Small Office Home Office

SUBSCRIBER GUIDE

Hillsboro OREGON | HiLight

Small Office Home Office

SUBSCRIBER GUIDE

www.hillsboro-oregon.gov/services/hilight

Support@GoHiLight.com

503-693-4400

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Introduction

Welcome to your subscriber portal. In this user guide you will learn how to edit your account information, manage your services, add, remove and change your features along with many other useful pieces of information.

In addition to showing you how to edit various features and services, this guide will also provide detailed descriptions about each of the calling features your telephone service provides.

Logging in

To access the subscriber portal, you will need to open a web browser on your computer and type the following in the address bar:

http://mydigitalservices.com

Enter the login credentials in the spaces provided and click “Login” to be directed to the landing page (shown below).

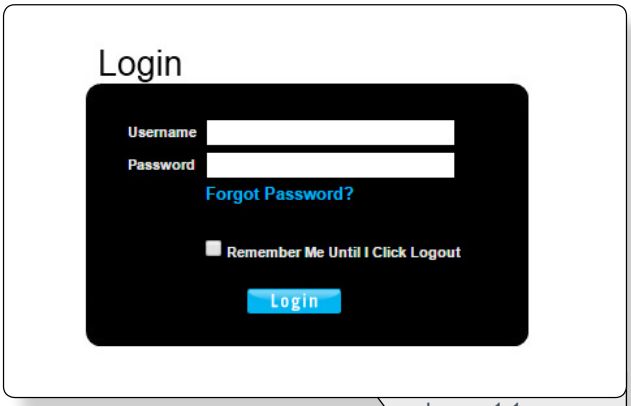

Image 1.1

Note: Your default login credentials will consist of:

Username: Default Username

Password: Default Password

If you need assistance with logging in, please contact your telephone provider.

Clicking Login will load a locations page similar to image 1.2.

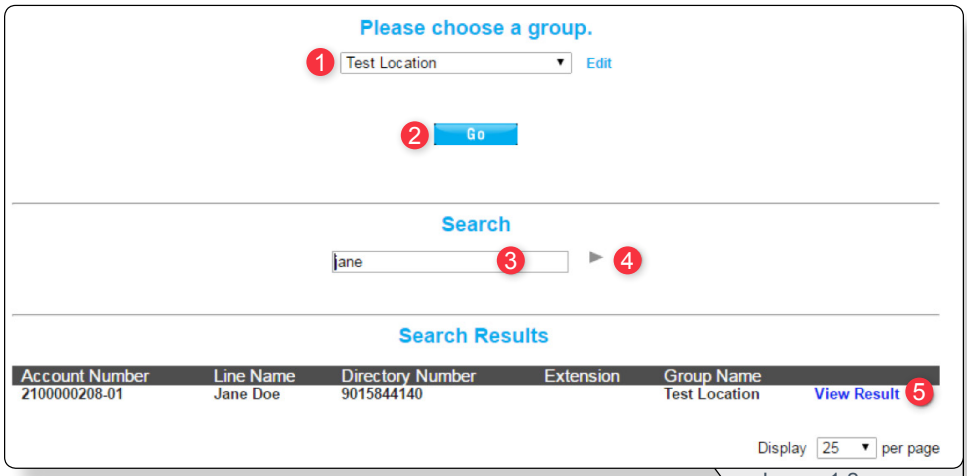

Image 1.2

1 – Choose a group to modify.

2 – Click **Go**.

OR

3 – Enter a name or number in the **Search.**

4 – Click the arrow. Image 1.1 displays an example search with one result returned.

5 – Click **View Result** for direct access to the line's configuration page.

Navigation Bar, Sub-Menu and Page Layout

When you login to the subscriber portal, you'll see a page similar to image 2.1

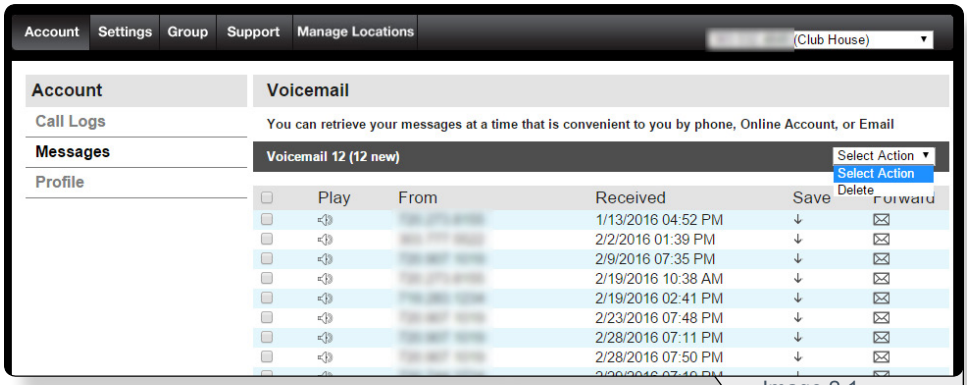

Image 2.1

The best way to move through the various screens is by using the navigation bar which is similar to image 2.2.

Image 2.2

Within the navigation bar, tabs are used to group customer and product details. Below is a brief description of each tab.

- **Account –** view or change account details.
- **Settings –** manage user level feature settings.
- **Group –** manage group level feature settings.
- **Support –** access support documents and applications.
- **Manage Locations –** switch between telephone service locations.

On the right of the navigation bar is a dropdown list of all phone numbers associated to this particular account and location. Before making any changes, ensure you have the correct phone number displayed so any changes are applied to the intended phone number.

Under each tab you will find a submenu bar similar to image 2.3. The header in bold is the submenu you are currently on and representative of the information the page displays.

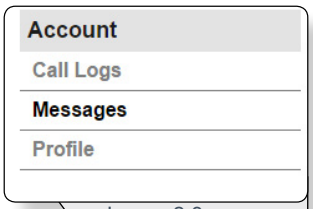

Image 2.3

Account

The account tab is the default tab in the portal. This tab allows you to view and manage your call logs, messages and customer profile.

Call Logs

To view all incoming and outgoing calls for the past three months, use image 3.1 and the following instructions.

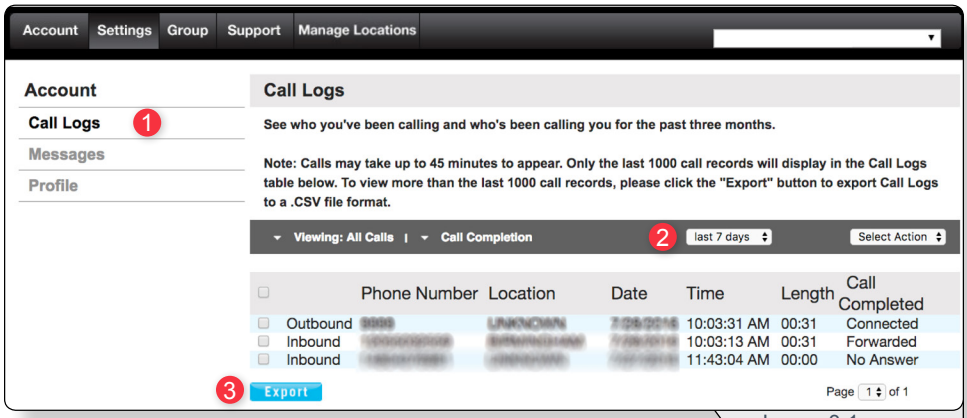

Image 3.1

1 – Select **Call Logs** on the **Account** submenu.

2 – Select the desired date ranges.

3 – Click **Export** to download a .csv file of the call log.

To block future calls from a number, use the following instructions and image 3.2.

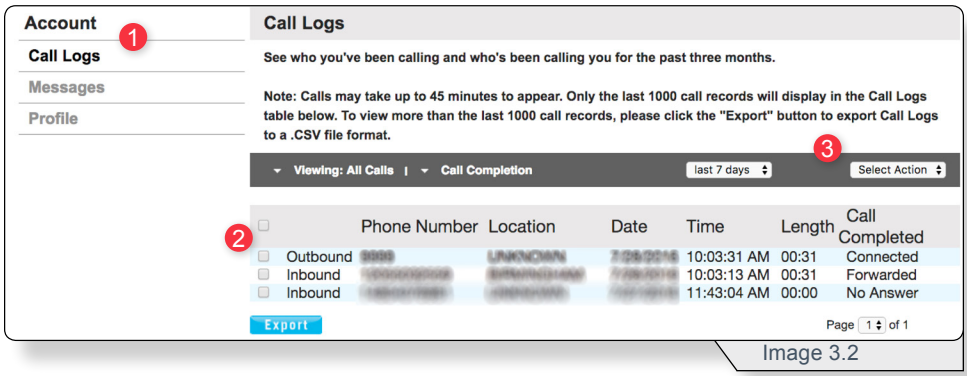

Image 3.2

1 – Select **Call Logs** on the **Account** submenu.

2 – Check the desired number.

3 – On the **Select Action** dropdown list, select **Block Number**.

Note: Selecting **Block Number** blocks the number without supplying a notification. Further management of call blocking is performed in that feature section.

Messages

To view a list of all new and saved messages, use image 4.1 and the following instructions.

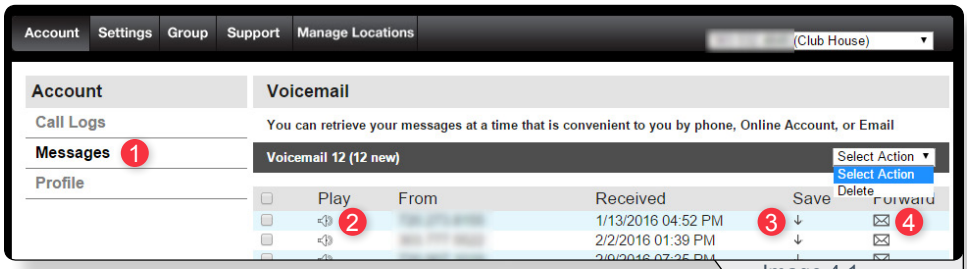

Image 4.1

1 – Click **Messages** on the **Account** submenu.

Note: The messages displayed are solely the messages of the number selected in the **Navigation Bar**'s phone number dropdown menu.

Once the messages are loaded you can:

2 – Click the audio icon to play a message.

3 – Click the down arrow to save a message.

4 – Click the envelope to forward a message to an email address.

If you select the Forward icon, a pop-up window similar to image 4.2 will load.

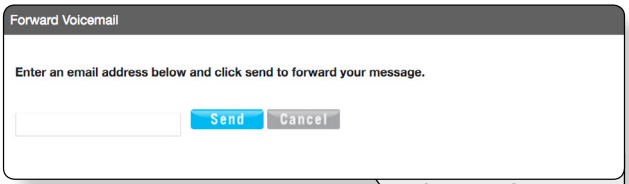

Image 4.2

Enter the email address and select Send to have the voicemail sent to the entered email.

To delete voicemail, use image 4.3 and the following instructions.

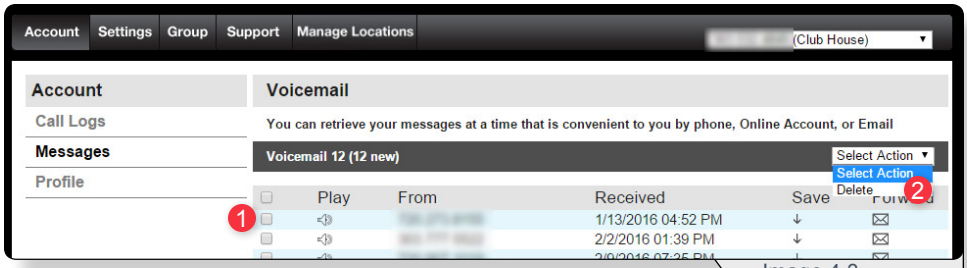

Image 4.3

1 – Check the box adjacent to the corresponding voicemail

2 – On the **Select Action** dropdown list, select **Delete**.

Profile

To view profile information for the phone number selected in the navigation bar, use image 5.1 and the following instructions.

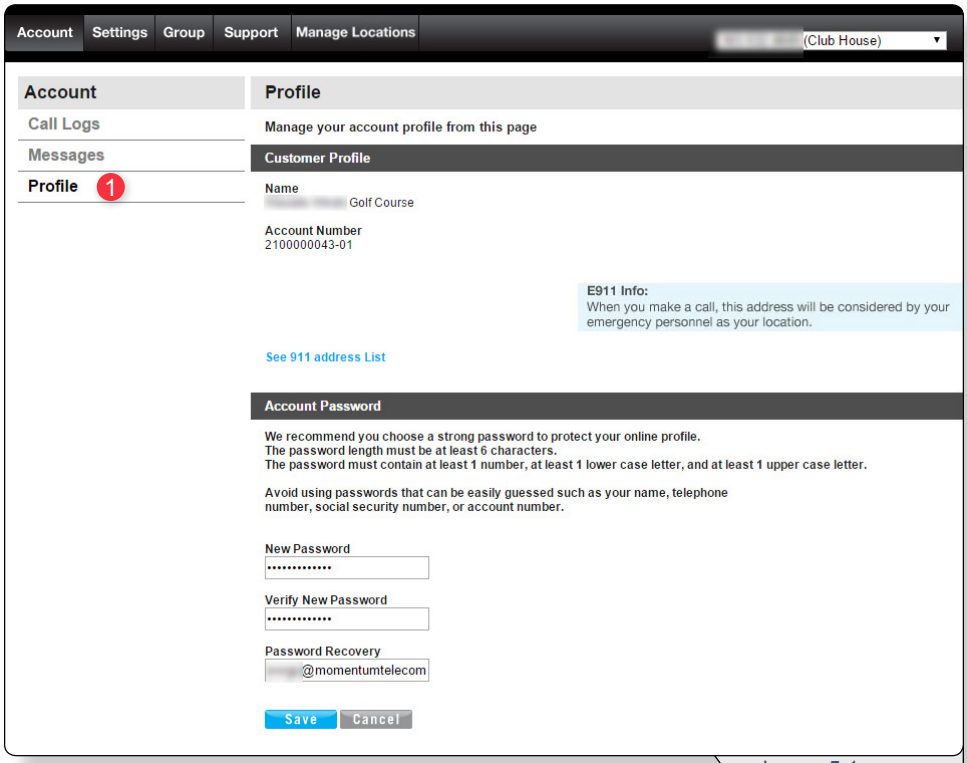

Image 5.1

1 – Click **Profile** on the **Account** submenu.

On this page you can change the account's password and e911 address.

To change your password, fill out the fields with the desired information and click **Save**.

To view and manage your E911 address details, select **See 911 Address List** and a page similar to image 5.2 will load.

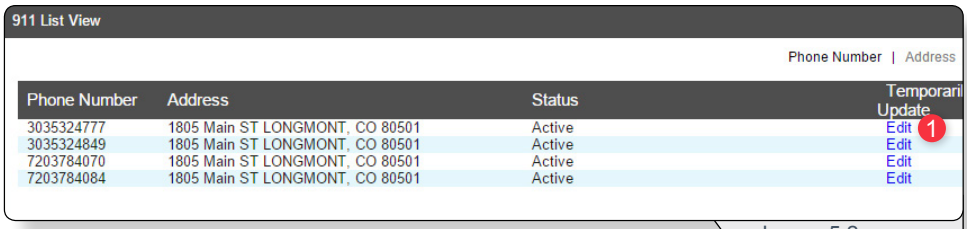

Image 5.2

1 – Click **Edit** to change the E911 address associated to the account.

A page similar to image 5.3 will load.

Continued on the following page.

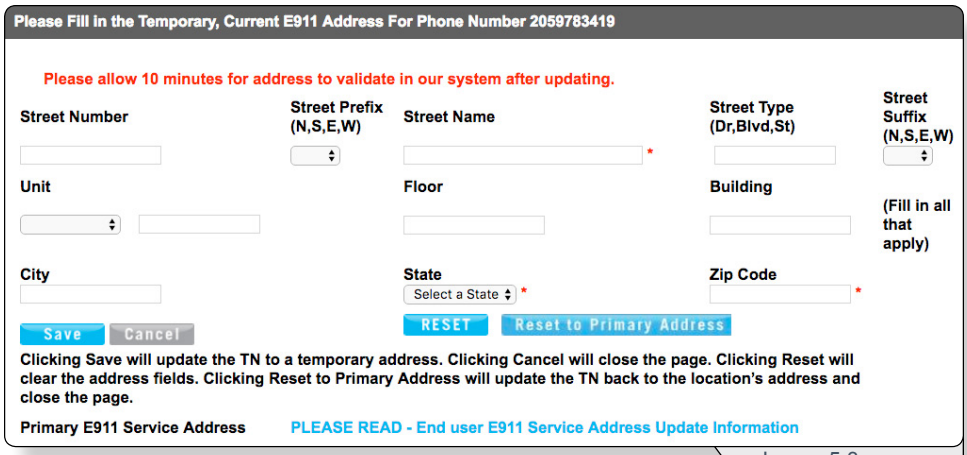

Image 5.3

Note: Before making any changes, review the E911 information to understand the importance of E911. Review this information by selecting the **PLEASE READ – End user E911 Service Address Update Information** button.

Make any address changes or select **Reset to Primary Address** to have the primary address become the E911 address.

Any changes can take up to 10 minutes to complete the address validation. During this time, various pages will show the E911 status as **Pending**. When validation is complete, the status will change from **Pending** to **Active**.

Settings

To access an account's settings select **Settings** on the navigation bar. A page similar to image 6.1 will load.

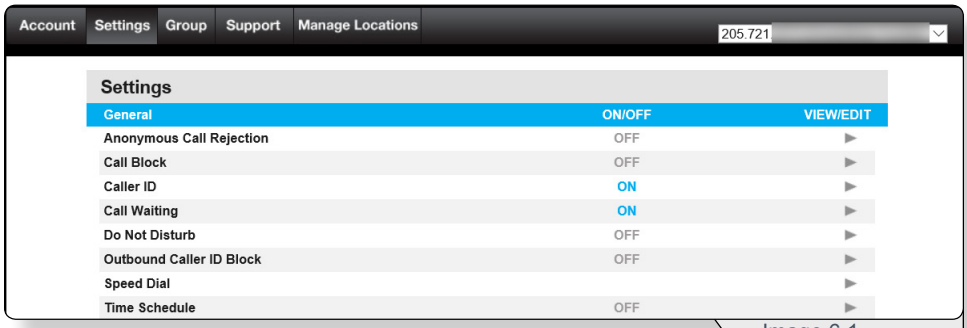

Image 6.1

The settings are divided into four sections:

- General
- Forwarding
- Messaging
- Mobility

Each individual feature is discussed in detail in the following sections of this document to follow.

To access any features, select the feature's corresponding **View/Edit** arrow.

Note: An account's feature set is determined by the service offering you have purchased so you may or may not all of the services listed in this example.

General Settings

Anonymous Call Rejection

Anonymous Call Rejection allows you to reject calls from callers who have blocked the display of their number. Only deliberate anonymous numbers are rejected. Callers whose numbers are unavailable are not rejected. Callers that are rejected are informed that you are not accepting calls from unidentified callers. Your phone does not ring and you do not receive any indication that they called.

Use image 7.1 and the following instructions to configure this feature.

1 – Click the **Anonymous Call Rejection**'s **View/Edit** arrow.

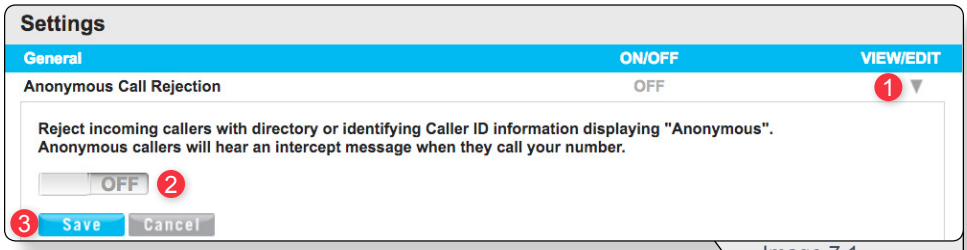

Image 7.1

2 – Select **On** or **Off**

3 – Click **Save** to apply the change.

Note: Refer to the appendix for telephone star code instructions to configure this feature from a phone.

TELEPHONE INSTRUCTIONS:

1. Dial *77 to enable.
   Dial *87 to disable.
2. Listen for a confirmation message.

Call Block

Call Block rejects calls that meet your pre-defined criteria. Callers meeting these criteria will be played an automated message advising them that you cannot be reached. Use this feature to prevent nuisance calls.

Call Block rules can be applied to all incoming calls or up to 12 specified phone numbers or digit patterns (example: 800* for all 800 numbers). You can configure up to 10 rules. Therefore, you can specify a total of up to 120 phone numbers to be automatically rejected. For a call to be rejected, it must match all entered criteria.

Use image 8.1 and the following instructions to configure this feature.

1 – Click the **Call Block**'s **View/Edit** arrow.

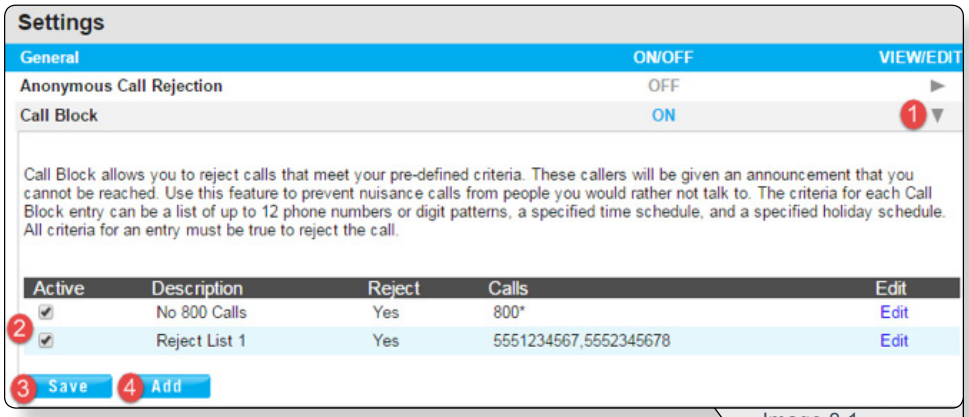

Image 8.1

2 – Check the box to make any existing rule active.

3 – Click **Save** to apply changes.

To create a new **Call Block** rule, click **Add** (see **4** in image 8.1).

Continued on the following page.

A page similar to image 8.2 will load.

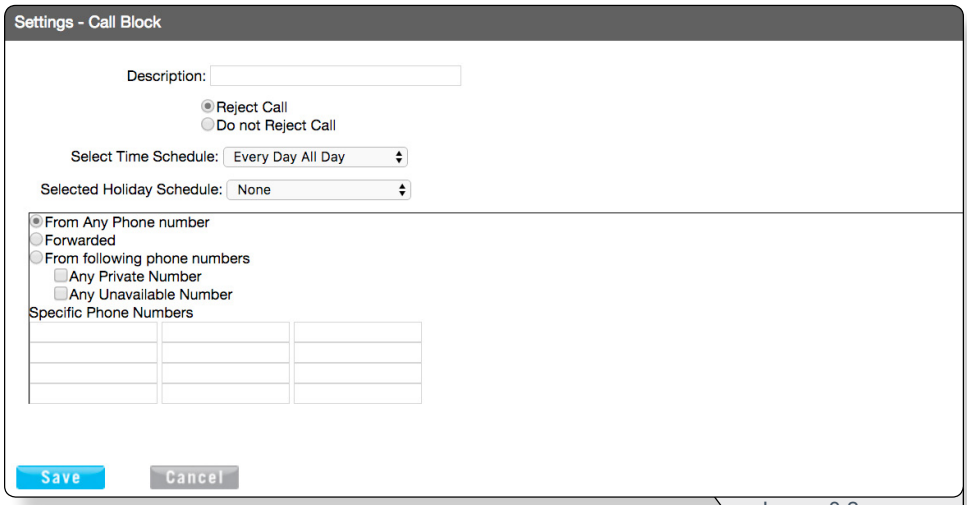

Image 8.2

Fill in the fields with the desired information.

See additional information for select fields below.

Time Schedule – Select one of the available options. Refer to the **Time Schedule** section for instructions on how to create a time schedule.

From Any Phone number – Use to reject all incoming calls.

Forwarded – Use to reject any call forwarded from another number.

From following phone numbers – Use to reject any numbers in the **Specific Phone Numbers** section.

Any Private Number – Use to reject all calls any caller with their number to private.

Any Unavailable Number – Use to reject any call where caller ID is not available.

Click **Save** to make any changes.

Caller ID

Caller ID shows an incoming caller's name and/or telephone number.

Use image 9.1 and the following instructions to configure this feature.

1 – Click the **Caller ID**'s **View/Edit** arrow.

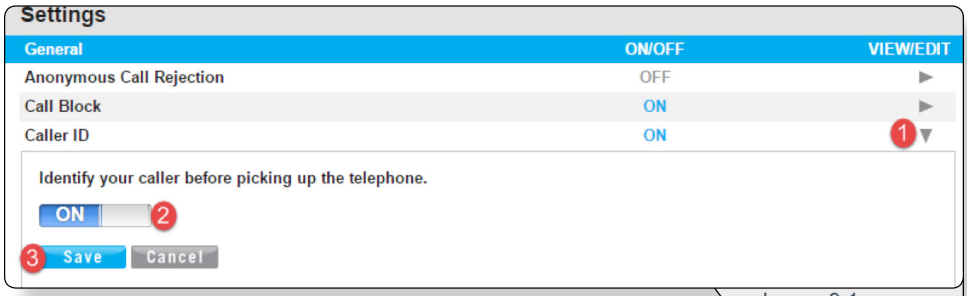

Image 9.1

2 – Select **On** or **Off.**

3 – Click **Save** to apply any changes.

Call Waiting

Call Waiting notifies of an incoming call when the line is already on another call.

Use image 10.1 and the following instructions to configure this feature.

1 – Click **Call Waiting**'s **View/Edit** arrow.

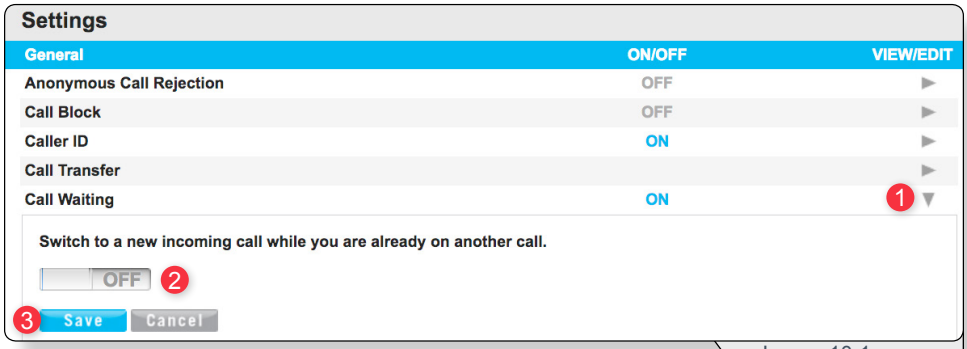

Image 10.1

2 – Select **On** or **Off.**

3 – Click **Save** to apply any changes.

TELEPHONE INSTRUCTIONS:

1. Dial *56 to enable.
   Dial *57 to disable.
2. Listen for a confirmation message.
3. Dial *70 and enter the appropriate 10-digit phone number to disable for one call.

To Answer:

1. Sound will alert when there is another call.
2. Press flash to put the existing caller on hold and accept the other call.

Do Not Disturb

When **Do Not Disturb** is enabled, incoming callers receive a message stating you are busy, and will subsequently be sent to your voicemail greeting.

Use image 11.1 and the following instructions to configure this feature.

1 – Click **Do Not Disturb**'s **View/Edit** arrow.

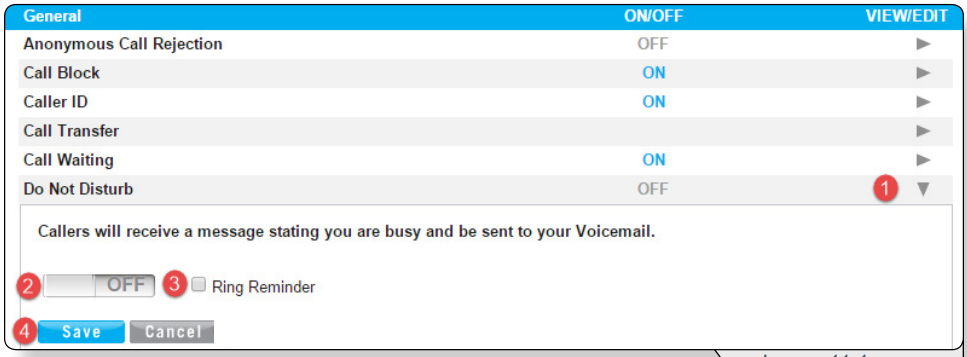

Image 11.1

2 – Select **On** or **Off.**

3 – Check the box to have a single ring sent to the phone whenever a call is forwarded to voicemail.

4 – Click **Save** to apply any changes.

TELEPHONE INSTRUCTIONS:

1. Dial *78 to enable.
   Dial *79 to disable.
2. Listen for a confirmation message.

Outbound Caller ID Block

Outbound Caller ID Block blocks your number from displaying in the receiver's caller ID display.

Use image 12.1 and the following instructions to configure this feature.

1 – Click **Outbound Caller ID Block**'s **View/Edit** arrow.

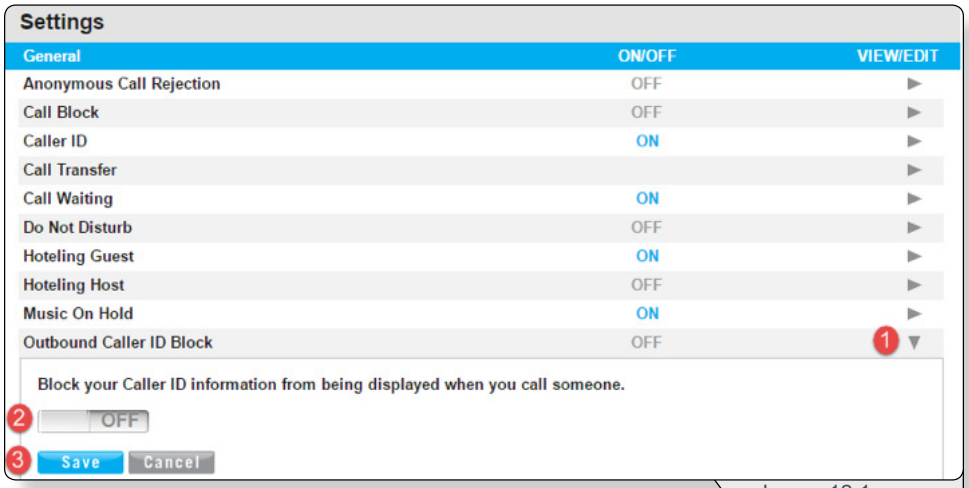

Image 12.1

2 – Select **On** or **Off.**

3 – Click **Save** to apply any changes.

TELEPHONE INSTRUCTIONS:

1. Dial *68 to permanently enable outbound caller ID block.
   Dial *81 to permanently disable outbound caller ID block.
2. Dial *67 and the 10-digit phone number to enable outbound caller ID block for one call.
   Dial *82 and the 10-digit phone number to disable outbound Caller ID Block for one call.
3. Listen for a confirmation message.

Speed Dial

Speed Dial allows you to set up quick dial shortcuts for your most frequent calls.

Use image 13.1 and the following instructions to configure this feature.

1 – Click **Speed Dial**'s **View/Edit** arrow.

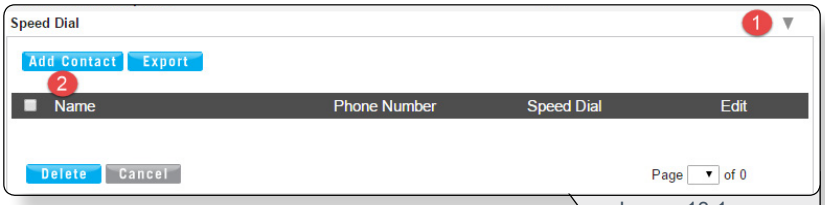

Image 13.1

2 – Click **Add Contact** to add a new speed dial entry.

A page similar to image 13.2 will load.

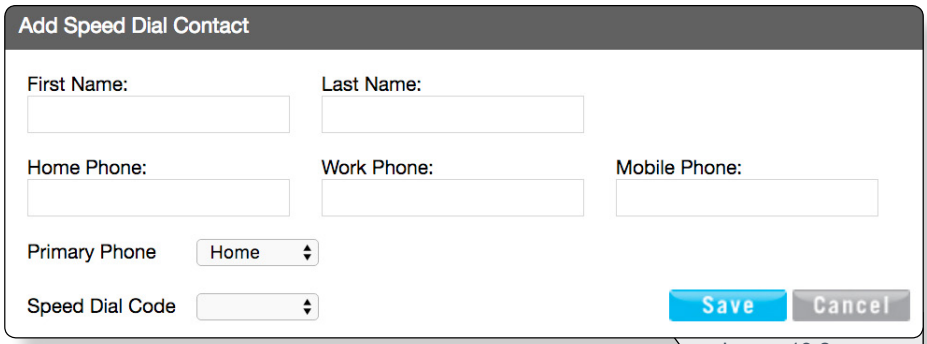

Image 13.2

Enter all the desired information for the contact. See additional information for select fields below.

Primary Phone – The number selected here will be the number called when the speed dial code is used on your phone.

Speed Dial Code – Select an option from the available two digit numbers.

You will return to the **Speed Dial** page but will notice a new rule. This will appear similar to image 13.3

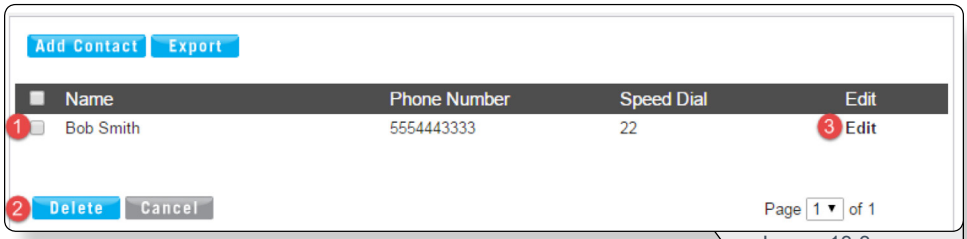

Image 13.3

Delete an alert rule by deselecting the corresponding check box (see 1 in image 13.3) and click **Delete** (see 2 in image 13.3).

To modify any entry at any time, click the corresponding **Edit** button (see 3 in image 13.3).

Note: Some speed dial codes should not be used because they conflict with certain feature access codes. These codes completely over-ride their feature access code functionality when active.

The following codes create conflict:

#31 Calling Line ID Delivery Blocking Persistent Deactivation

#40 Call Forwarding Busy To Voice Mail Deactivation

#41 Call Forwarding No Answer To Voice Mail Deactivation

#43 Call Waiting Persistent Deactivation

#58 Group Call Park

#70 Night Service Activation Manual Override

#71 Night Service Deactivation Manual Override

#72 Forced Forwarding Activation

#73 Forced Forwarding Deactivation

#76 Call Forwarding Selective Activation

#77 Call Forwarding Selective Deactivation

#80 Make Outgoing Call as Call Center

#81 Make Personal Outgoing Call

#83 Escalate Call to Supervisor

TELEPHONE INSTRUCTIONS:

1. Dial *75 and wait for the tone.
2. Dial appropriate speed dial code followed by the user's 10-digit phone number.
   (Example: 03+800-555-1212)
3. Listen for a confirmation message.

To Use Speed Dial:

1. Listen for a dial tone.
2. Dial # followed by appropriate 2-digit speed dial code.

Time Schedule

Time Schedule allows you to create and customize multiple schedules. Many other features use time schedules.

Use image 14.1 and the following instructions to configure this feature.

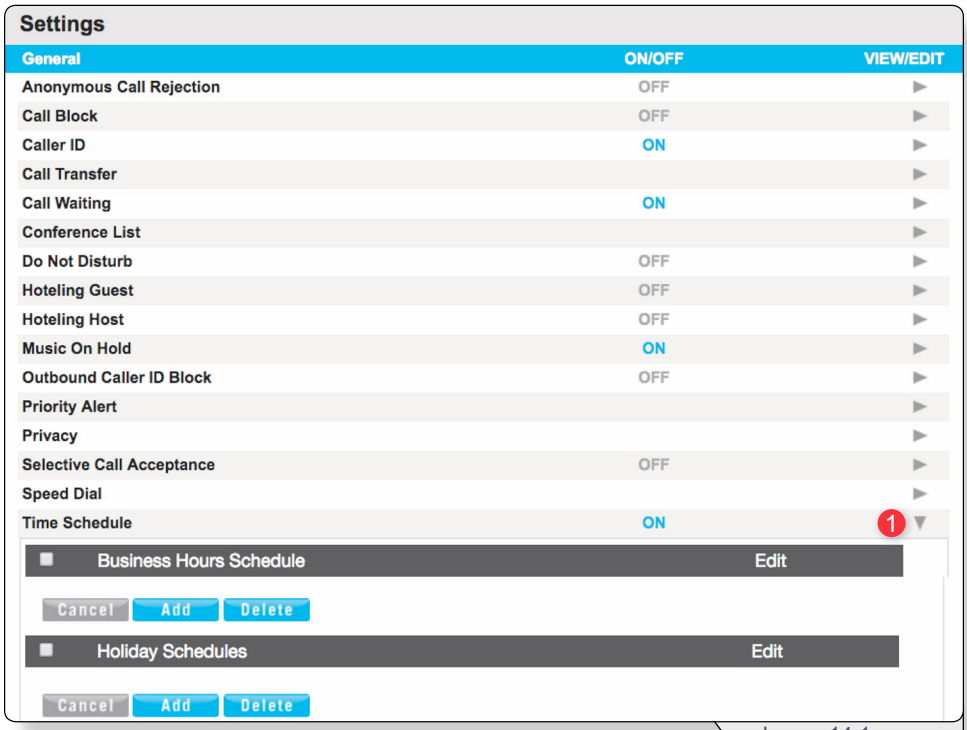

Image 14.1

1 – Click **Time Schedule**'s **View/Edit** arrow.

The process of creating a **Business Hours Schedule** and a **Holiday Schedule** are essentially the same.

Click **Add** to begin the process of creating a schedule. A page similar to image 14.2 will load

Image 14.2

Name the schedule and click **Save** to continue.

Clicking **Save** will cause an empty event list to be added to the page (similar to image 14.3).

Image 14.3

Name the schedule, Click **Save** and then Click **Add** to configure an event.

A page similar to image 14.4 will load.

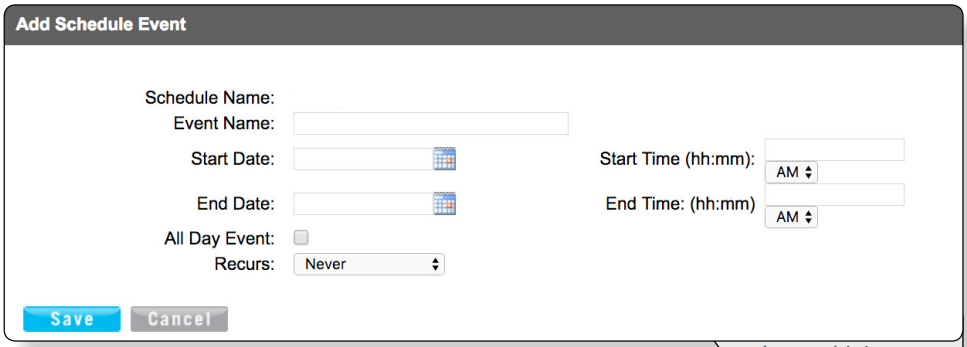

Image 14.4

Fill in each field with the desired entry for this rule.

To provide clarity, below are examples of the options in the **Recurs** field.

- Daily (Example: Reoccurs every one or two days)
- Weekly (Example: Every week on Tuesday and Thursday)
- Monthly by day (Example: Every month on the 15th)
- Monthly by Week (Example: First Monday of every month)
- Yearly by Day (Example: January 5th every year)
- Yearly by Week (Example: Second Tuesday in February every 2 years)

When finished, click **Save** to save the event.

Continued on the following page.

The event will be displayed in the **Add Schedule** view similar to image 14.5.

To add additional schedules, click **Add** (see **1** in image 14.5) and repeat the steps as above.

Image 14.5

To delete a time schedule, check the box next to the schedule's name (see **2** in image 14.5) and click **Delete** (see **3** in image 14.5).

To make changes to an existing time schedule, click **Edit** (see **4** in image 14.5).

When finished, click **Save** (see **5** in image 14.5).

Once a schedule has been created, it is displayed on the main **Time Schedule** page similar to image 14.6.

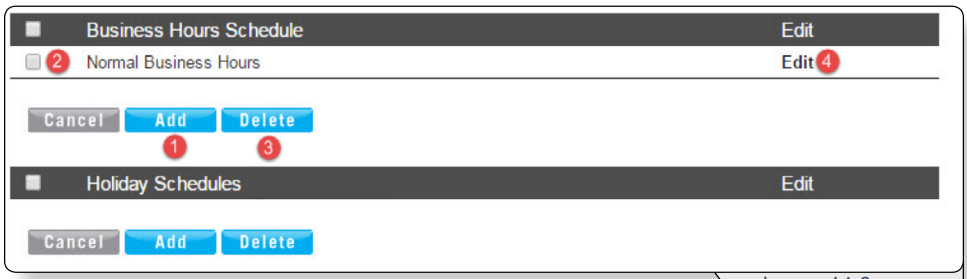

Image 14.6

To add additional time schedules, click **Add** (see **1** in image 14.6) and repeat the steps as above.

To delete a time schedule, check the box next to the schedule's name (see **2** in image 14.6) and click **Delete** (see **3** in image 14.6).

To make changes to an existing time schedule, click **Edit** (see **4** in image 14.6).

Forwarding

Each feature in the **Forwarding** section involves routing incoming calls to other phone numbers.

The **Forwarding** section can be found on the settings page similar to image 15.1.

Forwarding	ON/OFF	VIEW/EDIT
Call Forwarding		▶
Call Forwarding Selective	OFF	▶
Call Notify	OFF	▶
Find Me – Simultaneous Ring	OFF	▶
Find Me – Sequential Ring	ON	▶
Push to Talk	ON	▶

Image 15.1

Call Forwarding

Call Forwarding specifies when calls should be forwarded to another phone number and the phone number(s) where the calls should be forwarded.

Use image 16.1 and the following instructions to configure this feature.

Click **Call Forwarding**'s **View/Edit** arrow

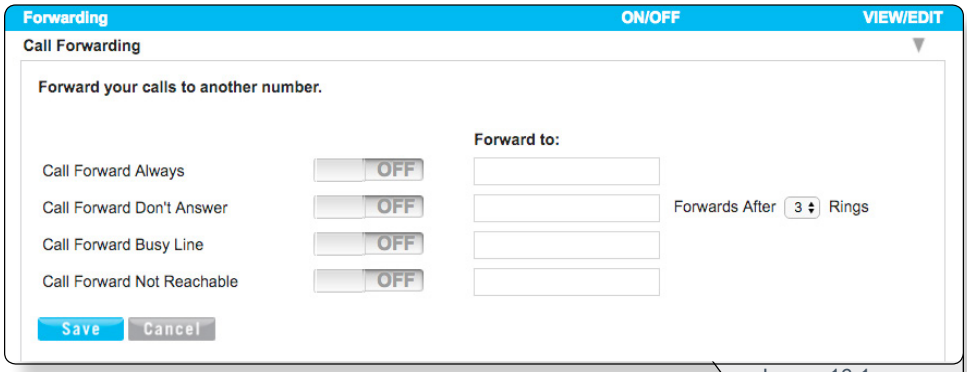

Image 16.1

Forwarding can be configured four ways:

- **Call Forward Always –** If enabled, all incoming calls will be forward to another number.
- **Call Forward Don't Answer –** If enabled, all unanswered incoming calls will be forwarded to another phone number.
- **Call Forward Busy Line –** If enabled, any incoming call that reaches this line when it is in use will be forwarded to another phone number.
- **Call Forward Not Reachable –** If enabled, any incoming call that reaches this line when it cannot be reached due to a service issue will be forwarded to another phone number.

Use the corresponding toggle buttons to turn the features **On** or **Off**.

Use the **Forward to** text boxes to specify the number where the call should be forwarded.

For **Call Forward Don't Answer**, specify the number of times the call should ring before forwarding.

When finished, click **Save** to apply any changes.

TELEPHONE INSTRUCTIONS:

1. Dial *72 to enable call forward always.
   Dial *73 to disable call forward always.
   Dial *94 to enable call forward not reachable.
   Dial *95 to disable call forward not reachable.
2. Enter the 10-digit phone number for the call forwarding destination and press #.
3. Listen for a confirmation message.

Call Forwarding Selective

Call Forwarding Selective allows you to forward specific calls matching pre-defined criteria to a different phone number. **Call Forwarding Selective** rules can be applied all incoming calls or to up to 12 specified phone numbers or digit patterns (example: 800* for all 800 numbers).

Note: All criteria must be met for a call to be forwarded.

Use image 17.1 and the following instructions to configure this feature.

1 – Click **Call Forwarding Selective**'s **View/Edit** arrow.

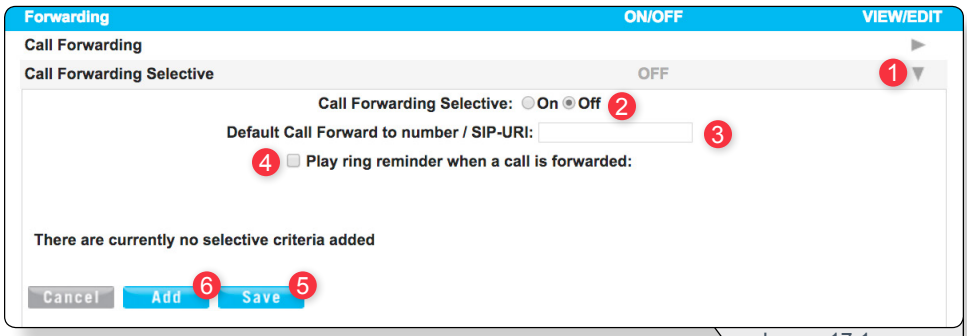

Image 17.1

2 – Turn **Call Forwarding Selective** on.

3 – Enter a phone number for the calls to be forwarded.

4 – Check this box to receive notification when receiving a forwarded call.

5 – Click **Save**.

6 – Click **Add**.

Continued on the following page.

An **Add Selective Criteria** window similar to image 17.2 will load.

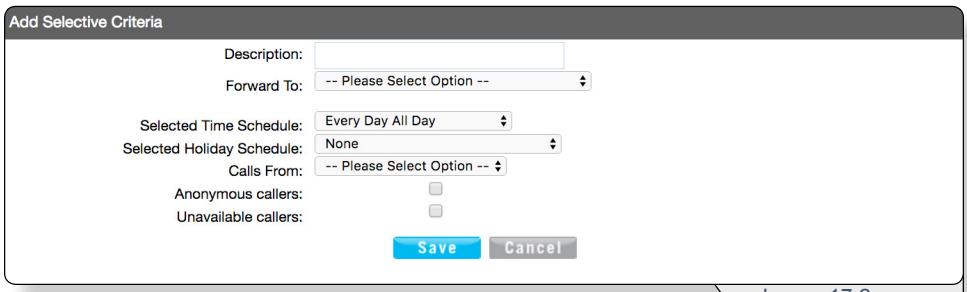

Image 17.2

Fill in the fields with the desired information.

See additional information for select fields below.

Time Schedule – Select one of the available options. Refer to the **Time Schedule** section for instructions on how to create a time schedule.

Any Phone number – Use to forward all incoming calls.

Following Phone Numbers – Use to forward any numbers in the **Specific Phone Numbers** section that will apear if this option is selected.

Anonymous Callers – Use to forward all calls any caller with their number to private.

Unavailable Callers – Use to forward any call where caller ID is not available.

Click **Save** to apply any changes.

Clicking **Save** will return you to the **Call Forwarding Selective** feature page similar to image 17.3.

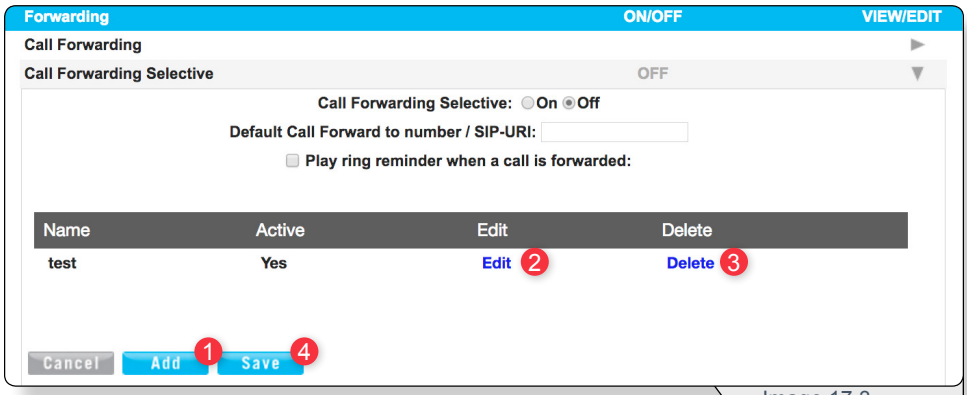

Image 17.3

From this page you can:

1 – **Add** a new rule.

2 – **Edit** an existing rule.

3 – **Delete** a rule.

4 – **Save** any progress.

Find Me – Simultaneous Ring

Find Me - Simultaneous Ring allows you to list up to 10 phone numbers you would like to have ring simultaneously in addition to your primary phone when you receive a call.

Find Me – Simultaneous Ring rules can be applied all incoming calls or to up to 12 specified phone numbers or digit patterns (example: 800* for all 800 numbers).

Use image 18.1 and the following instructions to configure this feature.

1 – Click **Find Me – Simultaneous Ring**'s **View/Edit** arrow.

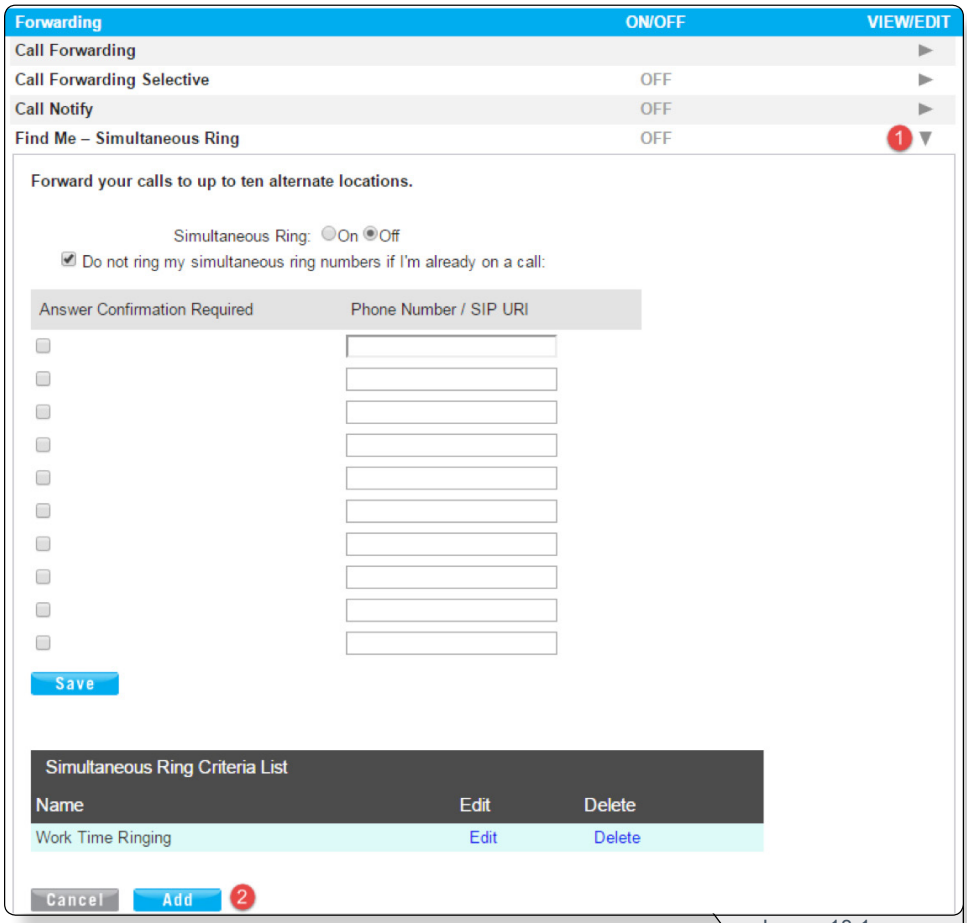

Image 18.1

2 – Select **Add**.

Continued on the following page.

An **Add Selective Criteria** window similar to image 18.2 will load.

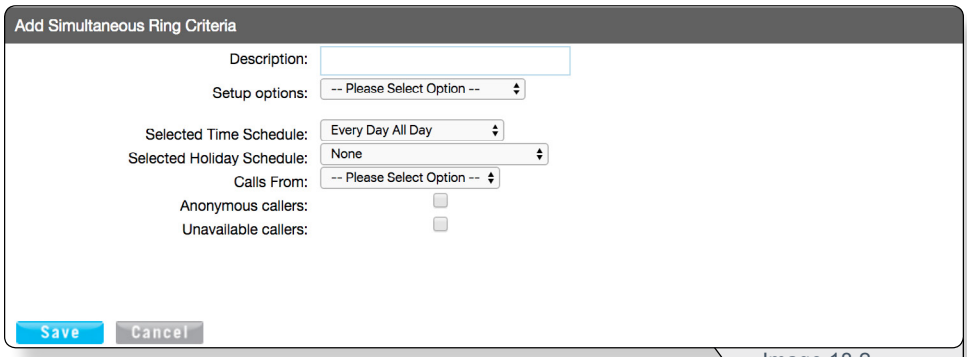

Image 18.2

Fill in the fields with the desired information.

See additional information for select fields below.

Time Schedule – Select one of the available options. Refer to the **Time Schedule** section for instructions on how to create a time schedule.

Following Phone Numbers – Use to forward any numbers in the **Specific Phone Numbers** section that will apear if this option is selected.

Anonymous Callers – Use to apply to any caller with their number set to private.

Unavailable Callers – Use to apply to any call where caller ID is not available.

Click **Save** to apply any changes.

Continued on the following page.

Clicking **Save** will return you to the **Find Me – Simultaneous Ring** feature page similar to image 18.3.

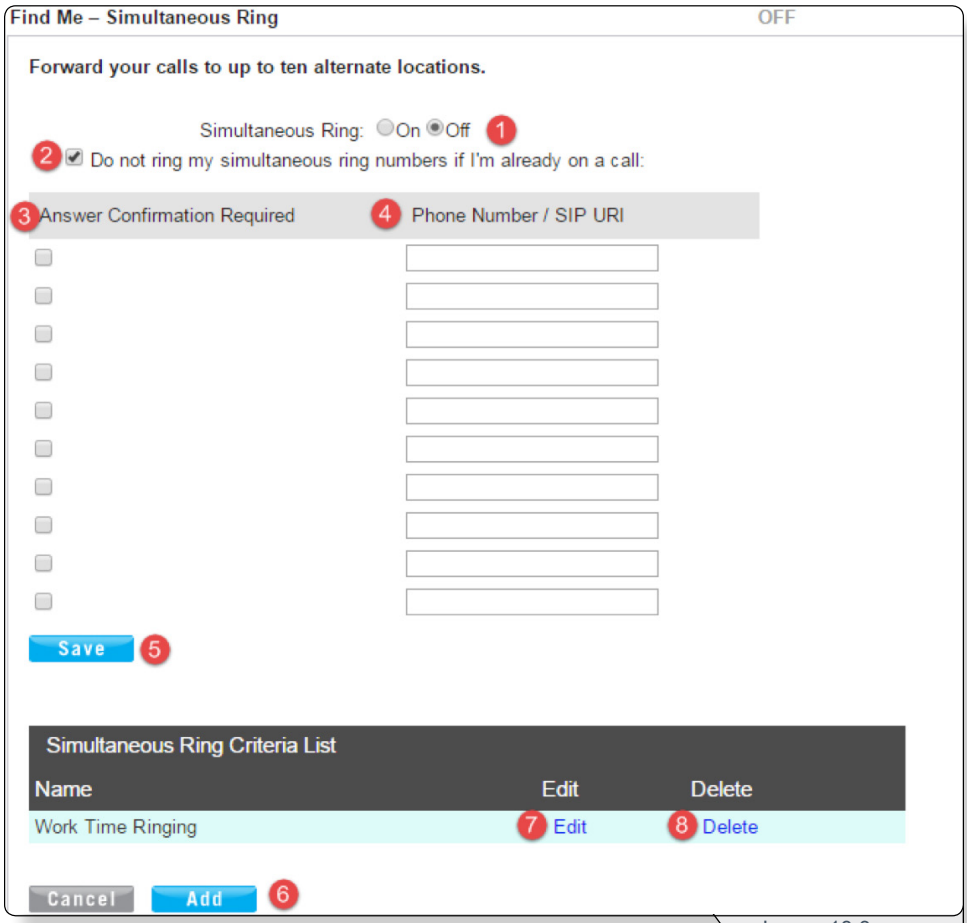

Image 18.3

From this page you can:

1 – Turn **Simultaneous Ring** on.

2 – Disable **Simultaneous Ring** if number is busy.

3 – Check this box to require answer confirmation.

4 – Enter phone numbers for feature.

Note: Whichever line has the fewest number of rings set before voicemail is prompted will be where the voicemail is delivered.

5 – Save any progress.

6 – Add a Rule

7 – Edit an existing rule.

8 – Delete a rule.

Find Me – Sequential Ring

Find Me - Sequential Ring allows you to configure your calls to ring up to 5 additional locations sequentially when there is no answer from the primary phone.

Find Me – Sequential Ring rules can be applied all incoming calls or to up to 12 specified phone numbers or digit patterns (example: 800* for all 800 numbers).

Note: All criteria must be met for a call to follow the sequential ring flow.

Use image 19.1 and the following instructions to configure this feature.

1 – Click **Find Me – Sequential Ring**'s **View/Edit** arrow.

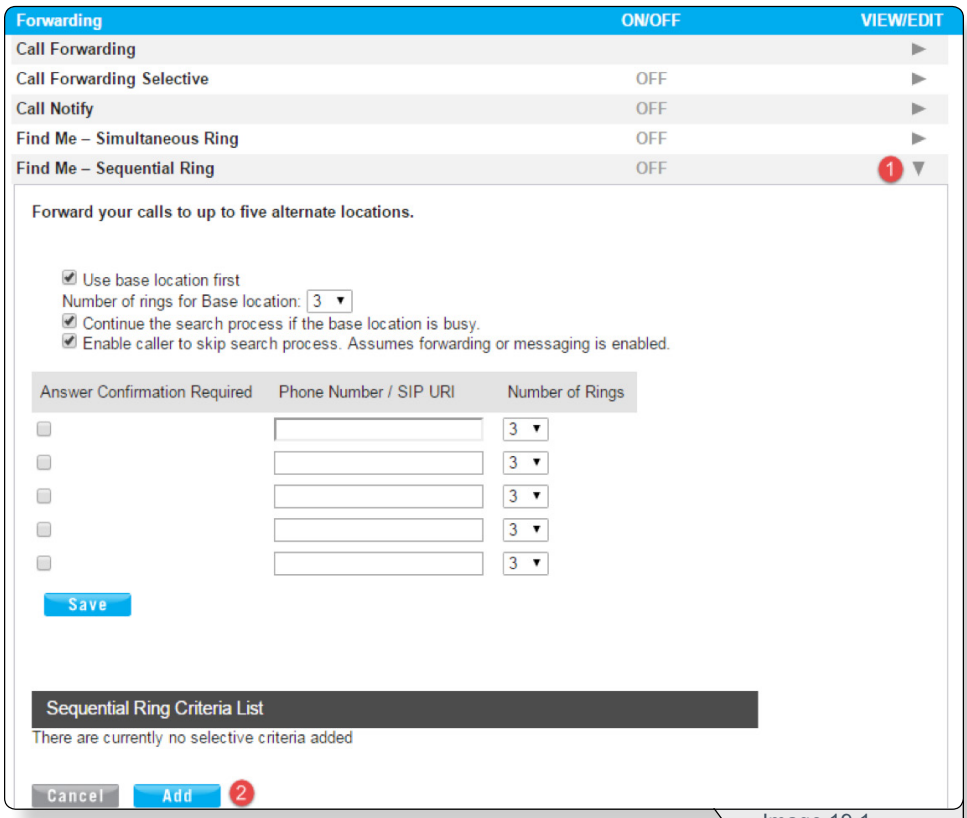

Image 19.1

2 – Click **Add**.

Continued on the following page.

An **Add Selective Criteria** window similar to image 19.2 will load.

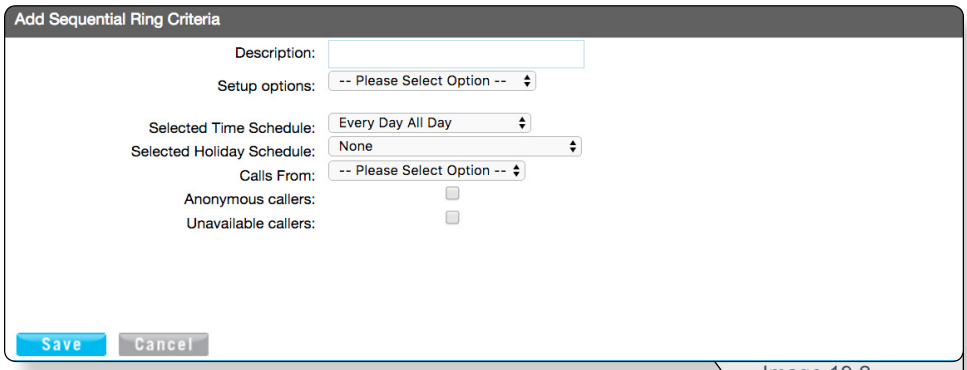

Image 19.2

Fill in the fields with the desired information.

See additional information for select fields below.

Time Schedule – Select one of the available options. Refer to the **Time Schedule** section for instructions on how to create a time schedule

Following Phone Numbers – Use to forward any numbers in the **Specific Phone Numbers** section that will apear if this option is selected.

Anonymous Callers – Use to apply rule to all calls any caller with their number to private.

Unavailable Callers – Use to apply rule any call where caller ID is not available.

Click **Save** to apply any changes.

Continued on the following page.

Clicking **Save** will return you to the **Find Me – Sequential Ring** feature page similar to image 19.3.

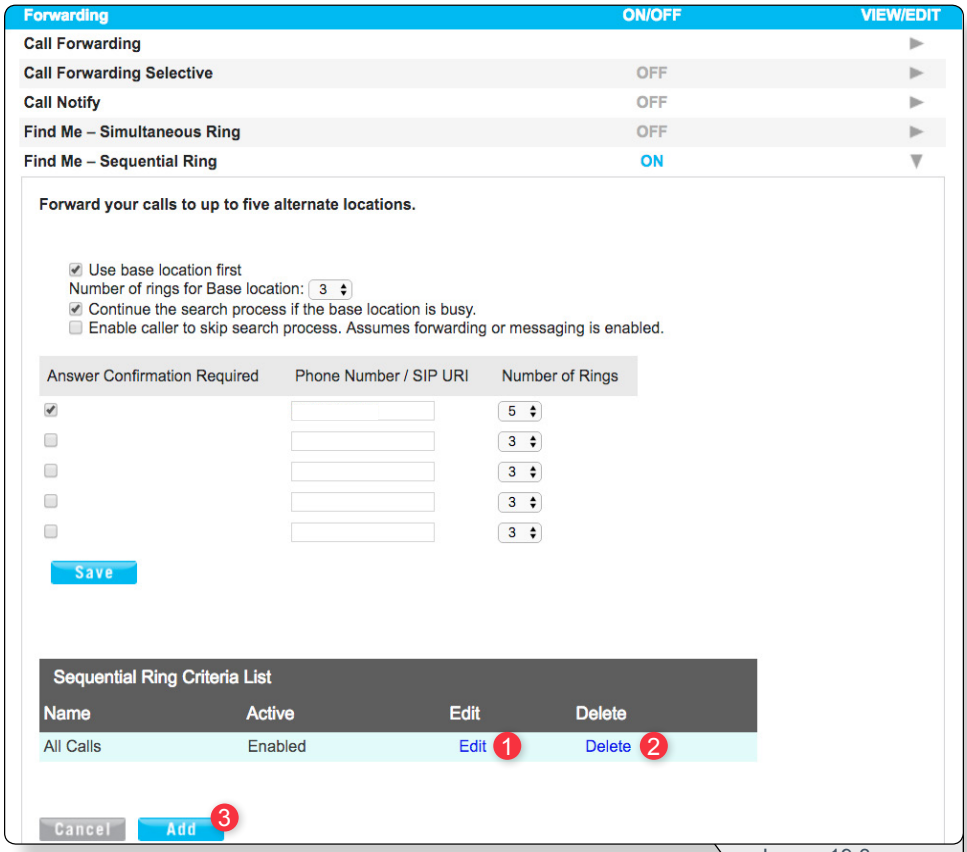

Image 19.3

Fill in the fields with the desired information.

See additional information for select fields below.

Use base location first – If checked, this has the primary device ring first.

Answer Confirmation Required – The line receiving the call must press a button to receive the call.

Number of Rings – The number of rings before the call is forwarded.

Note: Calls will be forwarded in the same order as they entered above. The process will begin with the first number and finish with the last.

Click **Save** to apply any changes.

Beyond configuring the feature, on this page you can also:

1 – **Edit** any rule.

2 – **Delete** any rule.

3 – **Add** any rule.

Messaging

The messaging section contains features directly associated with voicemail setup and delivery.

Messaging	ON/OFF	VIEW/EDIT
Voicemail	ON	►
Distribution List		►
Reset Voicemail Pin		►

Image 20.1

Voicemail

Voicemail configuration allows you to specify how voice messages will be handled, including options to retrieve voice messages using your phone or email.

Use image 21.1 and the following instructions to configure this feature.

1 – Click **Voicemail**'s **View/Edit** arrow.

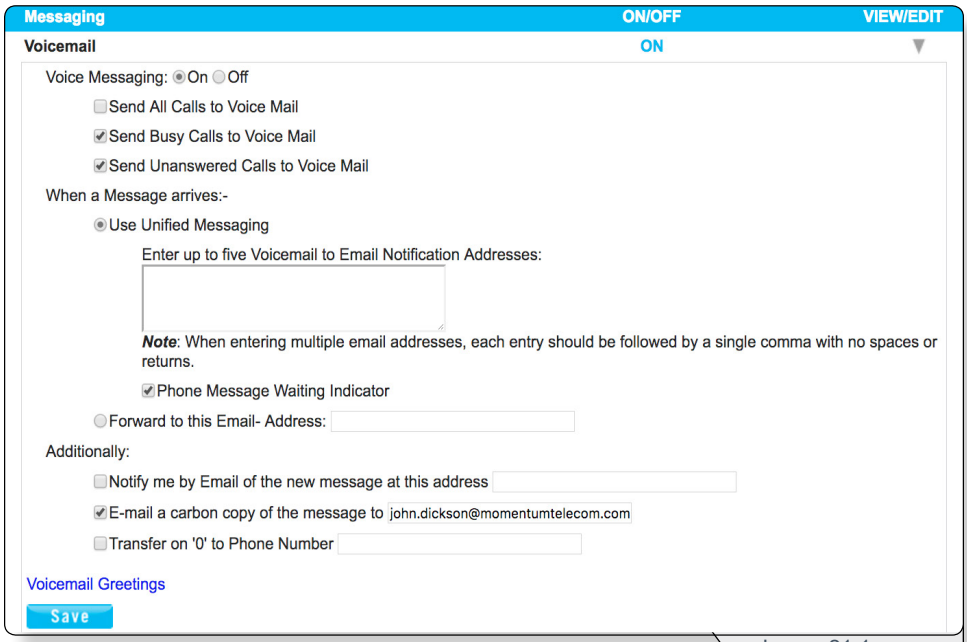

Image 21.1

Fill in the fields with the desired information.

See additional information for select fields below.

Send All Calls to Voice Mail – Sends all calls directly to voicemail

Use Unified Messaging – Voice are messages saved on the voice portal and up to 5 email address to receive notification emails when new voicemails have been received.

Forward to this Email- Address – will forward voicemails to a singular email and will not store the files in the voice portal.

Transfer on "0" to Phone – Allow callers to press 0 and be transferred to a different line. No message is played to callers, so they will need to know of this option in advance.

Voicemail Greetings – Refer to the following **Voicemail Greetings** section of this document.

Click **Save** to apply any changes.

Voicemail Greetings

Voicemail Greetings allows you to control the greeting a caller receives when they reach the line's voicemail.

Selecting **Voicemail Greetings** on the **Voicemail** feature page will load a page similar to image 22.1. For more instructions on how to reach this page refer to the previous **Voicemail** section.

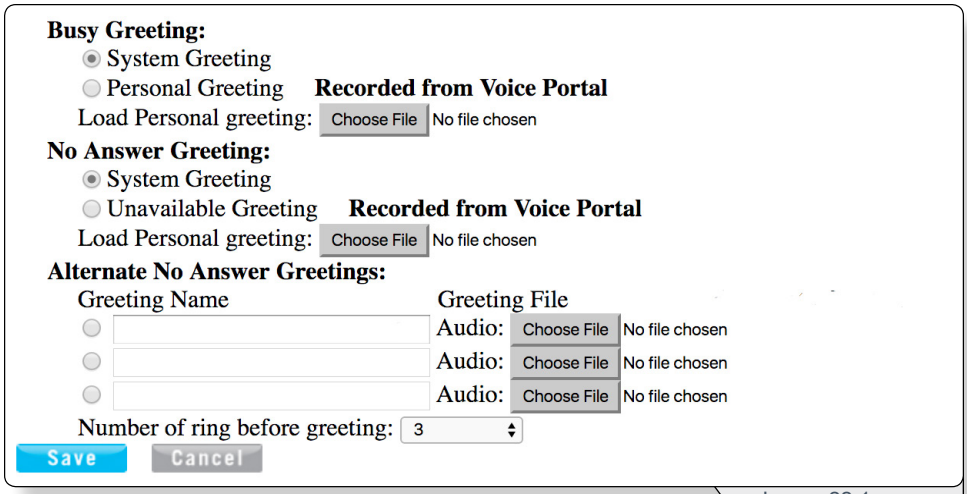

Image 22.1

Select an option to configure one of the three greeting types:

- **Busy Greeting –** the voicemail played when you are on the line and choose not to answer the second incoming call.
- **No Answer Greeting –** the voicemail played when a call goes unanswered.
- **Alternate No Answer Greetings –** the voicemail played when a call goes unanswered. This feature, however, allows the creation of multiple customized no answer greetings for special purposes (i.e., weekends, vacation, lunch).

Note: There can only be one active **No Answer** greeting at a time, either the **No Answer** or the **Alternate No Answer** greeting.

For each **Personal Greeting** option selected, use the **Browse** button to upload your customized greetings from your computer.

Select the number of times you want calls to ring before a greeting is played for callers.

Click **Save** to save changes**.**

Distribution List

Distribution List allows up to 15 phone number lists to be configured for forwarding voicemail messages using the voice portal.

Use image 23.1 and the following instructions to configure this feature.

1 – Click **Distribution List**'s **View/Edit** arrow.

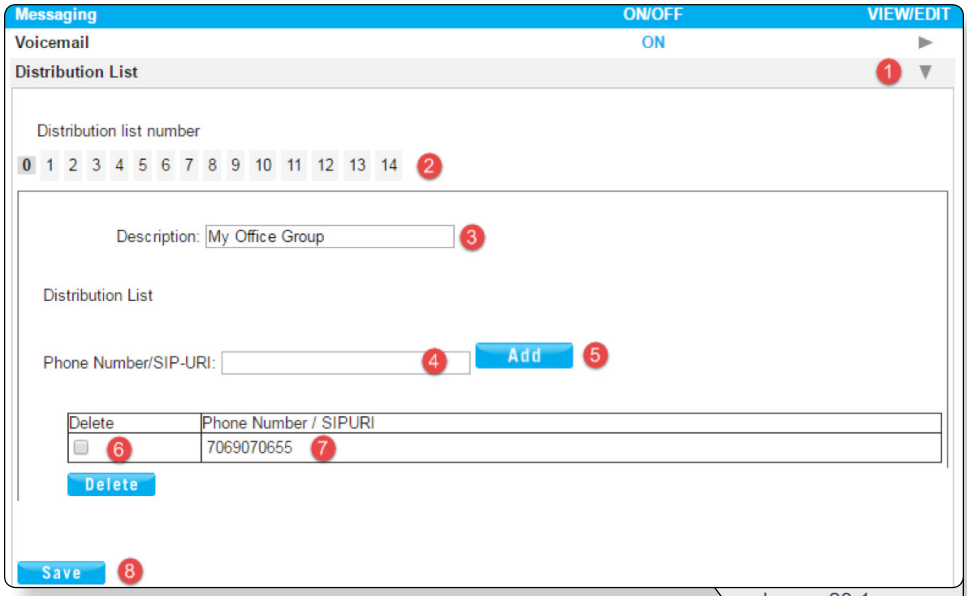

Image 23.1

2 – Select a distribution list number.

3 – Enter a list name.

4 – Enter a phone number or extension.

5 – Click **Add**.

Repeat this step until all phone numbers and extensions have been added.

To remove a number from a distribution list:

6 – Check the box adjacent to the corresponding phone number.

7 – Click **Delete**.

When finished configuring settings

8 – Click **Save** to apply your settings.

Note: Refer to the appendix for telephone star code instructions to configure this feature from a phone.

Reset Voicemail PIN

Whenever you reset your **Voicemail Pin**, it will reset back to the default pin (8642).

Use image 24.1 and the following instructions to configure this feature.

1 – Click **Reset Voicemail Pin**'s **View/Edit** arrow.

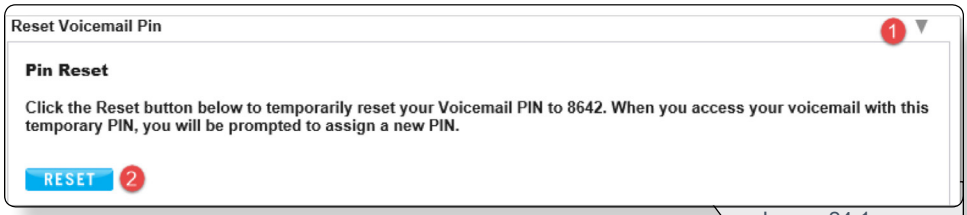

Image 24.1

2 – Click **Reset**.

Clicking **Reset** will load a confirmation message similar to image 24.2.

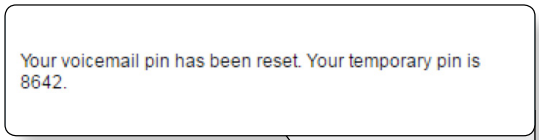

Image 24.2

Group

The **Group** tab provides access to all feature and administration settings that apply to your business group.

Note: Your business may not have all of the **Group Features** described in this section; the features are dependent on your service offering. Please contact customer support for additional details.

Group Feature Settings

Within the **Group** tab, the **Group Feature Settings** section contains all group features that can be configured.

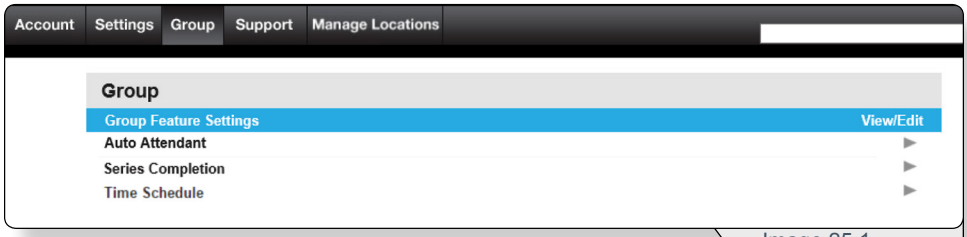

Image 25.1

Auto Attendant

Auto Attendant is an automated receptionist that answers the phone and plays a personalized recorded message to callers. **Auto Attendant** has 12 routing options for callers, including dial by name or extension, transfer to the operator or transfer to nine pre-configured phone numbers or extensions (for example, 1 = Marketing, 2 = Sales, and so on).

Note: Refer to the appendix for instructions on how to record a voicemail and/or greeting message for the **Auto Attendant**.

Use image 38.1 and the following instructions to configure this feature.

1 – Click **Auto Attendant**'s **View/Edit** arrow.

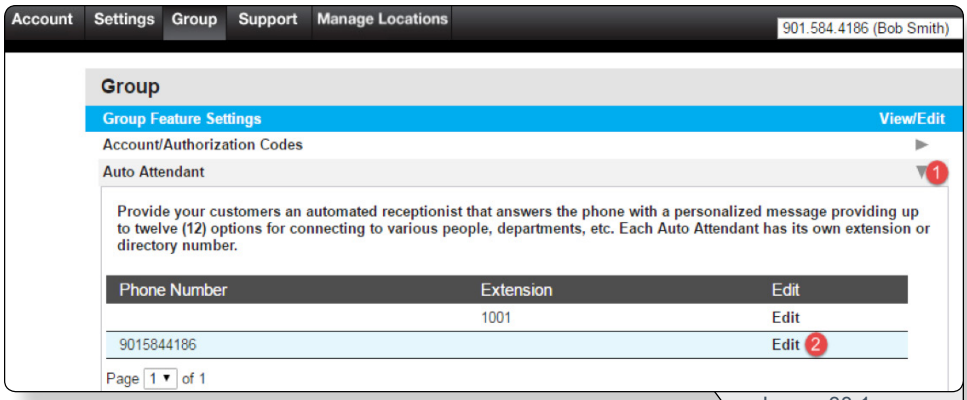

Image 38.1

2 – Click **Edit** for the auto attendant you want to configure.

Continued on the following page.

The **Edit Auto Attendant** page similar to image 38.2 will load.

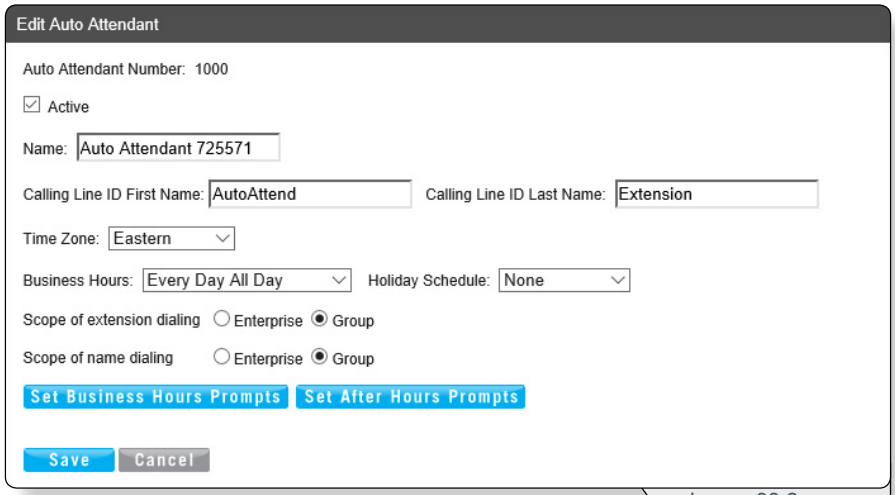

Image 38.2

Fill in the fields with the desired information. See select field information below.

Calling Line Name – name displayed to auto attendant call recipients.

Hunt Style – choose one of options described below:

- **Circular:** calls are routed to the next hunt group member based on who received the last call.
- **Regular (linear):** call routing always follows the sequence of the hunt group member list.
- **Simultaneous:** all idle users within the hunt group are alerted of an incoming call simultaneously.
- **Uniform:** calls are routed based on longest idle time.

Business Hours – select when the auto attendant should be enabled. Schedules are made in the Time Schedule feature.

Holiday Schedule – select the holiday schedule for the auto attendant. Schedules are made in the Time Schedule feature.

Scope of extension dialing – enable extension dialing across the enterprise (company) or the group (a location).

Scope of name dialing – enable name dialing across the enterprise (company) or the group (a location).

Directory Number Hunting – calls are routed to agents' individual phone numbers.

Set Business Hours Prompts – loads page to configure routing options for normal business hours.

Set After Hours Prompts – loads page to configure the routing options for non-business hours.

Click **Save** to apply any changes.

Selecting **Set Business Hours Prompts** or **Set After Hours** prompts will load a configuration page similar to image 38.3

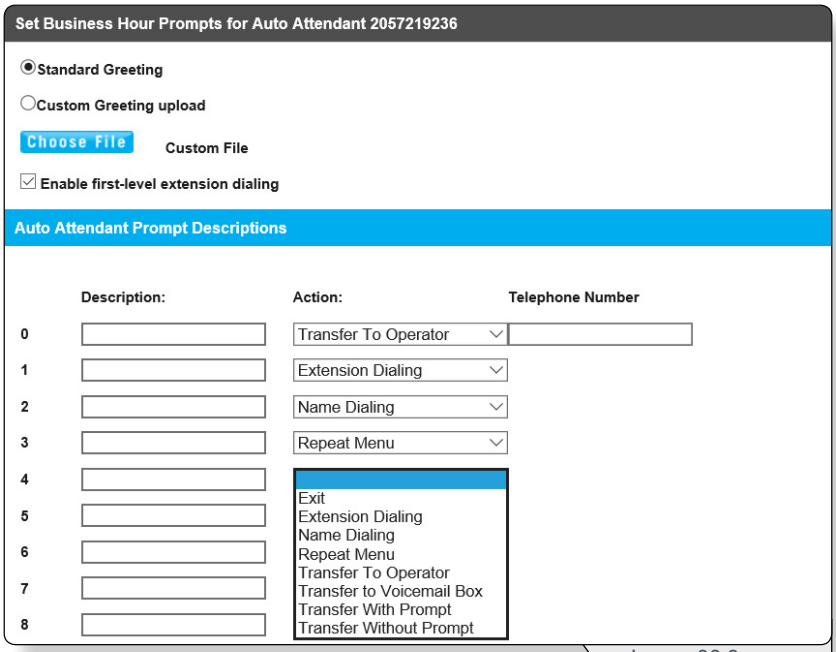

Image 38.3

Fill in the fields with the desired information. See additional information for select fields below.

Enable First-Level Extension Dialing – enable immediate extension dialing the caller can use at any time.

Description – optional field used to help identify the routing option.

Action – select the appropriate action type to be performed when the routing option is entered. Options include:

Exit: terminates the call.

Extension Dialing: allows caller to enter extension of desired party.

Name Dialing: allows caller to use the directory by name call routing option.

Repeat Menu: replays the menu selection.

***Transfer To Operator:** transfer caller to operator.

***Transfer to Voicemail Box:** transfers caller directly to voicemail.

***Transfer With Prompt:** transfers with a “You are being transferred to . . .” message played.

***Transfer Without Prompt:** directly transfers caller.

*Denotes an action that requires a telephone number to be specified.

Click **Save** when finished configuring.

TELEPHONE INSTRUCTIONS

To Setup Auto Attendant Voicemail:

1. From On-Network Extension: Dial 9999 and press *

   From Off-Network Extension: Dial 10-Digit Auto Attendant phone number and dial 9999

2. Enter extension (the last 4 digits of the Auto Attendant phone number)

3. Enter the default passcode (8642) and press #

4. Following prompt stating passcode has expired, enter a permanent passcode and press #

5. Re-enter permanent passcode and press #

Main Voicemail Menu Options:

[1] To access Voicemail

[3] Record name

[8] To change passcode

[9] To exit the voice portal

[#] To repeat this menu

To Access Auto Attendant Voicemail:

1. From On-Network Extension: Dial 9999 and press *
   From Off-Network Extension: Dial 10-Digit Auto Attendant phone number and dial 9999

2. Enter extension (the last 4 digits of the Auto Attendant phone number)

3. Enter permanent passcode and press #

Access Voicemail Options:

[1] To listen to messages

[2] To change mailbox busy greeting

[3] To change mailbox no answer greeting

[5] To compose and send a new message

[7] To delete all messages

[*] To go to the voice portal

[#] To repeat this menu

TELEPHONE INSTRUCTIONS (CONTINUED)

To Record a Custom Greeting:

1.* From On-Network Extension: Dial 9999. When you hear "Welcome to your voice portal," press *
   From Off-Network Extension: Dial the 10-Digit Auto Attendant phone number. Dial 9999. When you hear "Welcome to your voice portal," press *

2.* Dial Extension 9999#

3. Enter passcode 8642

4. Press 1 to change Auto Attendant greeting

5. Press 1 for Business Hours Greeting / Press 2 for After Hours Greeting

6. Follow the prompts

*The number of 9s required may vary, but will be equal to the extension digit length

Series Completion

Series Completion is used to create an ordered list of phone lines that can be used to reroute calls when the dialed phone line is busy. These calls will overflow to the next phone line in the list until the call is picked up or the end of the list is reached.

Use image 44.1 and the following instructions to configure this feature.

1 – Click **Series Completion**'s **View/Edit** arrow.

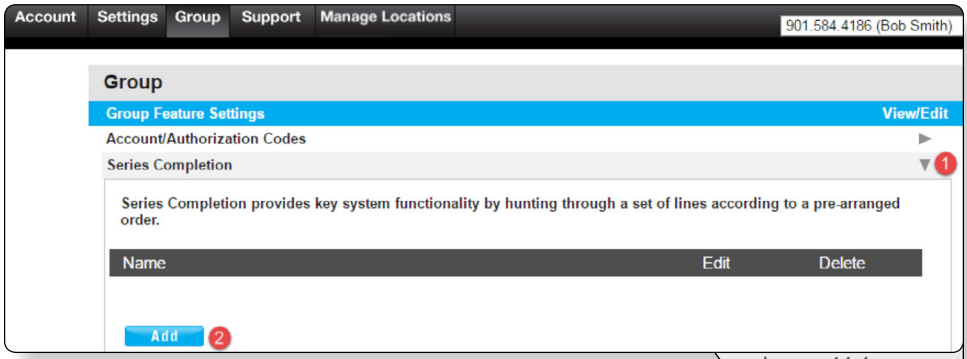

Image 44.1

2 – Click **Add**.

The **Add Series Completion** page similar to image 44.2 will load.

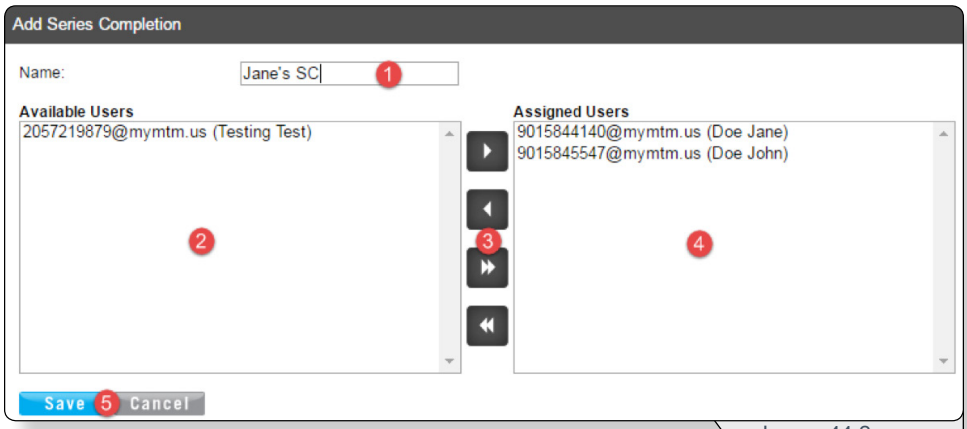

Image 44.2

1 – Enter a **Series Completion List** name.

2 – View and select the available user(s).

3 – Move selected users from the **Available Users** to **Assigned Users** using the arrow buttons.

4 – View the **Assigned Users** list.

5 – Click **Save** to apply group settings.

Note: Call routing attempts are performed in the same that sequence the numbers appear in the **Assigned Users** box.

When a series completion list is created it will appear on the **Series Completion** page similar to image 44.3.

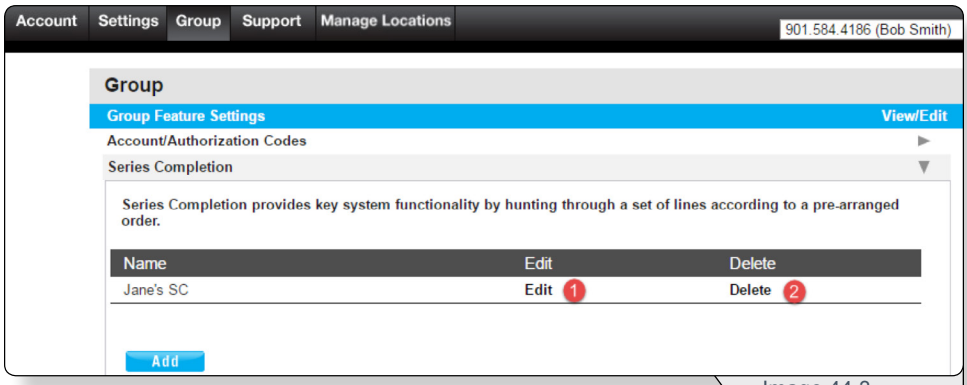

Image 44.3

1 – Click **Edit** to make changes to an existing series completion list.

2 – Click **Delete** to remove a series completion list from service.

Repeat the add series completion process to configure additional **Series Completion** lists.

Time Schedule (Group)

Time Schedules created in the **Group** tab are available to all lines associated to the group.

Use image 45.1 and the following instructions to configure this feature.

1 – Click **Time Schedule**'s **View/Edit** arrow.

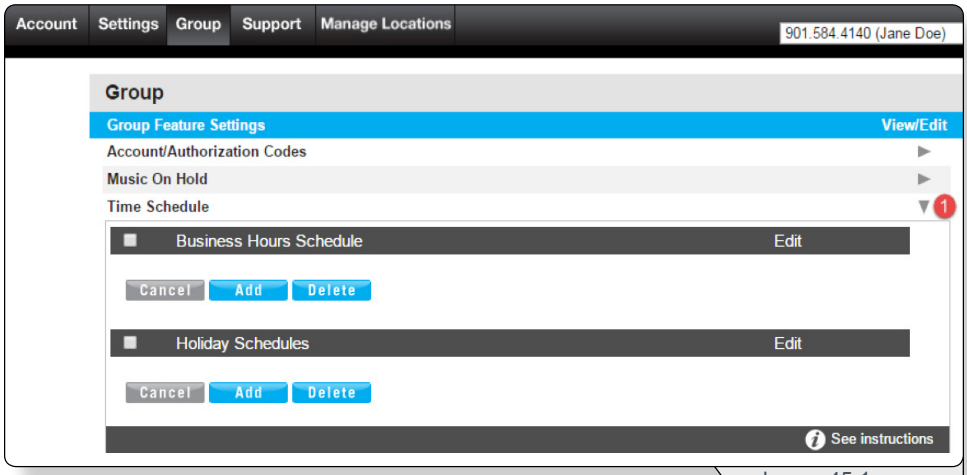

Image 45.1

Note: **Business Hours Schedule** and **Holiday Schedules** are configured using the same process.

Click **Add** to create a schedule.

The following page similar to image 45.2 will load.

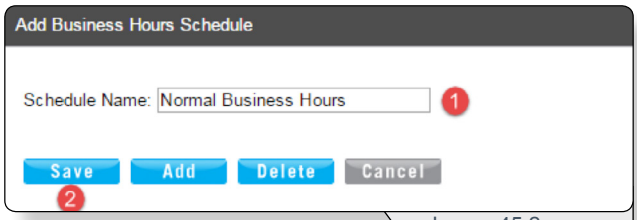

Image 45.2

1 – Name the schedule.

2 – Click **Save**.

Clicking **Save** will add an empty event list to the page similar to image 45.3.

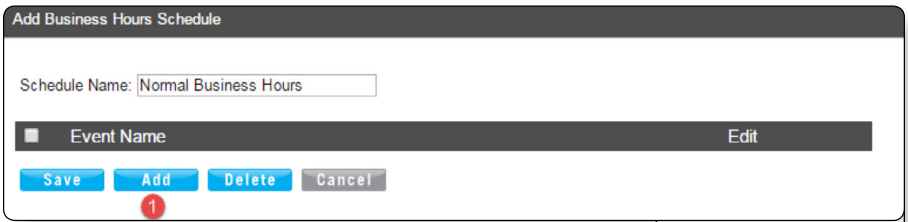

Image 45.3

1 – Click **Add** create a new event.

Clicking **Add** will load an **Add Schedule Event** page similar to image 45.4

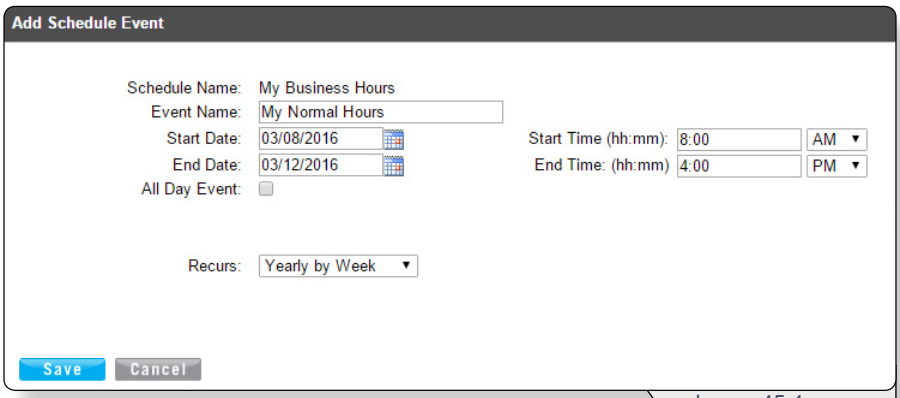

Image 45.4

Fill in the fields with the desired information.

See additional information for a select field below.

Recurs – choose one of the options below.

Daily (Example: Reoccurs every two days)

Weekly (Example: Every week on Tuesday and Thursday)

Monthly by day (Example: Every month on the 15th)

Monthly by Week (Example: First Monday of every month)

Yearly by Day (Example: January 5th every year)

Yearly by Week (Example: Second Tuesday in February every 2 years)

Click **Save** when finished configuring. This will display the event in the **Add Business Hours Schedule** view similar to image 45.5.

Image 45.5

On this page you can:

1 – Add more events.

2 – Select an event

3 – Delete a selected event.

4 – Edit an existing event.

5 – Save any changes.

When a schedule has been created, it is displayed on the main **Time Schedule** page similar to image 45.6.

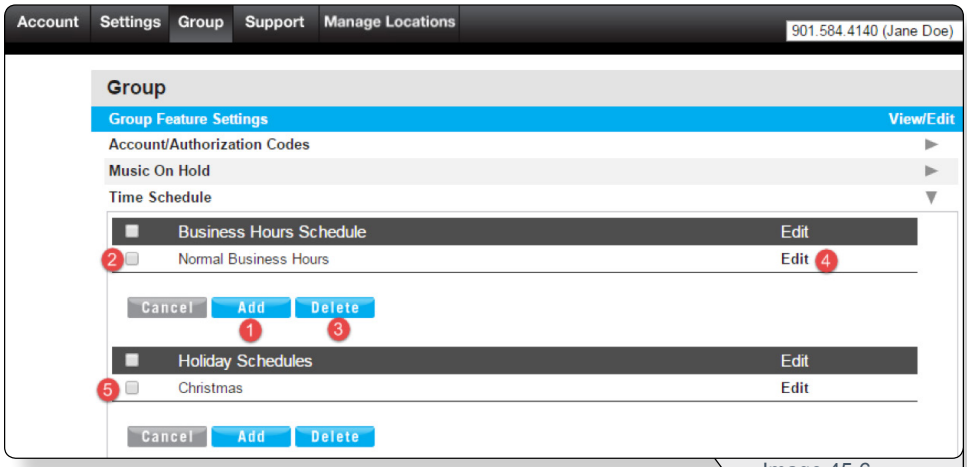

Image 45.6

On this page you can:

1 – Add more events.

2 & **5 –** Select an event

3 – Delete a selected event.

4 – Edit an existing event.

Group Administration

The **Group Administration** sections provide a convenient location to manage users and phone lines.

The following sections will discuss how to manage users and the settings that apply as a group to those accounts.

Manage Lines

Manage Lines provides functionality to update phone line user assignments and outbound Caller ID information.

Use image 46.1 and the following instructions to configure this feature.

1 – Click **Group Administration**'s **View/Edit** arrow.

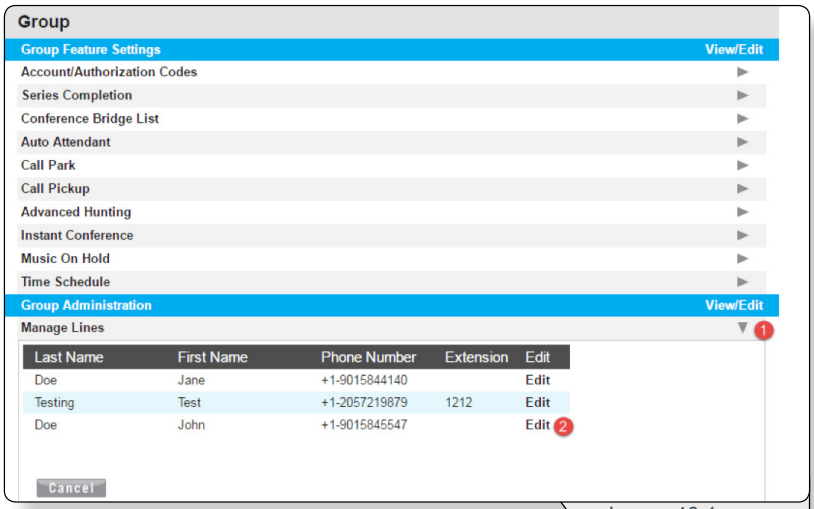

Image 46.1

2 – Click **Edit**.

Clicking **Edit** will load the **Edit Line** page similar to image 46.2.

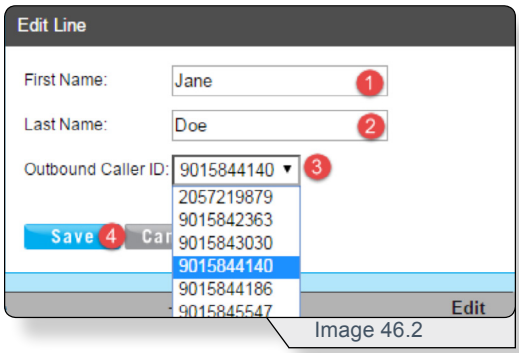

Image 46.2

1 – Modify the first name.

2 – Modify the last name.

3 – Modify the number that recipients see as this line's phone number on outgoing calls. This can be different from the actual line.

4 – Click **Save** to apply any changes.

Manage Users

Manage Users contains settings for managing individual user rights and password settings.

Use image 47.1 and the following instructions to configure this feature.

1 – Click **Manage Users**' **View/Edit** arrow.

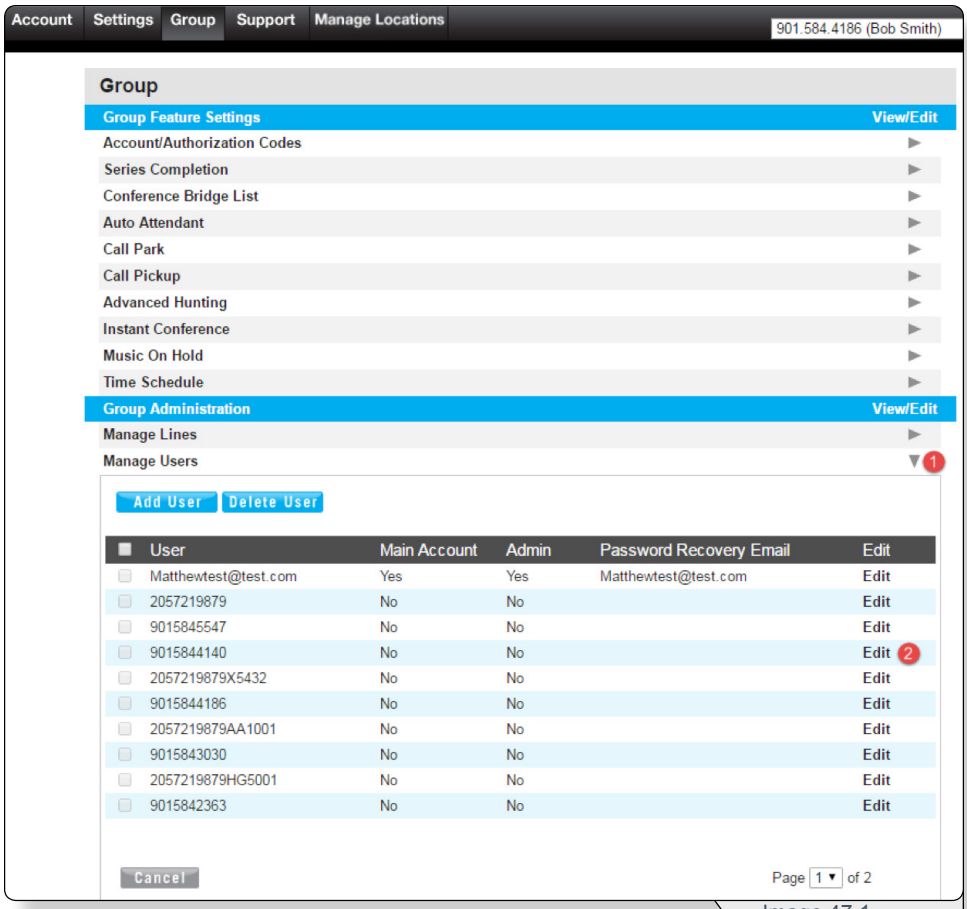

Image 47.1

2 – Click **Edit**.

Continued on the following page.

Clicking **Edit** will load the **Edit User** page similar to image 47.2.

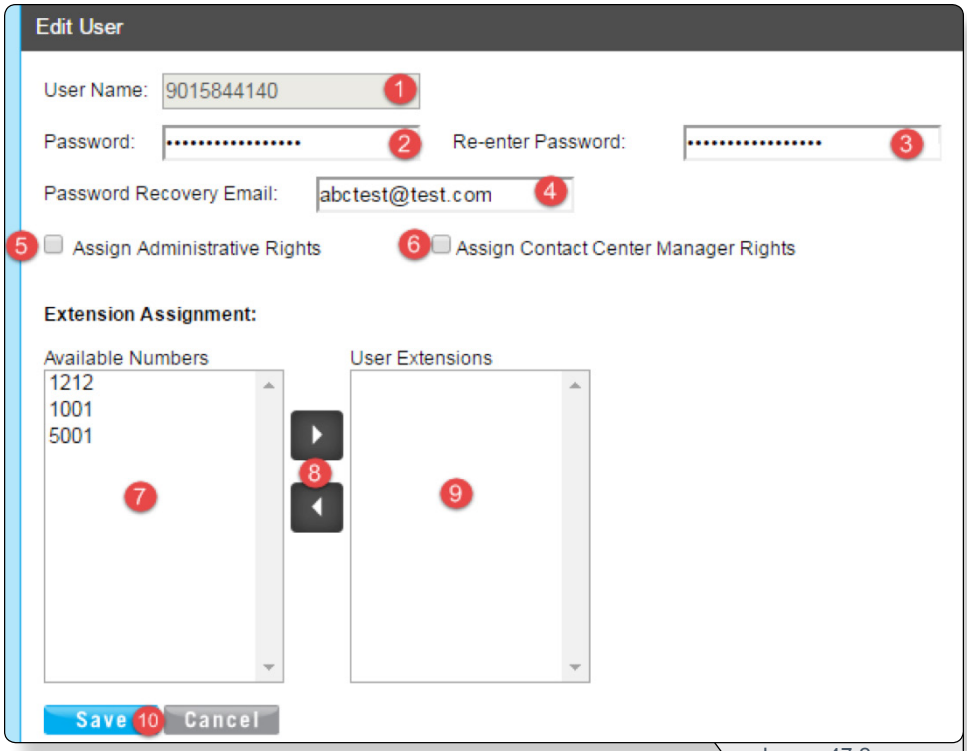

Image 47.2

1 – View the phone number of the user account being updated.

2 – Update this user account's portal password.

3 – Re-enter the updated user account's new portal password.

4 – Modify the user account's password recovery email.

5 – Check to assign this user administrative rights.

6 – Check to assign this user contact center manager rights.

7 – View and select extension numbers available to be assigned to this user.

8 – Use the appropriate arrow button to move the extension numbers.

9 – View and select extension numbers assigned to this user.

10 – Click **Save** to apply any changes.

Support

The **Support** tab provides access to product documentation including links and support information for additional applications that may be included with your voice services.

Use image 48.1 and the following instructions to access the Support tab.

1 – Click **Support** on the navigation bar.

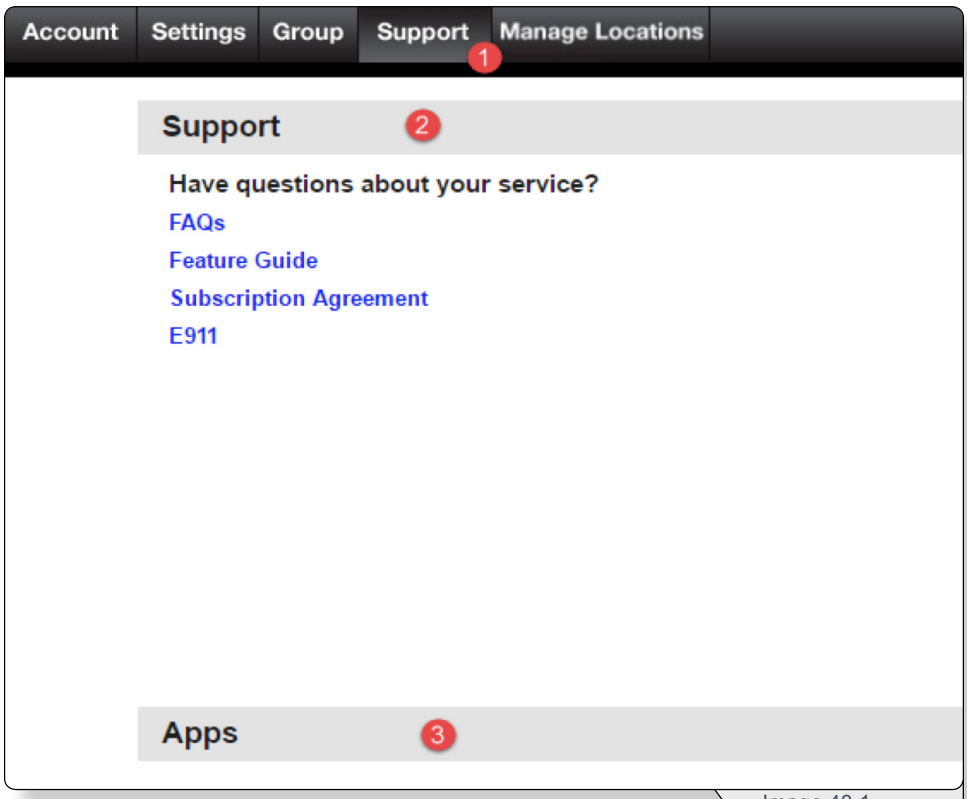

Image 48.1

2 – The **Support** section contains links to important information concerning product and service details.

3 – The **Apps** section contains links to instructions and downloads for support applications that may be part of your service offering.

Manage Locations

If a company has multiple locations, a user can switch between the locations using the **Manage Locations** tab (see 1 below).

Use image 49.1 and the following instructions to configure this feature.

1 – Click **Manage Locations** on the navigation bar.

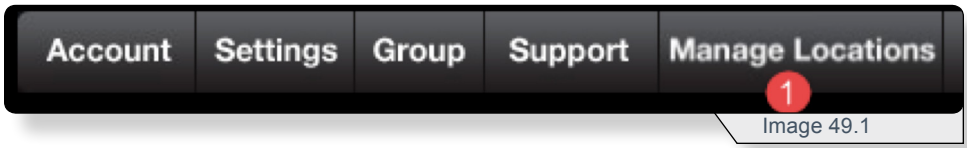

Image 49.1

Selecting the **Manage Location** tab will display a page similar to image 49.2.

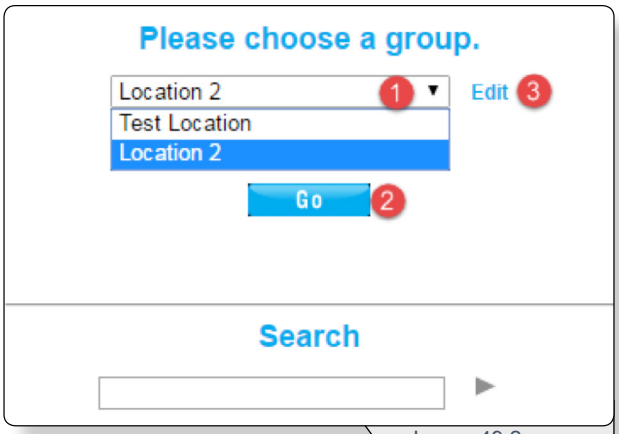

Image 49.2

1 – Select the location you wish to manage.

2 – Click **Go** to switch to the new location selection.

3 – Click **Edit** to update a location name.

Edit Location Name

Clicking **Edit** will load a page similar to image 49.3.

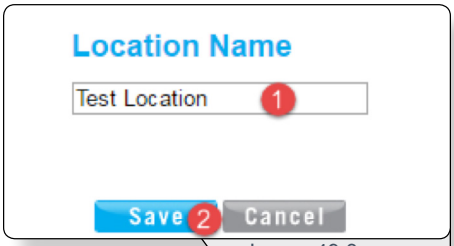

Image 49.3

1 – Enter a new **Location Name**.

2 – Click **Save** to apply the change.

Search for a Location

Use image 49.4 and the following instructions to configure this feature.

1 – Enter a name or number in the **Search.**

2 – Click the arrow.

Image 49.4 displays an example search with one result returned.

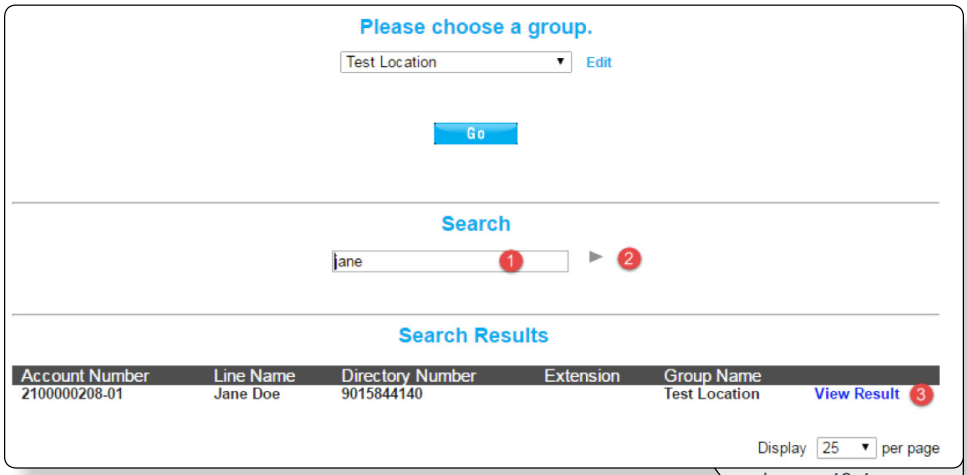

Image 49.4

3 – Click **View Result** for direct access to the line's configuration page.