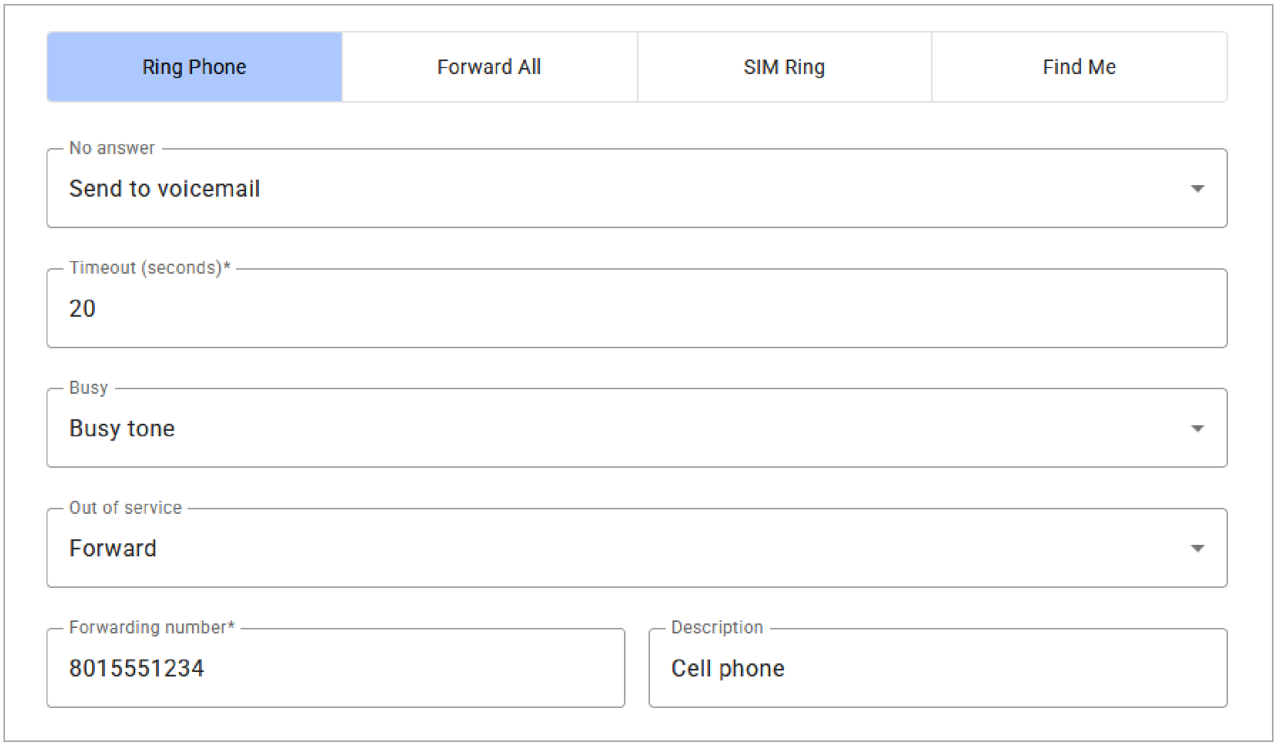
DND can also be managed via star code. See Do Not Disturb for details.

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

Ring Phone

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

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



Field	Description
No answer	Choose what happens to the call if it is unanswered after the number of seconds specified in the *Timeout*field below.
Busy	Choose what happens to the call when the device is busy (already in use and Call Waiting is not enabled).
Out of service	Choose what happens to the call when the device is not registering on the server.

Ring Length

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

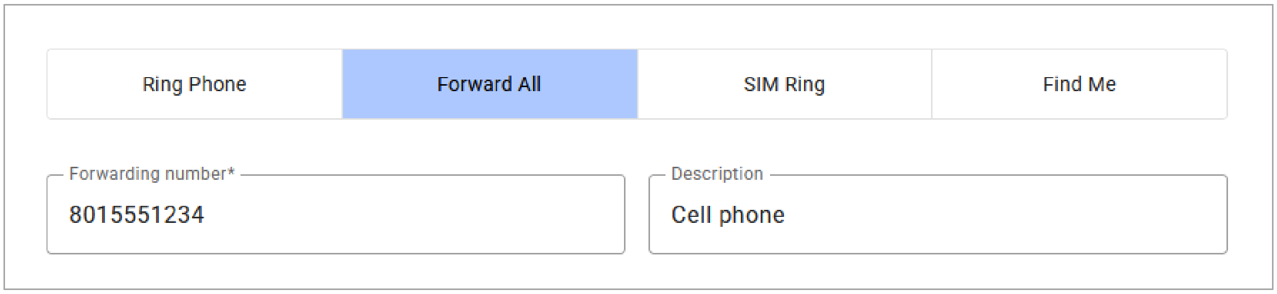
Forward All

Working on the go and need all the calls that come into your desk phone to reach you? Do all incoming calls need to be redirected elsewhere?

Forward All sends your callers to an alternative phone number, extension or short dial that you enter here. Once a forwarding phone number, extension, or short dial is saved, this feature can be enabled or disabled from the device by dialing Call Forwarding star codes.

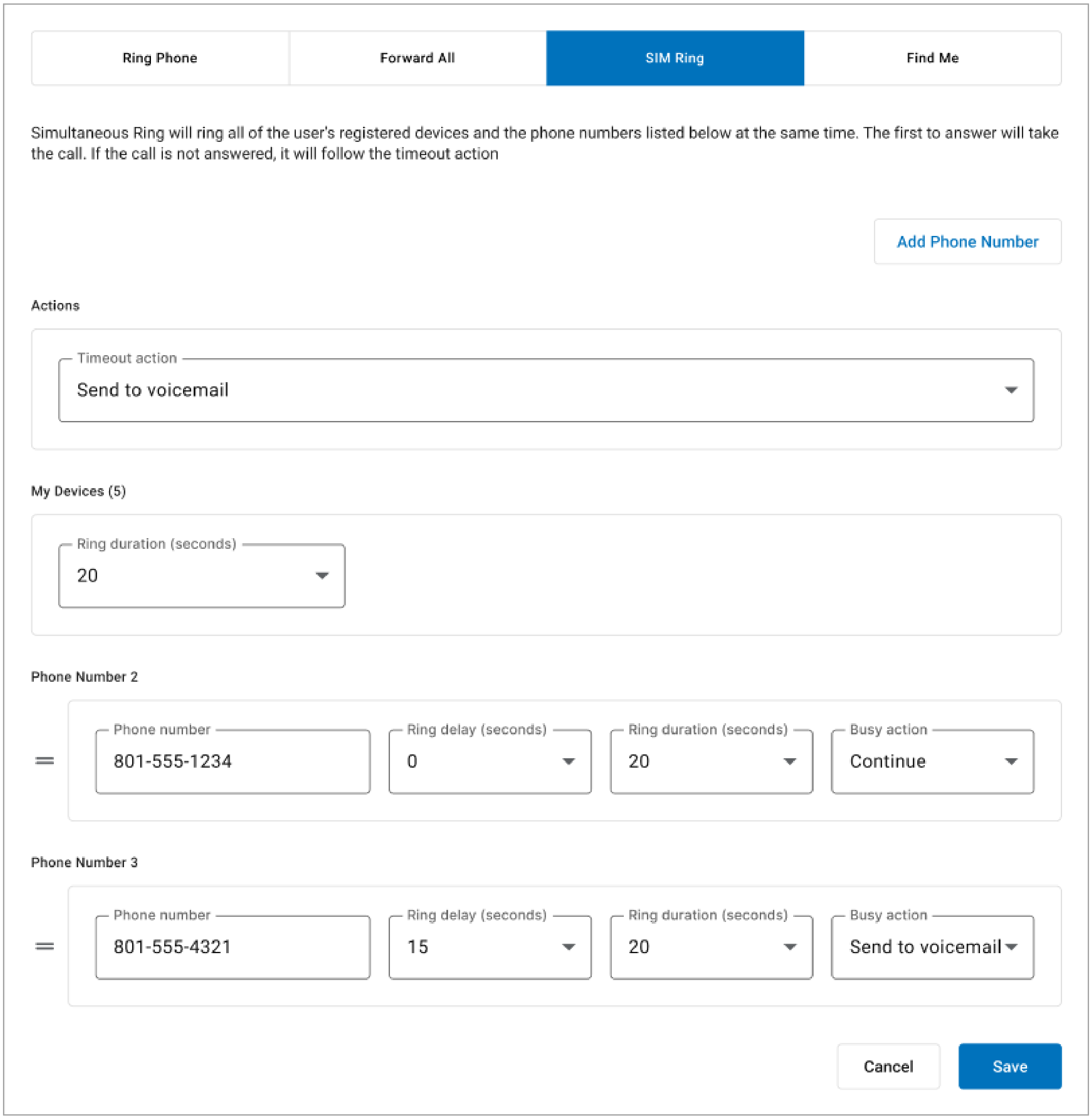
1. Choose the forwarding type from the dropdown.

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



Simultaneous Ring

Simultaneous Ring, or SIM Ring, rings all of the user's registered devices and the phone numbers added to the list at the same time until the call is answered or times out. The first to answer takes the call.



Feature	Description
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click **[+Add Number].**

Feature	Description
No Answer	Choose what happens when the call is unanswered: • Busy tone • Forward to (add a forwarding number) • Ring forever • Send to voicemail Also enter the number of seconds the call will ring before the action is triggered. However, calls that ring longer than 120 seconds may be disconnected by the carrier.

Find Me/Follow Me

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

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

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

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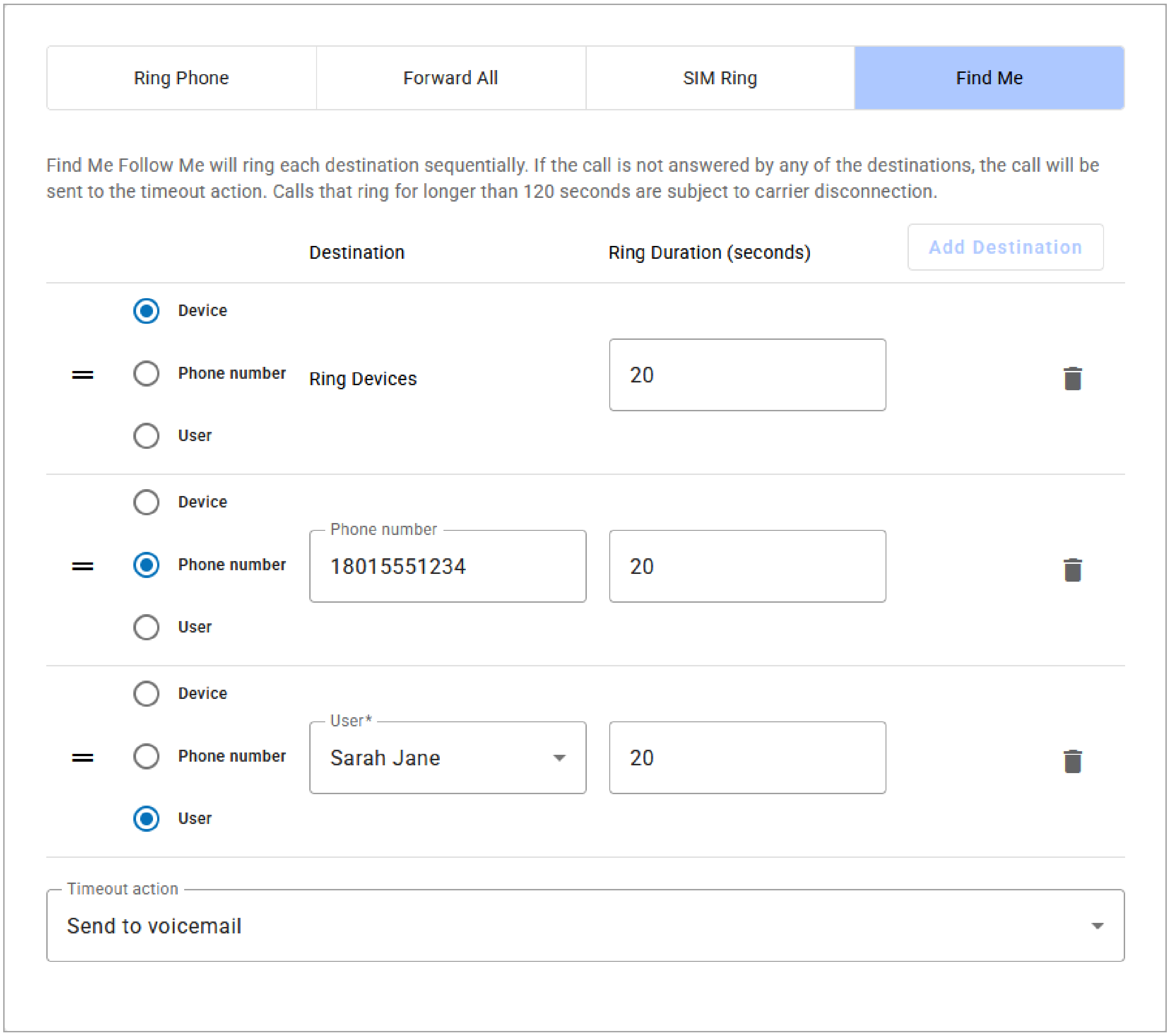


1. In the user's **Calls** tab, scroll down to **Call Handling** and select the **Find Me** tab.
2. Click **[Add Destination]** on the right.
3. Select the destination type:
   - **Device:** Ring all of the user's devices simultaneously.
   - **Phone Number:** Enter any off-net phone number.phone number (on- or off-net).
   - **User:** Select a user on the account to receive your calls.
4. To the right of the destination, enter the number of seconds the call will ring before moving on to the next destination. Please note, calls that ring longer than 120 seconds may be disconnected by the carrier.
5. Repeat steps 2–4 to add another destination.

6. In the *Timeout action* field, choose what will happen to the call after all destinations have timed out:
   - Busy tone
   - Send to voicemail
7. Review the list of destinations to make sure they're correct and in the right order. Drag to reorder a destination or click the **trash** icon to delete it.
8. When you're done, scroll down and click **[Save]**.

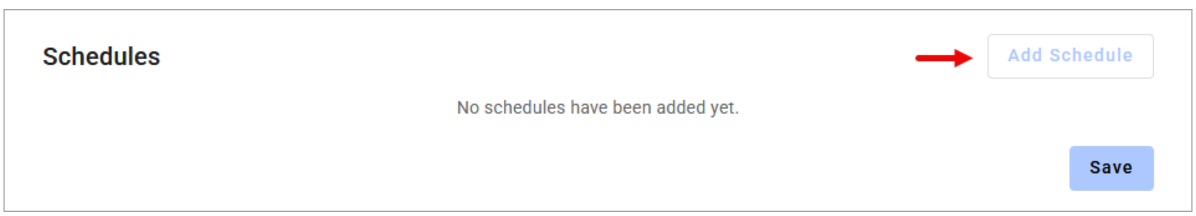
Call Schedules

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

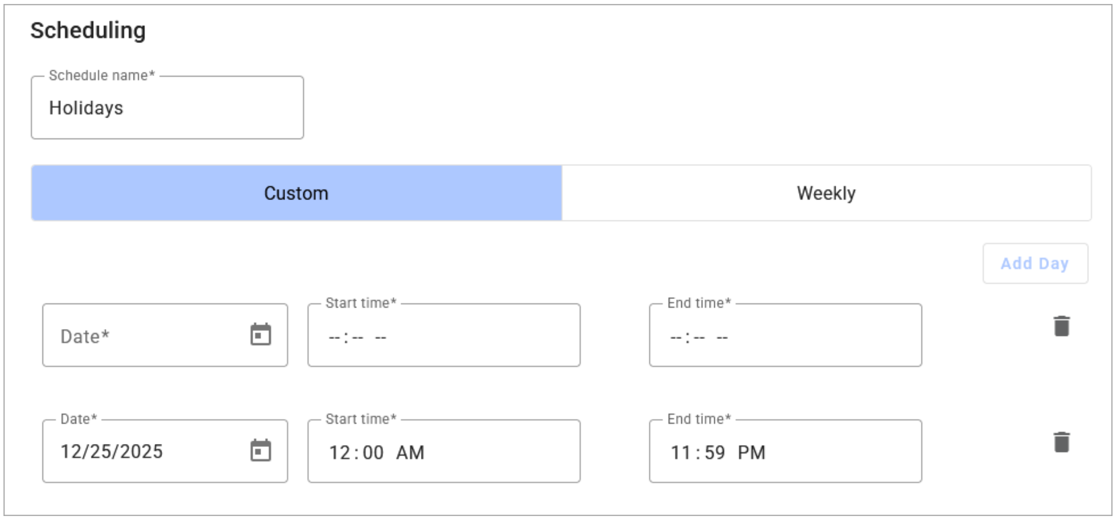
To access this feature, sign in to the portal and scroll down to **Call Handling**. For Admin users, go to **Users > Calls** tab.

Add Schedule

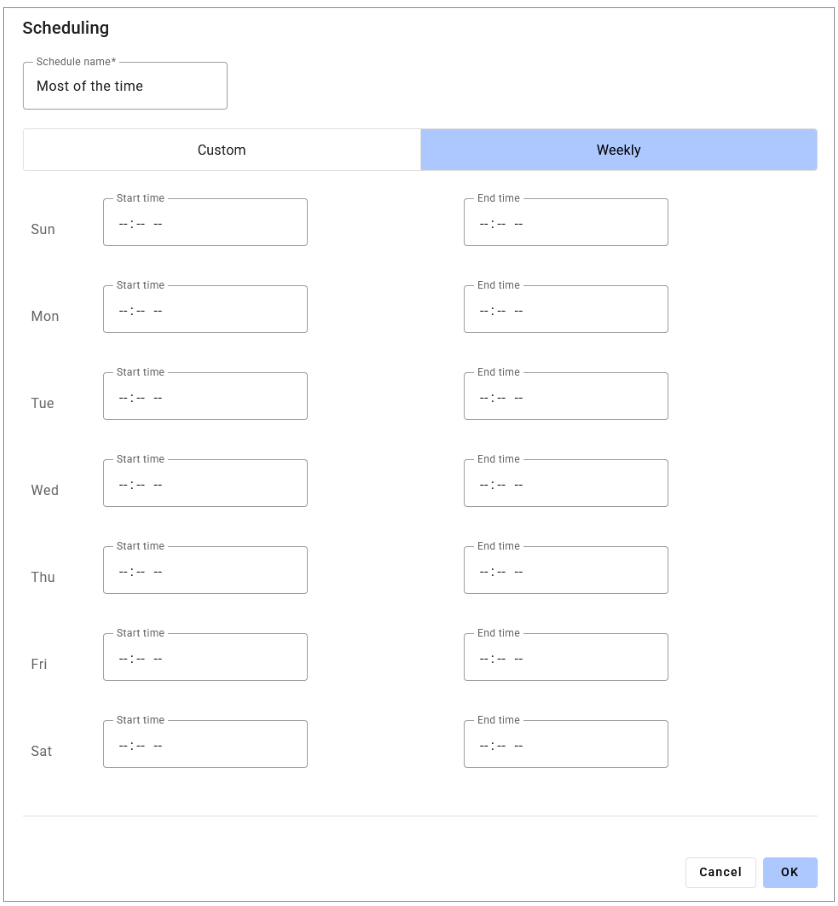
1. Click **[Add Schedule]**. The Scheduling window will open in a popup.



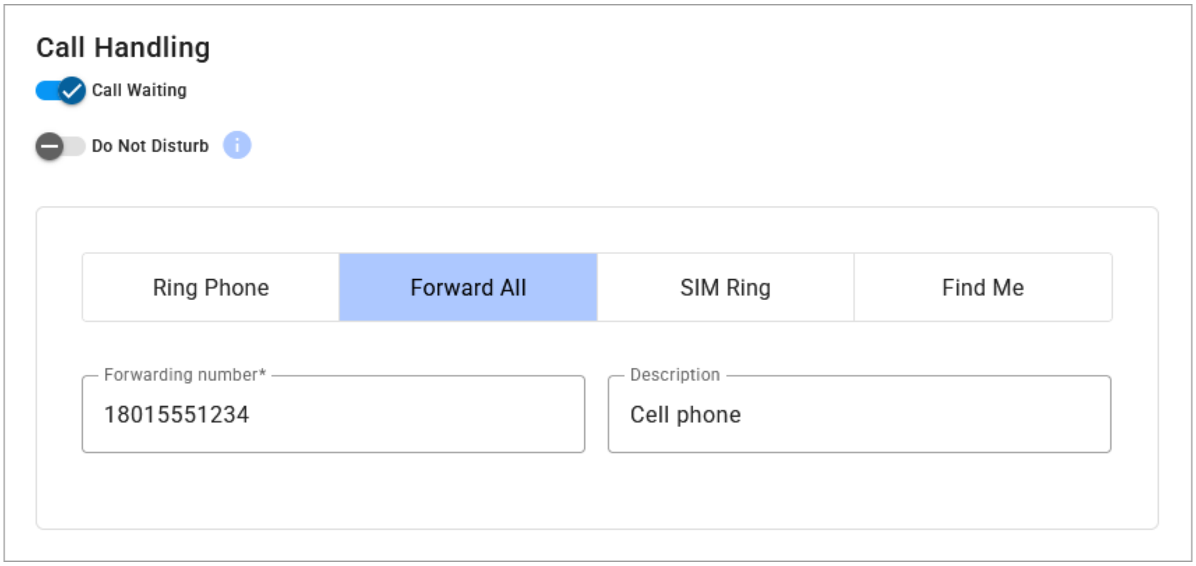
2. Enter the name of the schedule.
3. Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).
   - **Custom (per day).** Enter the date and time this schedule will be in effect. Click **[Add Day]** to add another one, or the trash icon to remove a day.



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



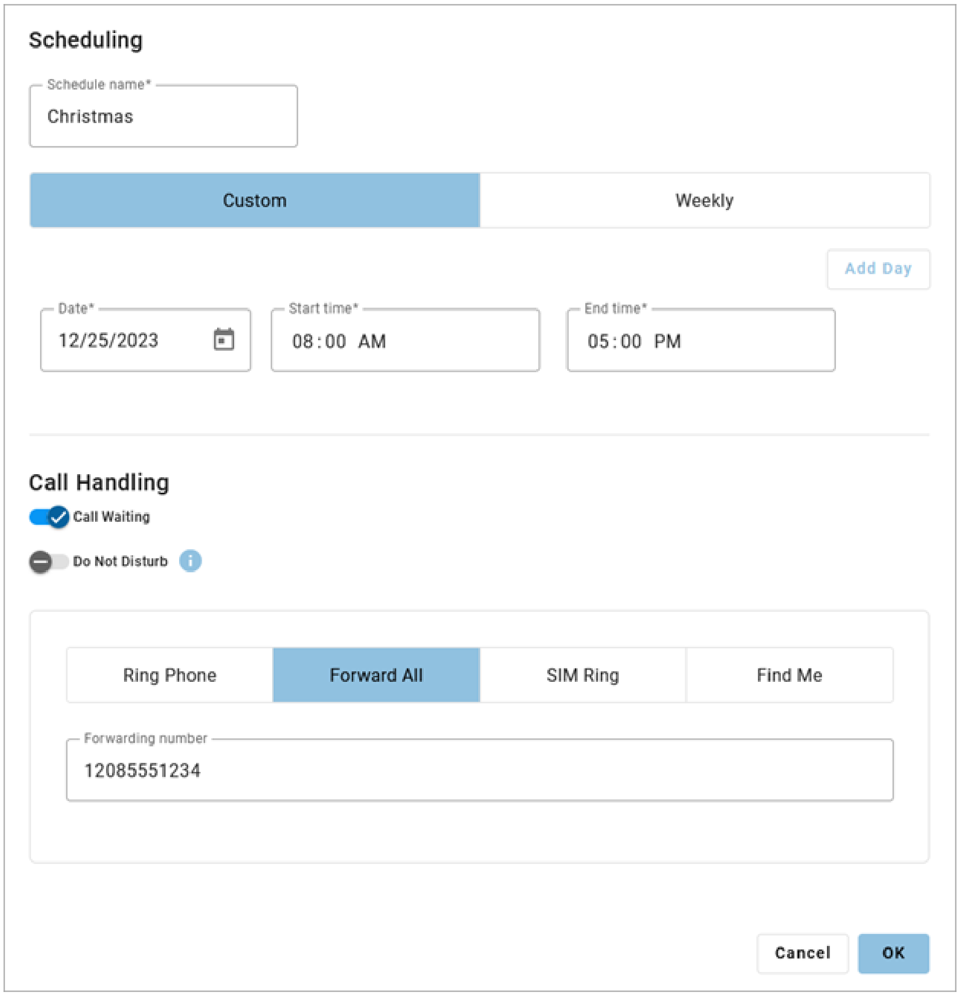
4. **Call Handling:** Scroll down and select the call handling actions that will occur during the specified times.



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

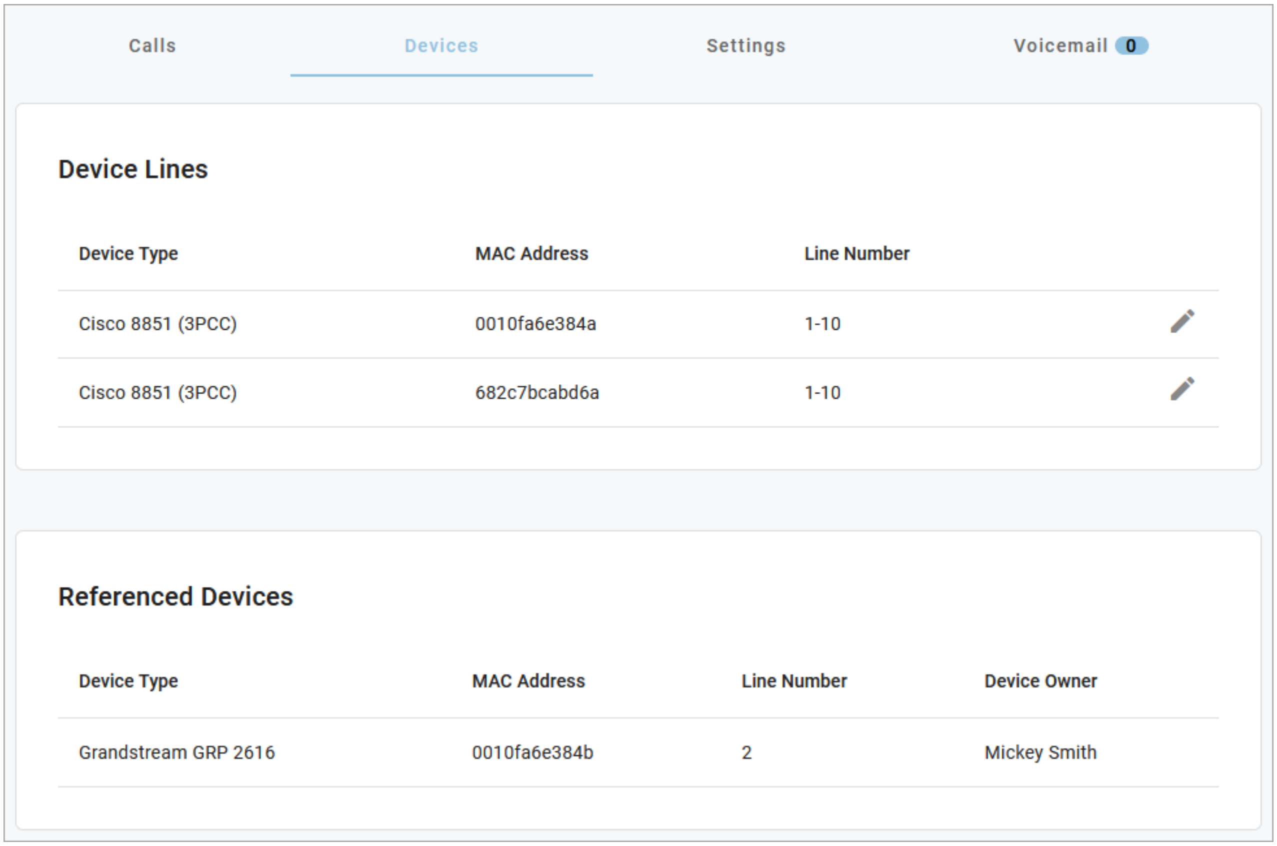
Custom Schedule Example

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



Manage a User's Devices

All devices assigned to the user are listed in the **Device Lines** section. If the user has a shared line on another user's device, it is listed under **Referenced Devices**.



Devices can be managed at the user level (here) or from the main **Devices** section in the left navigation menu. In either location, locate the device and click **Edit** on the right to manage its settings:

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

See Devices for detailed information about these features and settings.

UC Apps

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

Legacy Cymbus apps are not referenced.

UC Apps

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

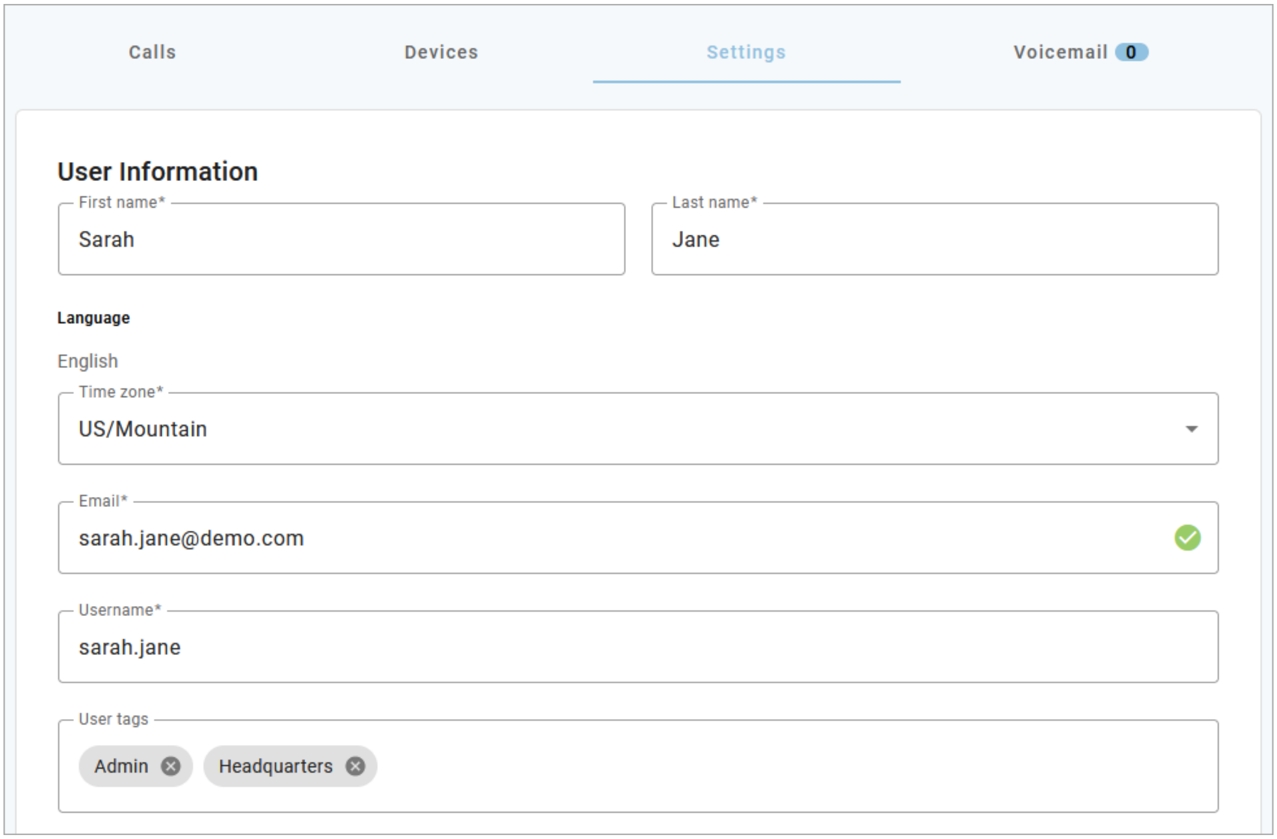
Manage a User's Settings

The user's Settings tab provides some quick information about the selected user. In this tab, you can reset the user's Voice Portal access and login information, grant Admin privileges (end user role), and manage their calling plans.

See also: Reassign User Account

User Information

Basic information about the user is presented in the User Information section: name, language, time zone, email, username, and user tags assigned to the user.



Field	Description
Name	The first and last name of the user.
Language	The user's default language, which applies to the web portal, telephone user interface (TUI) audio prompts, and system-generated emails. • English • French (Canadian) • Spanish This is separate from the Language setting on the Voicemail tab, which applies specifically to that voicemail box. Please remember to set both.
Time zone	The time zone displayed on the user's device and call records.
Email	A valid email address is required for every user who has access to the Voice Portal. This is where their *Welcome* and *Forgot Password* emails are sent. If single sign-on (SSO) is enabled, this must match the email address associated with their SSO account.

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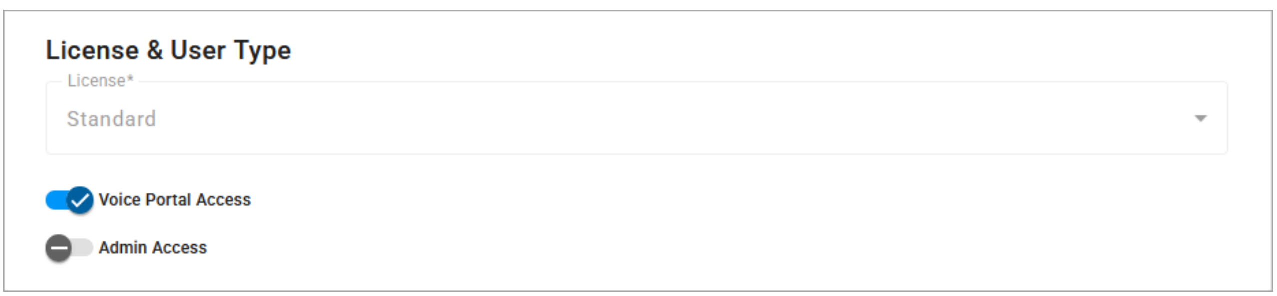
Field	Description
User tags	User tags are an optional mechanism to organize and search for users by one or more custom identifiers, such as department, location, or anything else. If it would be useful to search for this user by a particular term, enter it here.

License & User Type

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

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



Voice Portal Access

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

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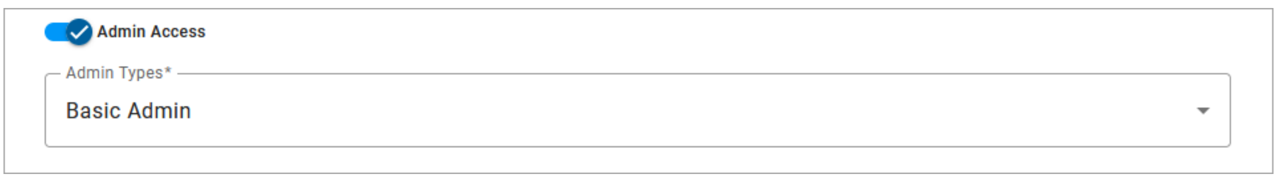
Option	Description
Voice Portal Access	For users with a Standard license, choose whether to enable Voice Portal access: • **Disabled:** The user does not have access to the Voice Portal, and the *Email* field is optional. • **Enabled:** The user has access to the Voice Portal, and the *Email* and *Username* fields are required.
[Resend Welcome Email]	Resend the *Welcome* email with the URL to their account portal, a link to create a password, and their UC app information.
[Reset Password]	Send the user an email with a link to reset their password. Not available with SSO.

Admin Access

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



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

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

Account Managers

Account Managers have the same level of access as Super Admins, but because they do not have their own voice services, they are managed separately from users. See Admin User Types and End User Feature Access for more information.

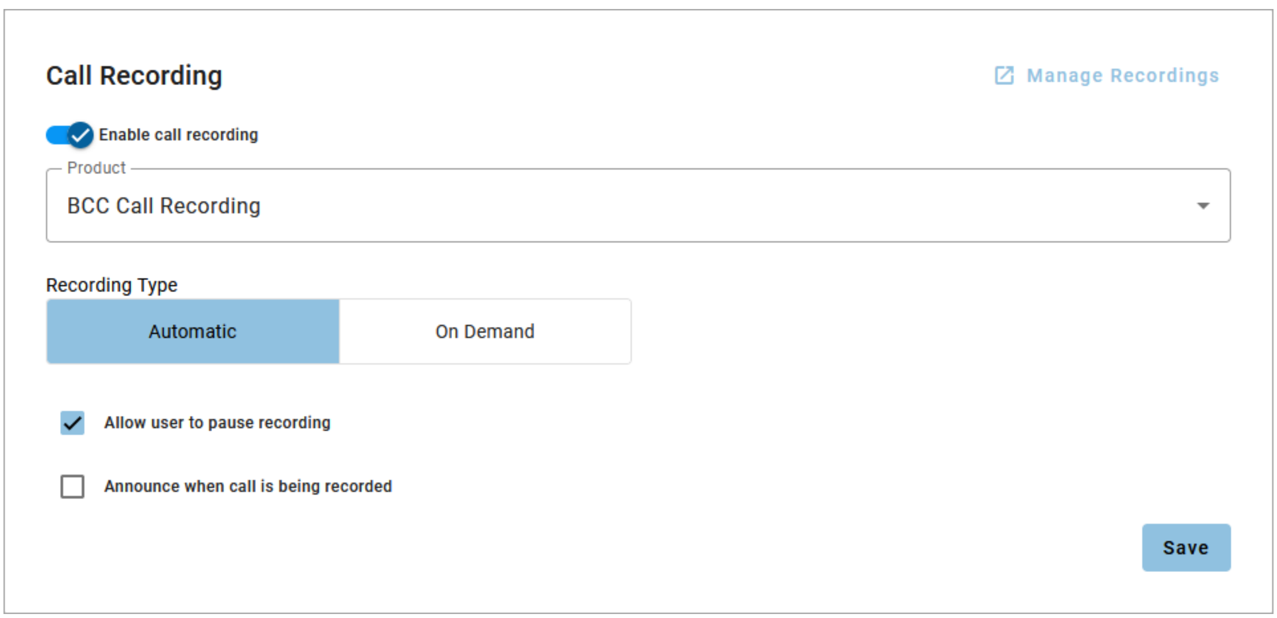
Music On Hold

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

Call Recording

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

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



Calling Plans

This shows the calling plan(s) assigned to this user. Multiple calling plans can be assigned to a user, and the most permissive settings will apply. A call will go through if any of their calling plans allows it. A call will be blocked if the location is blocked in all of the user's calling plans.

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

Calling plans

Calling plan	Minutes Used	Total Minutes
Default Plan	0	Unlimited

Account Codes

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

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

Manage a User's Voicemail

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

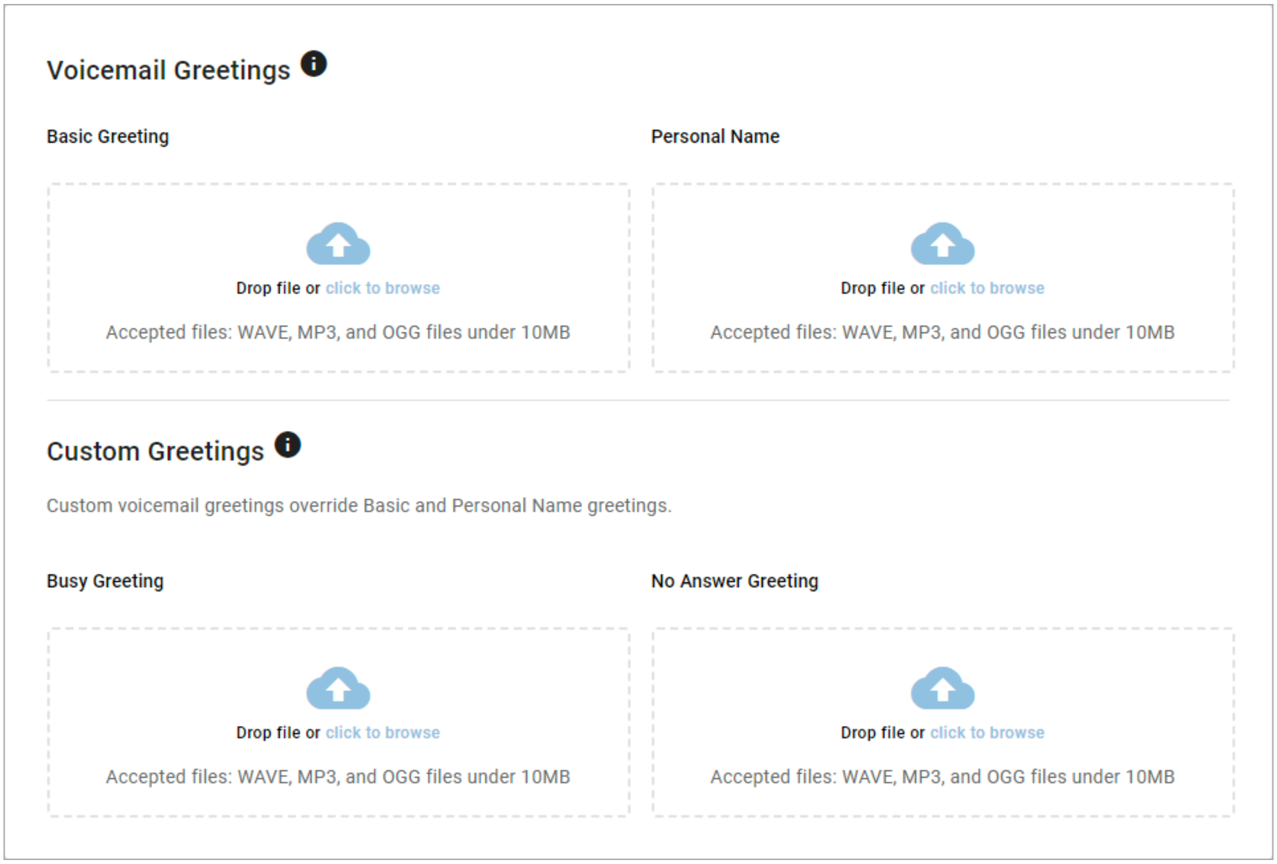
Tip
Voicemail boxes can be managed at the user level (here) or in the Voicemail section of the portal. See Voicemail for more information about these settings.

Voicemail Box Details

Field	Description
Voicemail Box Name	Enter or edit the name of the voicemail box. In the **User > Voicemail** tab, you can choose which voicemail box to assign to a particular user.
Owner	The name of the user(s) this voicemail box is assigned to. This is not an editable field.
Language	The language used for the voicemail menu audio prompts and forwarded Voicemail to Email messages: • English • French (Canadian) • Spanish If this voicemail box is assigned to multiple users, changing this setting for one user will change it for the other users. This is separate from the Language setting in the user's Settings tab, which applies to the web portal UI, telephone user interface (TUI) audio prompts, and system-generated emails. Remember to set both.

Voicemail Box Greetings

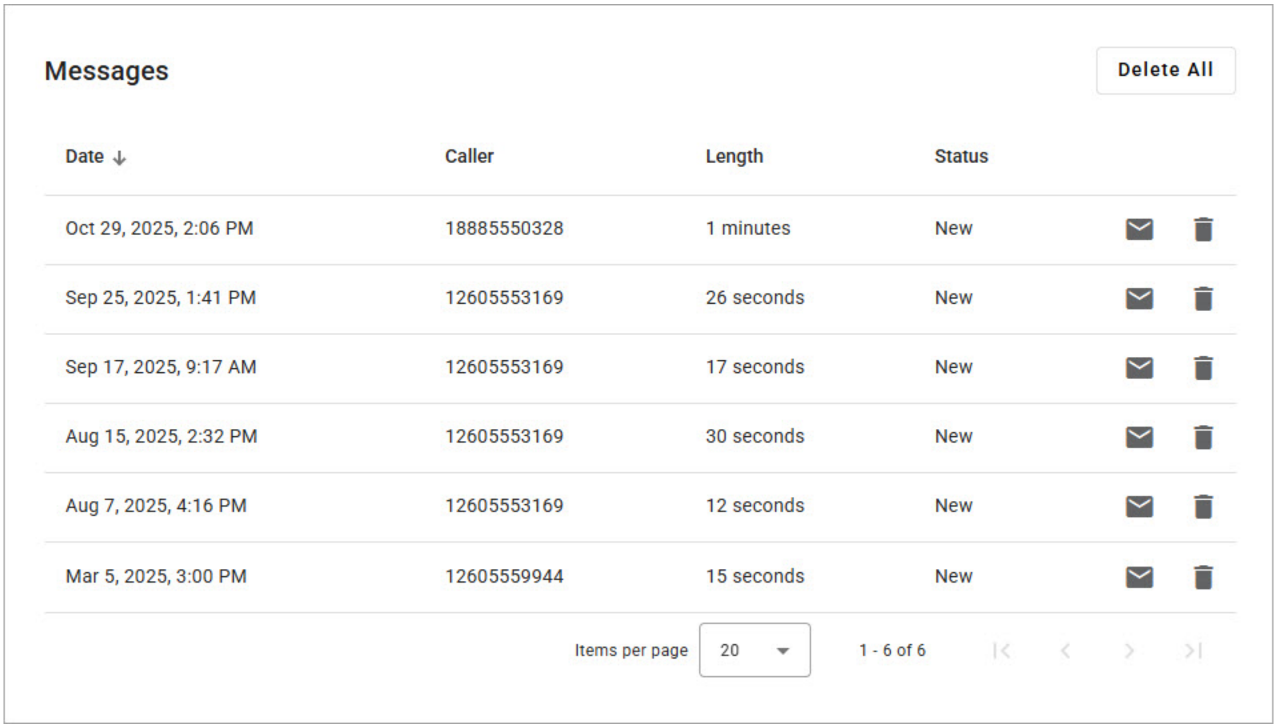
Upload and manage voicemail greetings (Basic, Busy, No Answer) and personal name recordings. Click the field to select a file from your computer, then click **[Upload]**. The upload will accept MP3, OGG, and WAV files that are less than 10MB.



Messages

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

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



- **Download.** Save a copy of the message to your computer as an MP3 file.
- **Save.** Change the status of the message to *Saved*.
- **Delete.** Delete this message from the box. To delete all messages at once, click **[Delete All]** in the top right.

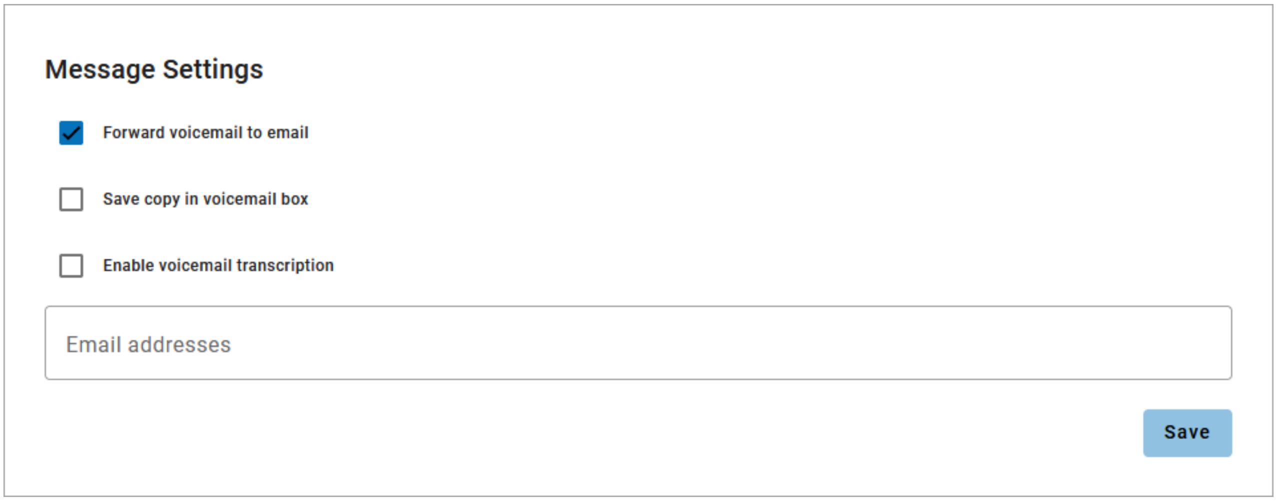
Storage Limit

Voicemail boxes do not have a storage space limit, and messages are stored indefinitely. Individual messages are limited to 5 minutes.

Message Settings

Forward Voicemail to Email

All voicemail boxes have the option to forward voicemail messages to one or more email addresses. When a message is left on the voicemail box, an email notification is sent to the specified email address(es) with the message recording attached as an MP3 file.



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

Example Email

Hi Donna,

You got a new Voicemail. Here are the details:

From: NAME / 1 (888) 555 0328
Time: Wednesday, October 29, 2025 at 2:06 PM
Duration: 01:04

See attachment.

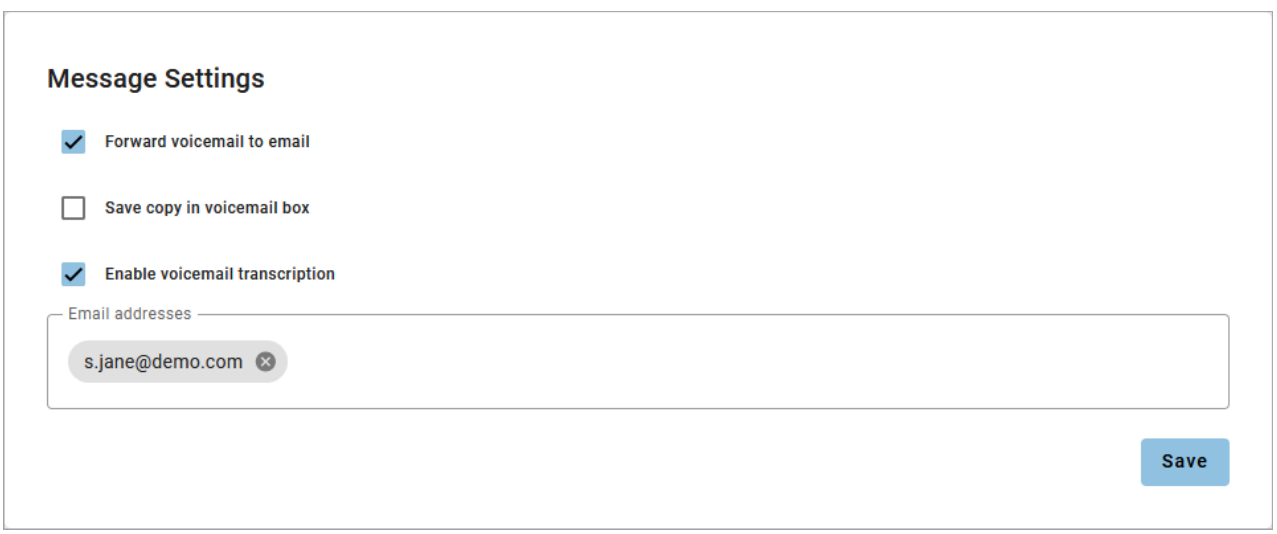
"From" Email Address
Forwarded voicemails are sent from noreply@cymbus.com. Please remember to whitelist this address so the emails can be delivered to your inbox.

Voicemail Transcription

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription, available only on Business Cloud Communications and , takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an MP3 file (depending on if you also have forwarding enabled).

With voicemail transcription, you can:

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



1. In the voicemail box, scroll down to **Message Settings**.
2. Check the box for *Enable Transcription*.
3. Optionally, check the box for *Forward Voicemail to Email* to email an MP3 of the message and *Keep a copy in voicemail box* if you want to save a copy of the message in the voicemail box when it's forwarded.
4. In the field below, enter one or more email addresses in the field below separated by commas (required).
5. Click **[Save]**.

Voicemail messages will be transcribed and sent to the email address(es) indicated here. If *Forward Voicemail to Email* is also enabled, an MP3 of the message will be attached to the email.

Example Email

Hi Mickey,

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

From: Kevin O / 1000
Time: Tuesday, October 19, 2021 at 11:56 AM
Duration: 00:40
Transcription:

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

See attachment.

Thanks,

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

HIPAA
Voicemail transcription is not HIPAA compliant. If you need to maintain HIPAA compliance, we recommend that you not enable transcription.

Admin User Types

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

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

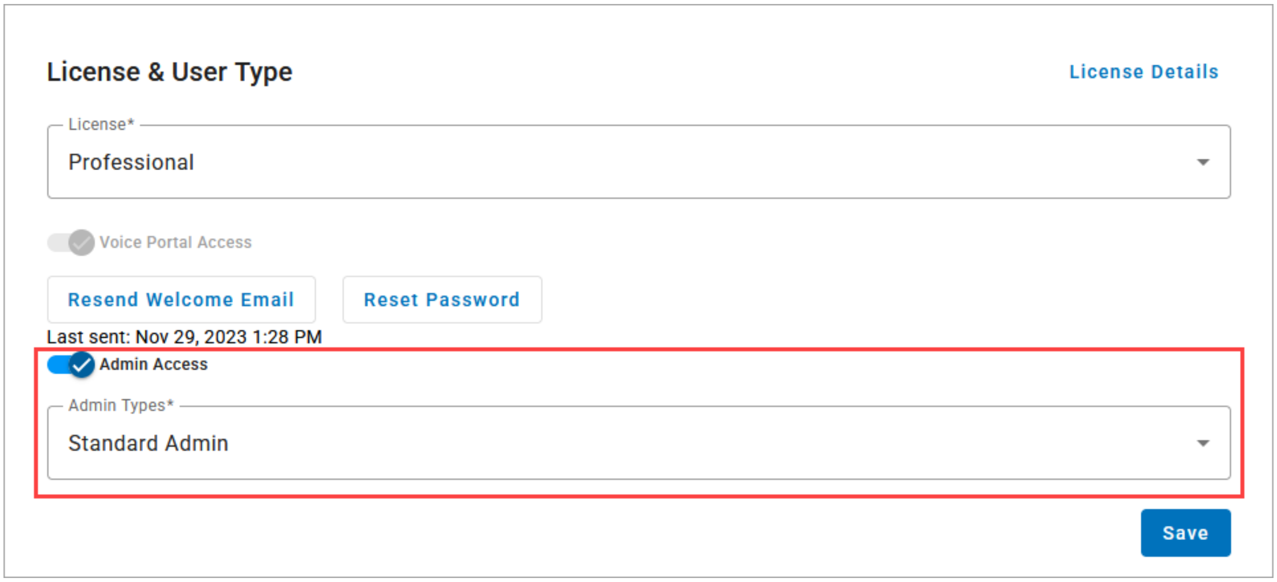
Admin Type	Access Description
Account Managers	**Create, edit, delete** Account Managers have full account-level permissions and can administer all other admin users. They do not have voice services of their own, so they are managed by your provider.
Super Admins	**Create, edit, delete** Super Admins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

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

Enable Admin Access

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

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



End User Feature Access

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

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

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

For more information about these users, see Admin User Types.

Access Levels

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

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

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Account Settings & Features

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Account Codes	Create	Create	Create	Create	-
Call Groups	Create	Create	Edit	View	-
Call History	View	View	View	View	-
Call Park	Create	Create	Edit	View	-
Emergency Notification Configuration[a]	Create	Create	View	View	-
Media Files	Create	Create	Create	Create	-
Music On Hold	Create	Create	Edit	View	-
Short Codes	Create	Create	Create	Create	-
Single Sign-on	Create	-	-	--	-

[a] If you don't have access to these settings, please contact your account administrator for assistance.

Call Handling

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Call Schedules	Edit	Edit	Edit	View	Edit
Call Screening	Edit	Edit	Edit	View	Edit
Call Waiting	Edit	Edit	Edit	View	Edit
Do Not Disturb	Edit	Edit	Edit	View	Edit
E911 Address[a]	Edit	Edit	View	View	Edit
Find Me/Follow Me	Edit	Edit	Edit	View	Edit
Forward All	Edit	Edit	Edit	View	Edit
Phone Number Destinations[a]	Edit	Edit	Edit	View	View

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Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Simultaneous Ring	Edit	Edit	Edit	View	Edit
Unanswered Call Handling	Edit	Edit	Edit	View	Edit

[a] If you don't have access to these settings, please contact your account administrator for assistance.

Devices

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

User Management

Contact your service provider to add or delete users.

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Account Codes	Create	Create	Create	Create	-
Admin Type	Edit	View	View	View	-
Calling Plan	View	View	View	View	-
Caller ID (Enable/ Disable)	Manage	Manage	Manage	View	Manage

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Caller ID Name (CNAM)	View	View	View	View	View
Caller ID Number	Edit	Edit	Edit	View	View
Call Recording	Edit	Edit	Edit	Edit	View
Email Address	Edit	Edit	Edit	View	-
Extension	View	View	View	View	-
First and Last Name	Edit	Edit	Edit	View	View
License	View	View	View	View	-
Language	Edit	Edit	Edit	Edit	-
Reassign User[a.]	Edit	Edit	Edit	-	-
Reset End User Password	Manage	Manage	Manage	View	Manage
Reset Voicemail PIN	Manage	Manage	Manage	View	-
Time Zone	Edit	Edit	Edit	View	-
User Groups	Create	Create	Edit	View	-
User Tags	Create	Create	Create	View	-
Username	Edit	Edit	Edit	View	View

a.

Voicemail

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Bypass Voicemail PIN	Edit	Edit	View	View	-
Change Voicemail Box	Edit	Edit	Edit	View	-
Custom Greetings	Manage	Manage	Manage	Manage	Manage

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Forward to Email	Manage	Manage	Manage	View	Manage
Language	Edit	Edit	Edit	Edit	-
Messages[a]	Manage	Manage	Manage	View	Manage
Reset Voicemail PIN	Manage	Manage	Manage	View	-
Voicemail Box Name	Edit	Edit	Edit	View	-

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

Auto-Attendant

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Auto-Attendants[a]	Create	Create	Edit	View	-
Name	Edit	Edit	Edit	View	-
Assigned Phone Number	Create	Create	Edit	View	-
Status	View	View	View	View	-

a.

Specialty Lines

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

Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Line Name	View	View	View	View	-
Phone Number	View	View	View	View	-
Device MAC Address	View	View	View	View	-

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Feature	Super Admins	Advanced Admins	Standard Admins	Basic Admins	Users
Device Registration Status	Refresh	Refresh	Refresh	Refresh	-
Device Port Number	View	View	View	View	-

Reassign User Account

This feature allows you to reassign a user’s account settings to another user. So, if one employee leaves the organization, their phone number, caller ID, device lines, IVR/Auto-Attendant references, etc. can be reassigned to their replacement.

When a user account is reassigned, the current user is removed from the system and their account settings are reassigned to a new user. Not all settings will make the switch, though. Here's how it works:

New User Default Settings

The name, username, and email address are updated with the new user's information. For privacy reasons, the following features and settings are reset to default:

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

Features and Settings That Switch

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

- Calling plan assignments (not minutes used)
- Product tier
- Voice Portal access
- End user role (Admin or Limited)
- Caller ID phone number and settings
- Device lines assigned to the user

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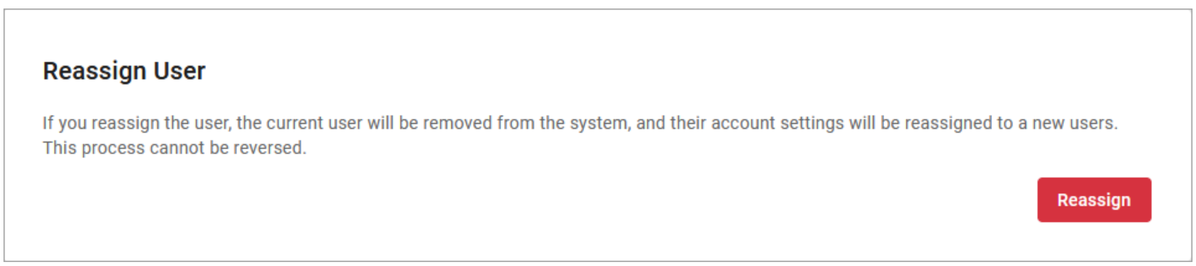
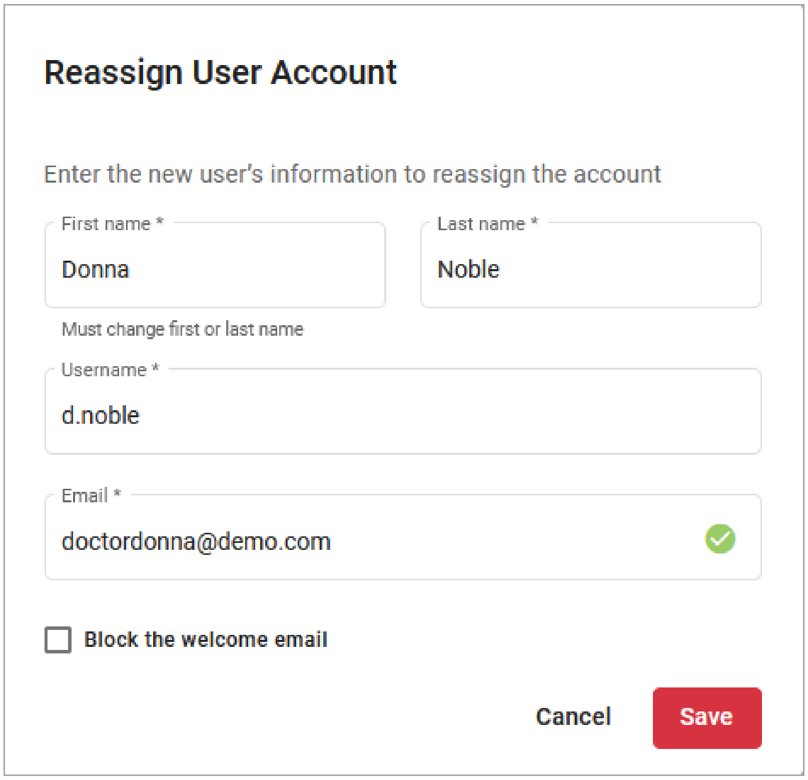
- Phone numbers routing to the user
- Cymbus UC device lines
- Extension number
- Language
- Time zone
- Shared lines, speed dials, and BLFs owned by or reference the user
- Paging and Pick Up Groups to which the user belongs
- Queues to which the user belongs
- IVR/Auto-Attendant references that point to the user, their device lines, or their voicemail box
- SIP trunk overflow routing (pointed at the user or their voicemail)

Steps to Reassign an End User Account

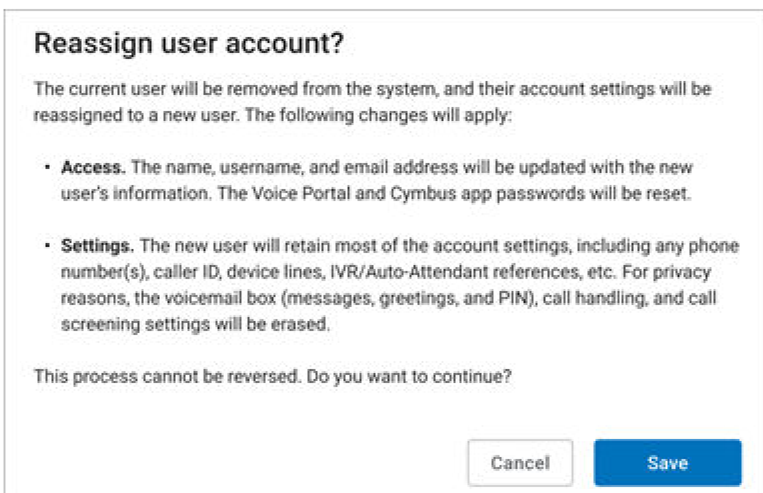
1. Go to Users and edit the user whose account you want to reassign.
2. In the user's Settings tab, scroll down to the bottom and click **[Reassign]**.
3. If you don't see this button, you may need additional permissions to use this feature. Please contact Customer Support for assistance.



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



5. Read the warning message carefully to understand what will and will not be switched. If you still want to proceed with the reassignment, click **[Save]**.



6. The previous user's account settings have been successfully reassigned to a new user. Unless the welcome email was blocked or SSO is enabled, the new user will receive instructions for accessing the portal.

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

End User Access

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

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

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Voicemail

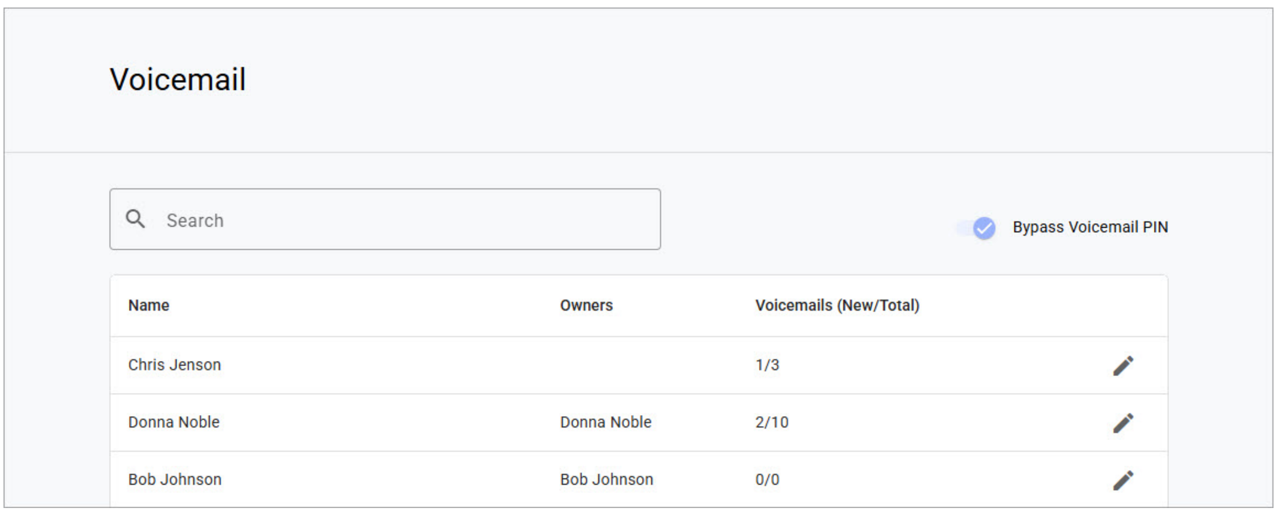
Voicemail is a huge part of how we communicate, and we make it very customizable. In addition to customizing the greetings, you can set up preferences for an individual user—including Voicemail to Email, where you can choose to forward voicemail messages as an MP3 to specified email address(es).

To view and manage all voicemail boxes on the account, go to **Account > Voicemail**.

Voicemail Management

While this section discusses how to manage voicemail boxes at the account level, they can also be managed at the user level (see Manage a User's Voicemail Box for details). The settings for individual voicemail boxes are the same in either location.

Additionally, voicemail messages and greetings can be managed by dialing in to the voicemail box. **See also:** Voicemail Access



Voicemail Access

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

Bypass Voicemail PIN

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

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

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

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Voicemail Box Details

Field	Description
Voicemail Box Name	Enter or edit the name of the voicemail box. In the **User > Voicemail** tab, you can choose which voicemail box to assign to a particular user.
Owner	The name of the user(s) this voicemail box is assigned to. This is not an editable field.
Language	The language used for the voicemail menu audio prompts and forwarded Voicemail to Email messages: • English • French (Canadian) • Spanish If this voicemail box is assigned to multiple users, changing this setting for one user will change it for the other users. This is separate from the Language setting in the user's Settings tab, which applies to the web portal UI, telephone user interface (TUI) audio prompts, and system-generated emails. Remember to set both.

Voicemail Box Greetings

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

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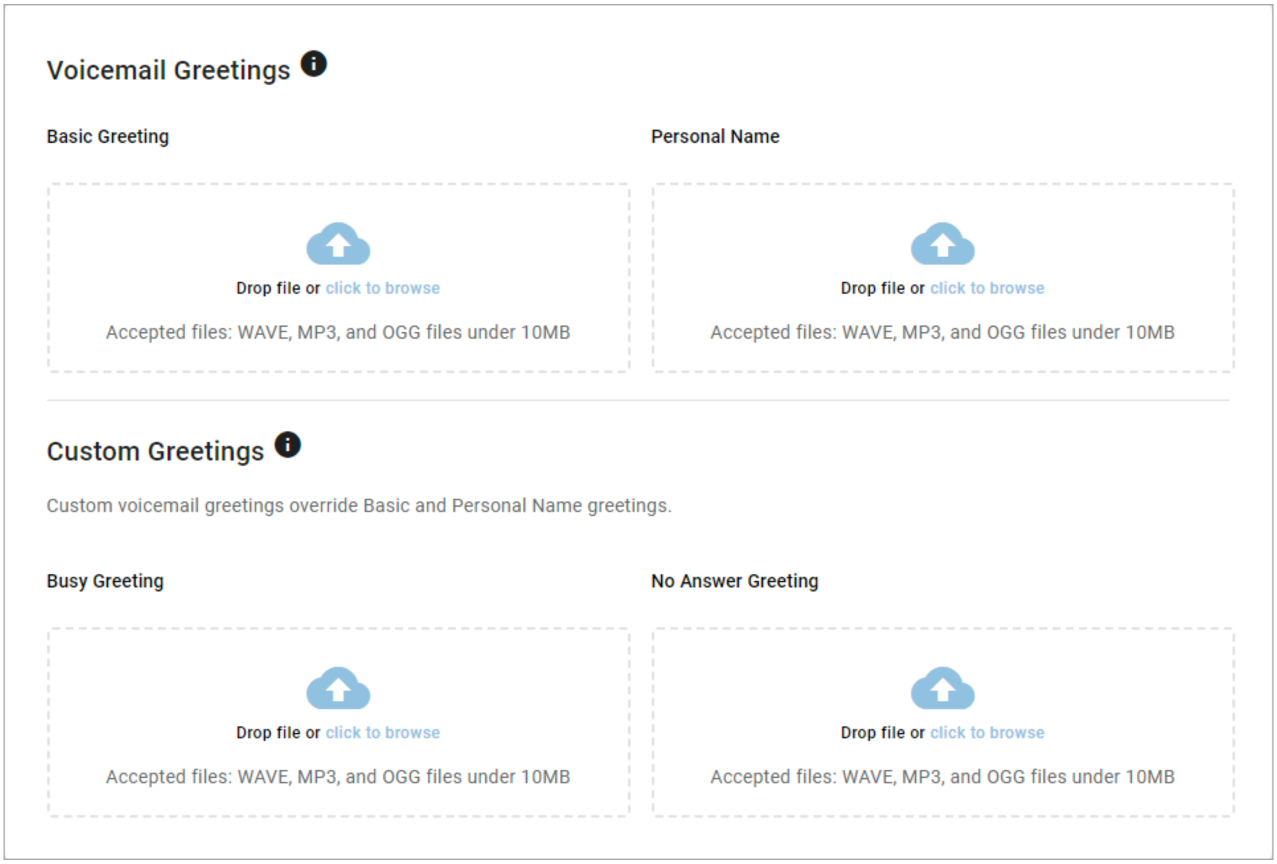
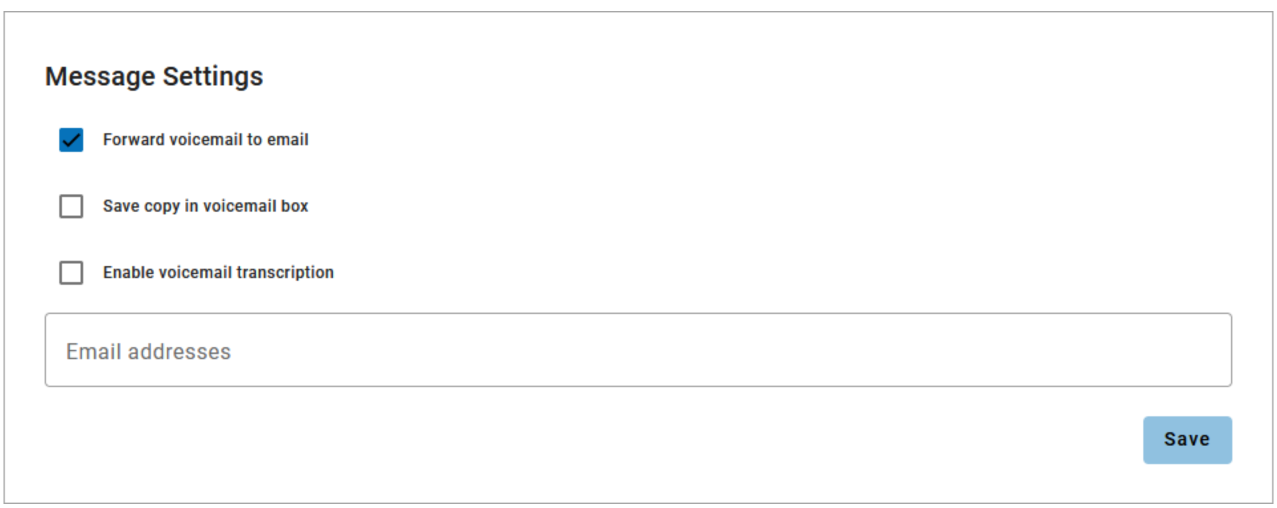


Message Settings

Forward Voicemail to Email

All voicemail boxes have the option to forward voicemail messages to one or more email addresses. When a message is left on the voicemail box, an email notification is sent to the specified email address(es) with the message recording attached as an MP3 file.



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

Example Email

Hi Donna,

You got a new Voicemail. Here are the details:

From: NAME / 1 (888) 555 0328
Time: Wednesday, October 29, 2025 at 2:06 PM
Duration: 01:04

See attachment.

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

Voicemail Transcription

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription, available only on Business Cloud Communications and , takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an MP3 file (depending on if you also have forwarding enabled).

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

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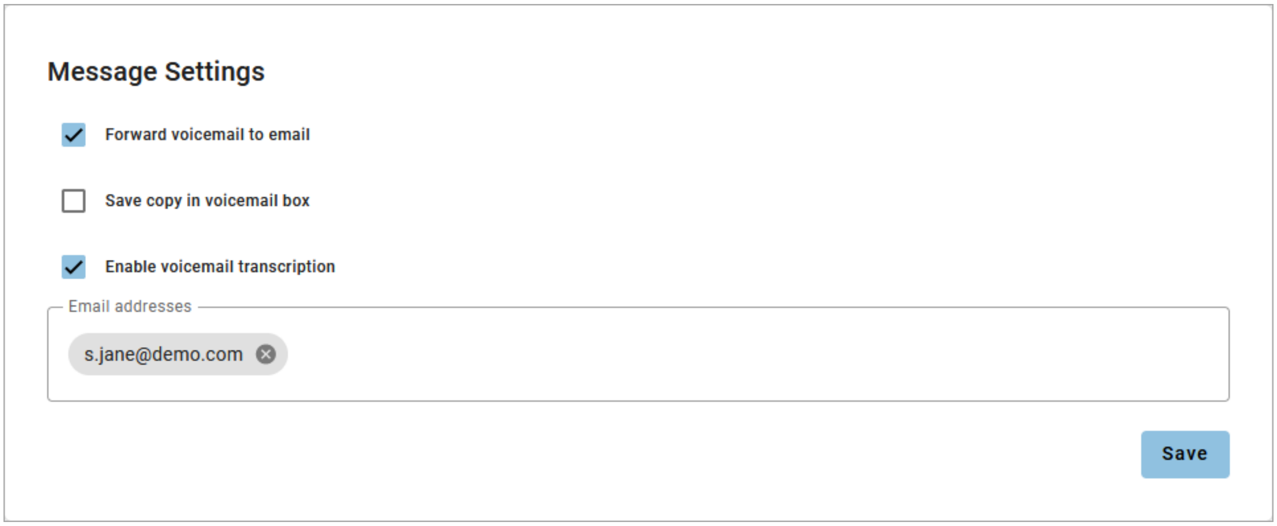
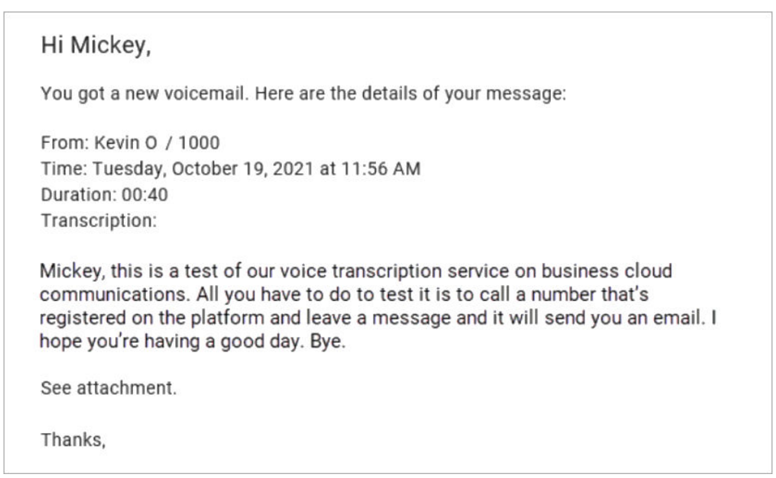
- Easily forward messages you've received.



1. In the voicemail box, scroll down to **Message Settings**.
2. Check the box for *Enable Transcription*.
3. Optionally, check the box for *Forward Voicemail to Email* to email an MP3 of the message and *Keep a copy in voicemail box* if you want to save a copy of the message in the voicemail box when it's forwarded.
4. In the field below, enter one or more email addresses in the field below separated by commas (required).
5. Click **[Save]**.

Voicemail messages will be transcribed and sent to the email address(es) indicated here. If *Forward Voicemail to Email* is also enabled, an MP3 of the message will be attached to the email.

Example Email



Hi Mickey,

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

From: Kevin O / 1000
Time: Tuesday, October 19, 2021 at 11:56 AM
Duration: 00:40
Transcription:

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

See attachment.

Thanks,

US English

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

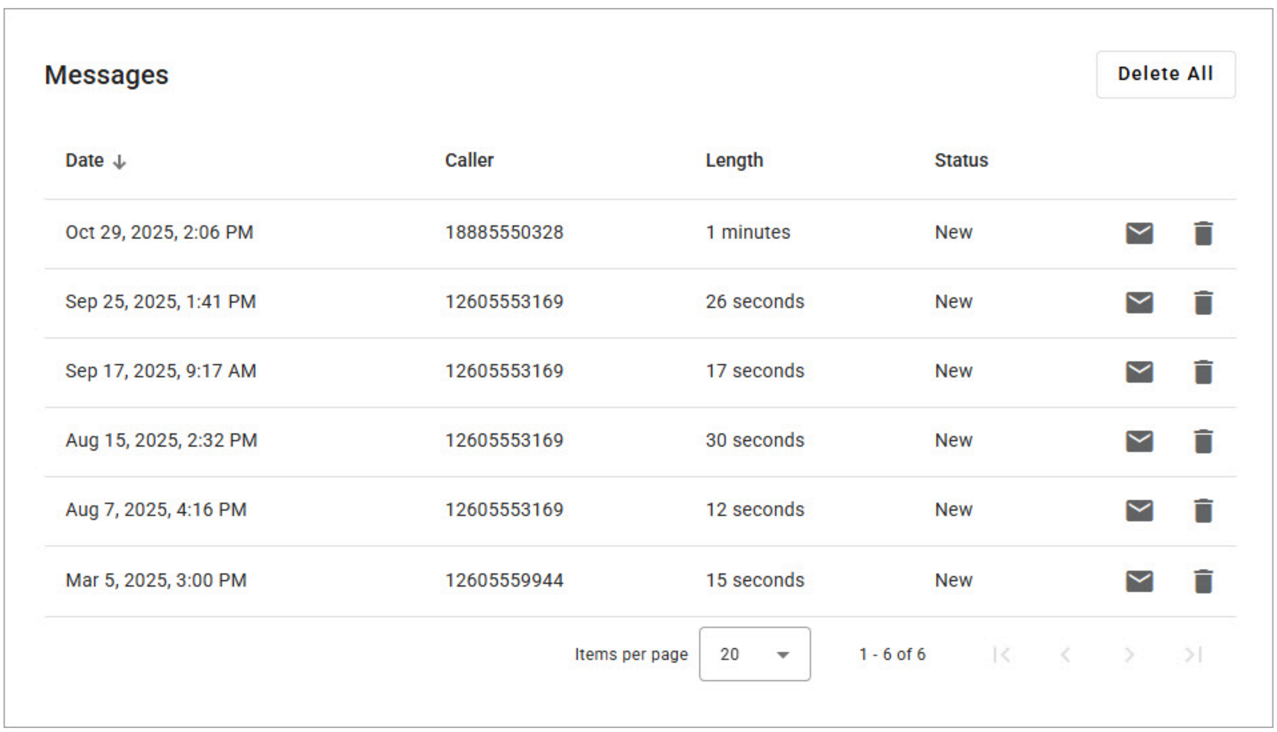
HIPAA

Voicemail transcription is not HIPAA compliant. If you need to maintain HIPAA compliance, we recommend that you not enable transcription.

Messages

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

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



Messages

Delete All

Date ↓	Caller	Length	Status		
Oct 29, 2025, 2:06 PM	18885550328	1 minutes	New		
Sep 25, 2025, 1:41 PM	12605553169	26 seconds	New		
Sep 17, 2025, 9:17 AM	12605553169	17 seconds	New		
Aug 15, 2025, 2:32 PM	12605553169	30 seconds	New		
Aug 7, 2025, 4:16 PM	12605553169	12 seconds	New		
Mar 5, 2025, 3:00 PM	12605559944	15 seconds	New		

Items per page 20 1 - 6 of 6

- **Download.** Save a copy of the message to your computer as an MP3 file.
- **Save.** Change the status of the message to *Saved*.
- **Delete.** Delete this message from the box. To delete all messages at once, click **[Delete All]** in the top right.

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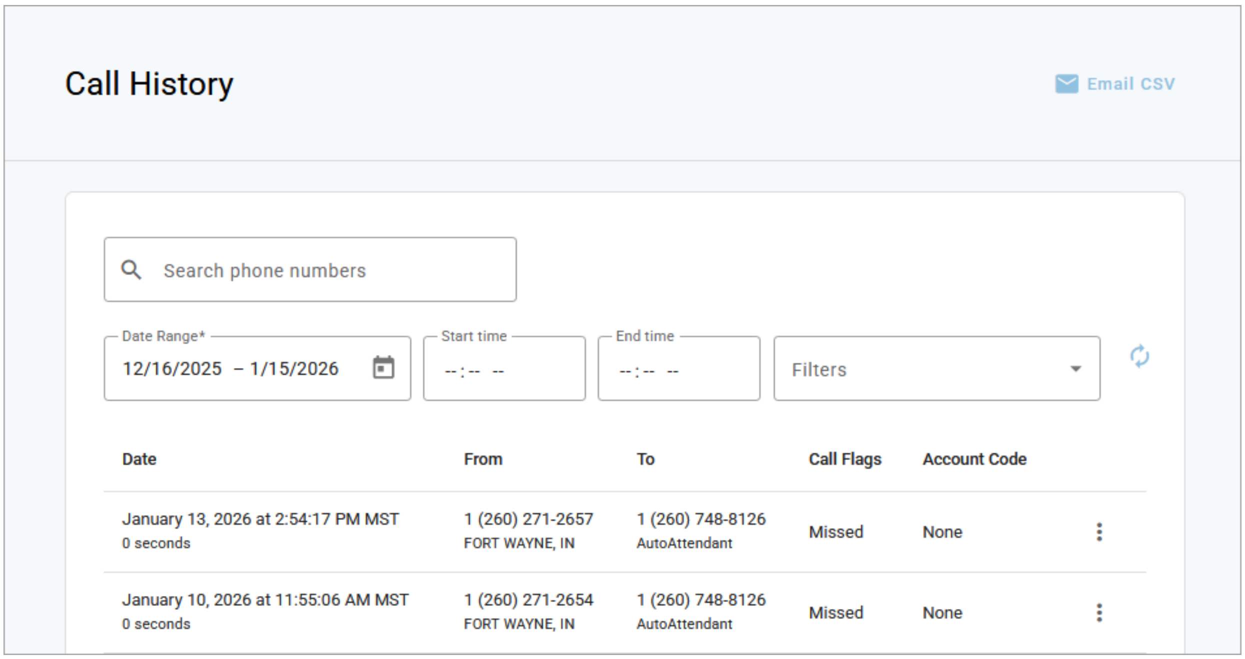
Storage Limit
Voicemail boxes do not have a storage space limit, and messages are stored indefinitely. Individual messages are limited to 5 minutes.

Call History

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

At the top right of the page, the current record list can be emailed as a .csv file. See Call History Report Fields for details on what is included in the report.



CDR Storage

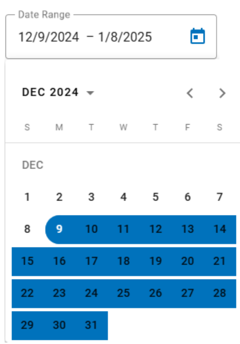
The FCC requires that all carriers keep call detail records for a period of 18 months. While some states defer to the FCC, other states have retention rates that exceed the federal requirement. To be safe, the portal displays call records for the past 18 months, but our database stores call records for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

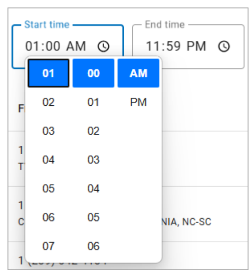
Apply Call Filters

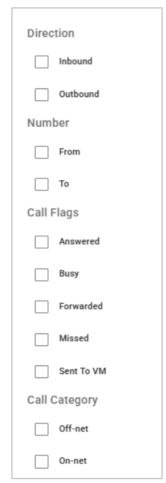
Apply call filters to locate specific call records. Once your parameters are set, the matching call records are displayed below.

- **Search phone numbers:** Search for a specific phone number or extension. Results automatically populate after the first three digits are entered.

- **Date Range:** Modify the date and time ranges or delete them entirely to gather the data you need. By default, the last 30 days of call records are displayed.
- **Start/End Time:** Enter a time range between 12:00 AM and 11:59 PM based on the account's time zone settings.
- **Filters:** Filter the call records by Direction, Number, Call Flags, and/or Call Category. These filters allow you to identify patterns in the calls, such as how many calls are being sent to voicemail, what calls are being missed, etc.
- **Reset:** When you're finished with your search, click **Reset Filters** to remove any parameters and display all calls.







Select Call Options

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

Block Number

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

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

Details

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

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

Email a Call History Report

Once you've applied the appropriate filters to locate the data you need, you can export the data into a .csv file for offline use.

1. At the top right of the page, click Email CSV. A banner displays on the page to indicate that your report is being generated.
2. When the file is ready, an email with a link to download the report is sent to the email address in your settings. The link **expires in 5 days** and can only be used once.

   Here's an example of what it looks like:

Hi Donna,

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

Account Name: Sample Account
Account Number: 123456789
Dates: Nov 10 - Dec 10, 2025
Types: Any
Call Flags: Any

Download the report

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

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

Call History Report Fields

This list includes all the fields available in the Call History report which can be emailed (exported) from the portal as a .csv file. Each line in the file represents a call. Your report may not include all available fields.

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

#	Field Name	Type	Description
G	AccountNumber	string	Client-assigned account number of the account to which the call is billed.
H	AcctId	string	Unique ID of account to which the call is billed.
I	ActualCallLengthSeconds	numeric	Length, in seconds, of the call from connect to end.
J	BillCallLengthSeconds	bigint	Length, in seconds, of the call from connect to end rounded according to applied calling plan product.
K	BillingCode	string	Unique code to identify the partition responsible for billing.
L	CallFlagType	string	Indicates if the call was answered on a device, and if not answered on a device, how did it terminate. • Answered • Busy • Forwarded • Missed • Voicemail
M	CallPickupFromId	string	Indicates the object that picked up the call.
N	CallPickupById	string	Indicates the object from which the call was picked.
O	CallType	string	Inbound or outbound.
P	CallingPlanProductId	string	Unique ID of the calling plan product with which the call was rated.
Q	CallingPlanProductName	string	Name of the calling plan with which the call was rated.
R	ConnectTime	date/time	Date and time the call was connected. Billing starts at this time.
S	Cost	double	Rated value of call, according to calling plan product.

#	Field Name	Type	Description
T	DialedNumber	string	Digits originally dialed to start the call.
U	DisconnectType	string	Indication of which party disconnected the call; "HangUp" indicates the origin, "HangUpOther" indicates termination.
V	EndTime	date/time	Date and time the call ended.
W	ForwardingNumber	string	Phone number the call was forwarded to.
X	ForwardingNumberAbbrRCName	string	Abbreviated name of the rate center of the phone number the call was forwarded to.
Y	ForwardingNumberCityName	string	Associated rate center city name of the phone number the call was forwarded to.
Z	ForwardingNumberLocation	string	MSA (metropolitan statistical area) of the rate center of the number.
AA	ForwardingNumberState	string	State of the associated rate center of the phone number the call was forwarded to.
AB	Id	string	Unique string of characters assigned to each call within the Alianza system.
AC	IdentityAttestLevel	string	STIR/SHAKEN field. A = fully attested or trusted source, B = partially attested, or C = not attested (potential spam).
AD	IdentityOriginationId	string	STIR/SHAKEN field. A unique identifier used to identify the source of the call.
AE	IdentitySignOrganization	string	STIR/SHAKEN field. The code for the carrier that performed the signing.
AF	IdentitySignSPCode	string	STIR/SHAKEN field. The code assigned to the service provider that signed the call.
AG	InPlan	boolean	True/False indicator of whether the call was considered "in plan."

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

#	Field Name	Type	Description
AW	RateType		Indication of why the call was rated the way that it was. • Local • OnPlanMinutes • OnPlanRated • OffPlanRated • Free • TollFree • 411 • Operator Local requires the calling plan to be set up with Unlimited Local, and the calls are rated at $0.
AX	ReferenceId	string	Unique ID of the acting or responsible party on the associated account to which the call was billed.
AY	ReferenceName	string	Name of acting or responsible party.
AZ	ReferenceType	string	Type of object to which the call is billed. • SIP_TRUNK • END_USER • ACCOUNT • BUSINESS_LINE
BA	SessionId	string	Internal softswitch session ID.
BB	SipCallIds	set<string>	List of SIP callIds associated with the call.
BC	StartTime	date/time	Date and time the call started ringing.
BD	TermAbbrRCName	string	Abbreviated name of the rate center of the phone number that received the call.
BE	TermCallCategory	string	Type of call that was made.

#	Field Name	Type	Description
BF	TermCarrier	string	Name of the carrier, if applicable.
BG	TermCityName	string	Associated rate center city name of the phone number that received the call.
BH	TermLocation	string	MSA (metropolitan statistical area) of the rate center of the phone number that received the call.
BI	TermNumber	string	Phone number that received the call.
BJ	TermState	string	State of the associated rate center of the phone number that received the call.
BK	OrigCnam	string	Originating caller's name.
BL	TermCnam	string	Terminating caller's name.
BM	ForwardingCnam	string	Forwarding caller's name.
BN	VerStat	string	STIR/SHAKEN field. String from the *verificationResponse* containing: • **TN-Validation-Passed.** The number passed the validation. • **TN-Validation-Failed**. The number failed the validation. • **No-TN-Validation.** No number validation was performed.

#	Field Name	Type	Description
BO	VerStatReason	string	STIR/SHAKEN field. String of text from the *verificationResponse* message used in case of failed verification. • BAD_IDENTITY_INFO • CLAIM_TO_SIP_MISMATCH • INVALID_IDENTITY_HEADER • MALFORMED_IDENTITY_HEADER • STALE_DATE • UNSUPPORTED_CREDENTIAL • UNSUPPORTED_PASSPORT_FORMAT
BP	CorrelationData		
BQ	ApplicationData		
BR	OrigNumberTags	string	Tag(s) assigned to the number on an outbound call.
BS	TermNumberTags	string	Tag(s) assigned to the number on an inbound call.

Analytics

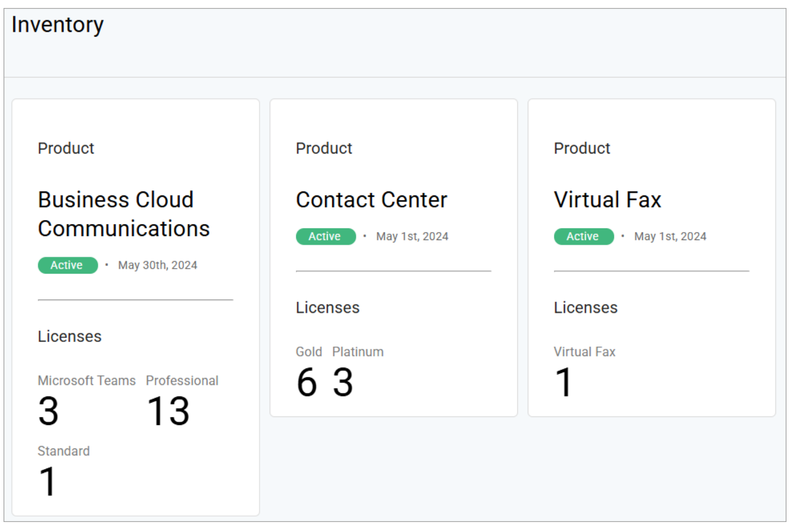
The Analytics section presents metrics about the account.

Inventory

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

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

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



Account Settings

Call Park

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

Use Call Park

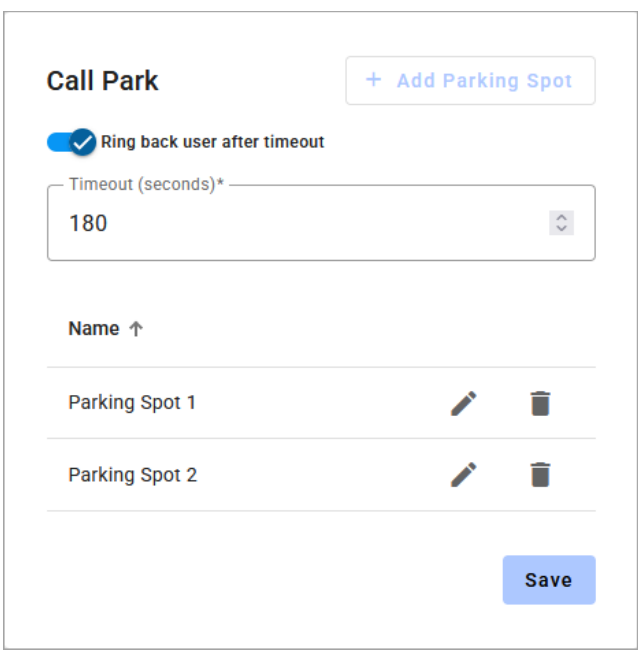
There are two ways to use Call Park:

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

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

Manage Parking Spots

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



Auto Ringback

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

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

Add Parking Spot

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

Delete Parking Spot

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

Music On Hold

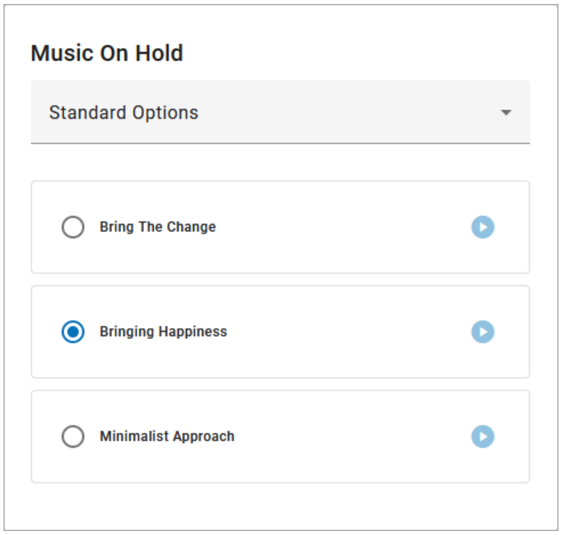
On hold music and messaging is a proven marketing tool for any company. Silence, bad music, or playing the radio is a wasted opportunity to create a positive customer experience. With the right audio, callers are less likely to hang up and are more likely to be in a good mood. See Music On Hold Best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

Set Up Music On Hold

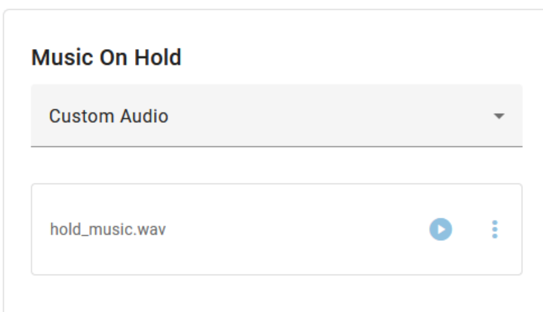
Music On Hold can be configured in the following locations:

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

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



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



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

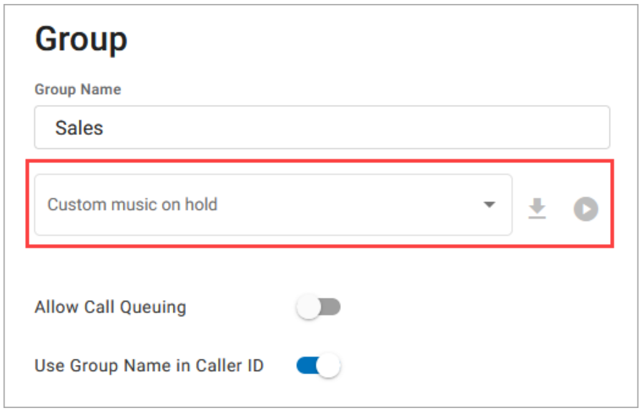
Listen to the audio file in your browser

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

Call Groups

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

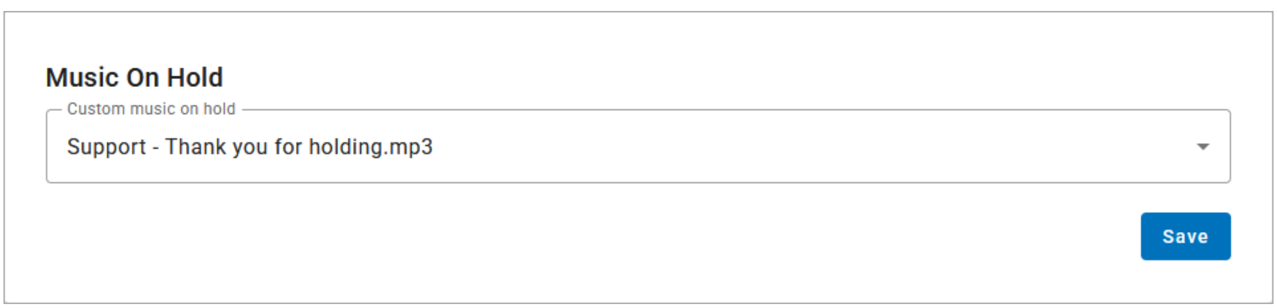
1. Go to **Call Groups > Hunt Groups** or **Queues**.
2. Select the group you want to modify.
3. Scroll down to *Custom music on hold* and select a file from the Media Files library.
4. To be sure you've got the right file, click **Play** on the right.
5. Click **[Save]**.



User Settings

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

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



Music On Hold Best Practices

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

The Benefits of Music On Hold Marketing

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

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

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

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

Tips for the Perfect Music On Hold

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

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

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

Finding Affordable, Legal Music

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

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

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

Recommendation
Not just as an ironic song title for callers, the Warm category at Melody Loops offers a file called "Your Time Has Come" which has a positive, uplifting tone.

Sound Quality

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

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

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

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

Emergency Notifications

In recent years, the FCC has passed Kari's Law and RAY BAUM's Act to help expedite response to emergency services to callers and improve outcomes. As part of Kari's Law, all multi-line telephone systems (MLTS) must be preconfigured to send a notification to an on-site location (like a front desk or security office) when a 911 call is made.

For Emergency Notifications to work, each phone number on the account must be successfully configured with a valid E911 record, which includes the physical address where the device is located and any other information necessary to precisely identify the caller's location. It is the end user's responsibility to keep this information up to date.

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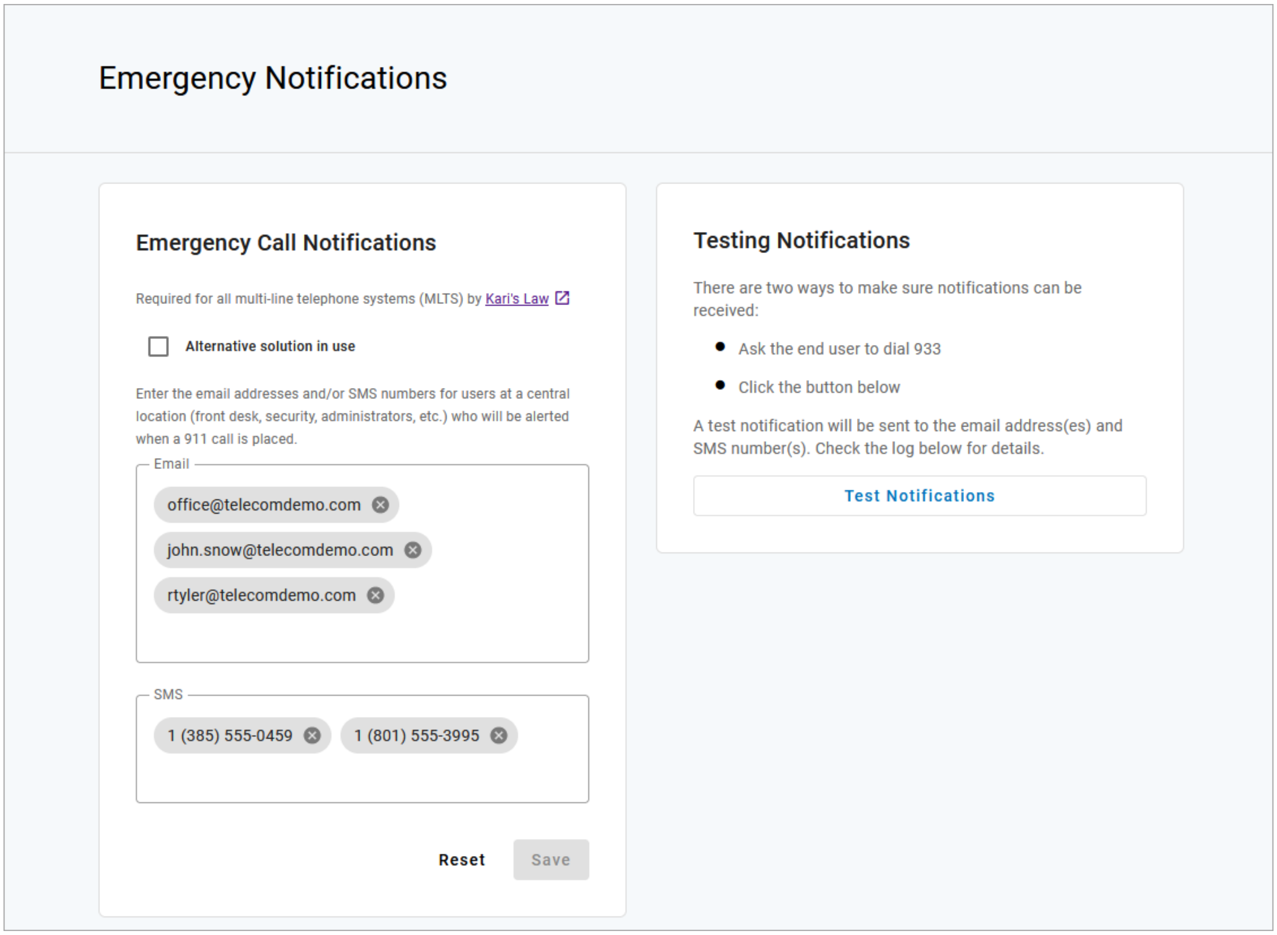

Alternative Solution

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

Configure Emergency Notifications

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

1. In the portal, go to **Settings > Emergency Notifications**.
2. Identify the email address(es) and SMS-capable phone number(s) that will be notified when an emergency call is placed from a number on the account. Enter those email addresses and phone numbers in the portal and click **[Save]**.

Now, when someone on your account dials 9-1-1, the emergency call is processed and a notification is sent to the recipients configured in the portal, so they are made aware of the situation and can assist emergency responders upon arrival.

Test Notifications

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

- Click [**Test Notifications]** to send notifications to the email address(es) and SMS number(s) configured for the account.
- Ask the end user to dial 933 to verify their emergency call record with their E911 provider.

  The call will be connected to an automated 911 verification service, which will play back the dialing phone number and its associated address. The end user is expected to contact their service provider if the information is incorrect or any changes are needed.

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

Example Texts

SMS notifications include the type of message and caller details.

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

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

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

Example Emails

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

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cymbus

Hello,

This is a test. No emergency call has been made.

A user has initiated a test of the Emergency Notification System, and an alert was sent to the assigned email and SMS recipients.

In the event 911 is dialed from this account, you will receive an email like this to alert you that first responders may be on their way and may need your assistance. The email will include the caller's E911 record (name, phone number, and address) to help identify their location.

Please add noreply@cymbus.com to your contact list. These notifications are too important to be filtered out of your inbox.

To see a test alert with real information, dial 933 for the Emergency Services Verification service.

Thanks,

The Cymbus Team

cymbus

Hello,

This is a test. No emergency call has been made.

A user has dialed 933 to verify the phone number and address on their E911 record. The details are listed below.

July 7, 2023 at 10:46:19 AM MDT.

Record Name
[redacted]

Phone Number
[redacted]

Address
[redacted]

In the event 911 is dialed from this account, you will receive an email like this to alert you that first responders may be on their way and may need your assistance.

Please add noreply@cymbus.com to your contact list. These notifications are too important to be filtered out of your inbox.

Thanks,

The Cymbus Team

Emergency Notification Log

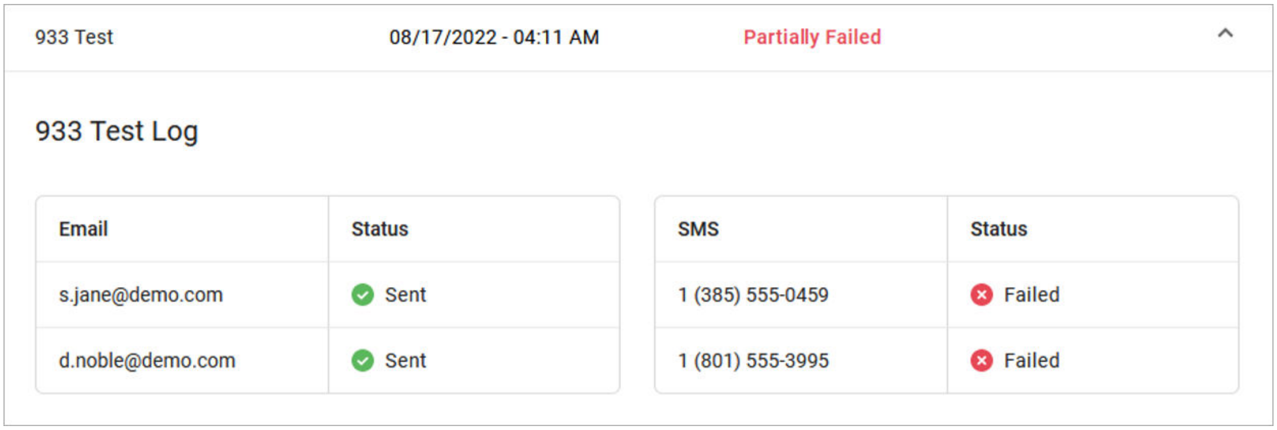
The Emergency Notification Log contains a complete history of all test and emergency call notifications sent for this account. The notification type is identified on the left, followed by the date and time and sent status:

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

Expand an entry for details:

Emergency Notification Log

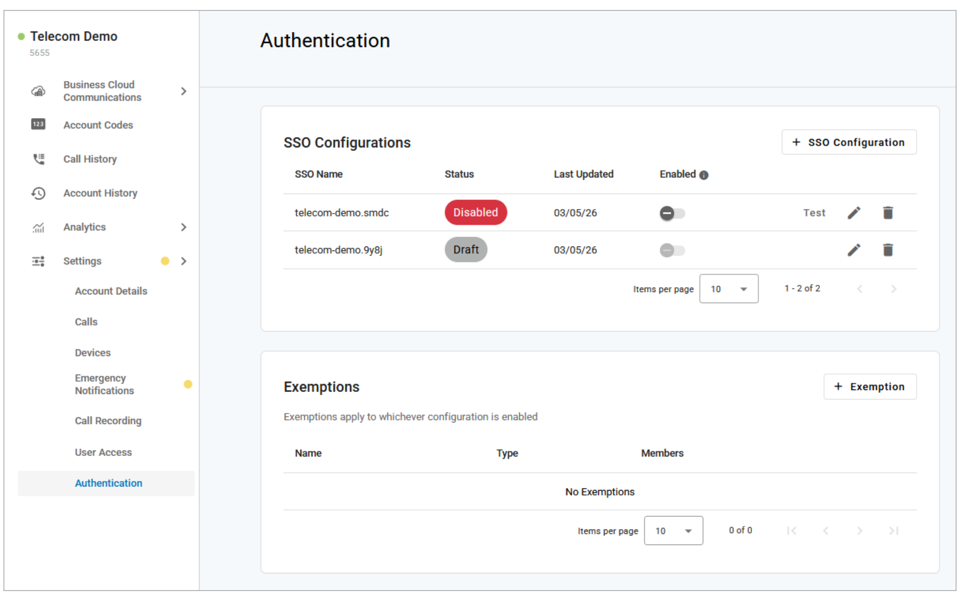
Notification Type	Date	Sent Status
933 Test	12/14/2022 - 08:59 AM	Successful
933 Test	08/17/2022 - 04:11 AM	Partially Failed



SSO Authentication

Single Sign-On (SSO) is an authentication method that allows users to access multiple applications using a single set of credentials. Once a user has signed in through their organization's Identity Provider (IdP), they can move seamlessly between connected systems without being prompted to log in again. This reduces friction and password fatigue for end users, while giving administrators the ability to enforce consistent security policies, such as multi-factor authentication (MFA), across all connected applications from a single place.

If you would like your employees to access the voice portal and UC app using the same single sign-on process they use for accessing other tools, you can set that up here, in the Authentication section of the account.

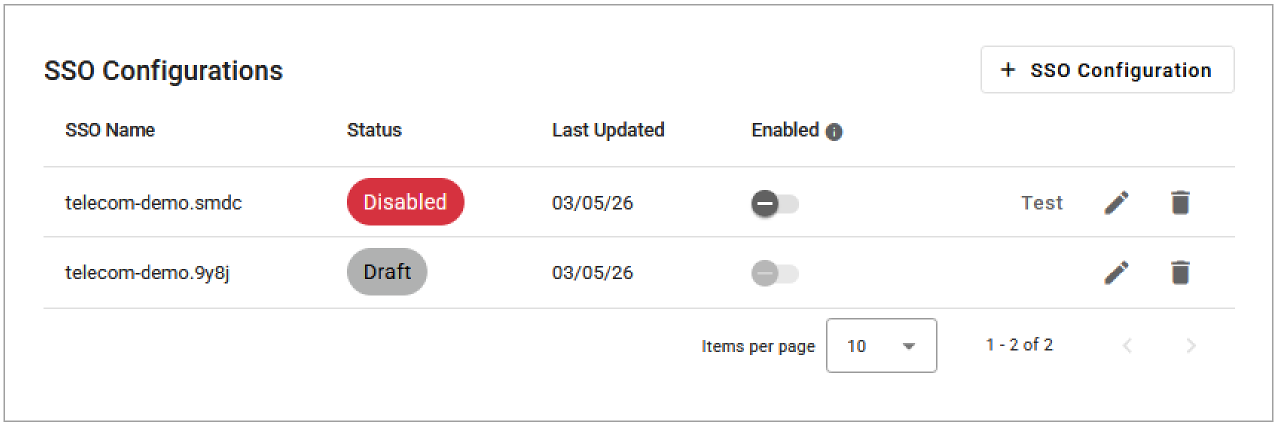


SSO Configurations

The SSO configurations section displays every SSO configuration set up on the partition. From here, you can create and manage your configurations, saving as many drafts as needed.

Keep in mind that only one SSO configuration can be enabled at a time. To switch to a different configuration, disable the current one and then enable the desired one.

See also: Manage Single Sign-On



Field	Description
SSO Name	System-generated name for the configuration. This cannot be changed.
Status	Will display the status of the SSO configuration, these include: • **Enabled.** The configuration is being enforced on the account. • **Disabled.** The active SSO configuration has been made inactive. • **Draft.** The SSO Account Name was generated and setup has begun, but has not been completed. • **Ready.** The configuration is complete and ready to test before being enabled.
Last Updated	Date the configuration was last created, edited, enabled, or disabled.
Enabled	Toggle on or off to manage which completed SSO is used by the account. • When enabling or changing which SSO configuration is being used, be sure customers are informed of the change.
Test	Test the connection between the IdP and the SSO configuration.
Edit	Modify your IdP information and the sign-in public key.

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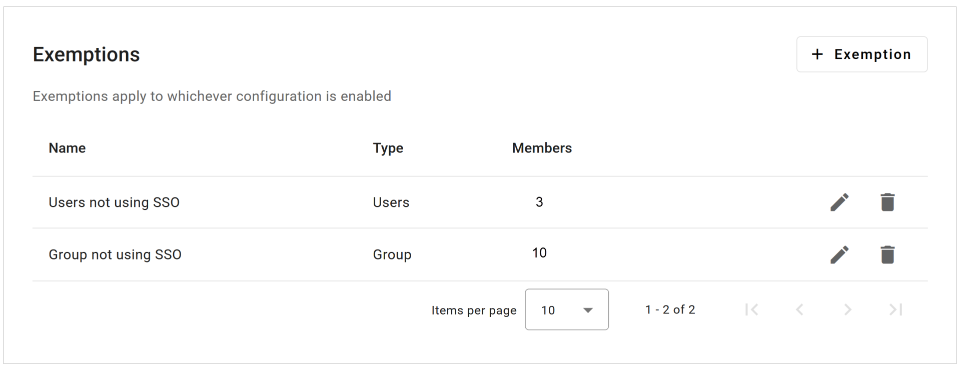
Field	Description
Delete	Remove the configuration from the account. • Configurations can only be deleted when they are **not** enabled.

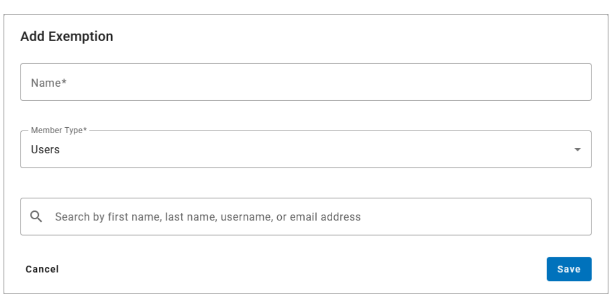
Exemptions

Use this section to exempt specific users or groups from using the enabled SSO on the account. Excluded users will fall back to Alianza's default login process, or can be configured with the partition's SSO instead. Contact Customer Service for details.



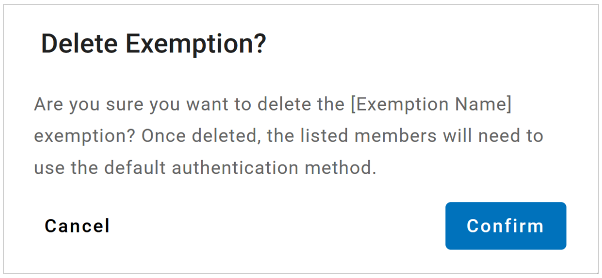
Add Exemptions

1. Go to **Account > Settings > Authentication**.
2. In the **Exemptions** section, click **[+ Exemption]**.
3. Enter a name to reference this list of exemptions.
4. Select if the exemption will apply to specific user(s) or group(s) of users.
5. Search for the user(s) or group(s) to be exempt from using the SSO configuration.
6. When complete, click **[Save]**.



Remove Exemptions

1. Go to **Account > Settings > Authentication**.
2. In the **Exemptions** section, click the **trash** icon next to the user or group list to be removed.
3. Click **[Confirm]** in the pop-up window to complete the deletion.



Manage Single Sign-On

Allowing specific login experiences for each customer account is possible with Account-level SSO. These SSO settings can be managed in **Account > Settings > Authentication** by end user Account Managers and Super Admins.

See also: SSO Authentication

Add SSO Configuration

1. Go to **Account > Settings > Authentication**.
2. Click **[+ SSO Configuration]**.
3. The SSO name and custom URLs are automatically created.
4. In the **Add to your IDP** section, copy the following information and add it to your identity provider's (IdP) interface/application:
   - SAML
   - Entity ID
   - Signing and Encryption Key
5. In the **Add from your IDP** section, enter the following information from your IdP:
   - **IdP user ID field name.** The name of the attribute in your IdP's SAML assertion that uniquely identifies each user on your side. Common values include `email`, `username`, or `uid`. Alianza uses this field to match an incoming SSO login to the correct Alianza account.
   - **IdP sign-in URL.** The SAML SSO endpoint of your IdP, which Alianza will redirect users to when they initiate an SSO login. This field is sometimes labeled as the SSO URL, SAML Endpoint, or Identity Provider Login URL.

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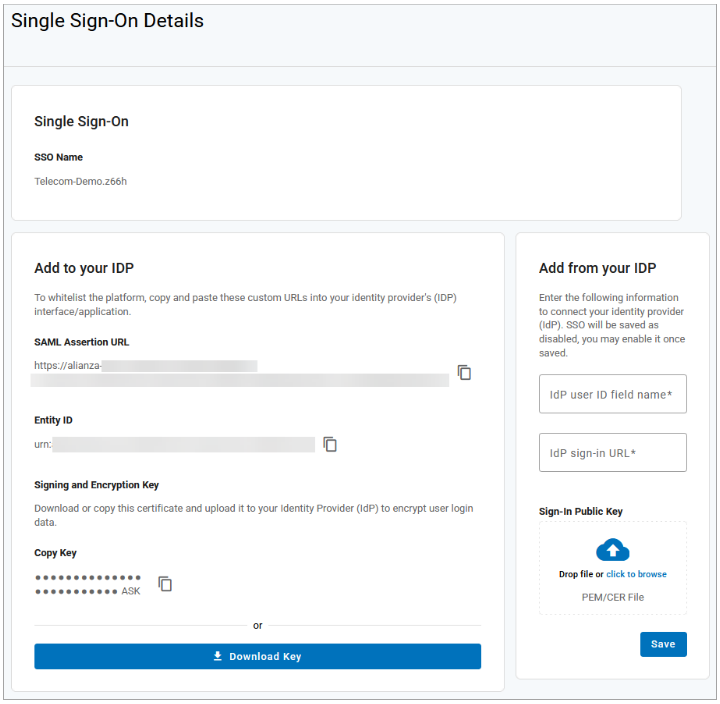
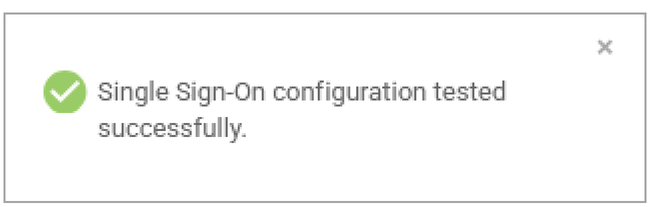
- **Sign-in Public Key.** The public key certificate (PEM or CER file) used to verify the authenticity of SAML assertions sent from your IdP to Alianza, ensuring login requests are legitimate and have not been tampered with.

6. Click **[Save]**. If all fields are complete, the status is updated to *Ready*.



7. Locate the configuration in the list and, if it's in a **Ready** status, click **Test** on the right.
   - **Successful.** The SSO configuration is ready to be enabled.
   - **Unsuccessful.** One or more fields were entered incorrectly. Check your settings and try again.



Enable SSO Configuration

1. Locate the configuration to be enabled and switch the *Enable* toggle on.
2. If testing has not been completed, a confirmation message will appear. Read the message, then click **[Cancel]** to go back and test the configuration before it's enabled or click **[Confirm]** to proceed.

3. All users on the account now use this authentication method to log in.
4. Notify the account users that they must sign in using SSO from now on. This part is important because there will be no visual indication on the login page that the process has changed. If they enter their username and password, they will get an error and will be unable to reset their password.

   For an example notification, see Customer Notification Templates.

Switch SSO Configurations

Follow these steps to switch which SSO configuration is enabled on the account.

1. Add a new SSO configuration and test it to make sure it works.
2. Disable the current configuration by switching the **Enable** toggle off.
3. For the new configuration you want to enable, switch the **Enable** toggle on. Customers will now use this SSO authentication method.
4. Notify your customers that their SSO authentication method has been switched, so they will need to use their credentials for the new IdP to log in.

Disable SSO Configuration

To disable SSO and go back to using local authentication (username and password) to log in, switch the **Enable** toggle off. Remember to notify the account users that they will need to reset their password to log in.

Customer Notification Templates

Alianza does not email your customers when the authentication method is changed, so it’s important for you to let them know what’s going on. Feel free to use these email templates to communicate with your customers — just remember to customize them with your information first.

Subject	Email Body
SSO Enabled	Hi <First Name>, Single sign-on (SSO) has been enabled for your <Title> account. This means you no longer need to remember a separate username and password for this service and will sign in with your <Identity Provider's> credentials instead. To access the portal or the UC app, click **[Sign in with SSO]** and enter your <Identity Provider's> credentials. Thank you, <Signature>
SSO Disabled	Hi <First Name>, Single sign-on (SSO) has been disabled for your account, which means you will no longer sign in using your <Identity Provider's> credentials. The next time you log in to the portal or UC app, click **[Forgot password?]** on the login screen to update your password. Thank you, <Signature>

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