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Auto Attendants

Auto attendants are interactive menu prompts which are able to play back a predefined message (sound file) and offer options which can be accessed by any standard telephone using the numerical key pad. A company will often have an auto attendant to help direct clients to different departments or let them choose to dial specific extensions within the system.

Name – This is a unique name to help you identify the auto attendant.

Description – This is used to describe the purpose of the auto attendant or what it does.

Background Sound – The background sound is the sound file (see Sound Manager) that will play to callers when this auto attendant is dialed. The background sound will normally introduce callers and describe the options the caller has to select from.

No Input Timeout – This option determines how long (in seconds) that the caller has to select an option after the background sound has finished playing. If the caller does not select an option in time, the caller will be directed to the 'Timeout' option.

Add a Menu Option – This allows you to create a new menu option. To create a new option enter the numerical key that you wish to assign the option to. Please note that *98 and * are predefined restricted keys and cannot be overwritten.

Auto Attendants - Menu Options

Auto attendant options are the numerical keys that callers can select from your menu. Each option can play a sound and perform a number of applications. To edit a menu option select the 'Edit' action beside the option key you wish to modify.

Option Name – This is the name or description of the key, this should be descriptive enough that its easy to determine what the purpose of this option is. Eg. 'Sales'

Option Value – This is the specific numerical key sequence that the caller must press to access this option. Option values can be single digits or multiple digits (Eg. 22). Options should not conflict with extension, hunt group or call queues numbers to avoid confusion.

Sound to Play – This is an optional sound file to play back to the caller when this option is selected before performing the application.

Application – This determines what application will be executed once this option is selected by the caller. Callers can be directed to a specific extension, hunt group, call queue etc. You can also use the dial-by-name feature to allow callers to find specific people in the organization. You can also direct callers to another auto attendant or use a business hour rule.

Predefined Options – There are a number of predefined options which are always part of auto attendants and cannot be deleted. The Invalid Option option is triggered whenever a caller enters an option that is not defined or does not exist. The Timeout (No Response) option is triggered if the caller does not select any option from the auto attendant. *98 (Remote Voicemail Access) and * (Remote Sound Manager Access) are always available and cannot be removed or altered.

Call Queues

Call queues are available to accounts which are subscribed to our Call Center Tools package. To access Call Queues select the My Account menu and then choose Call Queues.

Call Queues give you the ability to place multiple calls on hold at once while distributing calls on a first in first out basis to agents who are waiting to receive those calls. This allows you to queue callers to a finite number of waiting agents. Each agent has a regular extension on the system from which they receive calls. To Edit a call queue select the Edit action beside the call queue you wish to modify.

Preferences

Name – This is the name of the call queue (Eg. Sales).

Extension Number- This is the unique extension number of the call queue which allows you to quickly transfer calls internally to this extension number.

Description – Use this field to provide a description of what the call queue does (Eg. Handles After Hour Sales Calls)

Strategy – The strategy is the method which is used to distribute callers which are on hold to waiting agents. This is the method that determines which agent should receive the waiting call. The strategies include:

Ring All – This method is the simplest and just rings all agents at once.

Least Recent – This method calls the agent whom was the least recent agent to have answered a call (agent waiting the longest).

Fewest Calls – This method calls the agent whom has taken the fewest calls.

Random – This method calls agents completely at random

Round Robin – This method calls the agents in order, while remembering which agent the system left off with and starting with the next agent.

Skills Based – This method allows you to assign skill levels to each agent. The agent with the highest skill will always be the first to receive calls. If that agent is unavailable or on another call the system will try the agent with the next highest skill. This continues until the system gets to the agent with the lowest skill level in this queue. This method is useful if you have agents who have a higher knowledge level and are better prepared to answer calls.

Agent Timeout (in seconds) – This is the number of seconds that each agent should be called before trying another agent.

Absolute Timeout (in seconds) – This is the maximum number of seconds that a caller can remain on hold in the call queue before timing out and being directed to the No Answer Handling function. If you would like the caller to remain on hold indefinitely please set this value to 0.

Agent Wrap Up Time (in seconds) – This option allows you to define how long an agent should be allowed to remain idle after completing a call before receiving their next call. For instance agents often need to do post call work such as enter information about the client before they are ready to receive another call from the queue.

Ring in Use – This option determines if agents should receive calls while they are already engaged on another call. When this option is set to No the agent will not receive another call until they become idle.

Join when empty – This option determines if callers should be placed on hold when no agents are logged in or assigned to the call queue. Calls will immediately be routed to the No Answer Handling application.

Leave when empty – This option determines if callers should be taken off hold and exit the call queue if all agents log off or become unassigned while callers still remain on hold. Calls will immediately be routed to the No Answer Handling application.

Announce Hold Time / Position- When set to Yes this option announces to callers their position in the call queue (Eg. You are caller number 2). This option is used in conjunction with the Announce Frequency (in seconds).

Announce Frequency (in seconds) – Use this option to set how often to announce the hold time / position to callers.

Call Label – The call label is a string of text which is displayed to all agents when someone calls this hunt group. It is shown on their caller id display. This is useful for making it clear which call queue the caller is from (Eg. Technical Support).

Call Announcement – This is a sound file (see Sound Manager) which is played back to the extension that answers the call before the caller is taken off hold.

Assign Agents

This tab is used for assigning agents to the call queue. Use the icon in the + and – column to assign agents to the call queue. If you are using skills based routing, a column called Skill Level will appear which lets you determine the relative skill of each agent. The lowest skill level is 0 and the highest skill level is 10.

No Answer Handling

Once a caller has remained on hold past the Absolute Timeout period, they will automatically be routed to the function defined in the No Answer Handling tab. Use this tab to select where callers should be directed to.

Call Records

Call records are used to access details on calls made/received via the system. Both incoming calls and outgoing calls are tracked and available in realtime. A call will not appear in the call records until the call has ended. To access call records select the Call Records menu option and then select either Incoming Call Records or Outgoing Call Records.

Conference Bridge

If you are subscribed to the conference bridge service you can setup conference rooms to hold conferences. A conference bridge is a telephone number which lets you host audio conference calls with multiple parties. A conference bridge consists of a specific telephone number that customers can call into and conference rooms which they can join. An administrator hosts the conference call and can set various options both in the conference call and through the web portal. To access the Conference Bridge settings select the My Account menu and then the Conference Bridge option. You can Edit or Delete specific conference rooms or create a New conference room.

Name – This is the name of the conference room (Eg. Sales Presentation)

Room Number – This is the unique room number of the conference room, users will use this conference room number to access the conference room.

User's Pin Code – This is the code regular users will use to gain access to the conference room

Administrator's Pin Code – This is the code that administrators will use to gain access to the conference room.

Monitor Only Mode – This option specifies that only the administrator will be able to talk and regular users will only be able to listen. They will not be able to interrupt the conference or speak; a one way conference.

Quiet Mode – This option prevents the system from playing sounds when a user joins or leaves the conference.

Announce User Count on Joining – This option announces how many users are in the conference whenever a new user joins.

Announce Users Joining/Leaving – This option asks users to say their name and then announces their name whenever that users joins or leaves the conference.

For details on using the conference bridge, please see **section 2, Service Features**.

Devices

Devices are hardware based telephones which are assigned to this account. To access this feature select the My Account menu option followed by the Devices option. Each device in the list will display the device name (Make/Model) and the mac address. It will also display which extension the device is assigned to. To change the settings of this device select the Modify option. Software based phones do not appear in this list.

Line Assignments

Line assignments lets you determine which physical phone is assigned to which extension in the system. The Global Line assigns all lines on the phone to the same extension number. In most cases and situations this is the ideal setup and you will want to only set the Global Line to a single extension. You can leave the remaining Lines set to Not Assigned.

In cases where you wish to have individual lines assigned to different extensions, you can set each line to different extension. To make/receive calls only on that extension you will then select that specific line key on your phone.

Preferences

The preferences tab will differ depending on the specific make/model of your telephone. Some options may be different that described below.

Enable Call Waiting – This determines if the phone should receive more than one call at a time.

Play Call Waiting Tone – This option causes the phone to play a tone whenever a second call is received by the phone.

Disable Stuttered Dialtone – When the phone has new voicemail messages it will present a broken/stuttered dialtone. To disable this behavior, select this option.

Disable Missed Calls Indicator – This feature lets you disable indicator on the screen that tells you that you have missed calls.

Top Keys/Bottom Keys/Programmable Keys

This tab lets you program soft keys and hard keys on your desk phone. These keys are accessible as buttons that appear on your phone and can be assigned to a number of different functions such as speed dials, do not disturb etc. Unless otherwise indicated or instructed the Line # should always be set to the default of Global.

Key Position – This is the position of the key on physical phone. Different models number their keys in various order, but normally key position one is the leftmost and topmost key. Key positions normally follow a counter clockwise layout starting from key position 1. Once a key is modified the phone will automatically restart itself unless you are on a call.

Key Type – This determines what function this key will perform. Commonly used functions are Extension Indicator and Speed Dial.

Extension Indicator – This lets you monitor the status of a specific extension on the system. In the Value field enter the extension number of the person you wish to monitor. When they are on the phone the key's light will display red and when they are receiving a call it will flash red. You do not need to fill out the Label field because the system will automatically display the person's first name. You can however override this by filling out the Label field.

Speed Dial – This key function is used when you want to program an outside phone number such as a mobile phone. Simply enter the 10 digit phone number into the Value field and give it a name using the Label field.

Do Not Disturb – This key function will tell the system that you do not wish to receive calls on this particular phone. This is useful if you want to quickly make yourself unavailable. You do not need to fill out the Label or Value fields when using this feature.

Paging – You can use this key function if you wish to be able to page all phones in the office. This will only page phones on the same physical network and can't be used to page phones that are remotely in different places. This only works for phones that support paging, software based phones will not receive pages. You can use the Label field to set a name for this key. The Value field is not used.

Line – This key is used to add additional lines to your phone. If for instance your phone has 3 dedicated line keys and you wish to have a 4th line, you can set one of the keys to Line and then change the Line # option to 4 (or whichever line # you wish it to act as).

Intercom – This feature is used for paging a specific extension. Give this key a name using the Label field. The Value field is not used.

Emergency Locations (911)

Emergency locations are a vital part of the system and should not be overlooked. An emergency location consists of a telephone number and physical address which is electronically provided to 911 operators in the event a 911 call is placed from the system. Each account will have at least one emergency location. It is very important that this information is always kept up to date. If you move your phones or change physical locations it is important to update your emergency location.

To access Emergency Locations select the My Account menu and then choose the Emergency Locations menu option. To Edit an emergency location select the Edit action beside the emergency location you wish to modify. To modify the address simply enter your new address and select Update. If the address is not accepted, you will want to verify the address using the address finder with US Postal or Canada Post service website depending on which country you reside in. If you still have trouble please contact Easy Office Phone for assistance.

If you need to add additional emergency locations please contact Easy Office Phone. If you have multiple emergency locations you can Edit specific extensions and assign each extension to a specific Emergency Location. It is important that each extension's emergency location matches their physical address.

Extensions

Extensions are how individual staff members are identified on the system. Each staff member will have their own unique extension number which clients and other staff members can dial to reach that person. This extension can then be assigned to specific phones or forwarded to a mobile or land line phone. Extensions have a multitude of different options which can be configured.

To access extensions you need to select the 'Extensions' menu option from the 'My Account' menu. You can then "Edit" a given extension, which will present you with the following tabs and options.

General Tab

Belongs to – This option lets you decide whom the extension belongs to. You can select any user in the system to assign this extension to.

Emergency (911) Location – This option which physical location this extension resides in. This is very important because this will determine which address emergency services will be dispatched to if this extension dials 911. If this extension moves locations you will need to update the 911 emergency location for this extension to match their physical location. Each extension can have a unique emergency location but each emergency location requires a unique phone number.

Outgoing Caller ID – Each extension can have a different outgoing caller name and phone number displayed when they dial out. The 'Default' caller ID is always the primary telephone number on your account. You can also use a different phone number from your list of available phone numbers if this extension needs a different caller id.

Block Outgoing International Calls – This option lets you prevent this extension from making international calls. If international calling is blocked on the entire account this option will have no effect.

Voicemail Subscriptions – This option lets you decide which mailboxes this extension should receive message waiting indication for. Message waiting indication will cause your phone to flash red when messages are available. Soft phones alert users to new messages in different ways depending on the specific software version. You can select multiple mailboxes if you wish to monitor more than one mailbox for this extension. If the auto delete option is set for a mailbox this option will have no effect.

Call Forwarding and Availability Tab

Do Not Disturb – This option places your extension on do not disturb which prevents callers from reaching you, instead they will immediately go to voicemail.

Forward Calls – This option lets you forward all calls to this extension to an outside phone number (such as a mobile phone) or an internal extension within the system. If you wish to forward to an outside phone number you will need to enter the full 10 digit phone number of the outside number including the area code. To forward to an internal extension number just enter the internal extension number.

Call Flow Tab

Enable Transfer Sound - This option will cause the system to play back a sound prompt with the words "Please hold while we try to connect you" whenever this extension is dialed.

Enable Privacy (Call Screening) - This option causes the system to prompt callers to say their name before connecting to this extension. When the extension is answered an option to screen the call is offered. This allows the extension to choose if they want to take the call or send them to voicemail instead.

Call Label – Call labels are used when you want the phone to see a specific string of text shown to the extension before they answer the call. For instance you may want all calls to show 'Sales' on the screen before calls are answered.

Distinctive Ring – Some hardware based phones such as Aastra phones support distinctive ring. Distinctive ring is a feature which makes the ring tone on the phone different from the standard ring tone. This is helpful in determining whether an extension was dialed directly or is part of a hunt group. For instance a hunt group could have a different distinctive ring which makes it easier to determine how to answer the caller.

Timeout (in Seconds) – The timeout determines how long to ring the extension (desk phone or soft phone) before going to voicemail or using the find-me/follow-me settings. For instance if you selected 24 seconds, your desk phone or soft phone will ring for a total of 24 seconds before timing out.

Find-me/Follow-me - This feature is used when you want the system to try locating you at alternative locations before going to voicemail. This allows you to enter a mobile phone number or another internal extension number where the system can look for you. You can enter up to two different numbers or extensions and select the method you wish the system to dial these locations. Sequential dialing calls telephone number 1 and then telephone number 2. Concurrent dialing calls both telephone numbers at the same time.

No Answer Handling – This option lets you decide which voicemail box calls should be sent to if this extension does not answer the phone.

Faxing

If you are subscribed to the fax service you can send and receive faxes electronically. To access Faxing select the My Account menu and then select Faxing.

Send a Fax

You can send faxes electronically by uploading an appropriate document. Accepted documents are in the format of Word Documents, PDF, Rich Text Documents, Excel and Open Office Documents. Accepted fax size is 8.5 by 11 inches and faxes must be in portrait rather than landscape layout. Select the file you wish to upload by choosing the Choose File option. Enter a Recipient Fax Number including the area code (10 digits) and provide the name or organization you are sending the fax to in the Recipient Name field. When you are ready to send the fax choose the Send Fax button.

Sent Faxes

To see the status of a fax that is in the process of being sent or the status of faxes you have sent our previously, select the Sent Faxes tab. You can View faxes that you have sent or Delete faxes that you no longer wish to store on the server.

Received Faxes

You can View and Delete faxes that you have received by selecting the Received Faxes option. To change the settings of your fax service see the Telephone Numbers option.

Hunt Groups

A hunt group is simply a group of users to whom calls are sent to under certain circumstances. For example, you might wish to set up a "Sales" hunt group, which would consist of only your salespeople and would take effect only when a caller selects the Sales menu option from your auto attendant.

On the other hand some companies wish to send all calls to all users, and hunt groups will work equally well for such a scenario. Hunt groups are useful for separating extensions into specific work groups.

To access hunt groups select the 'Hunt Groups' menu option from the 'My Account' menu.

Preferences

Name – This is the name of the hunt group and should describe the function of the hunt group (Eg. Sales)

Extension Number – The extension number is the internal number that can be dialed to reach this hunt group directly. This is useful when you wish to transfer calls to a hunt group or call the members of the hunt group directly from your phone. This extension number must be unique and cannot be the same as an extension number for any other hunt groups, extensions or call queues.

Ring Strategy – The ring strategy is the method used to call the extensions assigned to a particular hunt group. The Ring All strategy calls all extensions simultaneously whereas the Sequential strategy calls each extension one after another based on the Dialing Order (see Assign Extensions). The Progressive strategy calls each extension and slowly adds the next extension until all extensions are being called simultaneously.

No Answer Timeout (in seconds) – This is the total length of time that the extensions in the hunt group will ring before timing out. Once the hunt group times out the caller can be directed to any number of applications (voicemail, another hunt group, an auto attendant etc).

Call Label – The call label is a string of text which is displayed to all extensions when someone calls this hunt group. It is show on their caller id display. This is useful for making it clear what the caller id calling about (Eg. Technical Support).

Play Music on Hold – This option controls what the caller hears while they are waiting in the call hunt group. The options are music or a ringing indication. Check this option to select music.

Distinctive Ring - Some hardware based phones such as Aastra phones support distinctive ring. Distinctive ring is a feature which makes the ring tone on the phone different from the standard ring tone. This is helpful in determining which hunt group was dialed.

Call Announcement – This is a sound file (see Sound Manager) which is played back to the extension that answers the call before the caller is taken off hold. This is very useful for mobile phones where its important to differentiate between personal phone calls and business calls.

[Assign Extensions](#)

The assign extensions tab lets you assign which extensions will be called when this hunt group is dialed. Depending on the strategy you have selected, a column called Dialing Order may appear which determines which order the extensions will be dialed. This is determined by the order the extensions are assigned to the hunt group. To reassign the order, first remove all extensions from the hunt group and then add them back in the order you wish them to be dialed. For the Ring All strategy the dialing order is not used.

No Answer Handling

No answer handling determines how calls should be handled which are not answered by any of the extensions assigned to the hunt group. If a call remains unanswered after the No Answer Timeout the application defined on this tab will be executed. You can choose to send the caller to an extension, another hunt group, a mailbox etc.

Mailboxes

Voicemail boxes are individual mailboxes where callers can leave messages for certain staff or departments. Generally an extension will also have a mailbox (Eg. Extension 100 will also have a Mailbox 100). Extensions are not required to have mailboxes however. To access mailboxes select the My Account menu and then the Mailboxes menu option. To edit a mailbox select Edit beside the mailbox.

Mailbox Belongs To – This determines whom the mailbox belongs to. Unless an alternative e-mail address is set (see Send to an Alternative E-mail Address) this is the person who will receive notification via e-mail new voicemail messages. It also helps administrators quickly tell which mailboxes belong to which users.

Mailbox Number – This is the mailbox number and is used when checking voicemail through your phone or remotely.

Mailbox Password – This is the pin code or password used to gain access to the voicemail box when checking for new or old messages through your phone.

General Options

Auto Delete Messages from Server – Choose this option to tell the system to automatically delete messages from the server. This is useful if you only wish to receive new messages via e-mail and do not want a copy of voicemail messages stored on Easy Office Phone's servers.

Mailboxes can hold a maximum of 50 messages, so if this option is not selected it's important that you delete messages regularly from the server.

Hide Mailbox from Dial-by-Name Directory – Use this option if you want this mailbox to be hidden from the dial-by-name application, this will prevent users from finding this mailbox. It is very useful from staff members that don't want their extension number to be known or group mailboxes.

Caller Playback Options

Play Personal Unavailable Greeting – This option tells the system to playback the unavailable greeting for the mailbox whenever this mailbox is called. The unavailable greeting is the greeting that the user records (Eg. You have reached John, I am not available, please leave me a message). In most cases this option should be selected.

Skip Playback of Caller Voicemail Instructions – When this option is not selected the system will give callers a list of options and instructions on how to leave a voicemail.

Voicemail Checking Options

Playback Caller ID Information – Select this option if you want the system to playback the callers phone number when checking for messages.

Playback Date/Time of each Message – Select this option if you want the system to playback the date and time of each message.

E-mail Options

Send E-mail Notification of New Messages – This option tells the system to send an e-mail to the user whom the mailbox belongs to informing them a new voicemail message has been left for them.

Include Copy of Voicemail as Attachment to E-mail – This option tells the system to include a copy of the voicemail message as a .WAV file attachment which can be listened to through your computer.

Send to an Alternative E-mail Address – Use this option if you wish to override the e-mail address of the person whom this mailbox belongs to. This will ignore the Mailbox Belongs To option.

Pager E-mail Address (No Attachment) – This option allows you to enter a second e-mail address which the system will send notification of new voicemail messages to. The system will not send an attachment with a .WAV file to this address.

Preferences

The account preferences gives you access to some of the global settings on your account. To access this page select the My Account menu and then the Preferences menu option.

Time Zone – The timezone determines the local timezone used throughout the account. This determines the time displayed for new voicemail messages, the time on your hardware phones and the time used for business hour rules.

Block International Calls – This feature cannot be changed by the account holder. This option determines if this account can make outgoing international calls. To enable this feature please contact Easy Office Phone.

International Spending Alert – This is the monthly dollar limit that the account is authorized to make before an alert is triggered. When the limit is reached, our system will e-mail you an alert. This limit can only be raised or lowered by Easy Office Phone staff.

Current International Spending – This is the current monthly international spending on the account.

Receptionist – The receptionist is the extension that is dialed (by pressing 0) when callers reach a voicemail box. This allows them to easily press 0 to interrupt the playback of the voicemail greeting and dial the operator. Setting this option to None disables this feature.

Default Music on Hold – When callers are placed on hold they hear music. This option defines which music channel (type of music) the caller hears.

Dial-By-Name Directory – This determines whether the dial-by-name directory uses the first or last name of the person when searching for extensions. The dial-by-

name directory searches based on the list of Mailboxes in the system. Mailboxes can be hidden from the dial-by-name directory by using the Hide Mailbox option (see Mailboxes).

Sounds Manager

The sounds manager displays all the sound files (both custom and standard) that you have access to. Custom sounds are sounds that are specific to your account. Standard sounds are part of the library of sounds that all customers have access to and cannot modify or re-record. Custom sounds can be re-recorded at anytime. Custom sounds are used in conjunction with auto attendants and for various prompts such as call announcements. A sound file can also be used to give callers information about your hours of operation or important information about the company.

Custom Sounds – The custom sounds lists all the sounds that you are able to re-record and the associated File #. The File # is used when re-recording a sound file to uniquely identify it from other sounds. You can Play and Edit sounds from this page. When editing the sound file, you can change the Name of the sound and modify (increase or decrease) the overall volume of the sound file. If you wish to upload your own custom sound file you can use the Upload File option while Editing the sound file. You may also create New sound files.

Re-recording Sound Files – You can re-record sound files directly from your telephone. To do so dial any telephone number on your system which leads to an auto attendant and press * when the auto attendant answers. You may also press the * key directly from your phone. The system will then ask you for your mailbox number and password. You will then need to enter the File # of the sound file you wish to re-record. Follow the audio instructions to proceed.

Standard Sounds – These are sound files which are common to all customers and cannot be re-recorded. You can use these sounds throughout your account and you can Play them as well.

Custom Music on Hold – This option lets you create music on hold channels. These channels can then be selected as your default music on hold for the account. This feature is useful if you wish to use a promotional advertisement or special music that is specific to your company. To create a new music on hold channel use the New option on the Custom Music on Hold tab. Then select the Tracks option to upload your own music on hold tracks. Once completed you

will need to select this music on hold channel as your account default which is available via the Preferences menu option.

Telephone Numbers

The Telephone Numbers option lets you control how your telephone number behave or configure specific settings. To access the Telephone Numbers option select the My Account menu followed by the Telephone Numbers option. To Edit a telephone numbers settings select the Edit option beside the telephone number you wish to modify.

Primary Number

The Primary Number is the telephone number which is used as the default outgoing caller id for the entire account. All extensions will by default use this telephone number when dialing out. You can however set different telephone numbers at the extension level (see Extensions).

Details

Description – This lets you set a description for the telephone number which will help you determine the purpose of the phone number or what it does.

CallerID Name – This is the associated caller id name that is displayed when dialing out from this phone number. You must contact Easy Office Phone to make changes to this setting.

Call Label - This is a text string that is displayed when this number is dialed. It is shown to extensions before they pick up the call to help them determine how to answer the call (Eg. Accounting).

Call Flow

The Call Flow tab lets you determine how calls are routed for this telephone number. You can choose to have incoming calls directed to an specific extension, or an auto attendant, a mailbox etc.

Fax Settings (if applicable)

If this telephone number is a fax number the Fax Settings tab will appear. This allows you to configure the settings for this telephone number related to receiving faxes.

User to Receive Faxes – This option determines which person in the organization will receive an e-mail notification when new faxes are received on this telephone number. An attachment with the fax will also be included in the notification e-mail. Faxes can also be viewed by using the Faxing menu option.

Alternate E-mail (Override) – This option allows you to use an alternative e-mail address for fax notification. For instance you may want to send all faxes to a mailing list such as `faxes@mycompany.com` rather than a specific user.

Tickets

Tickets are electronic cases, questions and requests that you wish to open with Easy Office Phone. Tickets are used when you have a question, wish to suggest a feature, wish to report an outage or equipment problem etc. Tickets can be opened by any user who has administrative access to the system. Tickets can be accessed under the My Account menu by choosing the My Tickets menu option.

Tickets are often used for:

Billing – Asking questions about invoices or payment history

Orders – Requesting changes to the services on the account, adding/removing phone numbers or purchasing new phones and equipment.

Sales – Asking questions about new services, features or specific solutions for your account

Technical Support – Informing our staff of outages, service interruptions, equipment failures, or problems with web portal

Once you create a new ticket you will be able to track the status of your request 24 hours a day from our online ticketing console. The ticketing system will automatically notify you via e-mail each time your ticket is updated and give you a chance to reply or add additional information to your ticket request.

You will receive an e-mail confirmation of your ticket submission, which will include a unique ticket number. You must refer to your ticket number if you need to contact us again regarding the same request.

Should you need to place a separate and unrelated request, please create another ticket. You can view and respond to existing tickets or create a new ticket from this interface.

Users

Users are the individual staff members in your company. Each user can login to the web portal and has a predefined set of access restrictions which are determined by the administrative user. The administrative user can create new users and change the access of existing users. Users are also assigned to specific extensions and voicemail boxes within the system.

To access users select the 'Users' menu option which is under the 'My Account' menu. To edit a user select the 'Edit' option, or to send the user a new random web portal password select the 'Reset Web Password' option.

First Name – This is the first name of the staff member.

Last Name – This is the last name of the staff member.

E-mail Address – This is the e-mail address of the staff member and must be unique.

Administrative Access – This allows the user to access all elements of the system with unrestricted access. They can also change the access restrictions of other users.

Billing Access – This allows the user to access transactions history, payment information, credit card information, make billing inquiries etc.

Basic Access – Basic access should always be checked for all users. This allows the user to see call records, modify their own voicemail box and extension settings and access the caller center tools features.

Presence Manager

The virtual receptionist is a tool which lets you quickly monitor the status of each extension in the system. The virtual receptionist can be accessed by choosing the My Account menu and then selecting the Virtual Receptionist option. Each extension will display the Phone Status which will indicate whether the phone is Ringing, Idle, Busy, On Hold or on Do Not Disturb (DND). This tool works with both software and hardware

based phones but will not track extensions that are forwarded to external numbers such as mobile phones.

Phone Guides

Each model phone and soft phone has its own user guide which details specifics on how to transfer calls, place calls on hold, setup 3 way conference calls etc. These user guides are available from <http://www.easyofficephone.com> under the Support menu option.

For Office Phones use the following link:

<http://www.easyofficephone.com/support/voip-phone-guides> and select the model office phone that you are using.

For Soft Phones use the link:

<http://www.easyofficephone.com/support/soft-phone-guides> and select the soft phone software you are using.

Section 2 - Control via phone

Blocking Calls

To block your telephone number for outgoing calls, first dial *67 (on Aastra phones press the # key after). You will be presented with a dial tone. Dial the telephone number you wish to reach and your caller ID information will not be transmitted.

Conference Bridge

Once you have setup your conference room through the web interface you can instruct users and the administrator on how to join the conference.

Users

Dial the conference bridge telephone number

The system will ask the user for the conference room they wish to join

The system will ask the user for the User's Pin Code

The system will ask the user to say their name if the Announce Users Joining/Leaving option is enabled

Administrator

Dial the conference bridge telephone number

The system will ask the user for the conference room they wish to join

The system will ask the user for the Administrator's Pin Code

The system will ask the user to say their name if the Announce Users Joining/Leaving option is enabled

Administrative Control within the Conference Bridge

Administrators can control the conference using their telephone once they have joined the conference using the admin PIN code. To access the administrative menu, press the * key from your telephone. The following options are available.

Mute/unmute the conference

Lock/unlock the conference

Eject the last user who joined the conference

Decrease the volume of the conference each time you press the 4 key. Use the 8 key to exit.

Increase the volume of the conference each time you press the 6 key. Use the 8 key to exit.

Decrease your volume. Use the 8 key to exit.

Increase your volume. Use the 8 key to exit.

Note you cannot lock out or eject administrative users, only regular users.

Voicemail Setup and Access

Setting up Your Voicemail Box

Here are the steps required to setup your voicemail box. It is important that you record your full name and unavailable greeting because your recorded name is used for the dial-by-name directory feature.

Dial *98 from your telephone or call your main number and dial *98 when you hear the automated attendant answer.

Enter your extension/mailbox number and your voicemail password (default password is 1234).

Press 0 to access the administrative options for your mailbox.

Press 1 to record your unavailable voicemail greeting which will play whenever you are not available.

Press 3 to record your first and last name which is used for by the dial-by-name directory feature.

Press 5 to change your voicemail password.

Accessing Voicemail

Method 1: Dial *98 from your telephone and enter your mailbox number and voicemail password.

Method 2: Press the voicemail button on your pbx telephone and enter your voicemail password.

Method 3: Call your main office telephone number and wait until the auto attendant answers, then press *98.

Navigating Voicemail

The following options are available while navigating the voicemail system

- 1 Listen to New Voicemail Messages
 - 1 Skip the time and caller phone number playback
 - 4 Play the previous message
 - 5 Repeat the current message
 - 6 Play the next message
 - 7 Delete the current message
 - 8 Forward the message to another mailbox
 - 9 Save the message in a folder
 - * Hear the help menu; Rewind the message
 - # Exit; Fast forward the message
- 2 Change to another Message Folder
 - 1 Change to the new messages folder
 - 2 Change to the old messages folder
- 0 Access administrative mailbox options
 - 1 Record your unavailable message
 - 2 Record your busy message
 - 3 Record your first and last name
 - 4 Record your temporary message
- * Help

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