Administrator User Guide

HOSTED VOICE WEB PORTAL

Smart City

SMARTCITYVOICE.COM | UPDATED 12/2022

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Introduction

Welcome to Smart City's Hosted Voice Administrator User Guide. Your Hosted Voice service includes a comprehensive set of administrator tools for configuring and managing the platform. This guide describes all of these features and provides detailed instructions on how to use these features. Our goal is to help you optimize the use of your Hosted Voice service.

In this guide, we will demonstrate how to access and manage the Administrator's Web Portal, including how to:

- Create **Users**, configure the user's options and manage existing users.
- Create **Conference Bridges** and the difference between Dedicated and Owned Conferences.
- Set up **Auto Attendant** options and review the dial pad menu options.
- Configure new **Call Queues** and manage existing ones.
- Create shared **Time Frames** with others in the domain and apply their answering rules.
- Customize **Music on Hold**.
- Route and manage phone numbers to a destination using **Inventory.**
- Display **Call History** and the call activity on your domain.

Please visit our support page at https://support.smartcityvoice.com/ if you have any further questions. You will find additional information and instructional videos.

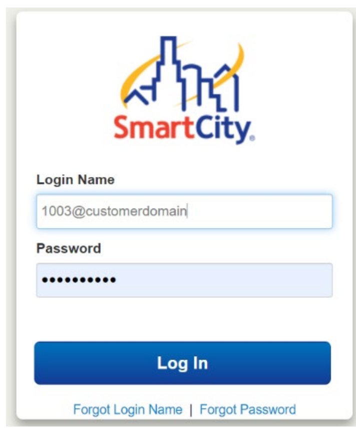
Accessing the Administrator’s Web Portal

The Administrator’s Web Portal is a web interface that you will use in order to manage your organization, your account, and communication with others. All administrative tasks are performed through the admin portal, a web-based application that runs on any device (PC, laptop, tablet or mobile phone) running on a browser. Once you have logged in to the portal, users with administrator permission can access the administrator portal.

Logging into the Web Portal

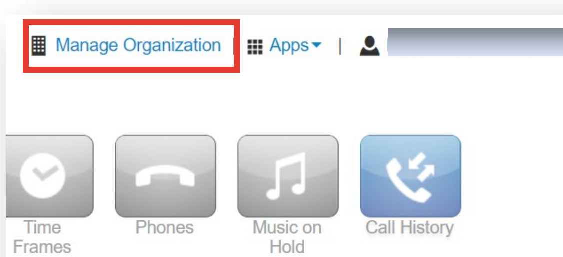
In order to access the Administrator’s Web Portal:

1. Launch a web browser.
2. In the browser address bar, type https://portal.smartcityvoice.com/portal/login and press enter. You will see this log in page.



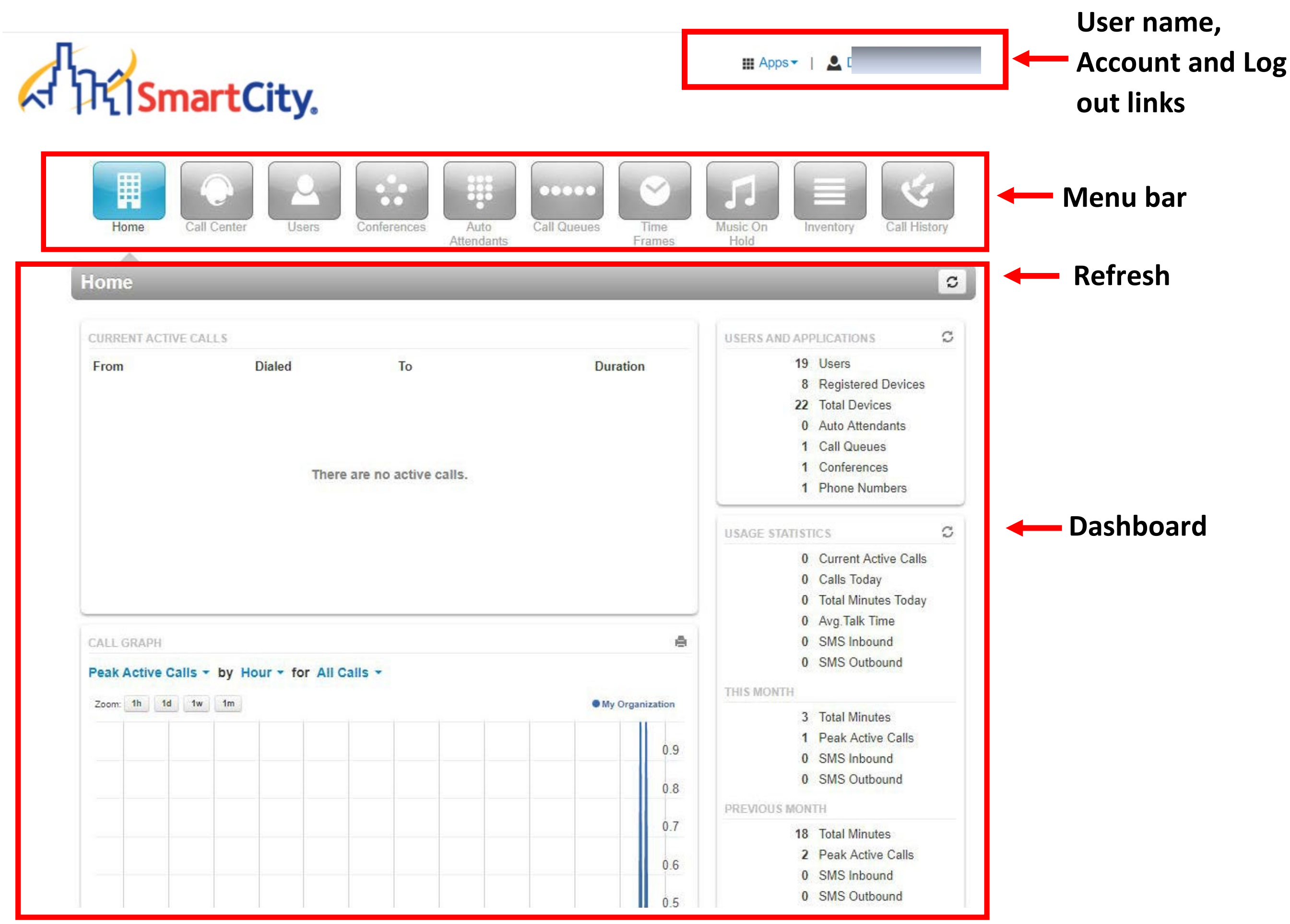
3. At the login page, enter the login name using the user’s extension and the company domain, typically the same as your email address domain as per this example – **ext@companydomain.**
4. Enter your password.
5. Click **Log In.**

Once you log in, users with administrator permissions will see a **Manage Organization** link in the upper right corner of the page.



Understanding the Admin Portal User Interface

Once you log into the portal, you will have access to the platform. The top of the admin portal interface contains a menu bar with icons for navigating through the portal (see the [Admin Menu Icons](#) table). When you click an icon, the page associated with the icon appears in the dashboard.



Admin Menu Icons

Menu Icon	Description
Home	Shows active call information including graphs and statistics.
Users	Shows users configured in the platform, and allows you to add, edit, and import users.
Conferences	Shows conferences configured in the platform, and allows you to edit, delete, join a conference, and view conference statistics.
Auto Attendants	Shows auto attendants configured in the platform, and allows you to add, edit, and delete auto attendants.
Call Queues	Shows call queues configured in the platform, and allows you to add, edit, and delete call queues, add Music on Hold files to call queues, and configure agents associated with call queues.
Time Frames	Shows all time frames configured in the platform, and allows you to add, edit, and delete time frames and view time frame start and end times.
Music On Hold	Shows all files that are part of the Music On Hold feature, and allows you to add, edit, and delete Music On Hold files, change the order in which files are played, and randomize the playing of the files.
Inventory	Allows you to manage the phone numbers and phone hardware in the platform.
Call History	Allows you to review, filter, and export call logs for analysis.
	Wherever you see this button in the top-right corner, you can click to refresh the information on the page.

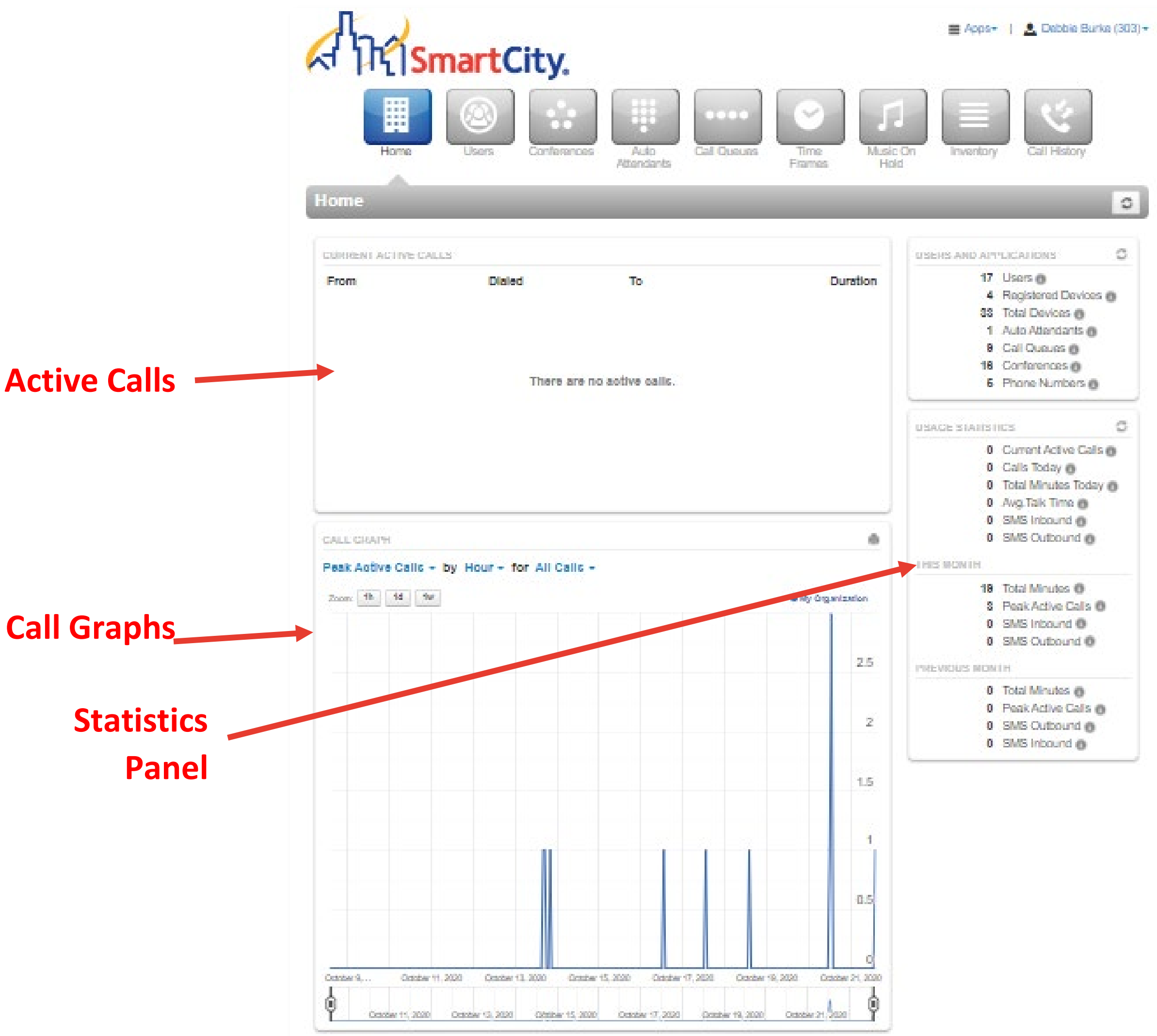
Active Calls Section on Home Page

On the home page, you will find the following sections. Each of these are described in detail on the following pages.

Active Calls section that show graphical and statistical information about current calls. This information updates automatically as active calls change.

Call Graphs, located on the left side of the home page, display calls by hour and day. This allows you to see trends in platform usage.

The **Statistics Panel,** located on the right side of the Active Calls page, shows the status and activity of the platform as described in the Statistics Panel Overview table. To update and refresh your Active Calls page, click the refresh button at the top-right side of the panel.



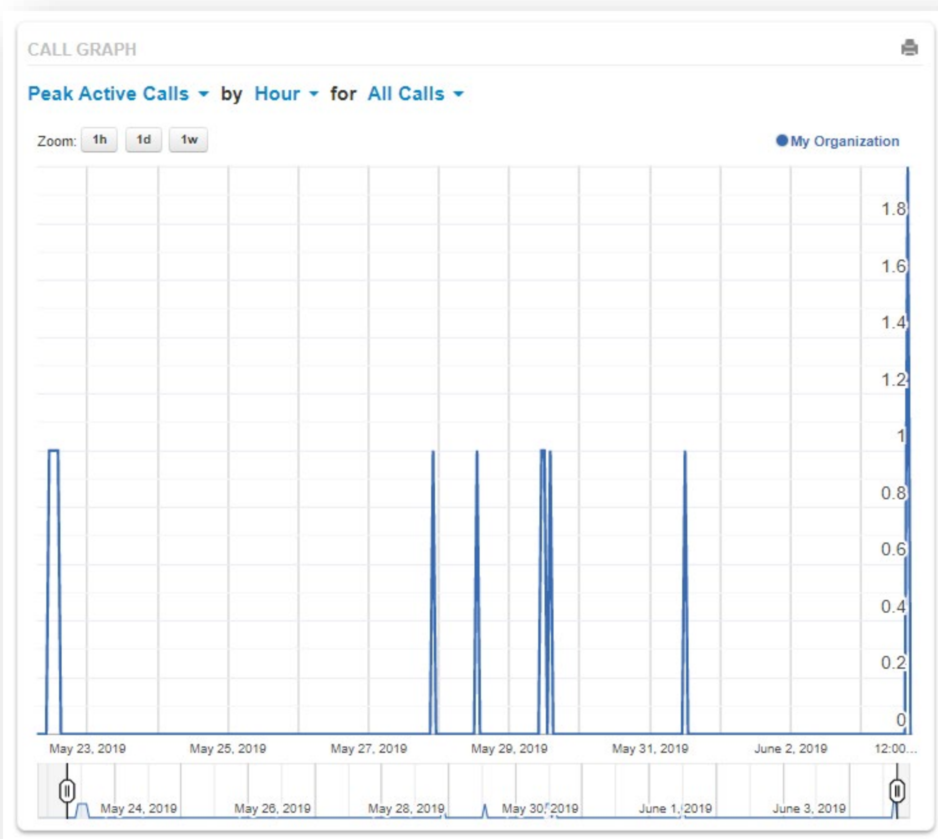
Call Graphs

The Call Graph widget gives you a visual representation of the organization's calls.

Current Active Calls – Displays all current calls your organization currently has connected. Includes the caller ID phone number and name of the person placing the call, the number dialed, the application the call is being sent to such as user, auto attendant, voicemail, and the duration of the call. The speaker on the right of the call will allow you to monitor the call.

In the **Call Graph** section, you can visually graph the number of calls by:

- **Peak Active Calls –** The number of concurrent calls placed at one time.
- **Call Volume –** Includes answered calls, abandoned calls, forwards and voicemail.
- **Total Minutes –** Total number of minutes your organization has used.



Statistics Panel Overview

The **Statistics Panel,** located on the right side of the Active Calls page, shows the status and activity of the platform as described in the table below.

Statistics	Description
Active Calls	The number of calls that are currently active.
Users	The number of users on the platform.
Registered Devices	The number of phones that are currently operational.
Total Devices	Total number of devices configured on your platform.
Auto Attendants	Total number of auto attendants in the platform.
Call Queues	Total number of call queues in the platform.
Conferences	Total number of conferences in the platform.
Phone Numbers	Number of phone numbers assigned to your platform.
Calls Today	Number of calls dialed and received today.
Total Minutes	Total amount of talk time. Includes total minutes for the current day and month, and the previous month.
Avg Talk Time	Average talk time per call.

Note: Wherever you see this button in the top-right, you can click to refresh the information on the page.

Quick Guide to Common Tasks

This section will give you a description of frequently performed tasks.

Resetting a Password

1. On the menu bar, click the Users icon. 

2. Click the name of the user that needs a password change.
3. Scroll down to the **Change Account Security** section, and then enter a numeric password in the **New Password** and **Confirm New Password** fields.
4. Click **Save.**

Replacing Employees

If you have a new employee taking over an old employee's extension:

1. On the menu bar, click the **Users** icon. 

2. Click the name of the user being replaced.
3. Change the name, department, email address, and password, as appropriate, and then click **Save.**
4. To reset the mailbox for the new employee, click the **Voicemail** tab, scroll down to the **Data** section, click **Clear Data** followed by **Yes** at the confirmation prompt, and then click **Save.**

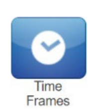
Moving a Phone

If a user changes office, we recommend moving the phone. The user's extension will follow the phone. If leaving the phone in the current location, use the following procedure to reassign phones:

1. On the menu bar, click the **Inventory** icon. 

2. Click the **Phone Hardware** tab.
3. Click the Mac Address on the appropriate phone.
4. In the pop-up window, reassign the extensions, and then click **Save.**

Changing Open Hours

1. On the menu bar, click the **Time Frames** icon. 

2. Click the name of the time frame you want to edit.
3. In the pop-up window, change the **When** setting. Use the check boxes, sliders, and text fields to adjust the open hour rules, as appropriate.
4. Click **Save.**

Setting New Holidays

Setting new holidays is a 2-step procedure. First, create or edit a time frame, and then configure user answering rules for that time frame.

1. Set the **Time Frame:**
   a. On the menu bar, click the **Time Frames** icon.
   b. Click **Add Time Frame** to add a new time frame or click the **Name** of the time frame you want to edit.
   c. In the pop-up window, enter or edit the name of the holiday, click when it occurs, and use the check boxes, sliders, and text fields to adjust the rules, as appropriate.
   d. Click **Save.**
2. Set the user **Answering Rules:**
   a. On the menu bar, click **Users** icon.
   b. Click the name of a user who needs the time frame applied to them.
   c. Click the **Answering Rules** link.
   d. Check to see whether the time frame already applies to that user. Otherwise, click **Add Rule.**
   e. Using the **Time Frame** drop-down list, select the time frame you defined in Step 1.
   f. Complete the other settings as found in Adding/Editing Answering Rules table.
   g. Click **Save.**
   h. Reorder the time frames as needed to ensure the new rule takes precedence.

Setting Call Forwarding

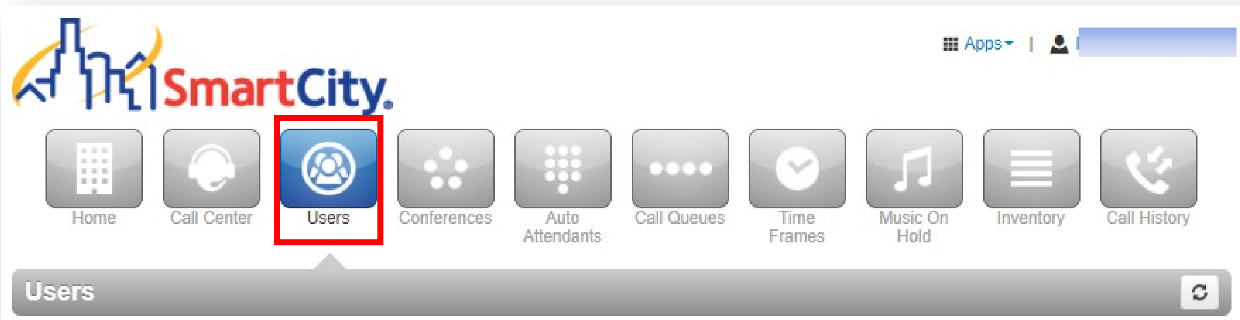
1. On the menu bar, click the Users icon.
2. Click the name of the user you want to forward.
3. Click the **Answering Rules** tab.
4. Hover over a time frame, and then click the edit icon.
5. In the pop-up window, select the appropriate call forwarding check box and enter the extension, number, or phone.

Blocking a Caller

1. On the menu bar, click the Users icon.
2. Click the name of the user that needs a block.
3. Click the **Answering Rules** tab.
4. Click the **Allow/Block** button.
5. In the pop-up window, enter the caller's number under **BLOCKED NUMBERS,** and then click +.
6. Click **Done.**

Managing Users

Selecting the Users icon will take you to the User's Center. This is where you can create and manage the users in your platform. Users are defined as the extension on your platform. Every person's account, conference bridge, auto attendant, call queue in the organization is a user. This section will help you to understand how to add, edit, and import users to the platform.

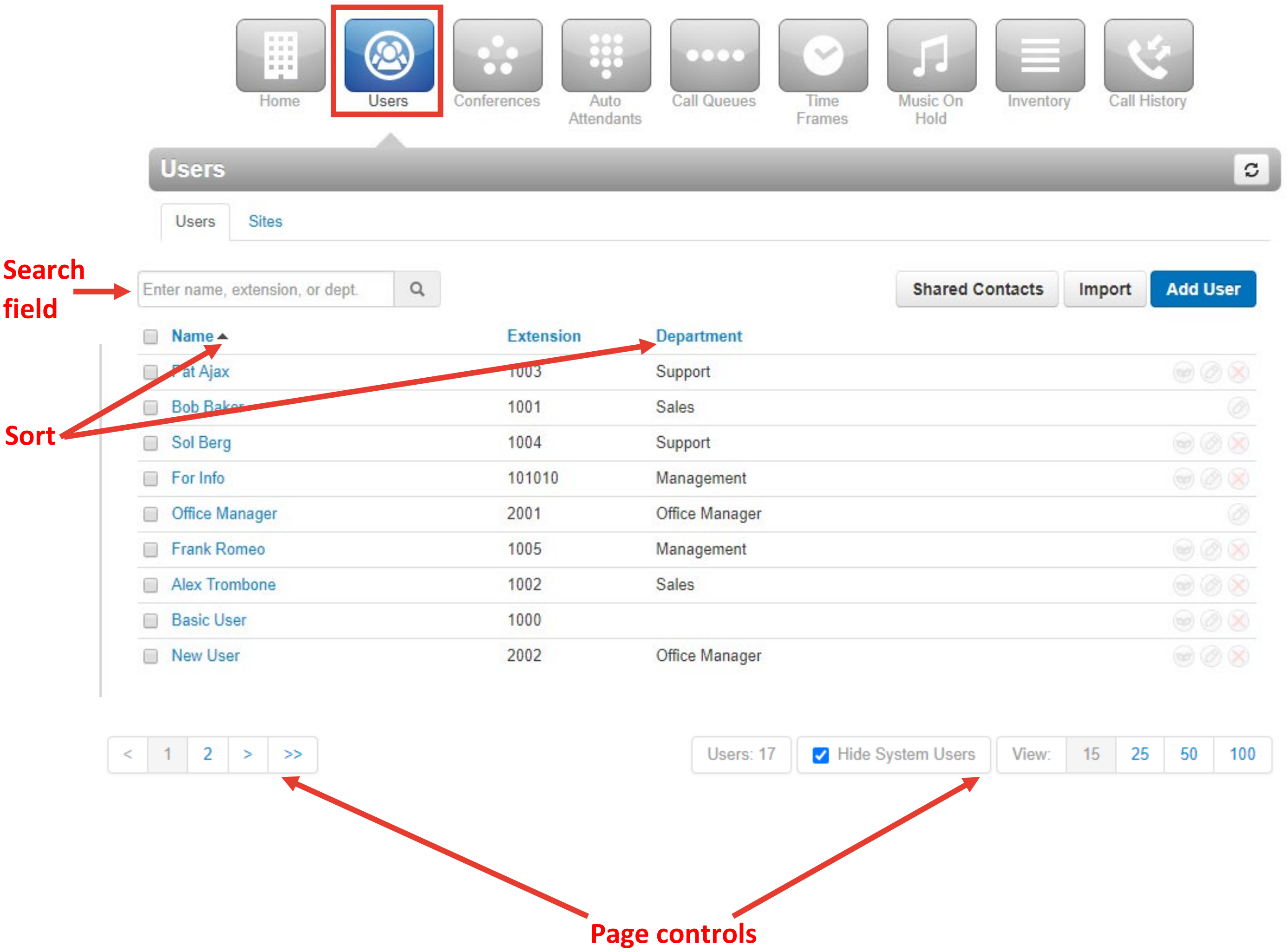


In this section, we will explain how to manage users, including how to:

- Navigate the User's Page
- Create a new user
- Edit a user
- Import users
- Delete a user
- Configure User Answering Rules
- Configure User Voicemail
- Configure User Phones

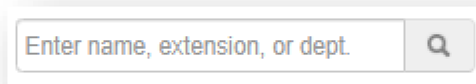
Displaying the User's Center

All user tasks are performed from the User's Center as shown below. To display this page, click the **Users** icon on the menu bar.

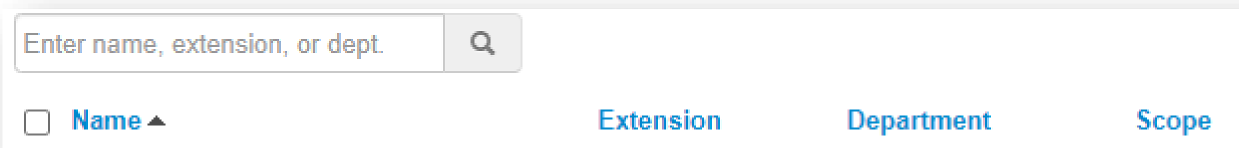


Navigating the User's Page

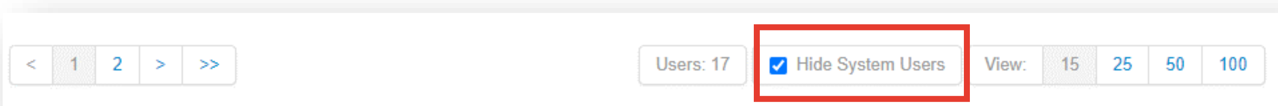
The **Search field** at the top left allows you to search users by entering their name, extension, or department, and then clicking the magnifying glass icon:



To **sort users by name, extension, or department**, click a blue column header. The arrow next to the column shows whether the items are sorted in ascending (up arrow) or descending (down arrow) order.

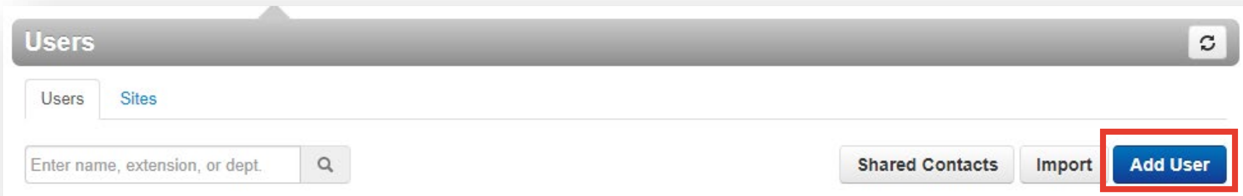


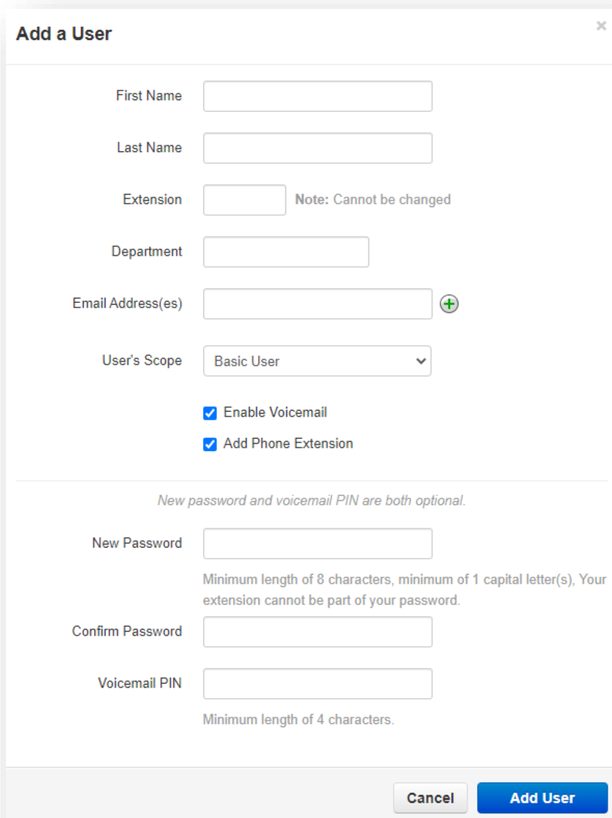
On the bottom left side of the page, you will find **page controls** to display the next or previous page. The right side gives you the controls to hide platform users and select the number of users shown per page. The **Hide Platform Users** option will filter just User's accounts. Unchecking it will display conference bridges, auto attendants, and call queue user accounts.



Creating a New User

1. To create a new user, click the **User** icon in the menu bar to bring up the Users Center.
2. Click the **Add User** button. The following Add a User pop-up window will appear.





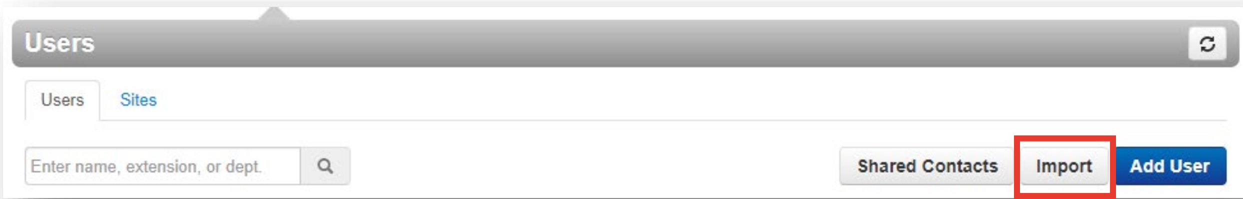
3. Complete the fields as shown in Adding/Editing a User table.
4. Click **Add User** button in the lower right corner.

Adding/Editing a User Settings

User Setting	Description
First Name	Enter the user's first name. The dial-by-name directory can match on this field but will by default match Last Name.
Last Name	Enter the user's last name. The dial-by-name directory can match on this field.
Extension	Enter the user's extension.
Department	Enter the department to which the user belongs.
Email Address(es)	Enter the user's address used for email, password resets, etc. To add email addresses, click the green plus icon.
User's Scope	Scopes are the level of permissions assigned to a user which provides them with access to various features. Clicking the scopes drop down will display the scopes that can be assigned to your users. Choices include following: • Basic User – Able to only view this account. • Office Manager – Able to view/modify all users across the domain. • Site Manager – Can only view/modify users at their site. • Call Center Agent (only available with Smart Office Max) • Call Center Supervisor (only available with Smart Office Max)
Enable Voicemail	Enable or disable Voicemail. Choices are: • Checked = Enable Voicemail. • Not checked = Disable Voicemail.
Add Phone Extension	This setting allows you to add a phone extension. Phone extensions allow users to be associated with a phone. A user can have one or more phone extensions. For example, user 111 could have three phones designated as 111a, 111b, and 111c. If you check this check box, you can then associate a phone to the user. Choices are: • Checked = Add phone extension. • Not checked = Do not add phone extension.
New Password	Enter a new numeric login password for the user. For security, each typed password character is masked by a dot (•).
Confirm New Password	Enter the same numeric login password you entered in the New Password field. For security, each typed password character is masked by a dot (•).

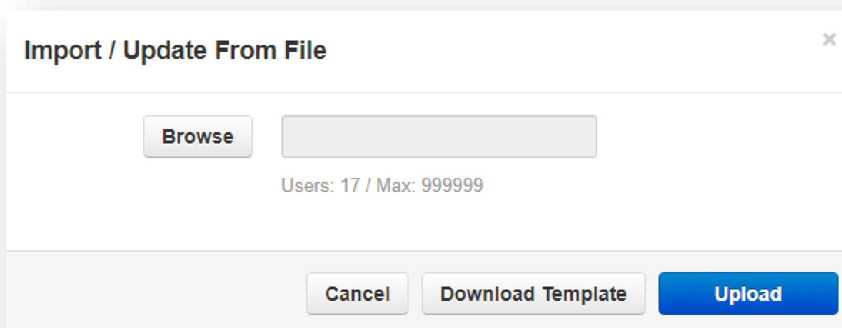
Bulk Importing Users

The Import option will allow you to bulk import users from a comma-separated-value (CSV) file. As part of this procedure, you can download a CSV-formatted template that can be opened using Microsoft Excel, populate the template with users and then import the template.



1. From the Users Center, click the **Import** button.

2. The **Import/Update From File** pop-up window appears.



3. To download a template that you can populate and import into the platform:
    a. Click the **Download Template** button.
    b. Save the template to an area you can access.
    c. Open the template, populate it with users, and then save the template.
4. Click the **Browse** button, navigate to where you saved the file containing the users to be imported, click the file, and then click **Open.**
5. Click **Upload** button. The platform shows a preview of the data to be imported and allows you to edit the values if needed.

Editing Individual Users

There may be times when you need to edit users, for example, change names, passwords, answering rules, voice mail or phone settings.

1. From the **User's Center**, either click a name or hover over a user's name, click the **Edit** icon at the far right of the Users page, and then click **Profile.**

Upon clicking on **Profile,** you will find the following options to edit/modify. Use the tabs to configure the settings for this user.

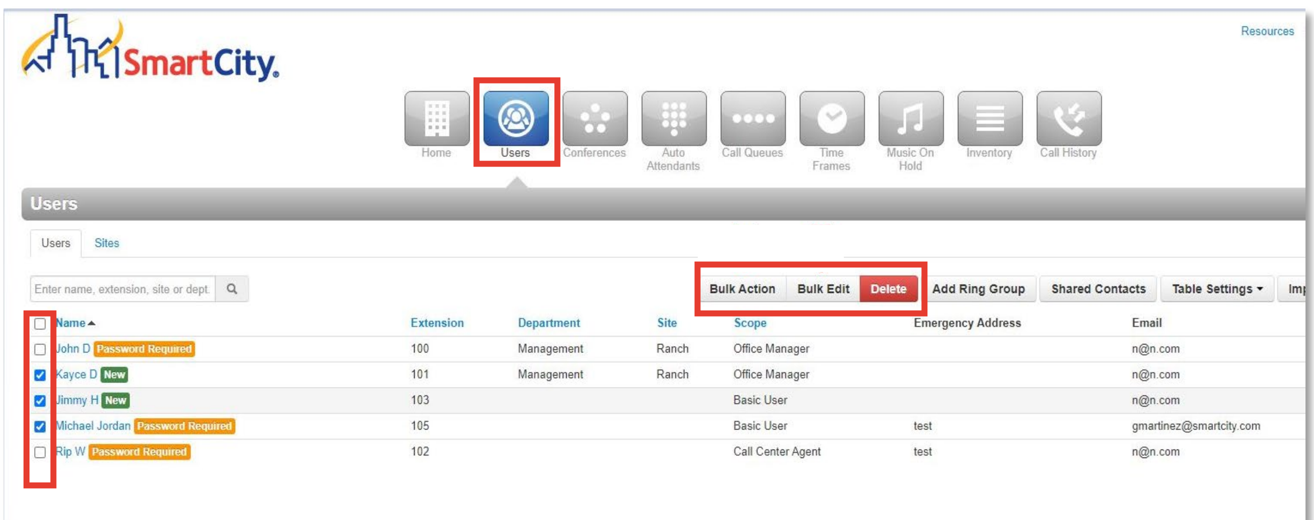
- The **Profile** option allows you to configure the user's profile, including caller ID, dial planning, and login password for the selected user.
- Use **Answering Rules** tab to configure time frames and answering rules for the selected user.
- The **Voicemail** tab configures voicemail settings for the selected user.
- Use the **Phones** tab to configure the phones associated with the selected user.
- The **Advanced** tab allows you to reset a user's setting and date, and to send a welcome email with a link to set up their password and voicemail PIN.

Bulk Edit Users

While users can be edited on an individual basis, there are times when you need to edit several users at once. The **Bulk Edit Users** feature allows the selection of multiple users and the ability to edit specific values at one time. There is currently no limit to the number of users who can be selected to bulk edit.

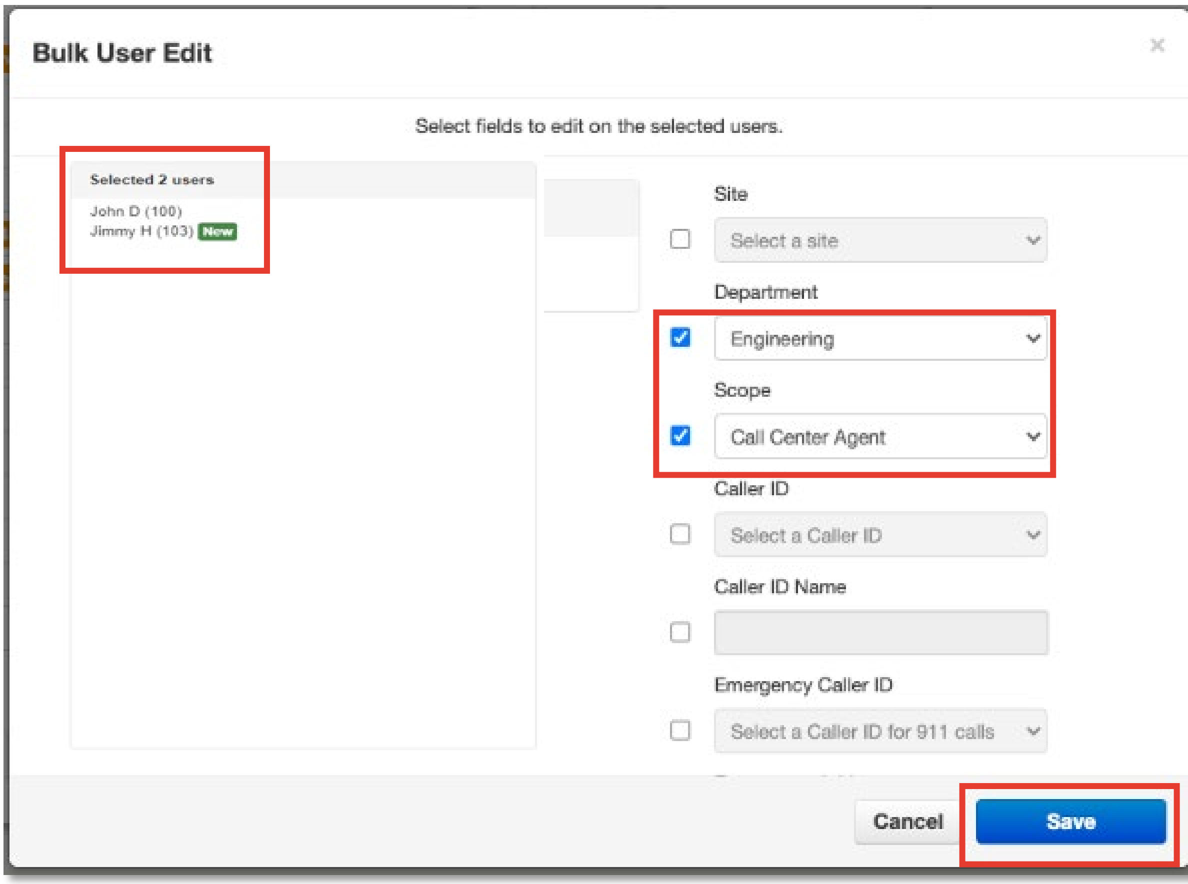
For example, a company is creating a new department and retiring an old department. The users under the old department need to be moved to the new department. Rather than editing individual users or managing an import/export of user field values, the admin can select all the users at once, select the new department, and the change will be applied immediately.

1. From the portal, navigate to **Users**. The "Bulk Action", "Bulk Edit", and "Delete" options will display only after selecting users that are to be edited. You can select ALL by selecting the first checkbox.



2. Select the fields and values you want to bulk change, and then click **Save.** The changes will be applied to all users that were selected.

In the example below, an administrator is changing the department and scope for two users (John D. and Jimmy H). After clicking save, both users will now have Call Center Agent access in the Engineering department. Their previous scopes and departments will no longer apply.



Deleting Users

If you no longer need a user, you can delete the user from the platform.

1. From the **User's** page, hover over the user, and the click the **Delete** icon at the far right of the row.

2. A confirmation prompt appears when you click the delete icon.
3. Click **Yes** to delete the user or **No** to retain it.

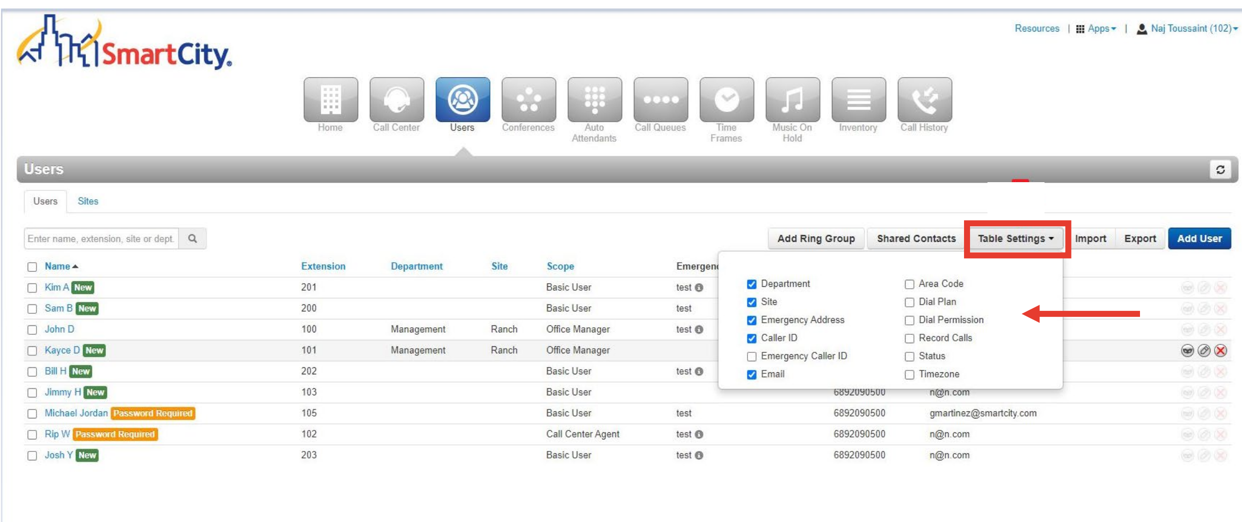
Configurable User Table Columns

Configurable User Table Columns features provides the ability to select the information that is displayed on the screen. This enables the user to customize the view on their display. The column options include:

Configurable User Table Column Options		
Department	Emergency Caller ID	Dial Permission
Site	Email	Record Calls
Emergency Address	Area Code	Status
Caller ID	Dial Plan	Timezone

To configure this feature:

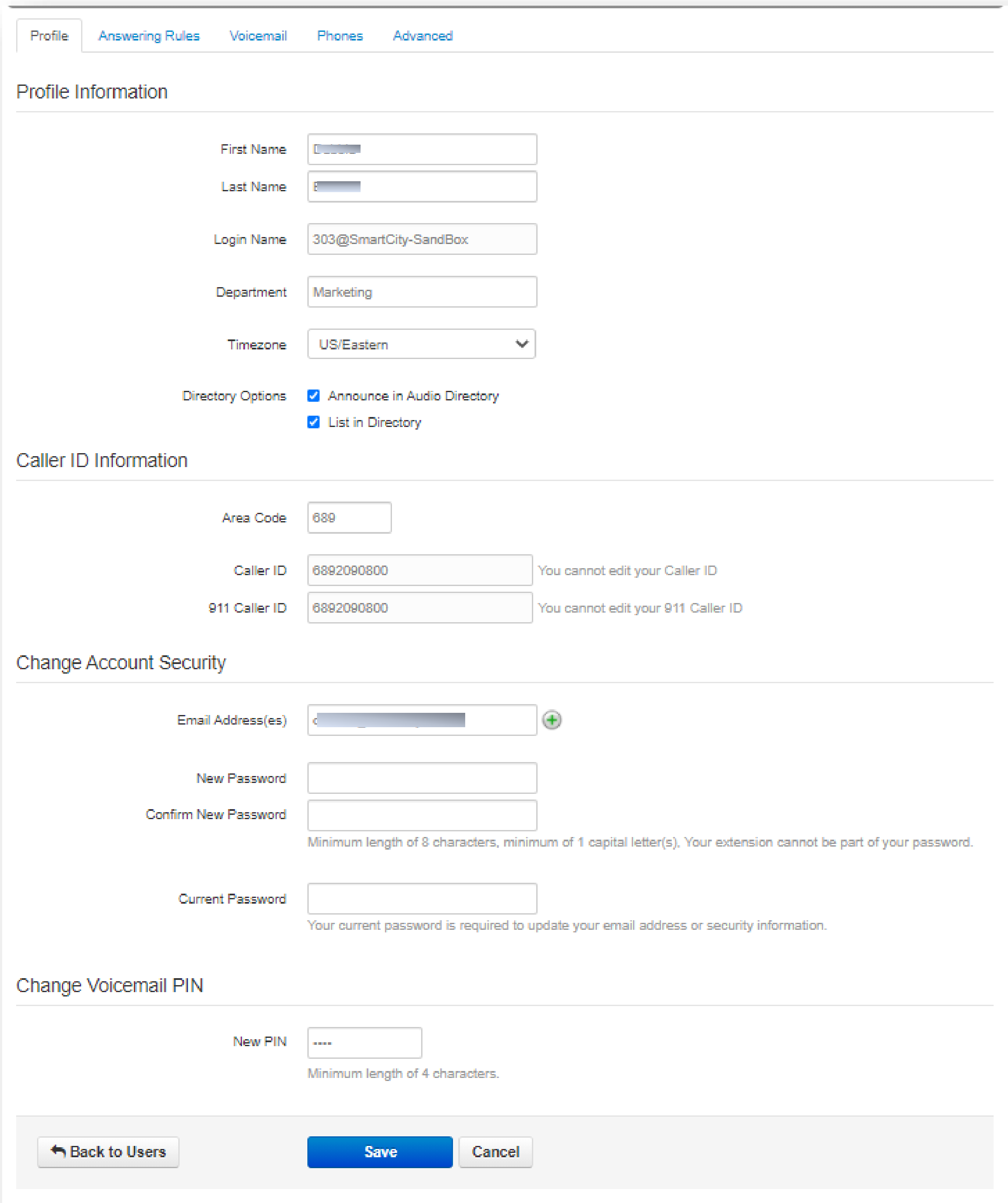
1. Click on the **Users** icon in the portal or the **Reports** button in the Call Center Module.
2. Click on the **Table Setting** box and select the criteria you want to display on your screen from the dropdown box.



3. Click out of the **Table Settings** box to view the customized screen.

Configuring the User Profile

To configure the profile for the selected user, complete the fields in the **Profile** tab as defined in the following table Configuring the User Profile, and then click **Save.**



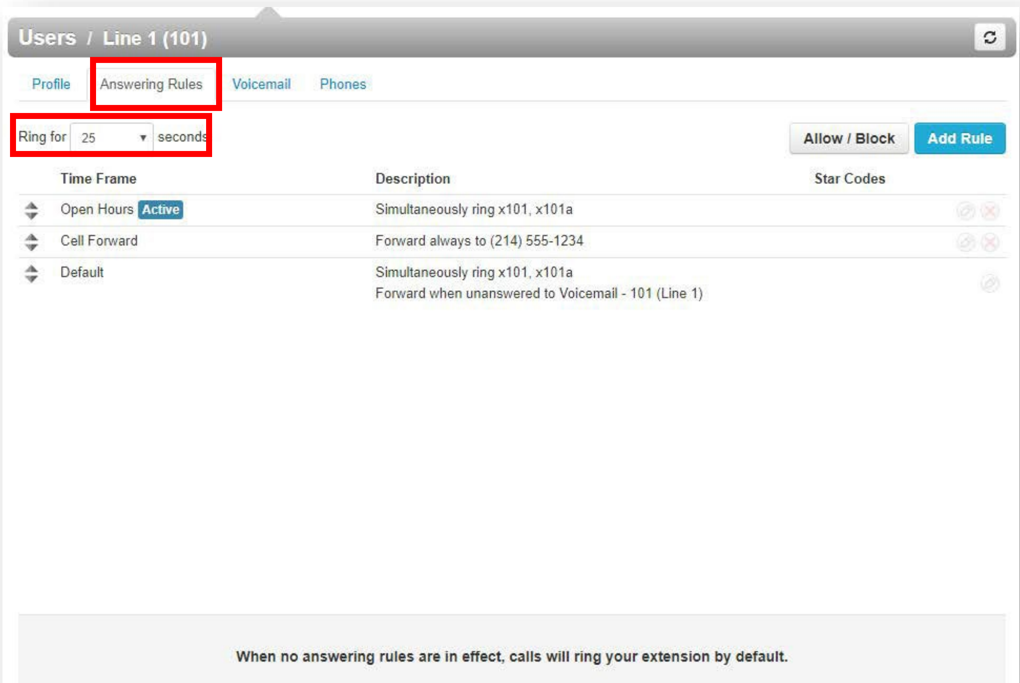
Configuring the User Profile Settings

Profile Information	
First Name	Enter the user's first name.
Last Name	Enter the user's last name. The user's last name is particularly important for the dial-by-name directory, as it matches on this field.
Login Name	Read-only field that shows the login name this user uses to log in to the portal.
Department	Enter the department to which the user belongs.
Time Zone	Enter the user's time zone.
Directory Options	Enables or disables announce in auto directory and list in directory features. • **Announce in Audio directory** -- Check to include the user in the dial-by-name directory. • **List in Directory** -- Check to add user to the internal extensions list (contacts).
Caller ID Information	
Area Code	Area code associated with the user.
Caller ID	Caller ID numbers that will be displayed for this user.
911 Caller ID	Caller ID number sent when calling 911. This may be different than your regular caller ID.
Change Password	
Email Address(es)	Enter the user's address used for email, password resets, etc. To add email addresses, click the green plus icon.
New Password	Enter a new numeric login password for the user. For security, each typed password character is masked by a dot (•).
Confirm New Password	Enter the same numeric login password you entered in the New Password field. For security, each typed password character is masked by a dot (•).
Current Password	Enter the current password if updating the user's email address or security information.
Voicemail PIN	
Change Voicemail PIN	Enter a new PIN for the user, with a minimum length of 4 character.

Configuring User Answering Rules

Answering Rules define how calls to this extension are handled. To configure answering rules for the selected user:

1. From the **Users** page, click the **Answering Rules** tab. A page similar to the following appears:

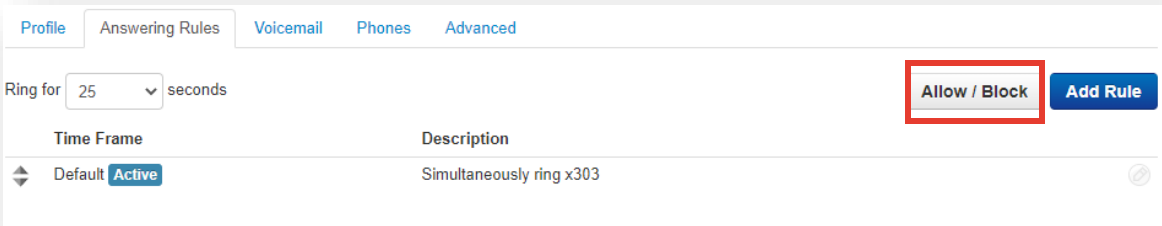


2. Use the **Ring for** drop-down list to select the maximum number of seconds that incoming calls ring for this user before the platform routes the call to the user's voicemail or the **Forward if Unanswered** option, if configured.
3. From this page you can:
    a. Allow or block calls for this user
    b. Add answering rules for this user
    c. Change the active rule for this user
    d. Edit answering rules for this user
    e. Delete answering rules for this user

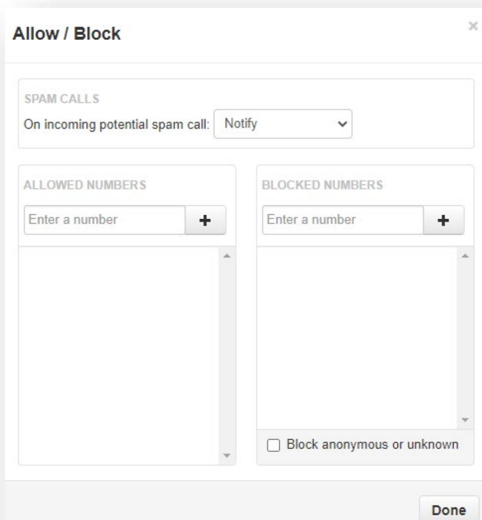
Each of these are explained on the following pages.

Allowing or Blocking Calls

1. Click the **Allow/Block** button.



2. The Allow/Block pop-up window appears.

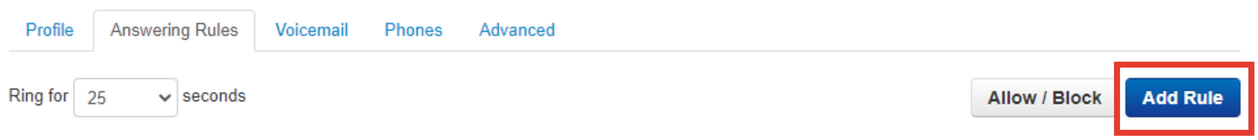


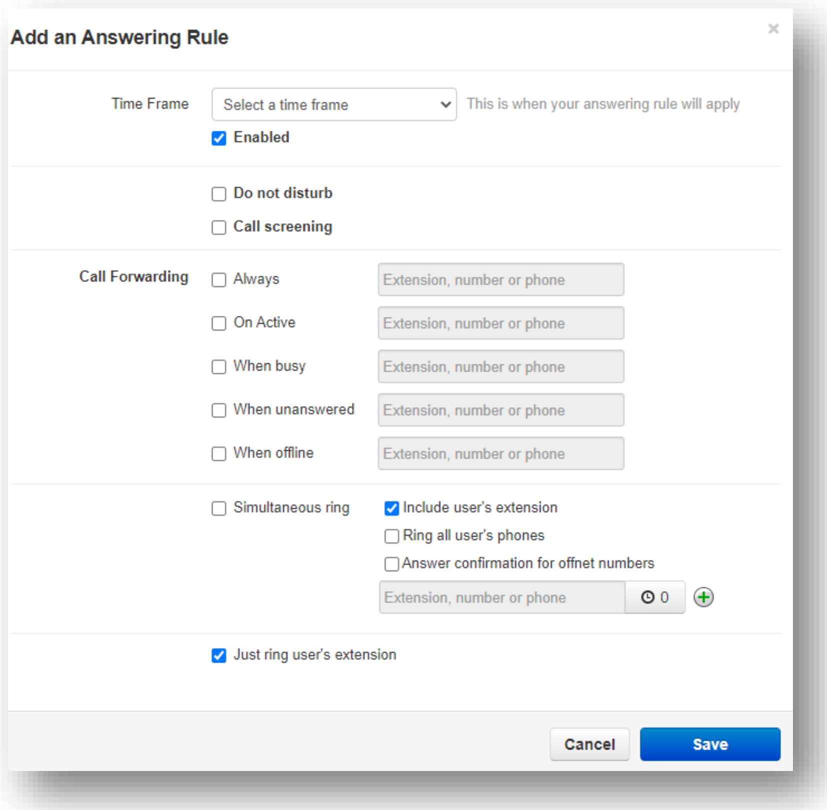
3. Calls from allowed numbers bypass call screening and server side Do Not Disturb (not phone DND). To allow numbers for this user, enter a number in the **Enter a number** field under **ALLOWED NUMBERS**, and then click the plus sign next to this field. Repeat this step for each additional number you want to allow for this user.
4. Calls from blocked numbers receive a fast busy or number disconnected message. To block numbers for this user, enter a number in the **Enter a number** field under **BLOCKED NUMBERS**, and then click the plus sign next to this field. Repeat this step for each additional number you want to block for this user.
5. To block anonymous or unknown numbers, check **Block anonymous or unknown**.
6. Click **Done**.

Adding Answering Rules

Adding additional answering rules allows you specify alternate call answering rules in a different time frame (for example, handle calls differently on a weekend than on a weekday). To add an answering rule for this user:

1. Click the **Add Rule** button. The Add an Answering Rule pop-up window appears.





2. Complete the settings in the Add an Answering Rule pop-up window.
3. Click **Save.**
4. Repeat this procedure to add answering rules for this user.

Adding/Editing Answering Rules Settings

Answer Rules Setting	Description
Time Frame	Select a time frame to which this answering rule will be applied. Choices shown are the ones previously configured using the procedure under Adding Time Frames.
Enabled	Add an answering rule: this check box does not appear. Edit an answering rule: • Checked = enables this time frame for this user. • Unchecked = does not apply this time frame for this user.
Do Not Disturb	Enables or disables the Do Not Disturb feature. Choices are: • Checked = enables Do Not Disturb. Send all calls directly to voicemail (if available), without ringing the phone. • Not checked = disables Do Not Disturb.
Call Screening	Enables or disables the Call Screening feature. Choices are: • Checked = enables Call Screening. Platform prompts callers to say their name, and then lets you screen the call before accepting it. • Not checked = disables Call Screening.
Call Forwarding Options	Select the following appropriate Call Forwarding settings. When entering another extension as a Call Forward option, a drop-down menu allows you to forward the call to specific resources associated with that extension. Some settings might not appear, depending on the features associated with the given extension. Choices are: • **Always** = immediately forward calls to the number specified in the text field. • **When busy** = forward calls to the number specified in the text field when your extension has used all available call paths. • **When unanswered** = forward calls to the number specified in the text field if the call is not answered after the specified ring timeout. • **When offline** = automatically forward calls to the number specified in the text field if your desk phone has lost communication (for example, during a power outage).

Answer Rules Setting	Description
Simultaneous Ring	Simultaneous Ring, also known as SIM ring for short, allows you to configure what devices ring when receiving a call. Clicking the Simultaneous Ring box will allow you to ring more than just your extension and allows you to ring other extensions or phone numbers as well. • **Include user's extension** = check to ring the user's extension when SIM ring is enabled. • **Ring all user's phones** = check to ring all phones associated with this user at the same time. • **Answer confirmation for offnet numbers** = lets the user know that the call is from an outside caller and gives them the option to be connected by pressing 1 or hanging up so that they are not connect to the with caller. In this field, you can enter the extension of another telephone you want to ring. The clock icon allows you to specify a ring delay. A ring delay allows you to enter the amount of time before the call rings at the destination. To add other phones to the simultaneous ring, click the green plus icon.
Just Ring User's Extension	Enables or disables the ringing of your telephone only. • Checked = incoming call rings just your telephone. • Not checked = feature is disabled.

Call Forward Selections Settings

Call Forward Selection	Description
User	Forward calls to the user at the specified extension and follow their user-answering rules.
Handset	Bypass the user-answering rules and forward calls to the handset associated with the specified user.
Voicemail	Forward calls to voicemail at the specified extension.
Queue	Forward calls to the queue associated with this user.
Auto Attendant	Forward calls to the auto-attendant associated with this user.

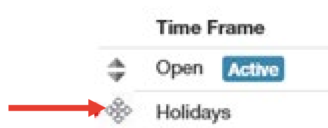
Changing the Active Answering Rule

You can define multiple answering rules, but only one rule can be active at a time. The active rule is the first rule with a matching time frame. Best practices dictate that you order answering rules according to how specific they are, with the most specific time frames (for example, Holidays) at the top.

Assume today is Tuesday, December 25th. In this example, the **Holidays** and **Open** time frames could match the time and date conditions for December 25th. If **Holidays** is the first rule, however, it becomes the active rule. But if **Open** is the first rule, **Open** becomes the active rule.

To specify a rule other than the top one as the active rule:

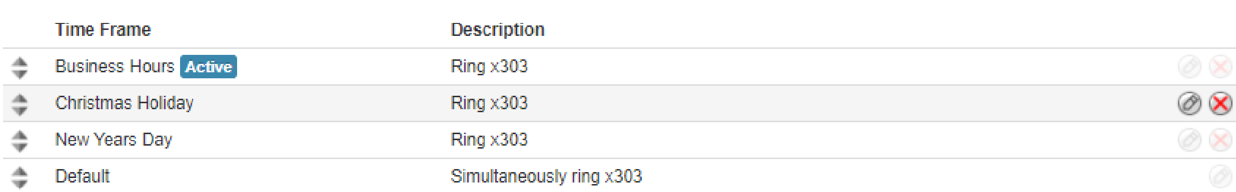
1. In the **Answering Rules** tab, find the rule you want to designate as the active rule.
2. On the left side of the **Answering Rules** tab, hover the mouse over the up/down arrows for that rule (the pointer changes to a 4-headed arrow).



3. Hold down your mouse button, drag the rule to the top row, and then release the mouse button. A message tells you that the answering rules have been reprioritized and prompts you to click **Save.**

Message that active rule has been reprioritized.

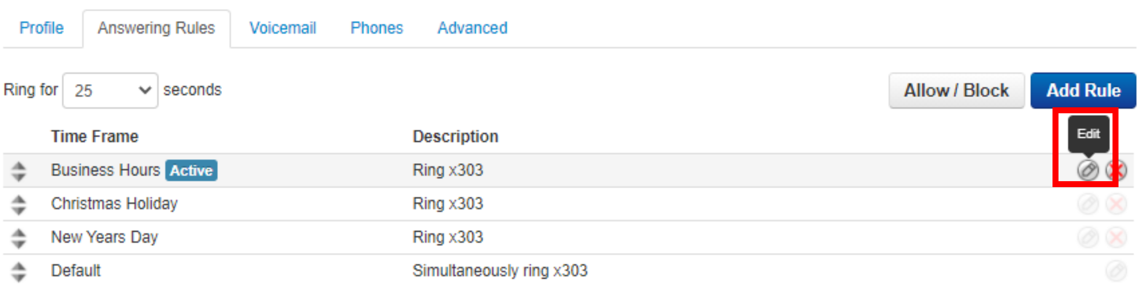
4. Click **Save.** The **Active** designation appears next to the topmost time frame.



Editing Answering Rules

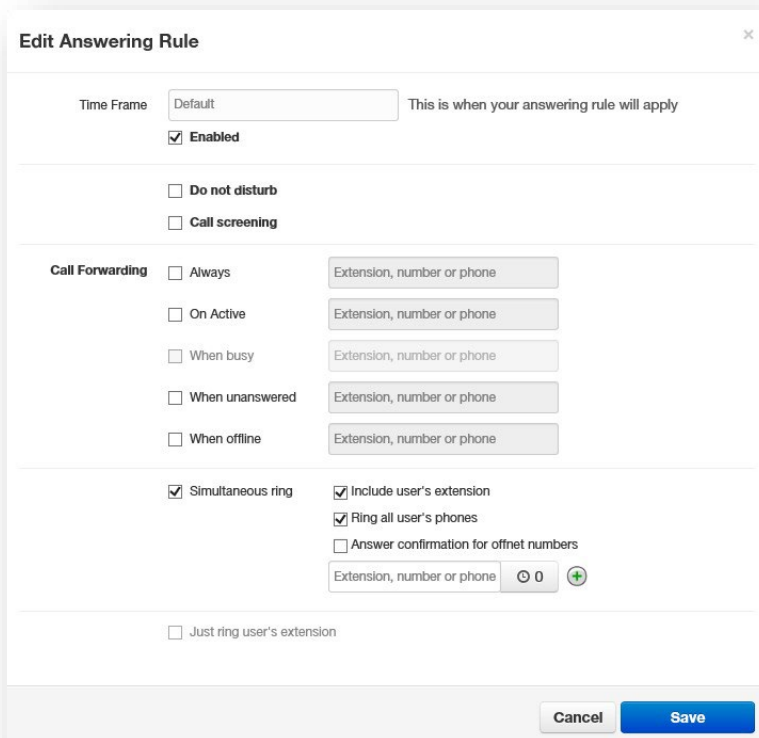
To edit an answering rule for this user:

1. In the **Answering Rules** tab, hover over the answering rule, and then click the **Edit** icon at the far right of the row.



The Edit Answering Rules pop-up window appears.

2. Change the rule, as appropriate. To help with the changes, see [Adding/Editing Answering Rules.](#)

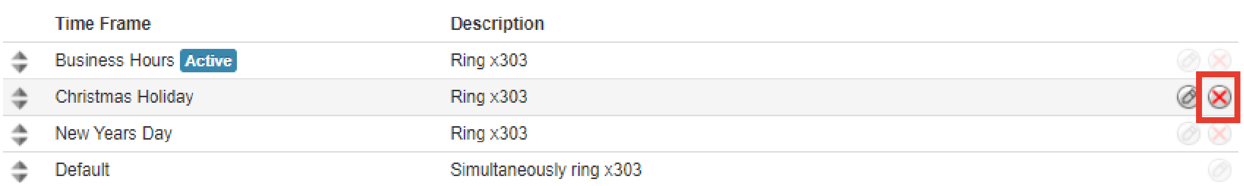


3. Click **Save.**

Deleting Answering Rules

If you no longer need an answering rule for a user, you can delete the rule. You can delete any answering rule, except the default rule.

1. In the **Answering Rules** tab, hover over the answering rule and click on the **Delete** icon on the far-right.



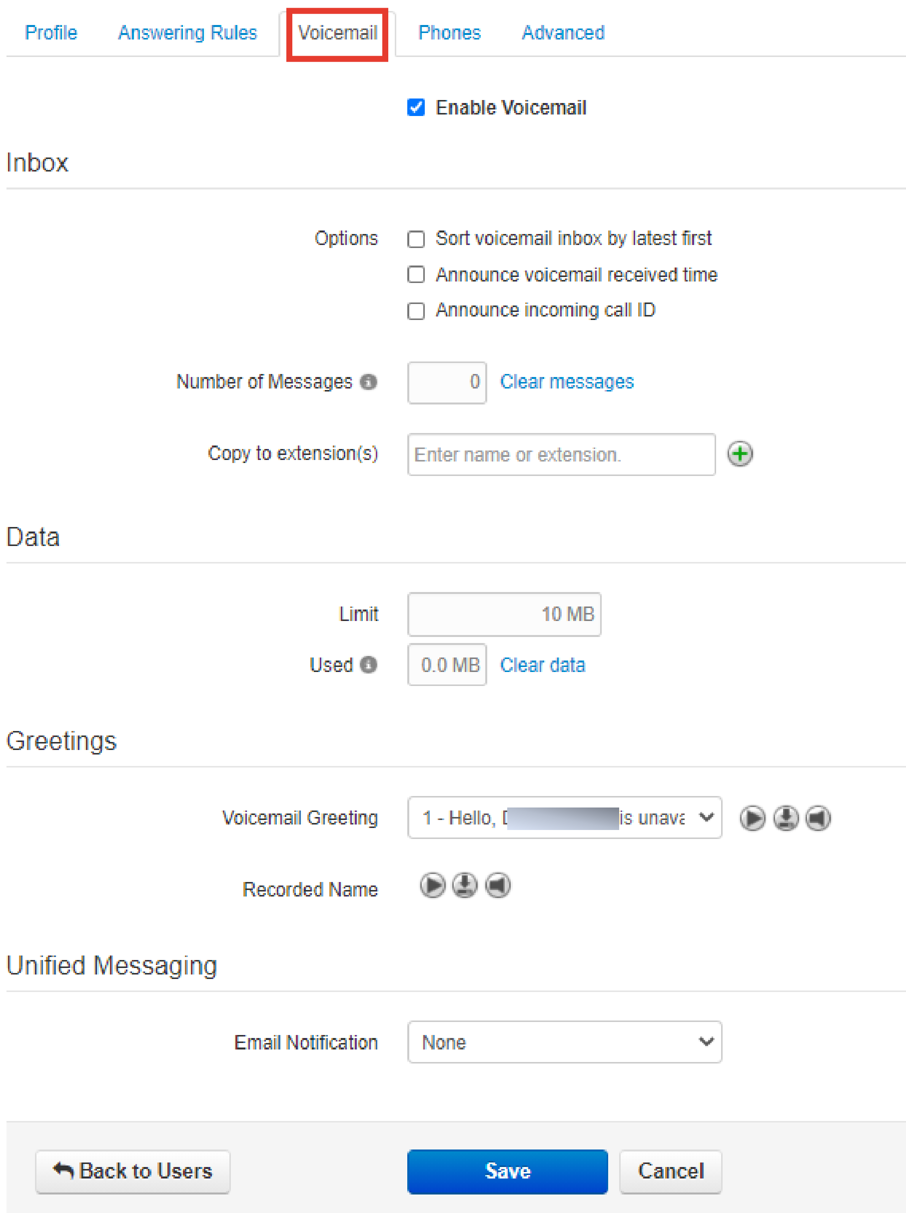
You will get a confirmation prompt once you click the icon.

2. Click **Yes** to delete the rule or **No** to retain it.

Configuring User Voicemail

To configure voicemail for the selected user:

1. From the **User's** page, click the **Voicemail** tab.



2. Complete the settings in the **Voicemail** tab. Available settings can be found in the following table.

3. Click **Save.**

Voicemail Settings

Voicemail Setting	Description
Enable	Enable (check) or disable (uncheck) voicemail.
Inbox	
Options	This setting affects calls into voicemail but does not affect the web portal voice messages. Check the appropriate inbox options. Choices include: • Sort voicemail inbox by latest first – Plays newest messages first. • Announce voicemail received time – Plays the timestamp of the message. • Announce Incoming Call ID – Plays the caller ID number if available.
Number of Messages	Read-only field that shows the current count of messages. Click the **Clear Messages** link to delete messages but leave greetings in place.
Copy to extension(s)	Adds the ability for voicemail messages to be automatically copied to other voicemail boxes within the same domain. Each user can control what is done with the message in their own inbox – keep as new, save or delete. Enter either the name or user's extension(s) that you want the voicemail to be sent to. To add multiple names/extensions, click the green + sign.
Data	
Limit	Read-only field that shows user's storage limit.
Used	Read-only field that shows user's used storage. Click the **Clear Data** link to delete all messages, greetings, and the name recording.
Greetings	
Voicemail Greeting	To select an active voicemail greeting, click a greeting from the drop-down list. To play the selected greeting, click the icon. To download the selected greeting, click the icon. To upload or record a greeting, click the icon to display the Manage Greeting pop-up window. Greetings must be in MP3 or WAV format. **To upload a greeting:** 1. Click the **Add Greeting** button at the bottom right of the pop-up box. 2. Next to New Greeting, click **Upload.** 3. Use the **Browse** button to select your recorded file. 4. Click **Save** and **Done.**

Voicemail Setting	Description
	To record a greeting: 1. Click the **Add Greeting** button at the bottom right of the pop-up box. 2. Next to New Greeting, click **Record.** 3. In the **Call Me** field, enter the number to call (either an extension or a telephone number such as your cell phone.) 4. Click **Call.** Your phone will be called. 5. At the prompt, record the new greeting, and then press # when you finish your recording. 6. Click **Done** (or click **Add Greeting** to add another greeting).
Recorded Name	If you company has a dial-by-name directory, you must record your name to appear in the directory. Click the icon to listen to your current name recording on your computer or click the icon to upload or record a new greeting.
Unified Messaging	
Email Notification	To adjust voicemail to email settings, select one of the following options: • **None** – No emails when voicemail is left. • **Send w/Hyperlink** – Platform sends an email to this user with a link to the voicemail. • **Send w/Brief Hyperlink** – Platform sends an email to this user in plain text with a link to the voicemail. • **Send w/Attachment (storage option)** – Platform sends an email to this user with the audio file for the message attached. The storage option lets this user leave messages in his inbox as New, Move to Saved, or Move to Trash.
Options	Check one the following Unified Messaging options: • **Send email when inbox is full** – Platform sends an email if this user's voicemail inbox runs out of space. • **Send email after missed call** – Platform sends an email if this user missed a call.

Configuring Phones

This section will show you how to add user phones and will display a list of what devices are registered to the user's account.

From the **Users** page, click the **Phones** tab. A page similar to this will appear.

Profile Answering Rules Voicemail Phones Advanced

Name	Device Type	IP Address	MAC Address	Line
5232	Polycom/5.4.1.14510 PolycomVVX-VVX_500-UA/5.4.1.14510	[redacted]	[redacted]	1
5232d	PolycomVVX-VVX_501-UA/5.8.2.4732	[redacted]	[redacted]	1
5232z	Z 3.15.40006 rv2.8.20	[redacted]	-	-
5232wp	SNAPmobile Web 40.0.1 (Chrome 74.0.3729.157)	[redacted]	-	-

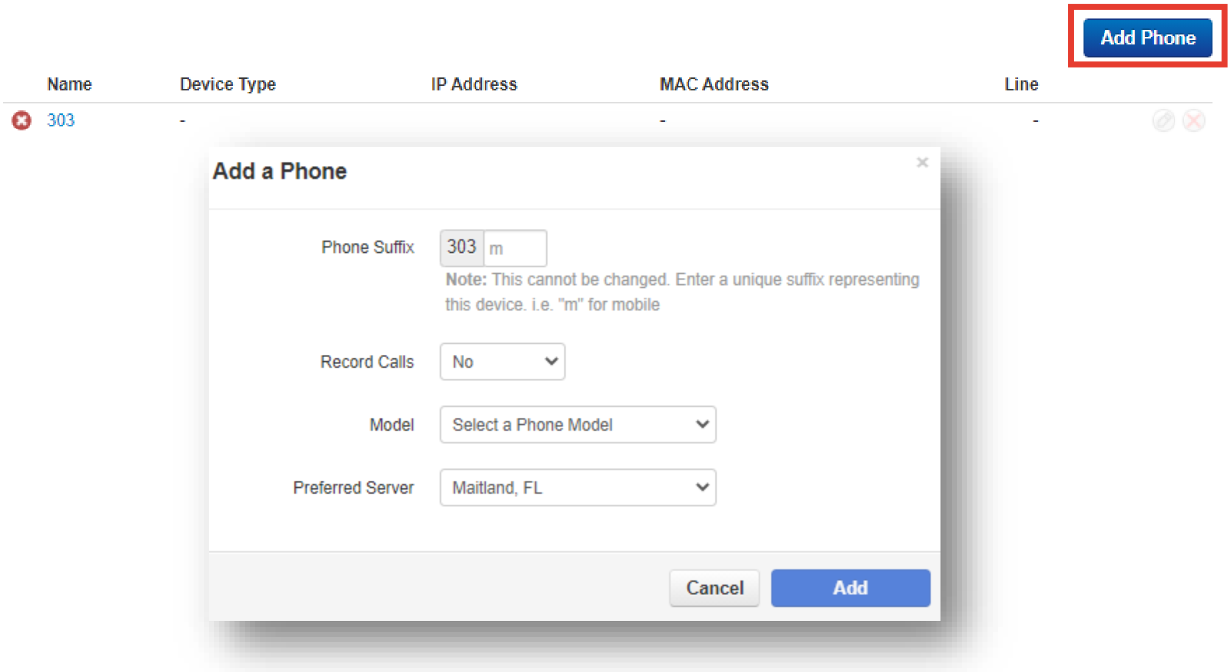
- A **green** icon next to the device means the device is registered and will be able to send and receive calls without issue.
- A **red** icon means the device is unregistered. This could be caused because the device is a softphone and currently turned off, or the phone platform is unable to communicate with the device.
- To the right of the status indicator is the name of the device. Followed by device type, the manufacturer and model number of the device, the IP address the device is registered, and the MAC address of the device.
- The line number the device has the extension number displayed.

From the **Phones** tab, you will be able to:

- Associate a phone with this user
- Edit phones associated with this user
- Delete phones associated with this user

Associating Phone with this User

1. To associate phones with this user, click the **Add Phone** button. The Add a Phone pop-up window appears.



2. Complete the settings in the **Add a Phone** pop-up window. See Adding/Editing Phones table for descriptions.
3. Click **Add**.
4. After you configure all the phones, reboot the phones to apply these settings.

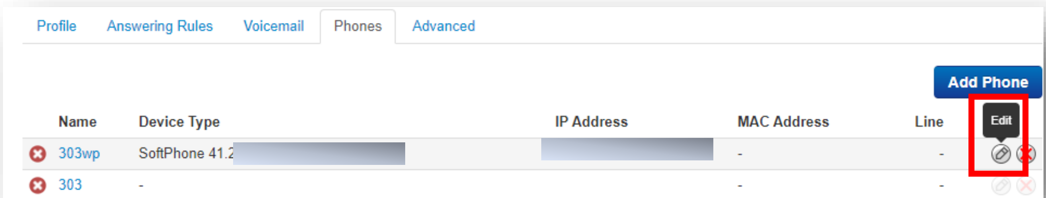
Adding/Editing Phones Settings

Phone Setting	Description
Phone Name	Adding a phone: Enter a name for this phone. The name should allow you to differentiate this phone from other phones you associated. For example, if you add phones for extension 111, you can name them 111a, 111b, and so on. Editing a phone: read-only field that shows the name of the phone
Record Calls	Select whether calls will be recorded (Yes) or not recorded (No).
Model	Select the telephone model. The remaining settings in the window change depending on the model selected.
Preferred Server	Select the preferred server setting with which the phone will be used.

Editing Phones

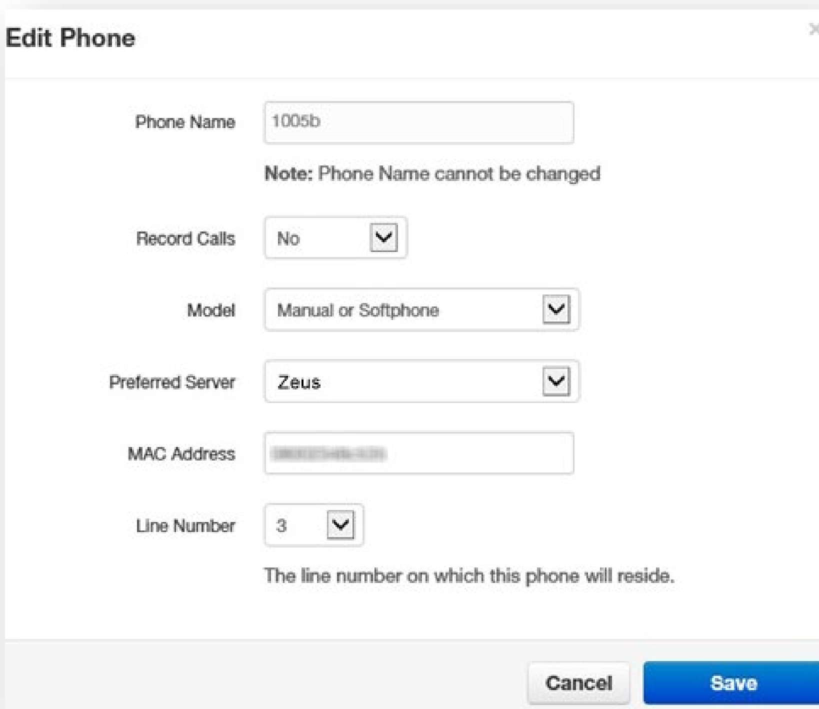
To edit a phone associated with this user:

1. From the **Phones** tab, either click the name or hover over a name and click the **Edit** icon at the far right of the page as shown below.



These steps bring up the following Edit Phone pop-up window.

2. Change the phone settings as appropriate. See [Adding/Editing Phones](#) table for descriptions.

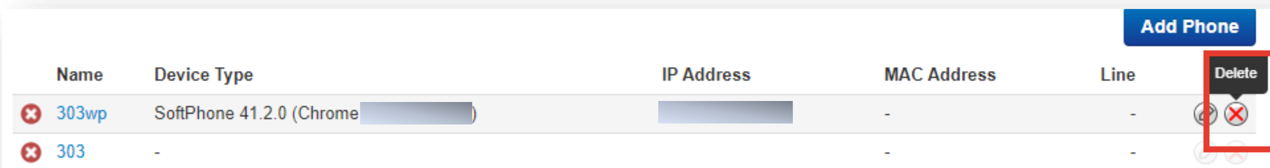


3. Click **Save.**

Deleting Phones

If you no longer need a phone that is associated with a user, you can delete the phone.

1. In the **Phones** tab, hover over the phone, and then click the **Delete** icon at the far right of the row.

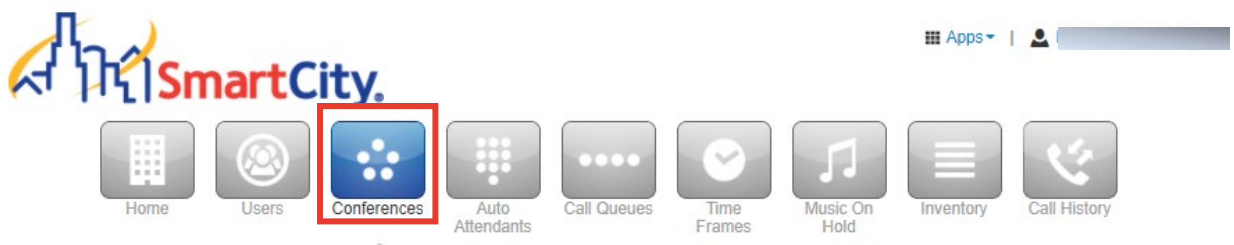


2. A confirmation prompt appears.
3. Click **Yes** to delete the phone or **No** to retain it.

Conferences

The Conference icon, as shown below, will take you to the Conference Center where you can manage your organization's conference bridges. Smart City's Hosted Voice service includes a conference bridge that allows people inside and outside of your organization to participate in a conference call.

All conference tasks are performed from the Conferences page. To display this page, click the **Conference** icon in the Menu Bar.



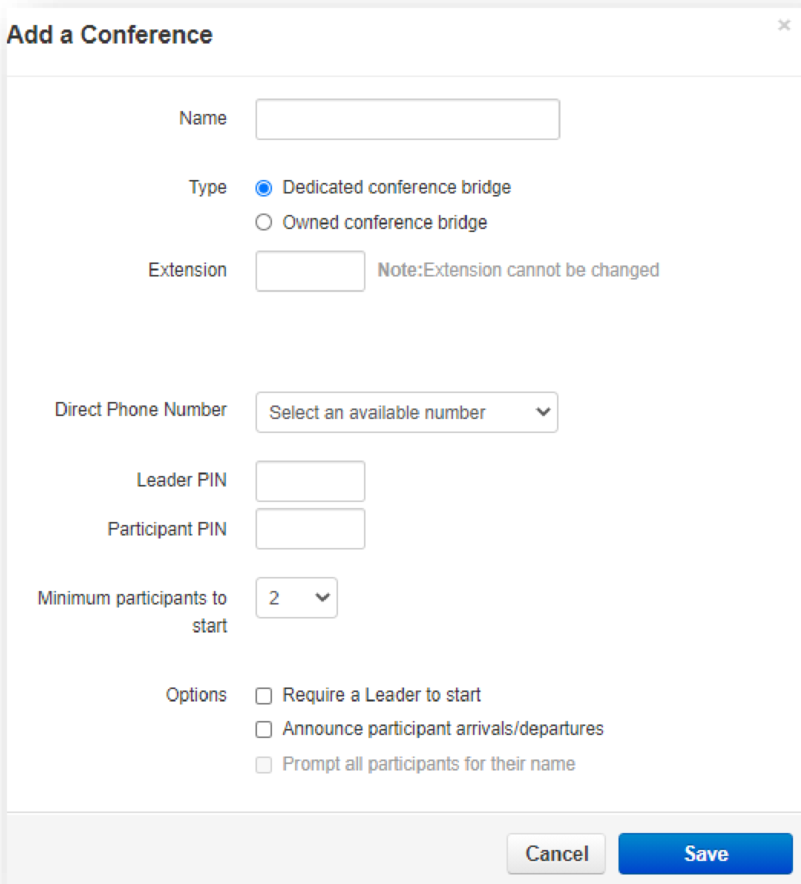
Conference bridges are used to make conference calls. A conference call is a telephone call in which someone talks to several people at the same time. The conference calls may be designed to allow the called party to participate during the call, or the call may be set up so that the called party merely listens into the call and cannot speak. The Conference icon will take you to the Conference Center where you can control your organization's conference bridges.

In this section, we will explain how to manage Conferences, including how to:

- Add conferences
- Edi conferences
- Delete conferences
- Join a conference

Adding Conferences

1. You can create a new Conference Bridge by clicking **Add Conference** button as seen below, then filling out the fields in the display window.



2. Once you click **Add a Conference** button, the above pop-up window appears.
3. Complete the fields as shown below in **Adding/Editing a Conference**.
4. Click **Save.**

Adding/Editing a Conference Settings

Conference Setting	Description
Name	Enter a name for this bridge. The name should allow you to differentiate this bridge from other bridges you configured.
Type	Select the conference type. Choices are: • **Dedicated conference bridge** creates a conference bridge that only you will be able to modify. • **Owned conference bridge** creates a conference bridge that the owner can modify. For an owned conference bridge, the platform will ask you for the extension of the owner.
Extension	Adding a conference: select the extension used to join this conference. Editing a conference: read-only field that shows the extension.
Direct Phone Number	The number used to reach the user's conference bridge directly. If you have available phone numbers, you can assign them by selecting them from the drop-down. If you do not see any phone numbers in the drop drown, there are no available phone numbers and one must be added to the inventory or you can select a number already point to another destination and reconfigure it to point to the conference bridge.
Leader PIN	The leader PIN is what people who will be administering the conference bridge enter when joining the conference. Leaders can enter star codes to manipulate the behavior of the conference bridge. Enter the personal identification number (PIN) that the leader will use to authenticate access when joining the meeting. This PIN is private and should be known by internal staff only.
Participant PIN	The Participant PIN is what people that are invited to join the conference bridge without having any elevated privileges and are only able to listen and speak when unmuted. Enter the PIN that participants will use to authenticate access when joining the meeting. Distribute this PIN to all guests of the meeting.

Conference Setting	Description
Minimum participants to start	Keeps the Music on Hold playing until the minimum number of participants have joined the conference bridge. Select the minimum number of participants that must attend the conference before it can start.
Options	Select the following options: • **Require a Leader to start --** This option will keep the Music on Hold playing for all parties until someone joins the conference bridge and enters the leader PIN. • **Prompt all participants for their name –** This option will prompt all participants to record their name and play the recording to people already in the conference bridge when joining. • **Announce participant arrivals/departures –** This option announces the participants arrival/departure, playing the recording of the participant's name when entering or existing the conference bridge.

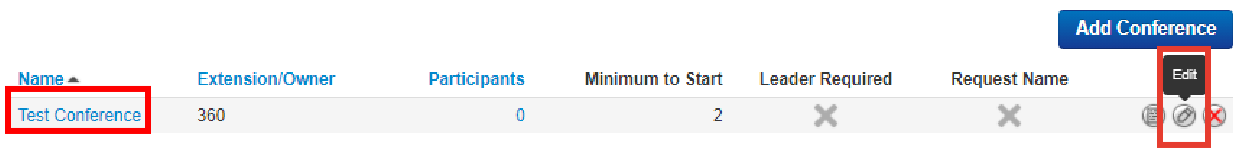
Mid Conference Star* Codes

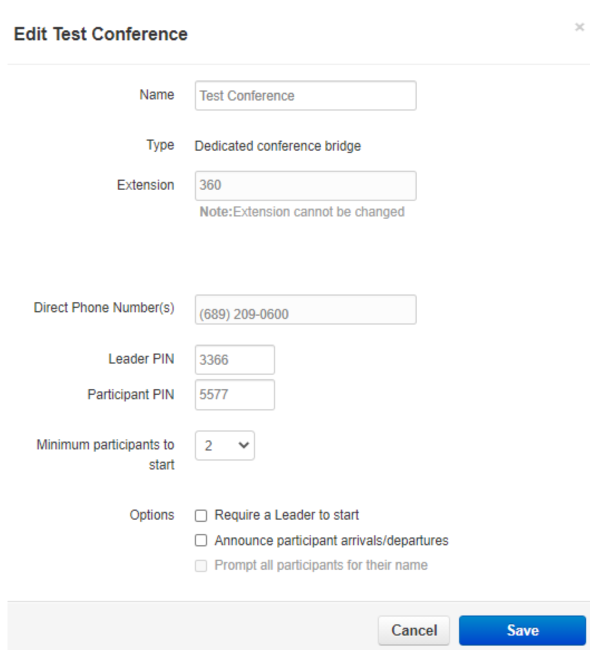
Action	Description
*6	Toggle Mute On/Off
*71	Start Recording
*73	Stop Recording
*74	Decrease Volume to Participant
*75	Reset Volume to Participant
*76	Increase Volume to Participant
*77	Decrease Volume to Conference
*78	Reset Volume to Conference
*79	Increase Volume to Conference
*91	Announce List of Active Participants
*92	Toggle Announcement On/Off
*93	Disconnect All Other Participants
*94	Toggle Conference Lock
*95	Announce Count of Active Participants
*96	Mute All Other Participants
*97	Unmute All Other Participants
*98	Speaker Sign-On
*99	Leader Sign-On

Editing a Conference

There may be times when you need to edit conferences. For example, you may want to change the leader or participant PIN.

1. From the **Conferences** page, either **Click a Name** or hover over a name and click the **Edit** icon at the far right of the Conferences page.



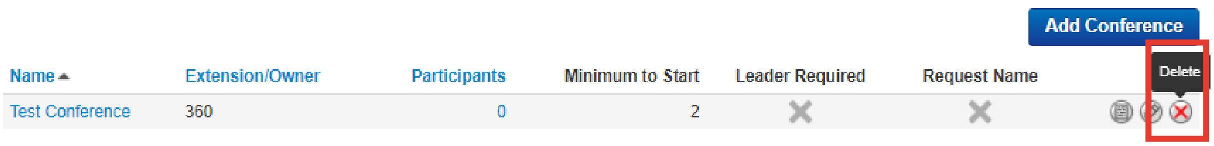


2. An **Edit** window will pop-up that will allow you to complete the fields.
3. Click **Save.**

Deleting a Conference

If you no longer need a conference bridge, you can delete it from the platform.

1. From the **Conferences** page, hover over the conference, and then click the **Delete** icon at the far right of the row.



2. A confirmation prompt appears.
3. Click **Yes** to delete the conference or **No** to keep it.

Joining a Conference

There are several ways to join a conference.

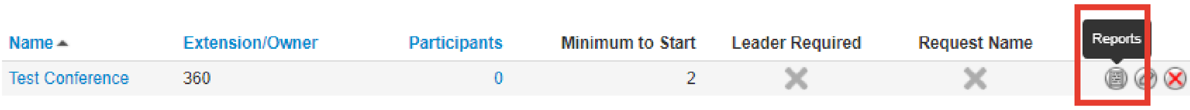
- Phones in your platform can dial a dedicated bridge via the extension of the bridge. An owned bridge can be dialed by using the configured Direct Dial code.
- Set a Direct Inward Dial (DID) number to the bridge for inside and outside callers.
- Participants can call into your main number, and then be transferred to the bridge, or the bridge can be an option of the auto attendant.

When joining, the platform prompts you for your password (either the leader or participant PIN, depending on your role).

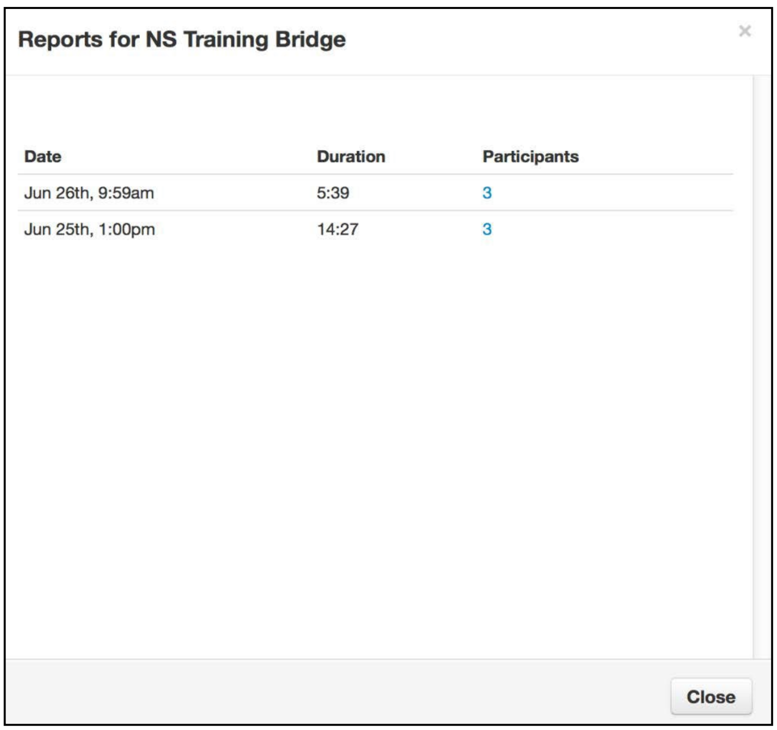
Viewing Conference Statistics

You can display historical information about your bridge.

1. From the Conferences page, hover over the conference, and then click the **Reports** icon on the far right of the row.



A pop-up window shows statistics about the selected conference.

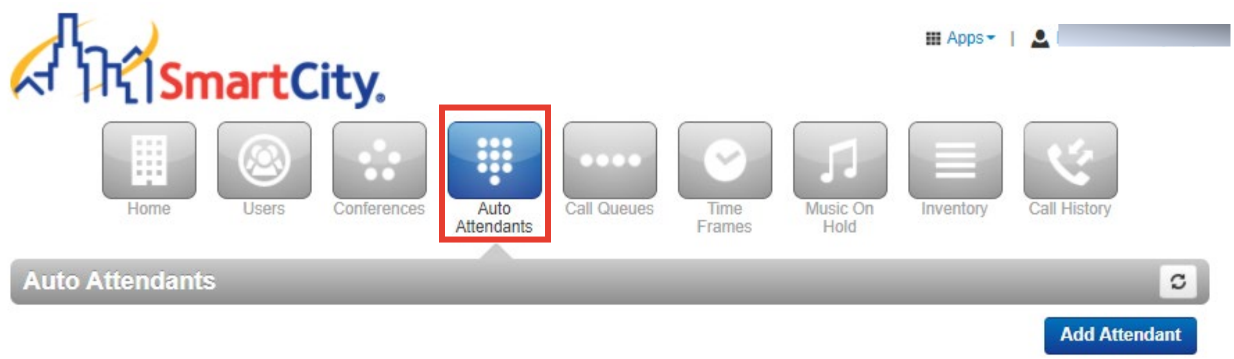


2. For more information about participants, click the hyperlink under the **Participants** column.
3. When you finish viewing the information, click **Close** to close the pop-up window.

Auto Attendants

Auto Attendants are automated greetings with options to route calls. The most common use case for an Auto Attendant is having the main company phone number pointed to an Auto Attendant. When callers then call into the business, they can be routed to the party they are trying to reach by listening to the menu prompt options or dialing a user's extension directly.

The Smart City Hosted Voice platform has an Auto Attendant builder that gives you easy access to change recordings and options anytime. Clicking the **Auto Attendant** icon on the top of the Menu Bar will take you to your Auto Attendant Center. All Auto Attendant tasks are performed from this page. You can edit existing Auto Attendants, delete them, and create new ones in the Center.

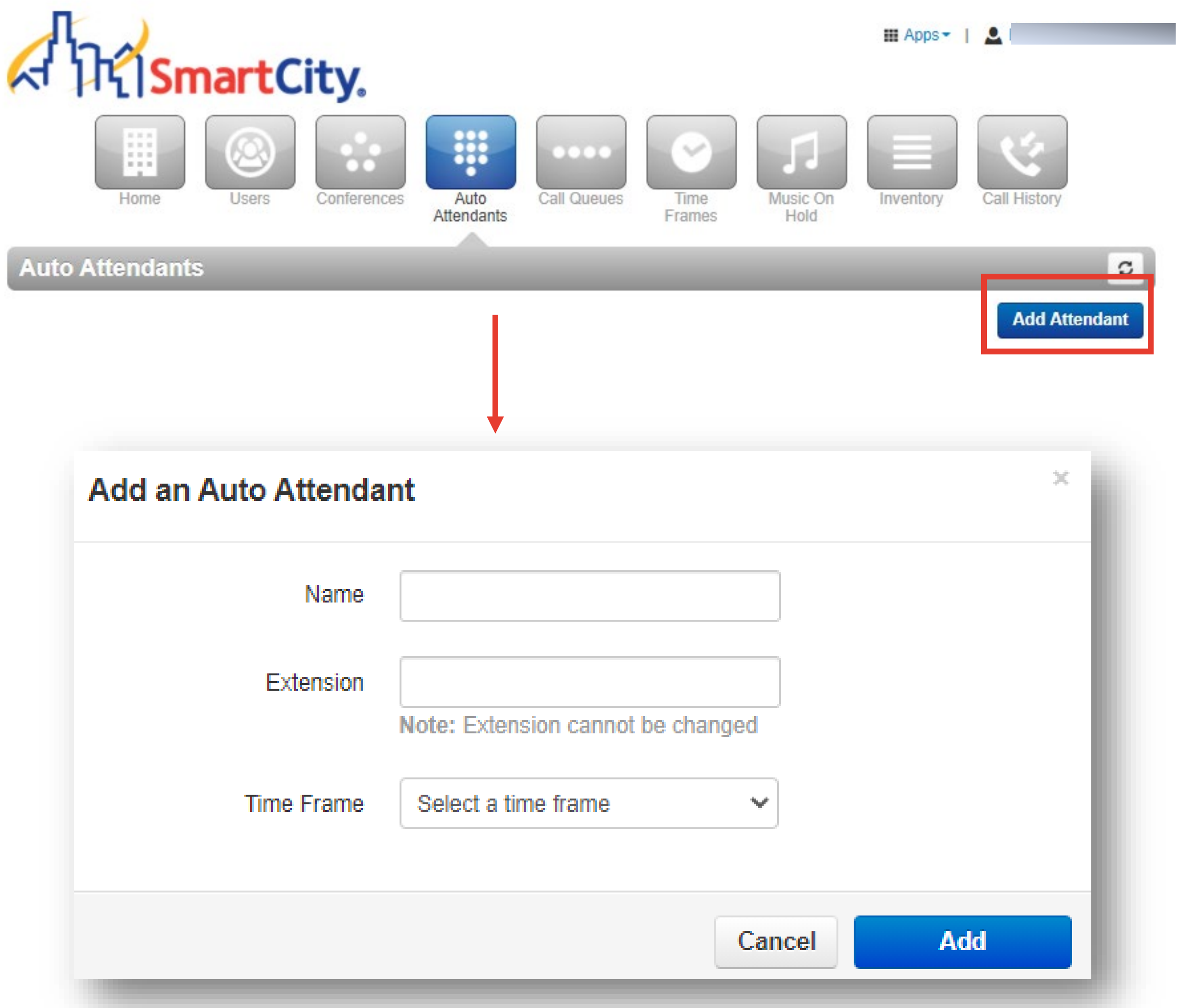


From the Auto Attendant page, you can:

- Create a new Auto Attendant
- Edit Auto Attendants
- Delete Auto Attendants

Creating a new Auto Attendant

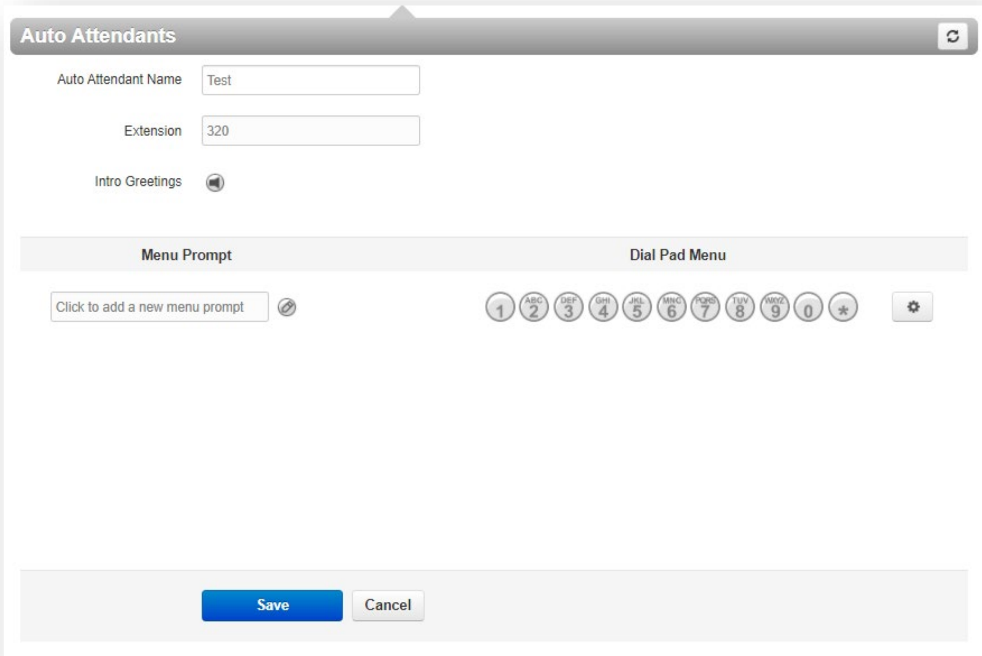
1. To add an Auto Attendant, click the **Add Auto Attendant** button, found on the right side of the page. The **Add an Auto Attendant** window will appear as seen below.



2. **Name** the Auto Attendant and give it an **extension**. This name should allow you to differentiate this Auto Attendant from other Auto Attendants you have created.
3. Select a **Time Frame** for frame to which this answering rule will be applied.
4. Click **Add** button to create the Auto Attendant.

Note: The extension cannot be changed once the Auto Attendant has been created.

5. Once you created the Auto Attendant, the following screen will pop-up.



6. Complete the fields as defined below:

   Auto Attendant Name – this is the name you entered on the previous page. Use this field to change the name if desired.

   Extension – This is a read-only field that shows the extension associated with this Auto Attendant that you entered on the previous page.

   Intro Greeting – Click the icon to display the **Manage Greeting** pop-up window and play, upload, record, or delete greetings. See **Intro Greetings** section for more information.

   Menu Prompt – Click in the text box or click the icon to upload or record a menu prompt.

   Dial Pad – Routes calls to a variety of resources when a caller selects that option. Click a number. Details on the Dial Pad Menu can be found in Auto Attendant Dial Pad Options.

Recording Intro Greetings and Menu Prompts

Once the Auto Attendant has been created, click the **Intro to Record** to record the first message the caller will hear. Each Auto Attendant can have an optional introductory greeting that plays when a call is directed to the Auto Attendant followed by the menu prompt. An example of an introductory greeting might be:

> *"Thank you for calling ABC Company. Our offices are now closed."*

A menu prompt might be:

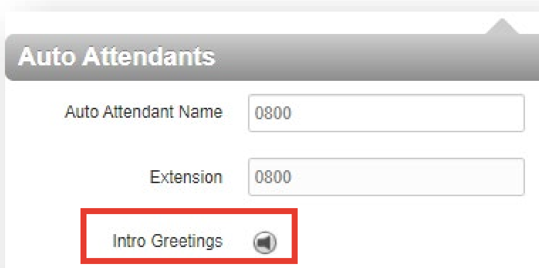
> *"Press 1 for sales, press 2 for service, or press 0 for operator assistance."*

Separating intro greetings into menu prompts allows you to change greetings for holidays or night-time hours without having to re-record the entire message.

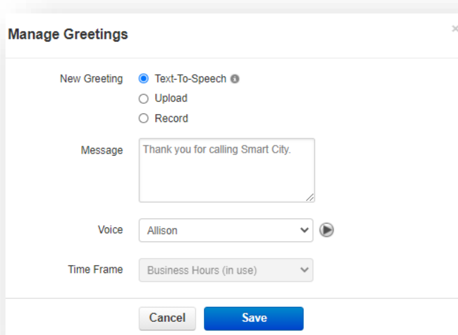
1. From the Auto Attendants page, click the name or extension that you want to manage the greeting.

Name	Extension	Timeframe
0800	0800	Business Hours
Test	320	After hours

2. Clicking on the speaker next to the **Intro Greetings** will display the Manage Greeting window.

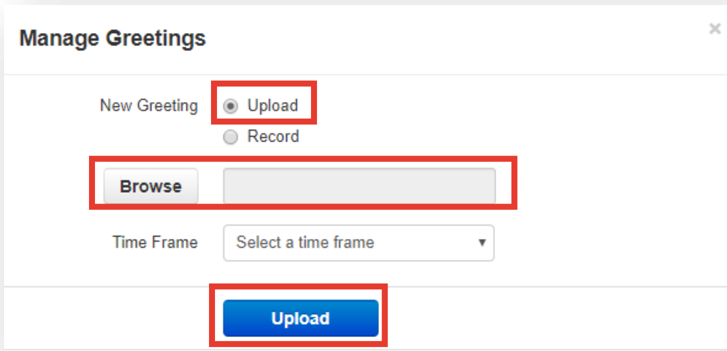


A Manage Greetings pop-up window will appear. You can either upload a new greeting or record a new one. Then you can select a time frame for that message so it will only play during the selected time frame.

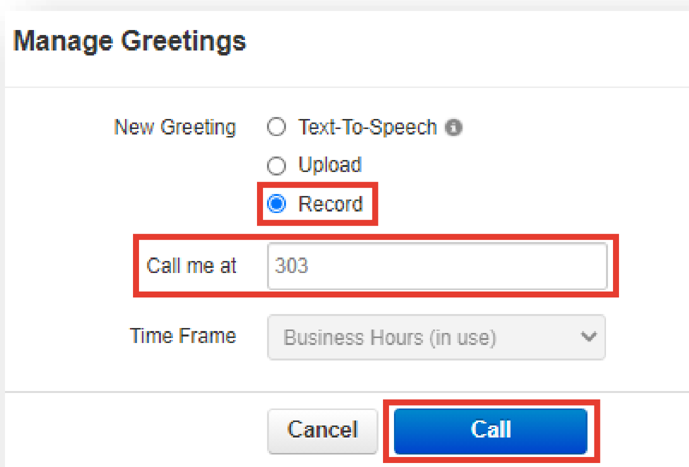


3. Add your intro greeting.

- To upload a new greeting, click **Upload.** Click the **Browse** button to find the MP3 or WAV file you want to use for your greeting. Click the file and click **Open.** Click **Upload.**



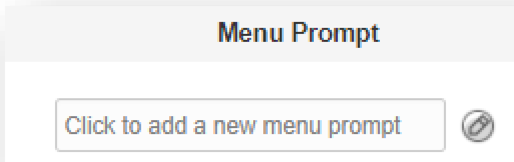
- To record a new greeting, click **Record.** In the **Call me at** field, enter the number to call you (either an extension or a cell phone number) and click **Call.** Your phone will be called. At the prompt, record the new greeting, and the press **#** when you finish your recording.



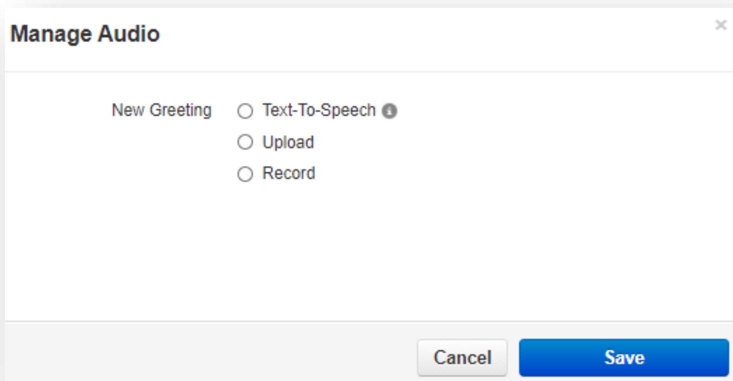
Recording a Menu Prompt

The Menu Prompt will allow you to record a message to let callers know what digits will route them to an application or destination.

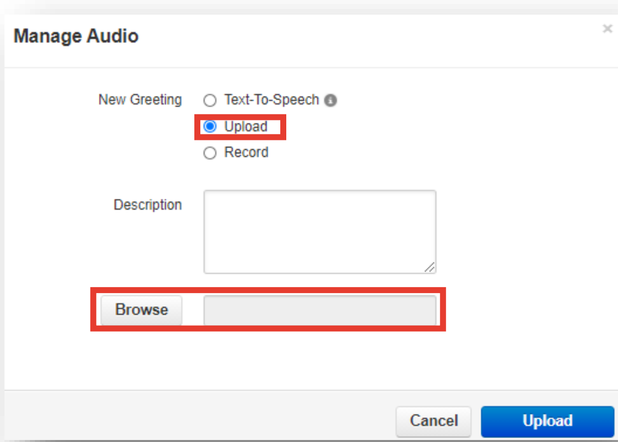
From the Auto Attendants page, under **Menu Prompt**, click the button that says "**Click to add a new menu prompt"** or click the edit icon to the right of the box.



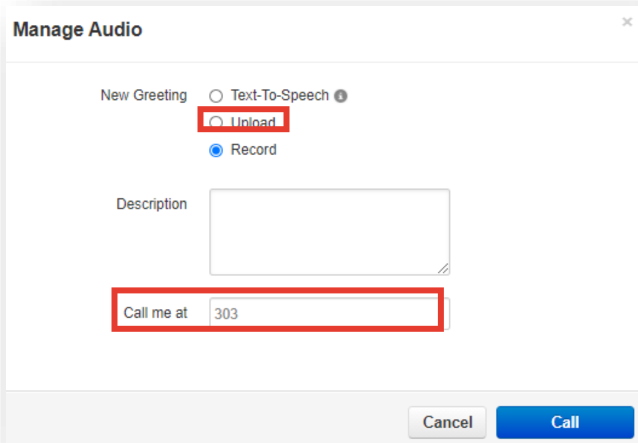
The **Manage Audio** box will pop-up where you can either upload or record a new greeting.



To **Upload** a new greeting, select the Upload button, add a description. Click the **Browse** button to find the MP3 or WAV file you want to use for your greeting. Click the file and click **Open.** Click **Upload.**

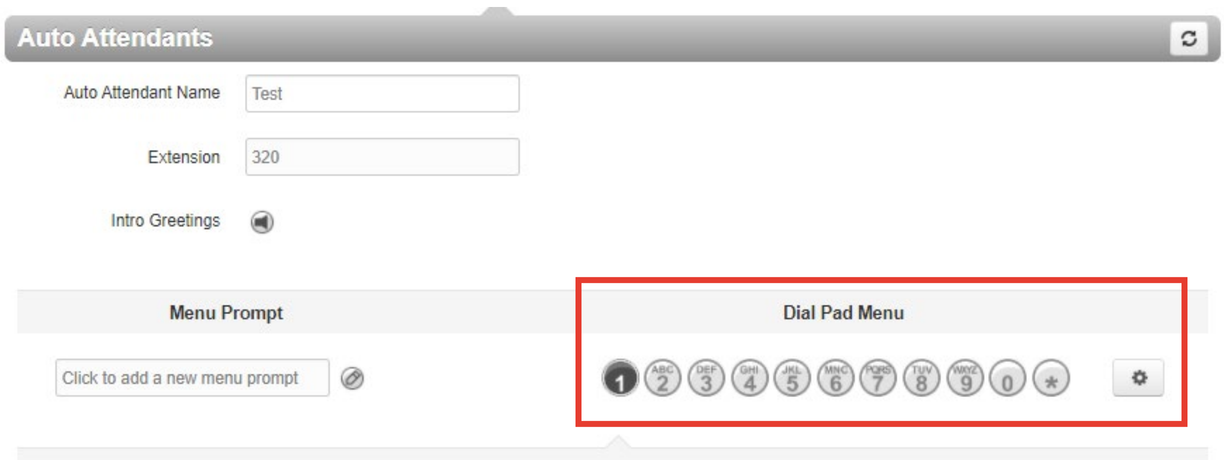


To **Record** a new greeting, you must enter a description and a number. In the **Call me at** field, enter the number to call you (either an extension or a cell phone number) and click **Call.** Your phone will be called. At the prompt, record the new greeting, and the press **#** when you finish your recording.

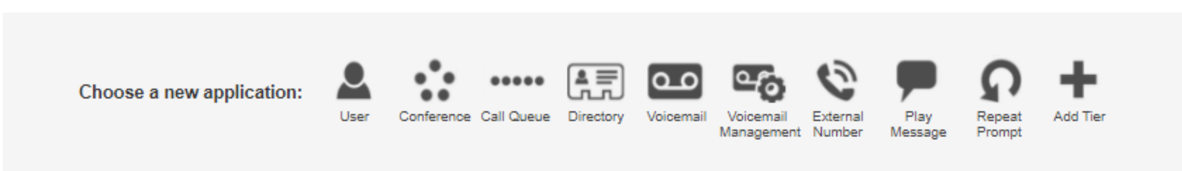


Dial Pad Menu

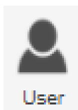
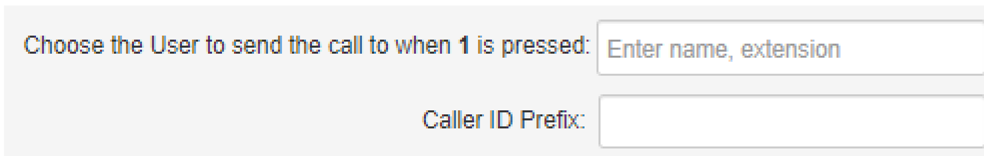
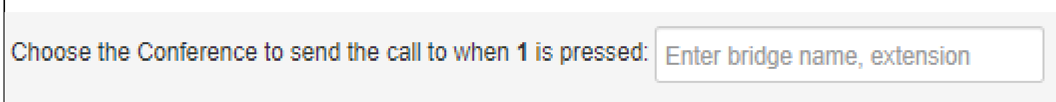
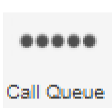
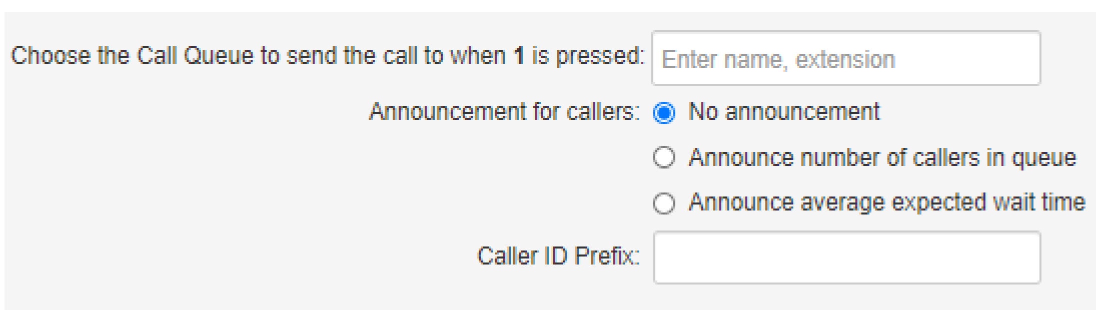
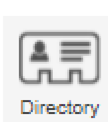
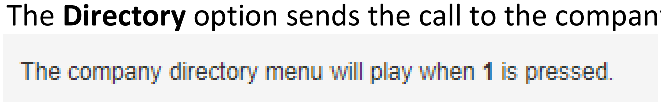
The Dial Pad Menu is where you will configure what numbers correlate with an application. When you select a number, you will see the applications you can choose from, as shown below. Click on a number and you will see the applications you can assign to it.



When clicking on a number and select an application, you can see the options that you can configure the application with. Each of these are described the table below.



Auto Attendant Dial Pad Options

<table>
<tr><th>Application</th><th>Description</th></tr>
<tr><td>
</td><td>The User application allows you to forward the caller to an extension on the platform of another user. It will also give you the option to add a prefix to the caller ID so that the user the call is being forwarded to knows the call is being routed from an Auto Attendant.

</td></tr>
<tr><td>
</td><td>The Conference option will allow you to forward the call to the conference bridge you enter into the “Enter bridge name, extension” option field.

</td></tr>
<tr><td>
</td><td>Call Queues options as seen below allows the caller to be forwarded to a call queue.
Announcement for callers: Allows you to have the platform announce the number of callers in the queue ahead of the caller or announce the average expected wait time.
Allows for a Caller ID prefix to be added so the agent in the queue knows the call was routed to them from an Auto Attendant.

</td></tr>
<tr><td>
</td><td>The Directory option sends the call to the company directory.

</td></tr>
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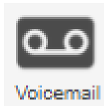
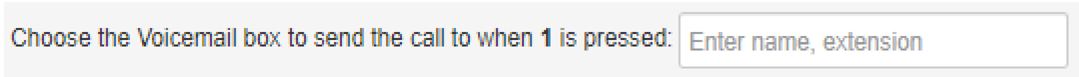
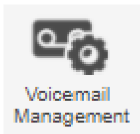
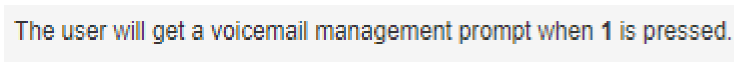
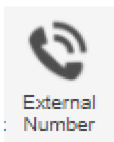
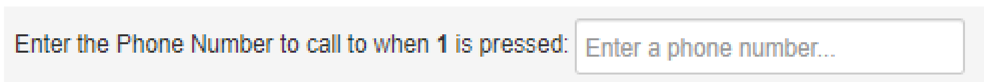
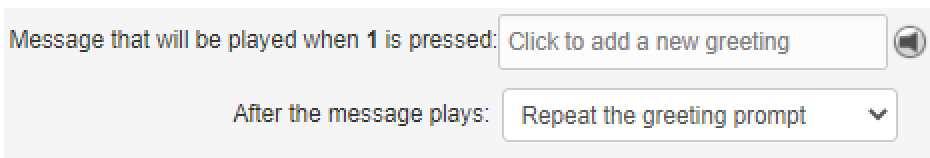
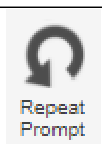
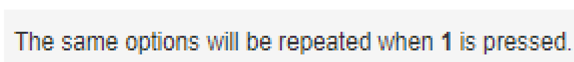
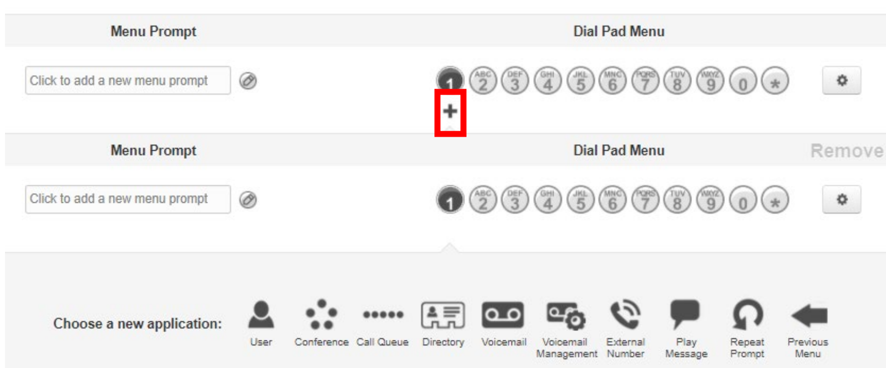
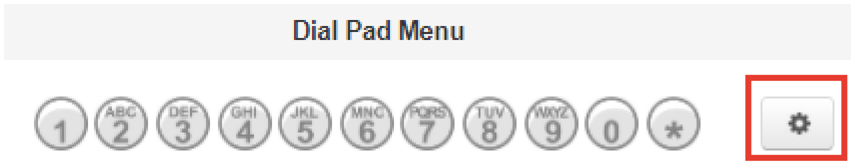
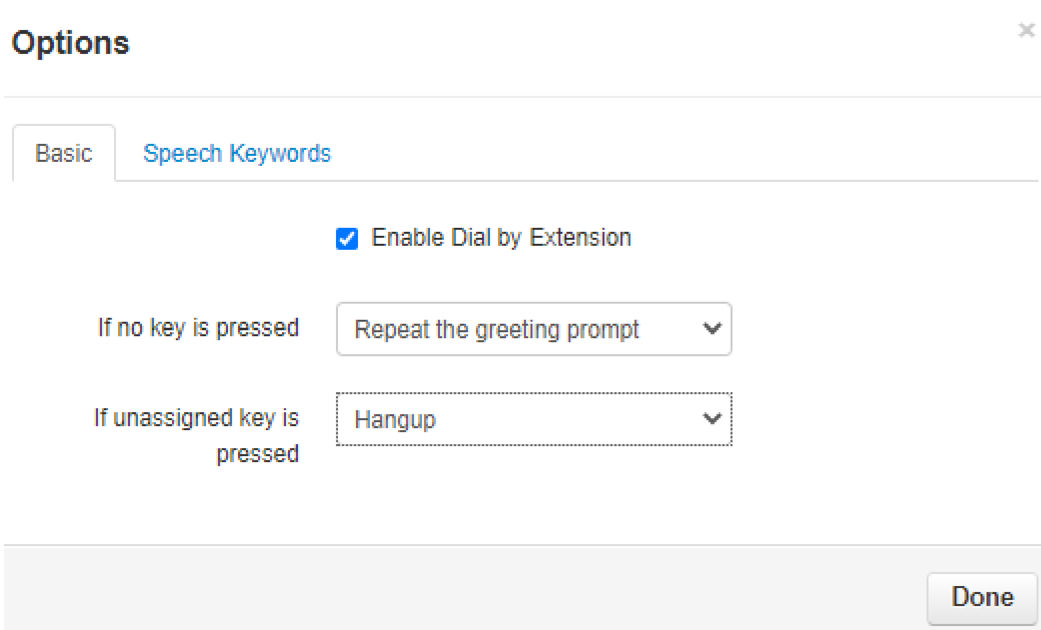
Application	Description
	**Voicemail** option will forward a caller to the voice. 
	**Voicemail Management** option allows users on the platform to enter their extension number and PIN. They can then check messages and manage their voicemail account. 
	**External Number** option will forward the call to another telephone number. 
	**Play Message** option allows you to record a message that will be played to the caller. You can then decide how to route the call after the message has been played. 
	**Repeat Prompt** will replay the menu prompt message. 
	The **Add Tier** option will allow you to add another dial pad menu to the Auto Attendant. You can only add one tier. Once another tier has been added, you will see the same options except for Add Tier. The option for the Previous Menu appears so the caller can route back to the original Auto Attendant level. You cannot add a tier to 0 or the star key. 

<table>
<tr><th>Application</th><th>Description</th></tr>
<tr><td></td><td>
The Gear option takes you to the options settings window for the Auto Attendant that allows you to control the caller’s experiences. If no key is pressed, or if an unassigned key is pressed, the options include to either repeat the greeting prompt or hang up.



Options include:

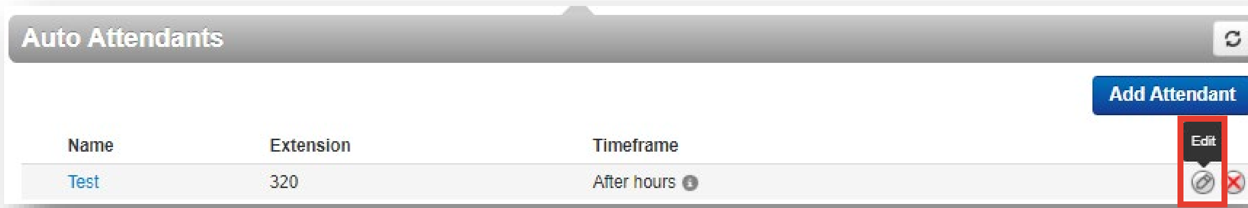
Enable Dial by Extension: Allows you to enable calling an extension directly from the Auto Attendant if the caller knows the user’s extension number.
If no key is pressed: Allows you to select a dial pad menu option, repeat the menu prompt recording, or hang up if no digit is pressed when the caller is in the Auto Attendant.
If unassigned key is pressed: Configure what to do with the call is the caller does not press any digits when in the Auto Attendant and what to do if the caller presses a key that is not configured in the Dial Pad Menu.



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

Editing Auto Attendants

If you need to edit an Auto Attendant, from the **Auto Attendants** page, either click a name or hover over a name and the click the edit icon.



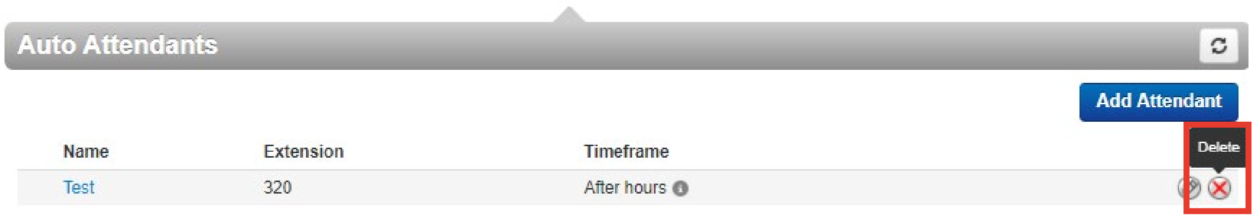
The Auto Attendant box will pop-up.

Edit the fields you want to change and click **Save.**

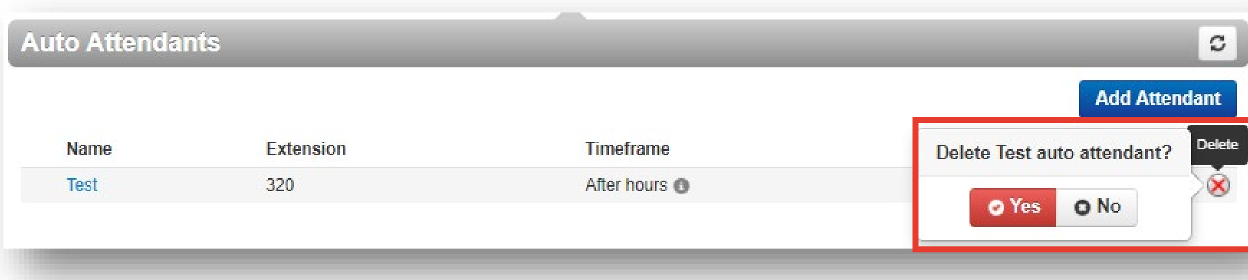
Deleting Auto Attendants

If you no longer need an Auto Attendant, you can delete it from the platform.

1. From the Auto Attendants page, hover over the Auto Attendant you want to delete, and click the delete button on the far right.



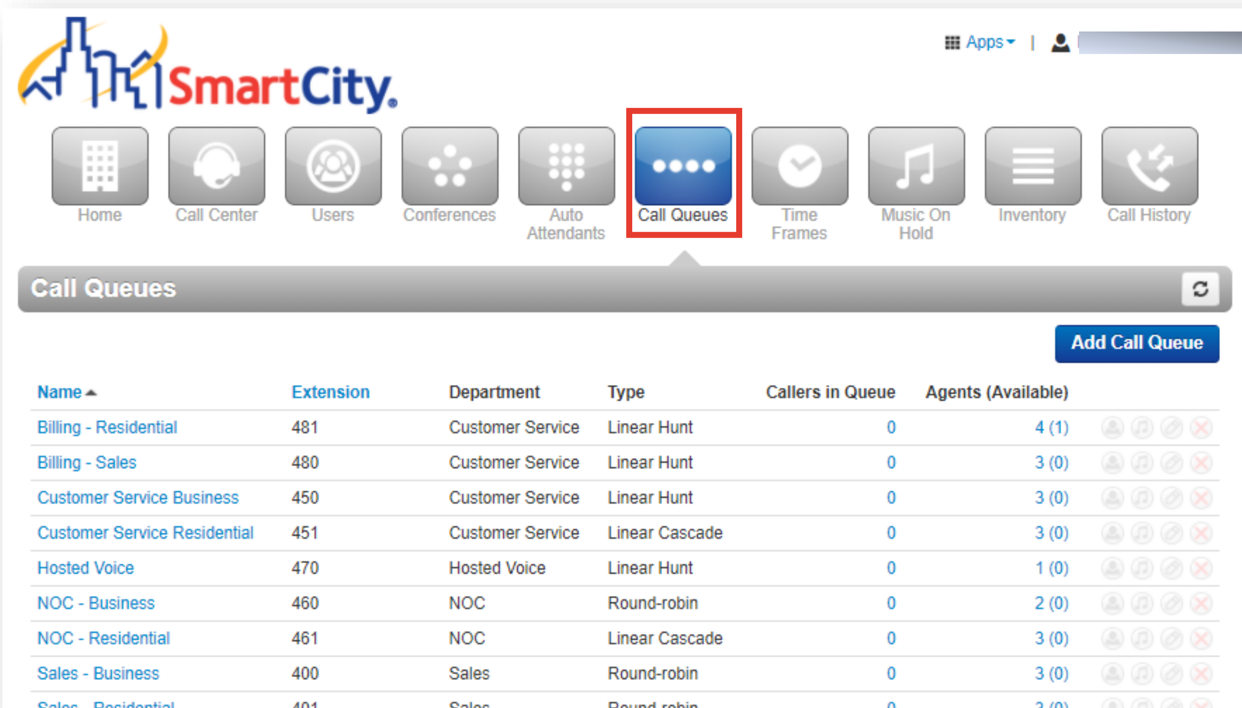
A confirmation prompt appears. Click **Yes** to delete the Auto Attendant or **No** to retain it.



Call Queues

Call Queues, also known as Hunt Groups, are the perfect way to manage high traffic flows. When all lines are in use for the company or group, you can place the caller in queue until the next available agent is free instead of having the caller listen to a busy signal or sending them to voicemail. While in queue, callers can hear Music on Hold or custom company announcements. A Call Queue can be configured to ring multiple devices in a certain order or a parking lot for a call to site and wait until someone retrieves the call.

To navigate the Call Queues center, select **Call Queues** icon on the Menu Bar. If the domain has any Call Queues configured, they will be displayed here.



In this section, we will show you how to:

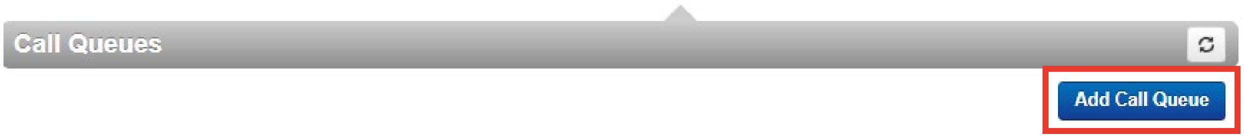
- Add Call Queues
- Manage Call Queues
- Edit Call Queues
- Delete Call Queues
- Edit Music on Hold settings
- Work with agents associated with Call Queues

Call Queue Rules

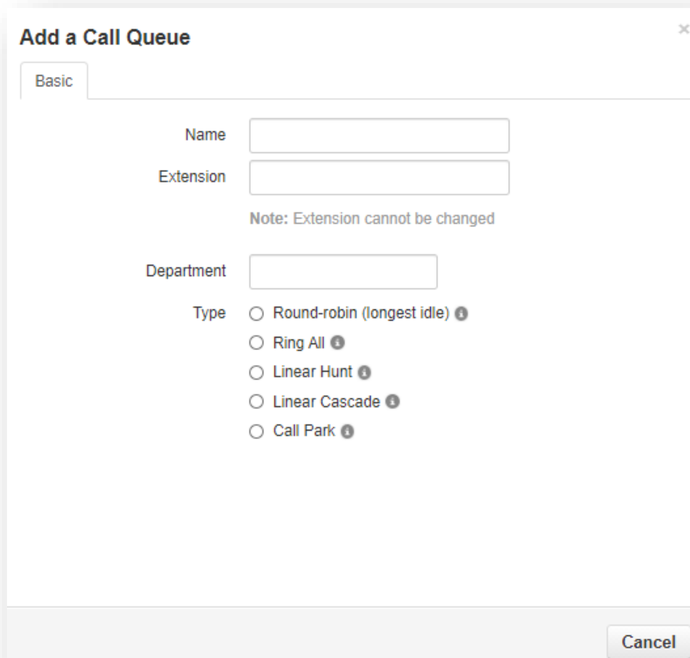
- Call Queues can be configured and modified only by users with a scope of Office Manager, Call Center Supervisor, or higher.
- Call queues need to have a numerical name.
- You must assign a dedicated extension/owner.
- If the extension you are creating for the queue is not currently present: the platform will create one and indicate this by showing the green **New** label to the right of the dialog box.
- Queues must have Music on Hold files uploaded to it, otherwise domain default Music on Hold will be played.
- Agents can only be added once a call queue has been set up.
- Call queues can contain both on-net and off-net agents.
- Only online agents can be part of an active queue.
- If a device is not registered, the agent will be considered offline.
- Icon colors represent agent status:
    - Gray: Offline
    - Green: Online
    - Red: Online but currently taking a call
- Agents that are part of multiple queues can prioritize one queue over another.

Add a Call Queue

1. To add a call queue, click the **Add Call Queue** button on the Call Queue center.



You will get the following pop-up. The platform will guide you through the configuration of the queue, including basic options, pre-queue options and in-queue options.

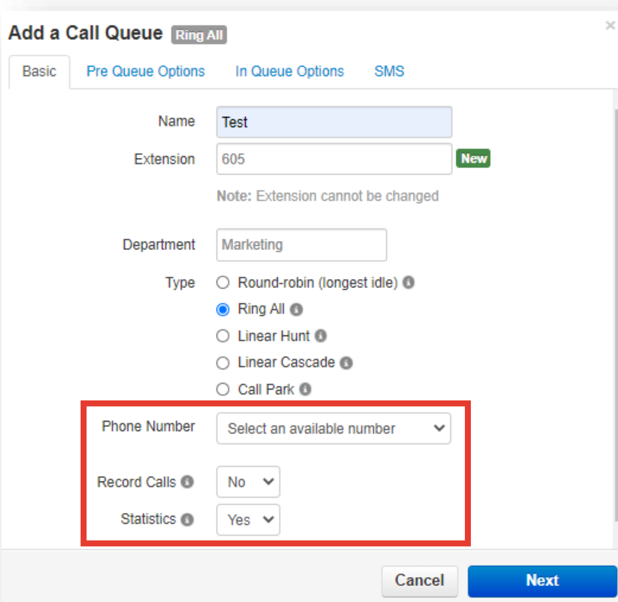


2. Under the **Basic** tab, you will be asked for the name you would like to give the queue and the extension number. The extension number cannot be changed once the queue is created.
3. Select a Ring Type the fields as described in the table below. The ring type controls how the call is sent to specific devices. Calls are sent to specific devices instead of users so their Answering Rules will not route to an undesired destination.

Call Queue Ring Types

Ring Type	Description
Round-Robin	Routes callers to the available agent that has been idle the longest.
Ring All	Simultaneously rings all available extensions in the queue. The first agent that answers gets connected with the caller.
Linear Hunt	Linear Hunt calls agents in a predefined order. The order is defined when editing the queues agents after the queue has been created.
Linear Cascade	Routes calls to groups of available agents in a predefined order. The order is defined when editing the queues agents after the queue has been created.
Call Park	Allows users to place calls on hold until the agent retrieves them. Selecting Call Park will not display Pre-Queue options or In Queue Options. These options will not select a phone number for direct dialing, recording calls, or collecting statistics.

4. If you select **Call Park**, click **Save** to complete setting up this Call Queue.
5. For all other selections, complete the additional fields as listed below:

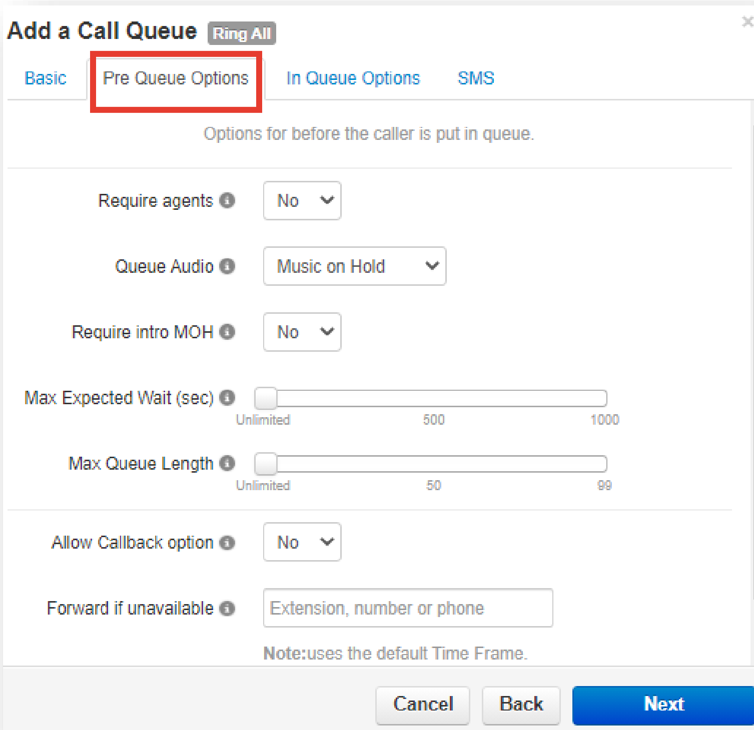


Phone Number: Select a phone number that will route directly to the Call Queue being created.

Record Calls: Setting Record Calls to **Yes** will record all calls that are routed through the queue being created.

Statistics: This option will collect statistics for the queue being created and provides information to the Call Center Supervisor.

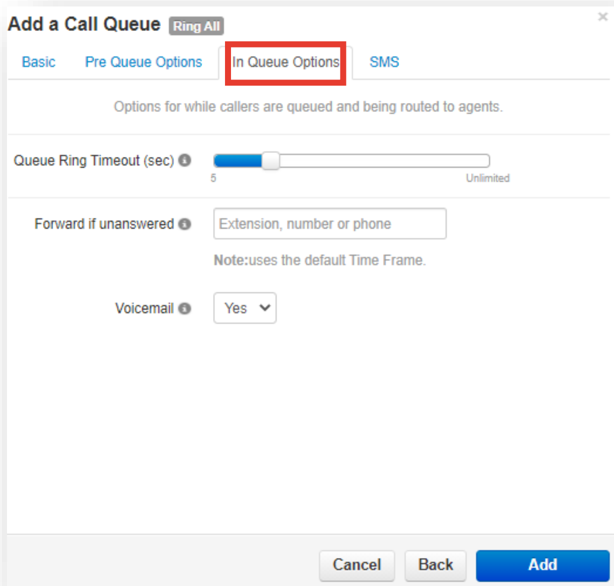
6. Click **Next** to display the **Pre-Queue Options** tab and proceed to the next step.
7. The **Pre-Queue Options** pop-up will appear. The Pre-Queue options are a set of conditions that must be met before the queue will accept the call. If any of the conditions are not met, the call will be forwarded to the destination in the **Forward if** Unavailable field. The table below describes each of the options.



Pre-Queue Options

Pre-Queue Options	Description
Require Agents	Sets whether at least one agent is required to be online before sending the caller to the queue. Select whether to require (Yes) or not require (No) agents for this queue.
Require Intro into MOH	Setting Require Intro MOH (Music on Hold) will play the first recording in the Music on Hold queue directory when they enter the queue. This setting forces playback of the complete MOH before dispatch. This is useful for compliance greetings such as "*Calls may be recorded.*" Select whether to require (Yes) or not require (No) the complete playback of the Music on Hold for this call queue.
Max Expected Wait	The time in seconds before the queue is unavailable to new callers. This is applied when the queue's average wait time reached the maximum expected wait. If the Max Expected Wait time is exceeded for a new caller entering the queue, the caller will be sent to the destination entered into the Forward if Unavailable field. Use the slider bar to specify the maximum expected wait time, in seconds. If the estimated wait time exceeds this number, the call cannot queue.
Max Queue Length	Allows you to set a cap of how many callers can be waiting in the queue at one time. If a Max Queue Length is set and a caller attempts to join the queue, it will forward them to the destination entered in the Forward if Unavailable field. Use the slider to specify the maximum number of people that the platform will allow to wait in this call queue.
Allow Callback Option	Allows for callers entering the queue to save their place in the queue and receive a call from the platform when an agent is available. Select whether the callback option is available (Yes) or not available (No) to users in this call queue.
Forward if Unavailable	Setting that specifies where to forward if pre-queue options will not allow for queueing, such as if the queue has reached its Expected Max Wait or the Max Queue Length limit has been reached.

8. The **In-Queue Options** tab appears. The In-Queue options allow you to control how the call is handled if the call meets all the Pre Queue Options and the call is accepted into the queue. This tab will change based on the ring type selected. The In-Queue Options table below describes each of these options.



In-Queue Options

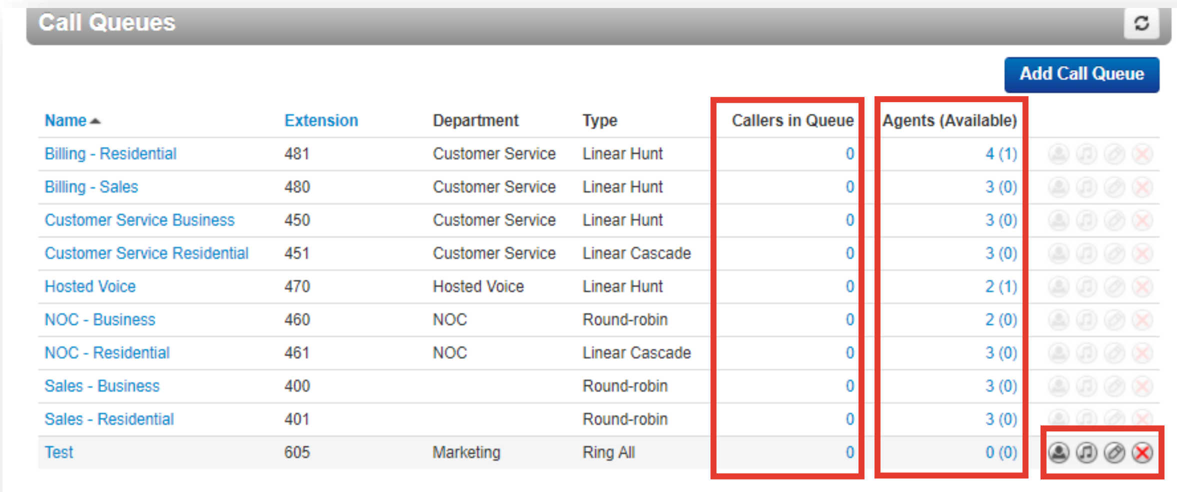
In-Queue Options	Description
Queue Ring Timeout	A time limit that can be set for how long a call will remain in the queue before being timed out. If Forward if Unanswered is enabled, the call is handled according to the Forward if Unanswered setting. If voicemail is enabled and Forward if Unanswered setting is disabled, the platform prompts the caller to stay in the queue or go to voicemail. • Moving the slider bar to the right will increase the amount of time in 5 second intervals. • Move the bar all the way to the right for unlimited. This will keep the call in the queue until someone answers or the call disconnects.

In-Queue Options	Description
Agent Ring Timeout	Allows you to configure how long each agent's phone will ring before moving to the next agent. This option will not display if the call type of the queue is Ring All. Use the slider to specify the maximum number of seconds that the queue will ring an event before moving on to the next agent. This value should be less than the Queue Ring Timeout value.
Logout Agent on Missed Call	Allows you to log an agent out of the queue if a call from the queue goes unanswered. Select whether an agent can log callers out of the queue (Yes) or does not (No) log out callers if an agent misses a call.
Forward if Unanswered	Allows you to set a destination for calls that are not answered. This could be another user's extension or another phone number. Enter the phone number or extension where callers are forwarded if agents fail to answer before the Queue Ring Timeout occurs.
Voicemail	Enabling Voicemail will create a voicemail box for the queue and will allow callers to leave a voicemail if no Forward if Unanswered has been set. Select whether callers will be (Yes) or will not be (No) given the option to leave a voicemail if agents fail to answer when the Queue Ring Timeout occurs and Forward if Unanswered is not set.

Managing Call Queues

There may be times when you need to edit a Call Queue, such as changing Basic, Pre-Queue, or In-Queue options.

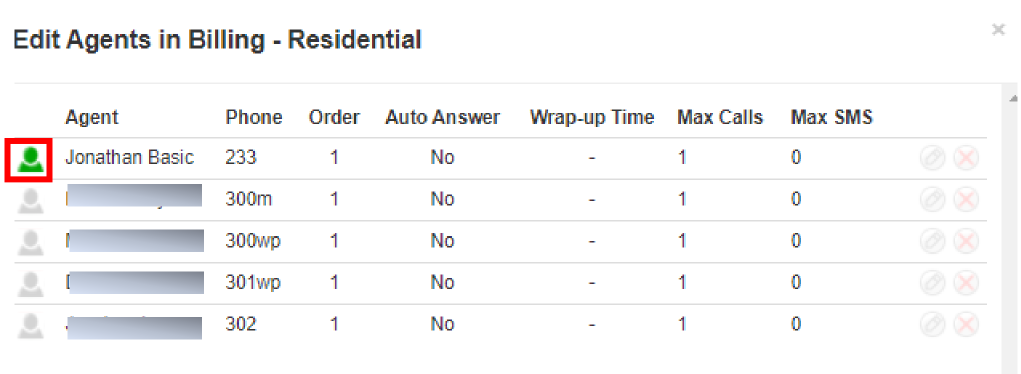
1. Find the Call Queue you want to edit. To the right of that queue, you will see the ring type selected for the queue and an overview of how many callers and agents are in the queue. You will also see the options to Add Agents, Edit the Music on Hold, edit any of the options selected when creating the queue, and delete the queue. The only fields you will not be able to edit are the name or extension number.



Name	Extension	Department	Type	Callers in Queue	Agents (Available)
Billing - Residential	481	Customer Service	Linear Hunt	0	4 (1)
Billing - Sales	480	Customer Service	Linear Hunt	0	3 (0)
Customer Service Business	450	Customer Service	Linear Hunt	0	3 (0)
Customer Service Residential	451	Customer Service	Linear Cascade	0	3 (0)
Hosted Voice	470	Hosted Voice	Linear Hunt	0	2 (1)
NOC - Business	460	NOC	Round-robin	0	2 (0)
NOC - Residential	461	NOC	Linear Cascade	0	3 (0)
Sales - Business	400		Round-robin	0	3 (0)
Sales - Residential	401		Round-robin	0	3 (0)
Test	605	Marketing	Ring All	0	0 (0)

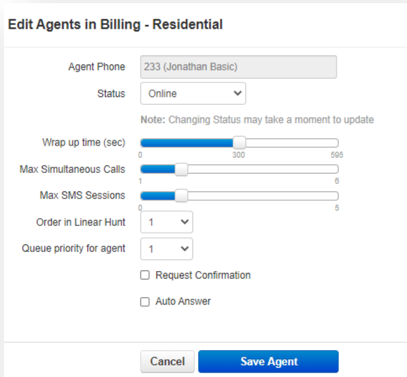
Editing Agents in a Call Queue

The **Edit Agent** icon will take you to the Edit Agents page as shown below. Here you will be able to add agents to the queue, modify if they are able to receive calls and how many calls that they can receive at one time.



Agent	Phone	Order	Auto Answer	Wrap-up Time	Max Calls	Max SMS
Jonathan Basic	233	1	No	-	1	0
[redacted]	300m	1	No	-	1	0
[redacted]	300wp	1	No	-	1	0
[redacted]	301wp	1	No	-	1	0
[redacted]	302	1	No	-	1	0

To edit an agent, click on the **Edit** icon to the right of their name. The following screen will pop-up.



Adding/Editing Agents in Call Queues

Fields	Description
Agent Phone	Select a phone of the agent that you want to add to the queue.
Status	Select whether the agent is ready to take calls (Online) or not active (Offline).
Wrap up Time	Use the slider to specify the amount of time the agent is allocated to complete paperwork after finishing a call and before a new call is dispatched.
Max Simultaneous Calls	Use the slider to specify the maximum number of calls an agent can take at one time. This will almost always be 1.
Order in Linear Hunt	Sets the dispatch order. If a call is dispatching, it will go the available agent with the lowest order.
Queue Priority for Agent	Sets weighting for an agent that is servicing multiple queues. If you have an agent servicing two queues and both queues have a person waiting, the agent will get the call from the queue whose priority is highest (lowest number).
Request Confirmation	Enables or disables request confirmation. Choices are: • Checked – Requires the agent to confirm receiving the call. • Not Checked – Agent does not confirm the call.
Auto Answer	Enables or disables auto answer. Choices are: • Checked – agent phone answers automatically (not all phones support this feature). • Not checked – agent phone does not answer automatically.

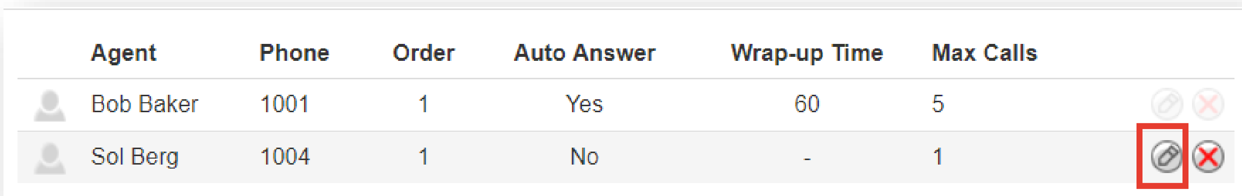
When you have completed making your changes, click the **Save Agent** button. The color-coded status of the new agent is displayed.

Green = Available

Gray = Offline

Red = On a Call

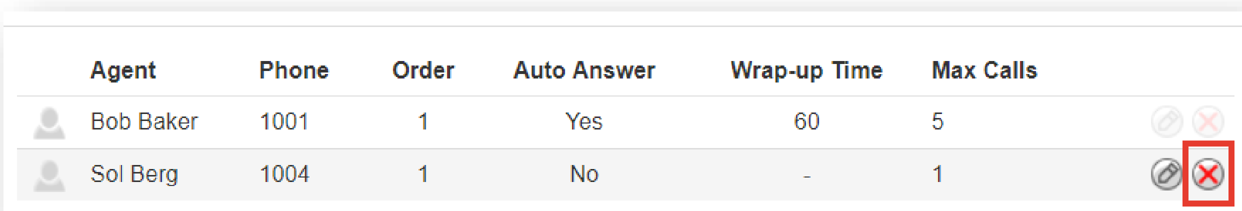
After adding the agent's device, you can change any of these options by clicking the **Edit** icon.



Agent	Phone	Order	Auto Answer	Wrap-up Time	Max Calls
Bob Baker	1001	1	Yes	60	5
Sol Berg	1004	1	No	-	1

To **delete** an agent:

1. Hover over the agent you want to delete and click the **Delete** icon at the far right of the window.

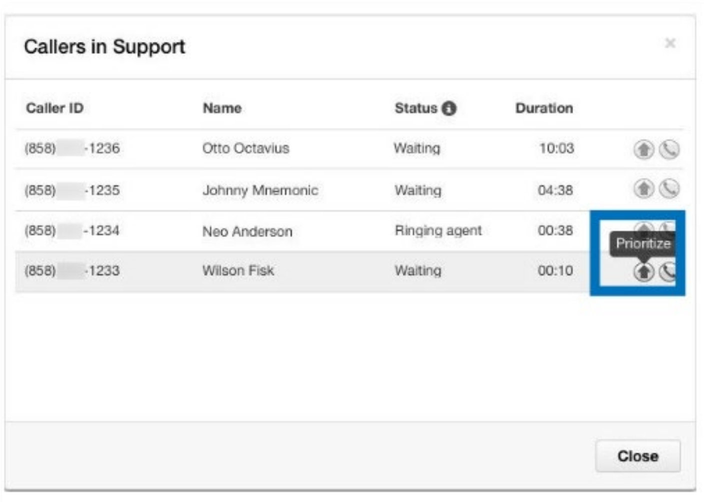


Agent	Phone	Order	Auto Answer	Wrap-up Time	Max Calls
Bob Baker	1001	1	Yes	60	5
Sol Berg	1004	1	No	-	1

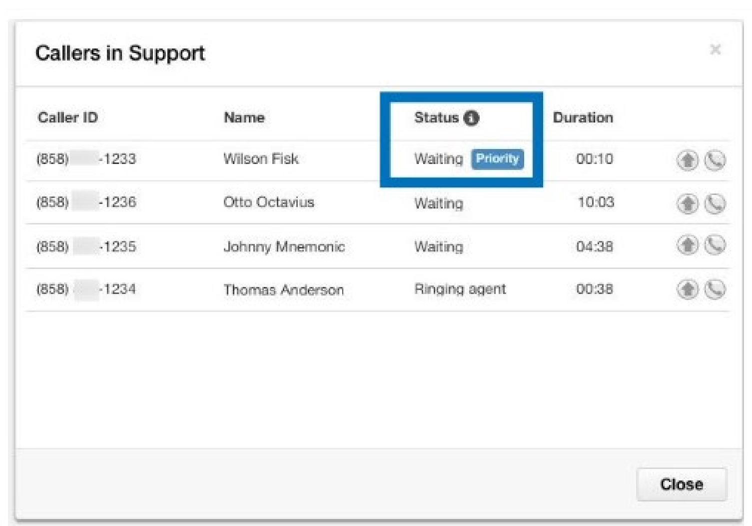
Prioritize Calls Waiting in Queues

The feature to prioritize calls that are waiting in a call queue allows greater control in how calls are being received. When a call is prioritized, it is sent to the top of the queue, and it will be the next to be dispatched to a call center agent. In the case of multiple prioritized calls, the calls will all move to the top of the queue in the order of "longest in the queue" first.

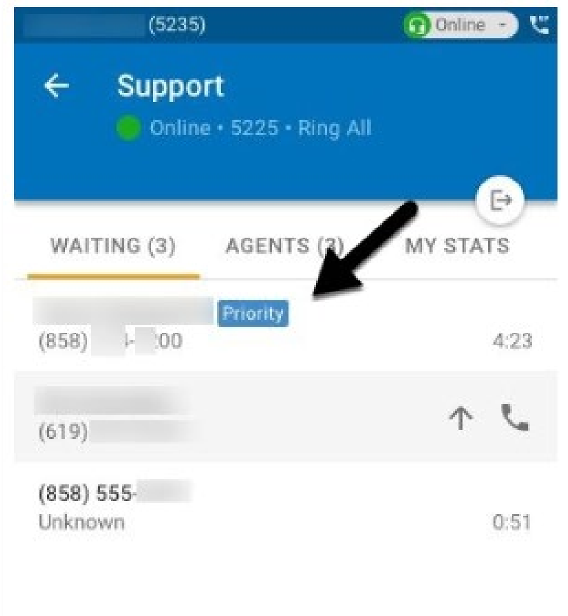
From the scope of a Call Center Supervisor, click the arrow "Prioritize" across from a call to move the call to the top of the list. Call Center Agents cannot prioritize calls.



The caller will move to the top of the call queue list. Their **Status** will now have a "priority" tag. All priority calls move to the top of the queue, in order of longest "Duration".

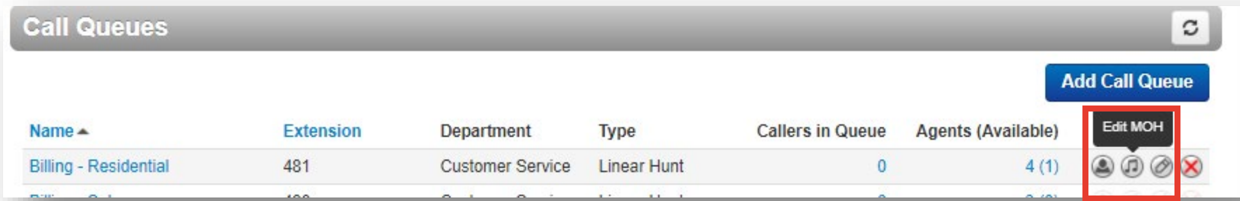


In the Smart City Connect mobile application, the UI is similar. The caller is moved to the top of the call queue and their call is tagged as "Priority".

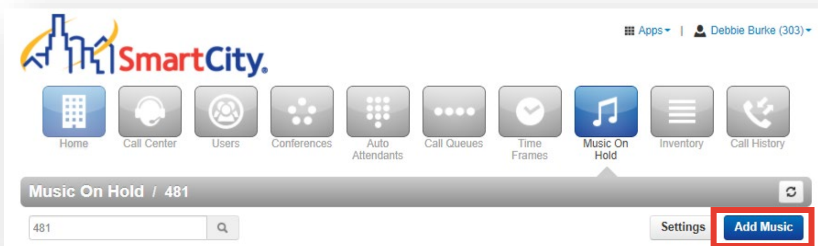


Edit Music on Hold in Call Queues

If you want to edit the Music on Hold that is played in Call Queues, click on the **Edit MOH** icon. 



This will take you to the Music on Hold directory on the Menu Bar as shown below.



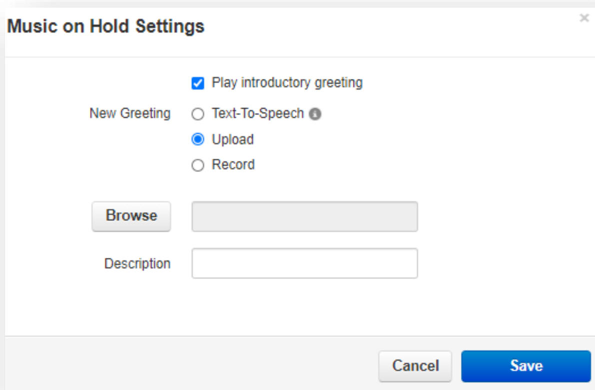
Adding Music to Call Queue

You can add music by clicking the **Add Music** button. Select the audio file you want to add. The file must be in .wav or .mp3 format. Name the hold music and click upload.

The music will be played in a top to bottom format or randomized order depending on what is selected when the domain was created. You can reprioritize the order of the music by dragging and dropping it.

Setting an Introductory Greeting for the Call Queue

Click the **Settings** button to open a Music on Hold Settings window. This will allow you to configure the queue with an introductory greeting, a message that will be played to every caller before they are connected with an agent. You can upload an introductory greeting or have the platform call you to record one. Name the greeting and click **Save.**

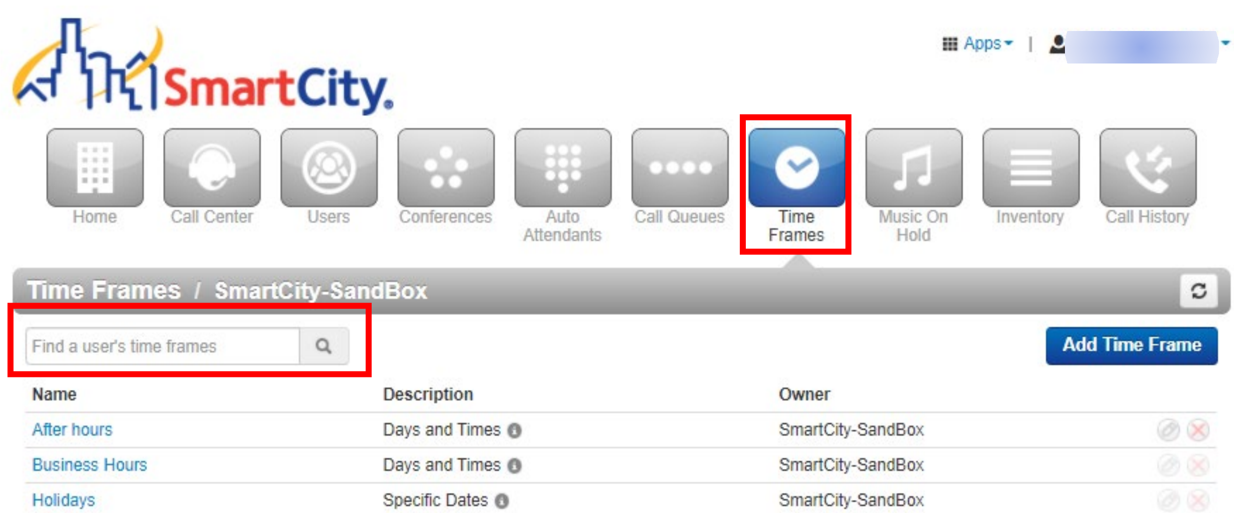


Time Frames

The **Time Frames** icon will take you to the Time Frames application center. Time Frames are a set period of time which covers when we want certain events to occur, such as what hours is the phone to ring. Time Frames are created with different time and date ranges so we can apply them to answering rules, which then allow you to control how calls are routed depending on the time of the day the call occurs.

Using Time Frames, you can tell the platform about the times when your office is open, closed, or celebrating a holiday. Time Frames do not go into effect until you apply a time frame to an answering rule or Auto Attendant greeting. When the time frames are applied, the first matching time frame becomes active.

To view and create your available Time Frames, click on the Time Frame icon in the top of the navigation menu bar. All Time Frame tasks are performed from the Time Frames page.



A search field at the top left of the page allows you to review a specific user's personal time frames by entering a user time frame and then clicking the magnifying glass icon as highlighted above.

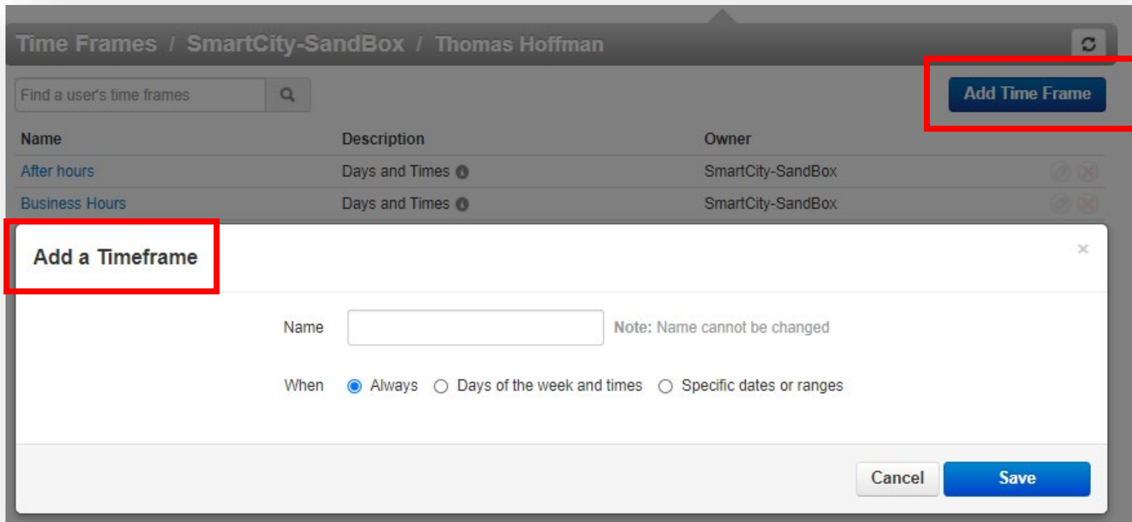
In this section, we will explain how to work with Time Frames, including:

- Add a Time Frame
- Edit a Time Frame
- Delete a Time Frame
- View Time Frames

Adding a Time Frame

To create a new Time Frame, click on the **Add Time Frame** button.

1. The Add a Timeframe box pops up where you can begin to create a new Time Frame.



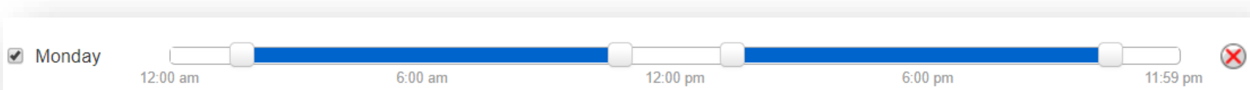
2. When you create a new Time Frame, you assign a unique name to it and then specify one of the following times associated with the time frame.

   Name – The Name field allows you to give the Time Frame a name that will help identify the rule. The name cannot be changed once the rule is created. If you want to change the name, delete the rule and recreate it under a new name.

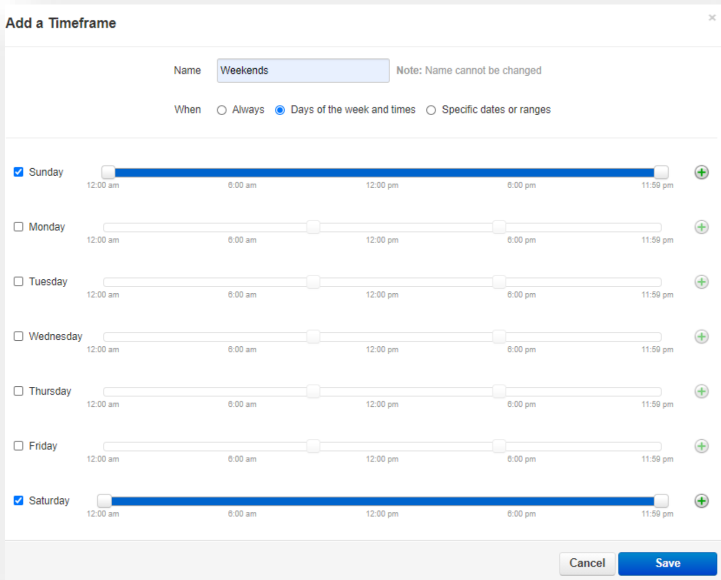
   Always – This option make this rule always in effect – 24 hours a day, 7 days a week, 365 days a year.

   Days of the Week and Times – Allows you to select the specific days of the week and the hours in the day you want the time frame to take effect. When selecting this option, the days of the week appear with a check box that allows you to select which days you would like the Time Frame active. Once selecting a day of the week, a blue bar appears allowing you to slide the ends to when you would like the time frame to stop and start. This is most commonly used to define office open hours such as Monday-Friday 8 am to 5 pm.

   If you would like a break in the middle of the Time Frame, click the **Plus** sign, you will then see another blue bar appear representing when the Time Frame will take effect.

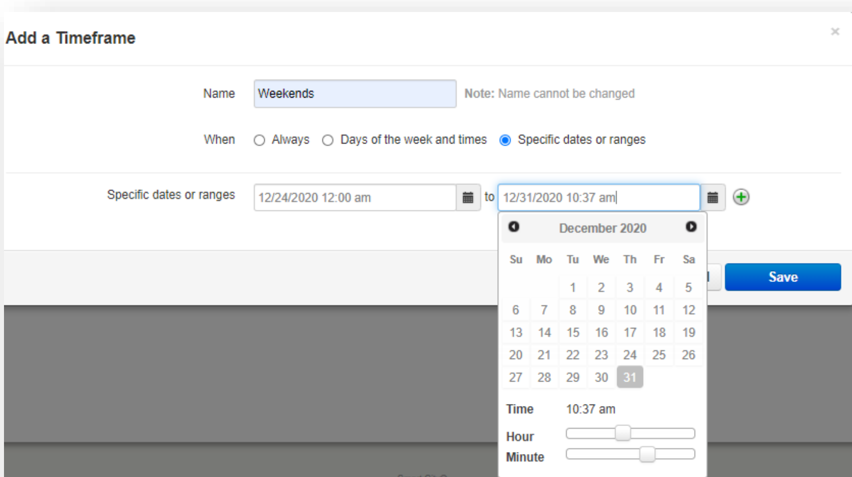


Setting Days of the Week and Times example:



Specific Dates or Ranges -- Commonly used to define holidays or other special events such as Fourth of July or a company closure. Use pop-up calendars to select the To and From dates when the time range will apply.

Setting Date Range example:

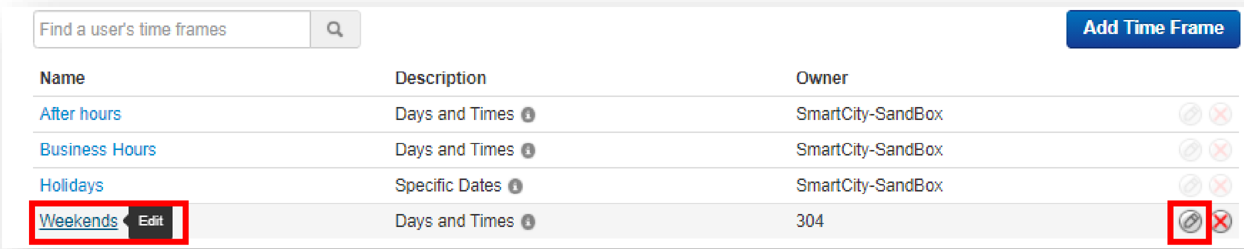


3. Hit the **Save** button.

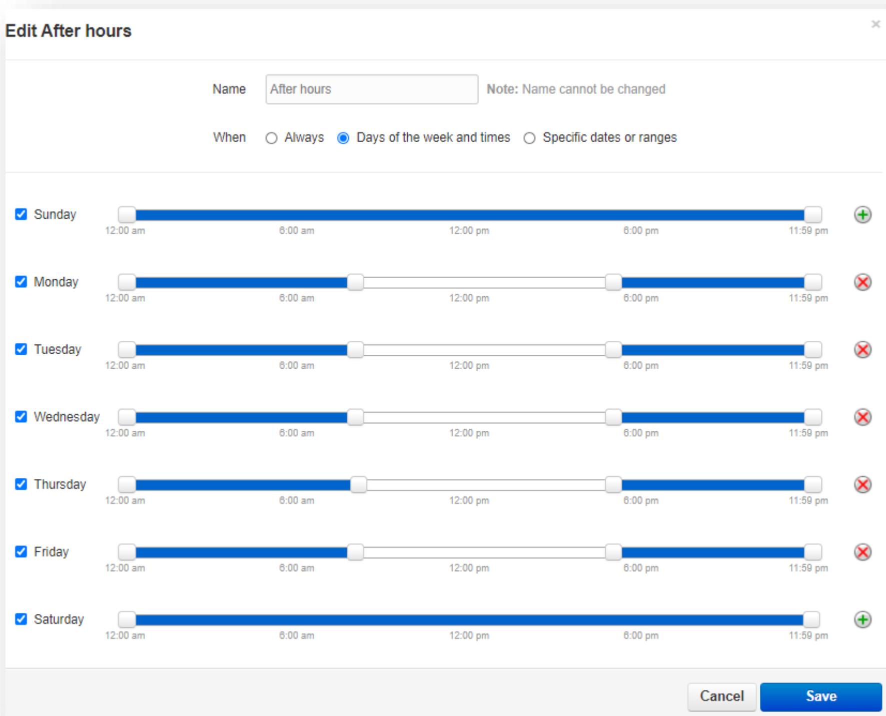
Editing Time Frames

If you need to edit an existing Time Frame, follow these steps.

1. From the **Time Frames** page, click on either the name of the Time Frame or hover over a name and click the edit icon on the right side.



2. The **Edit** pop-up window appears.

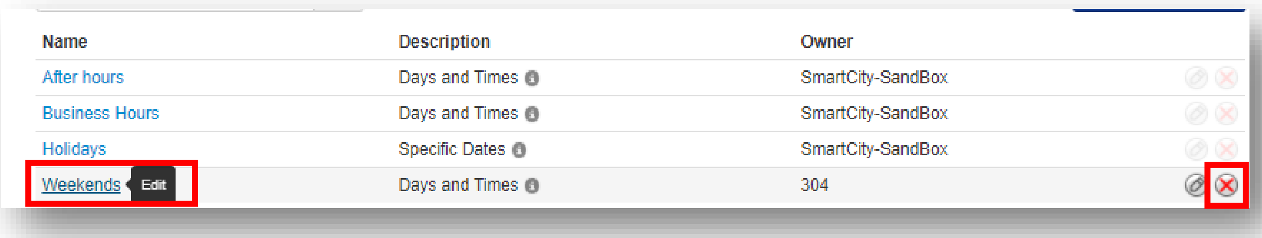


3. Make your changes and click **Save.**

Deleting Time Frames

If you no longer need a Time Frame, you can delete it from the platform.

1. From the **Time Frames** page, hover over the time frame, and click the Delete icon.

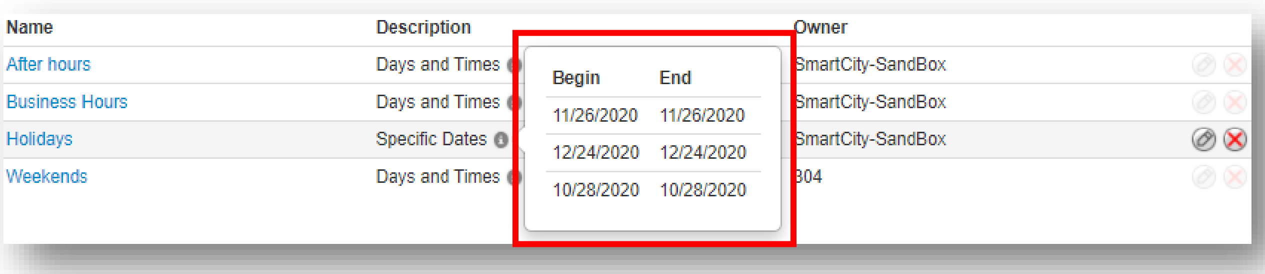


Name	Description	Owner
After hours	Days and Times	SmartCity-SandBox
Business Hours	Days and Times	SmartCity-SandBox
Holidays	Specific Dates	SmartCity-SandBox
Weekends Edit	Days and Times	304

2. Click **Yes** to delete the Time Frame, or **No** to retain it.

View Begin and End Dates

To view the begin and end dates for a Time Frame, hover over the description. A pop-up window will appear that will show the begin and end dates for the time frame.



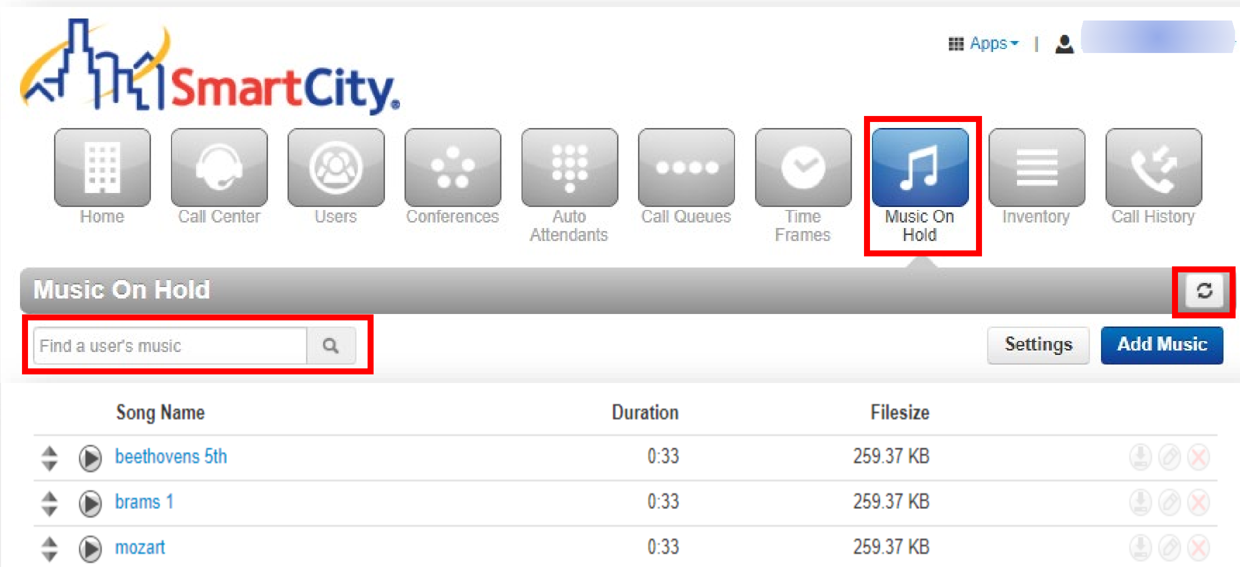
Name	Description	Owner
After hours	Days and Times	SmartCity-SandBox
Business Hours	Days and Times	SmartCity-SandBox
Holidays	Specific Dates	SmartCity-SandBox
Weekends	Days and Times	304

Begin	End
11/26/2020	11/26/2020
12/24/2020	12/24/2020
10/28/2020	10/28/2020

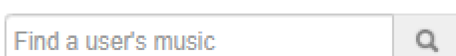
Music on Hold

The platform has a Music on Hold feature that plays when callers are on hold or waiting in queue. You can precede the first file with an optional introductory greeting.

All Music on Hold tasks are performed from the Music on Hold page. To display this page, click the **Music on Hold** icon on the menu bar. This will take you to your account's Music on Hold center and will list all the custom music uploaded to your account that is played when you place someone on hold. Music is played in a top-to-bottom order or randomized depending on how the queue was created.



A search field at the top left of the page allows you to view the Music on Hold files for a specific user by entering a file name, and then clicking on the magnifying glass icon, as shown above.



 This button at the top right side of the page refreshes the information on the page.

In this section, we will explain how to work with Music on Hold, including:

- Adding Music on Hold files
- Changing the order of the files
- Editing Music on Hold files
- Deleting Music on Hold files
- Adjusting Music on Hold settings

Music on Hold Page Layout

There are five (5) different User Interface (UI) layouts available for Music On Hold (MoH), with important differences between these UI layouts.

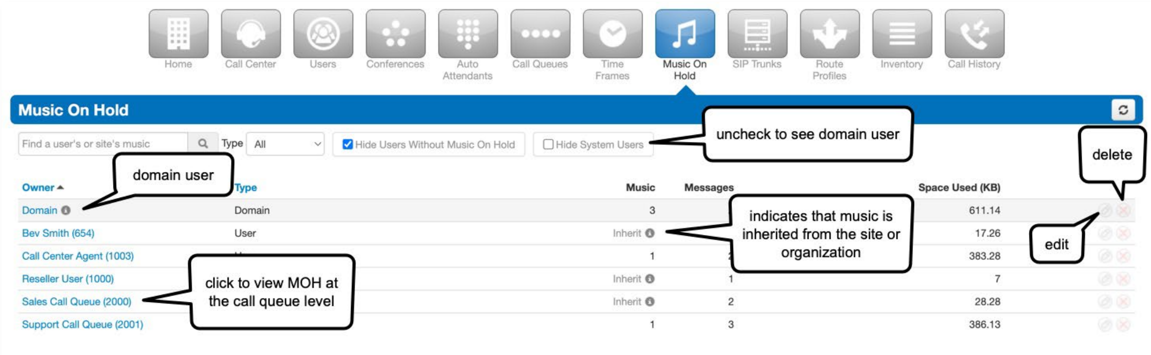
Music on Hold Page Layout	Description
Domain Level	Inventory table that lists all users and call queues with Music on Hold.
Domain User	Music/message panels for the domain that houses all default greeting files and images for the domain.
Call Queue	Displays the options for randomizing music, time between messages, and to add/remove music and messages for the call queue.
Site	Displays the options for randomizing music, time between messages, and to add/remove music and message for users.
User	Music/messages panels for the user that basic users and Call Center Agents access directly from the Music on Hold page to copy and modify music and messages from the site.

Domain Level MoH Layout

Known as the **Inventory Table for Music on Hold**, Administrators/Office Managers and above have access to the domain level MoH layout. By default, this table lists all the users and call queues with MoH. Uncheck "hide users without Music on Hold" to view all call queues and all users regardless of whether they have MoH or not.

The **Domain User** is also present in this list. By default, "hide system users" is unchecked on this page. If it is checked, then the domain user will be hidden. When a new domain is created, then the system creates a new user named domain. This user houses all default greeting files and images for the domain.

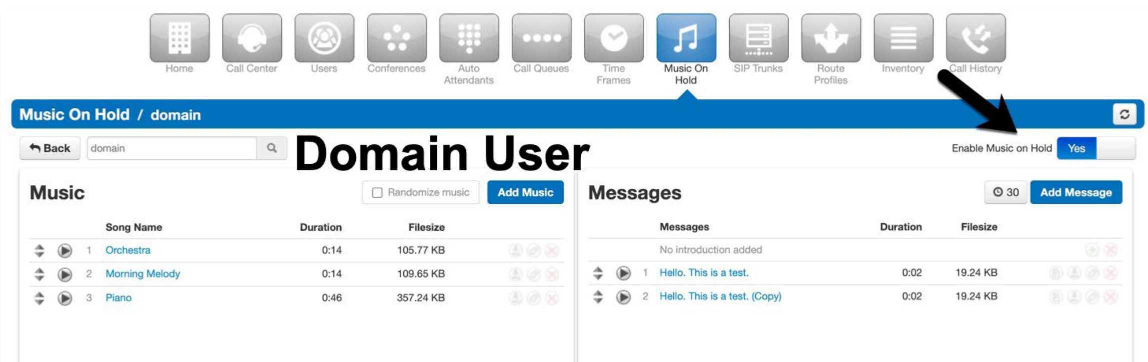
Inherit is a term that users may see in these rows to the direct left of either music or messages. This means that particular user or call queue is using music or messages that is inherited from the site or organization.



Domain User MoH Layout

When a new domain is created, the system creates a new user named **Domain User**. The Domain Users MoH layout houses all default greeting files and images for the domain.

There is a toggle for **enabling or disabling music on hold** on the domain user's MoH page that enables or disables MoH for the entire domain.

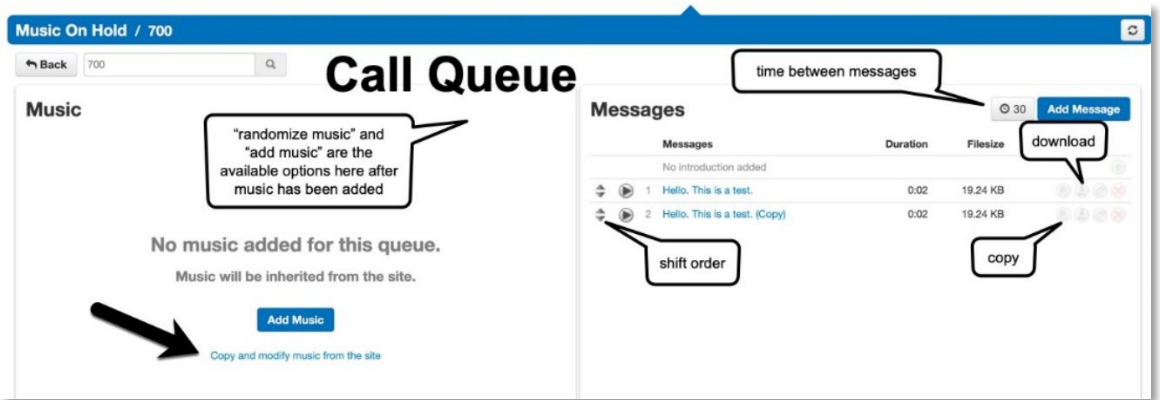


Call Queue MoH Layout

This is the MoH page inside of a call queue. It is accessible from an Administrator/Office Manager scope and above by either selecting a particular call queue in the **Domain Level MoH Layout** inventory table or by clicking the "edit MoH" music note icon across from a particular call queue on the **Call Queues** page.

The **Call Queue MoH Layout** displays the options for randomizing music, the time between messages, and to add/remove music and messages.

The ability to **"copy and modify"** music and messages from the site is only available when there is no music nor messages already in the table. Notice the **Music** panel on the left has the "copy and modify music from the site" option because there is no music there, but the **Messages** panel on the right does not have the option.

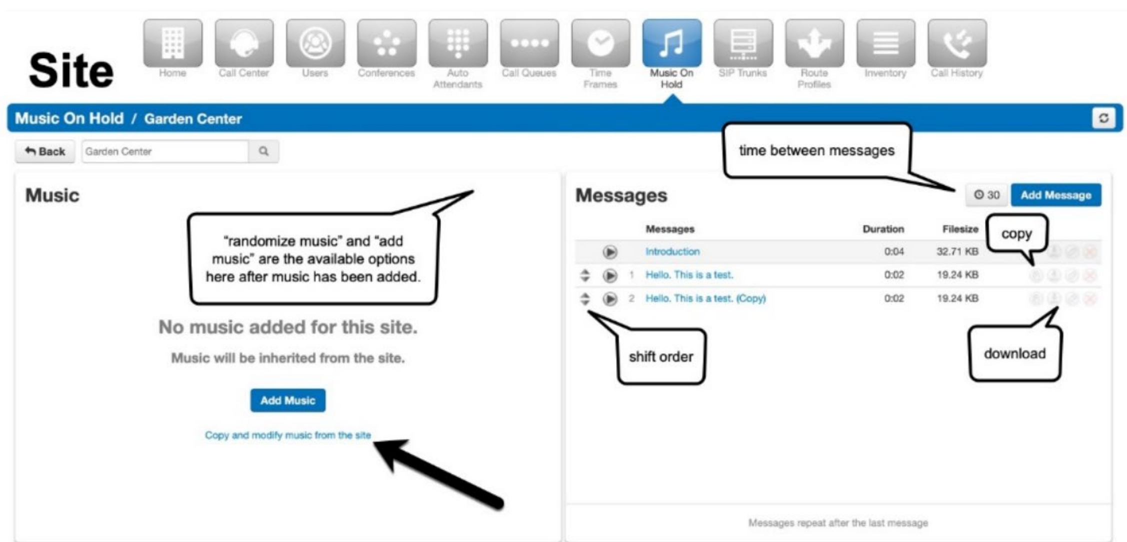


Site MoH Layout

This is the MoH page inside of a Site. It is accessible from an Administrator/Office Manager scope and above by clicking the "Edit MoH" music note icon across from a particular site on the **Users** page in the "Sites" tab.

The **Site MoH Layout** displays the options for randomizing music, the time between messages, and to add/remove music and messages.

The ability to **"copy and modify"** music and messages from the site is only available when there is no music nor messages already in the table. Notice the **Music** panel on the left has the "copy and modify music from the site" option because there is no music there, but the **Messages** panel on the right does not have the option.

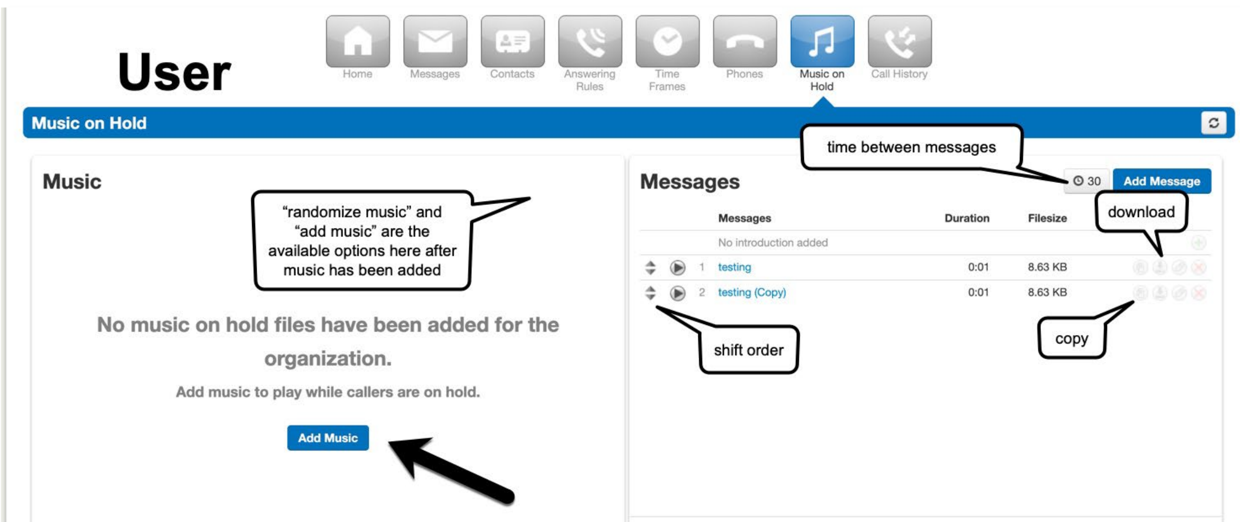


User MoH Layout

Basic Users and Call Center Agents access this page directly from the **Music on Hold** page. These user scopes do not have access to the MoH inventory table or the Domain User, and this is the only screen they see.

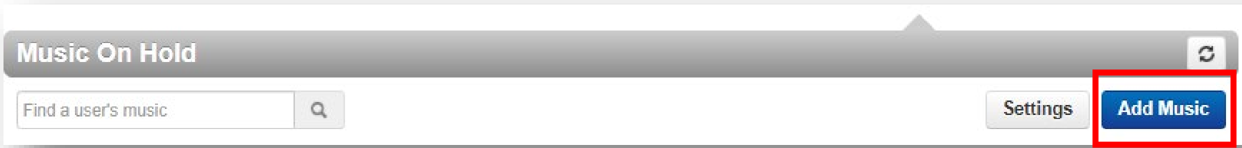
Administrators/Office Managers and above can access the **User MoH Layout** by navigating to their user name dropdown > **My Account** and then clicking on the **Music on Hold** page.

The ability to **"copy and modify"** music and messages from the site is only available when there are no music/messages already in the table.

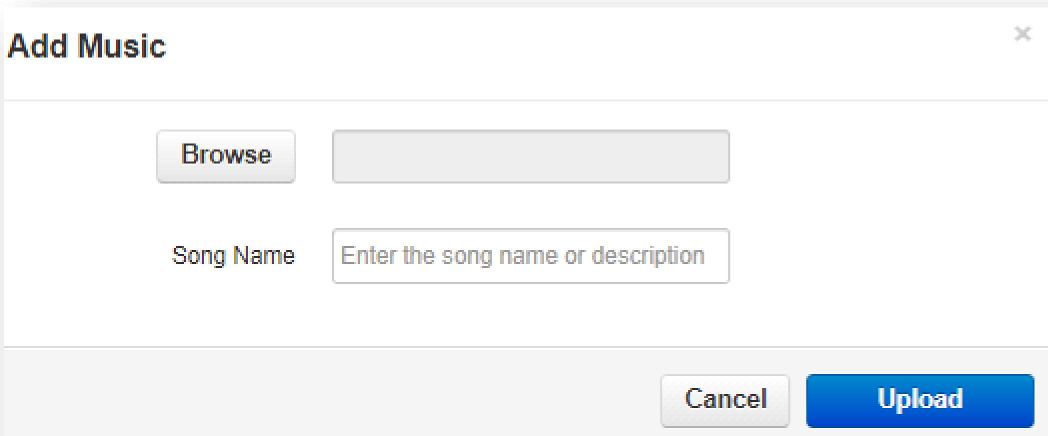


Adding Music on Hold Files

1. To add Music on Hold files to your account, click the **Add Music** button on the Music on Hold center.

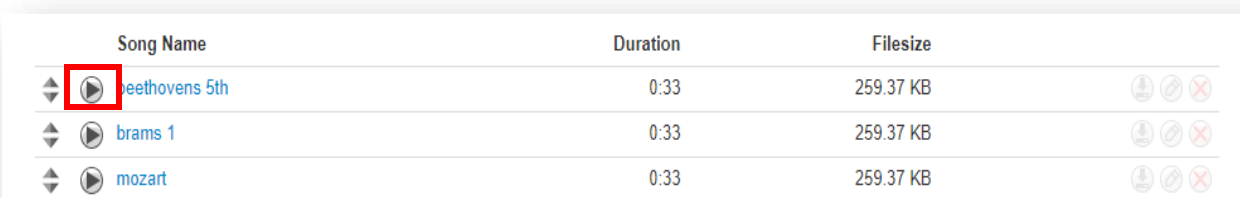


2. The **Add Music** pop-up window appears.



3. Click the **Browse** button to find the MP3 or.WAV file that you want to upload. Click the file and click **Open.** Click **Upload** to add to your Music on Hold library.

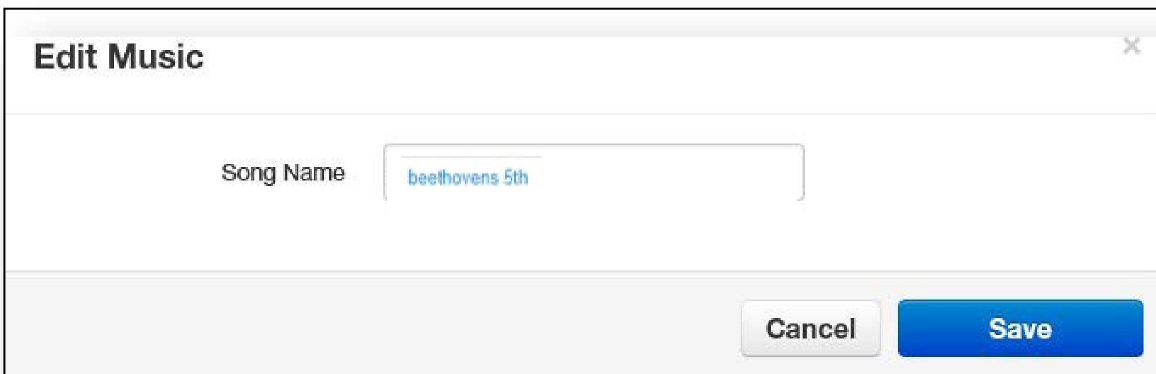
4. After the file is uploaded, you can play it on your computer by clicking the play icon to the left of the file on the Music on Hold page.



Editing Music on Hold Files

If you need to edit the name of the Music on Hold file, from the Music on Hold page, either click a file name, or hover over a file name, and then click the edit icon on the far right side of the Music on Hold page.

An **Edit Music** pop-up window will appear.



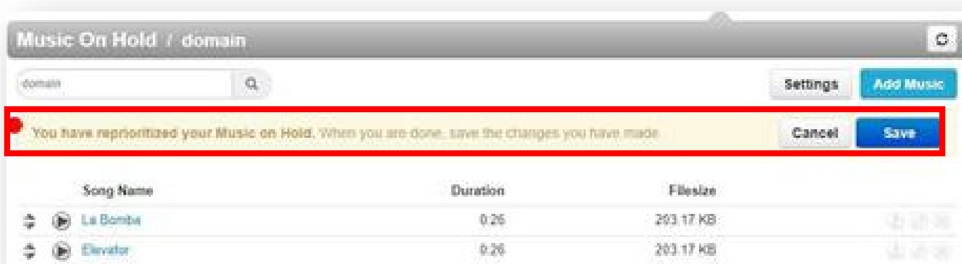
Make your changes and click **Save.**

Changing the Order of Music on Hold Files

Music on Hold files play according to the order in which they appear in the Music on Hold page, starting with the top file on the page, if the randomization setting is not selected. To change the order in which files are played:

1. On the left side of the Music on Hold page, hover your mouse over the up/down arrows for the file that you want to move (the pointer changes to a 4-headed arrow).

2. Hold down your mouse button, drag the file to the desired location, and then release the mouse button. A message tells you that the file has been reprioritized and prompts you to click **Save.**



Deleting Music on Hold Files

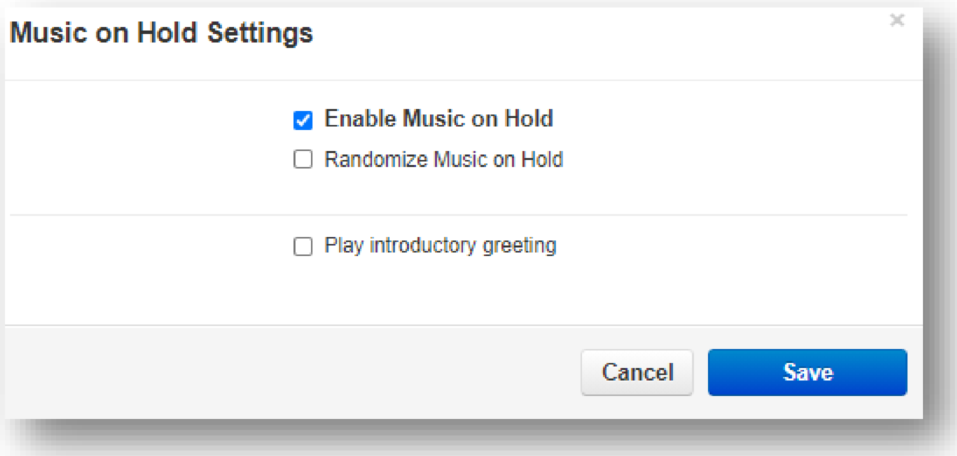
If you no longer need a Music on Hold file, you can delete it from the platform.

1. From the Music on Hold page, hover over the file name, and then click the **Delete** button.
2. Click **Yes** to delete the file or **No** to retain it.

Adjusting the Music on Hold Settings

To adjust Music on Hold settings:

1. From the Music on Hold page, click the **Settings** button. A Music on Hold Settings pop-up window appears.



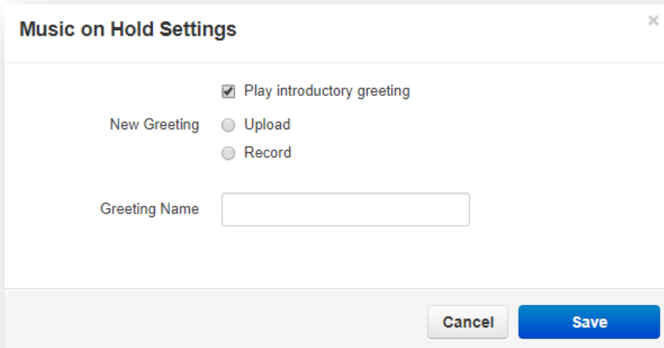
2. Complete the fields as described below.

Setting	Description
Enable Music on Hold	Enable by checking or disable by unchecking the Music on Hold feature.
Randomize Music on Hold	Play Music on Hold files in a random order (check) or according to their order on the Music on Hold center (uncheck).
Play Introductory Greeting	Play (check) or do not play (uncheck) an introductory greeting before playing the first Music on Hold file. See below on how to set up an Introductory Greeting.

3. Click **Save.**

Setting up an Introductory Greeting

1. From the Music on Hold **Settings** page, click **Play introductory greeting** as shown above.



2. Click **Upload** to and use the **Browse** field to add either a WAV or MP3 file of your introductory greeting.   This introductory greeting always plays first when someone is placed on hold, then music will play after.
3. In the Greeting Name field, enter a name for the greeting.
4. Click **Save.**

To record a greeting:

1. Next to New Greeting, click **Record.**
2. In the **Call Me** field, enter the number to call (either an extension or a telephone number such as your cell phone.)
3. In the Greeting Name field, enter a name for the greeting.
4. Click **Call.** Your phone will be called. At the prompt, record the new greeting, and then press **#** when you finish your recording.
5. Click **Save.**

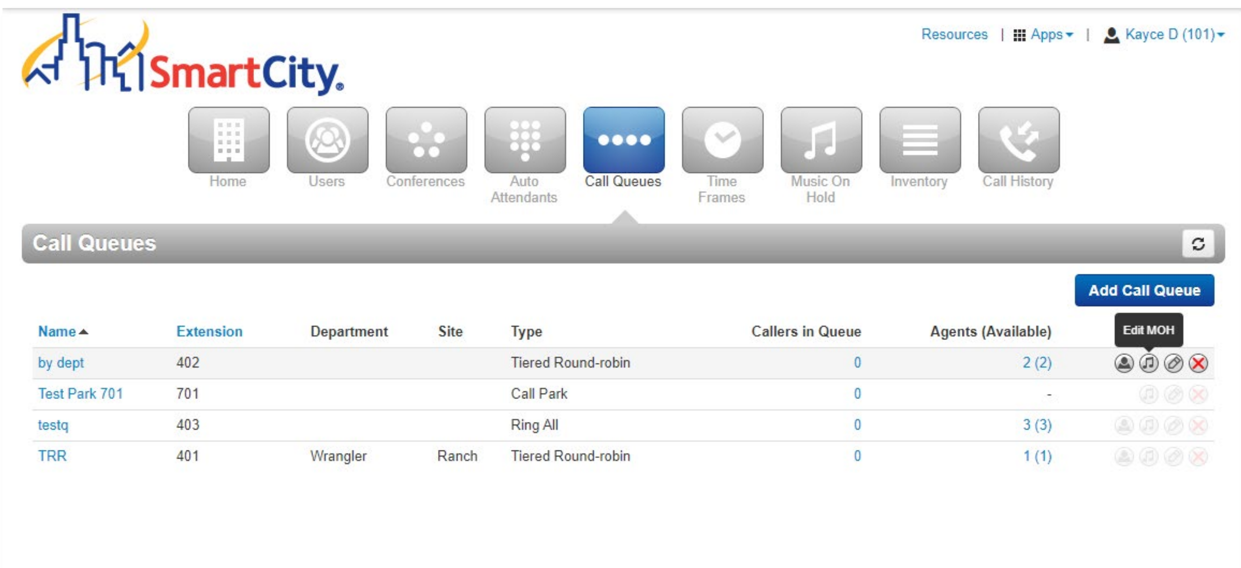
Customizable Music on Hold

Customizable Music on Hold gives you the ability to insert Music on hold and messages into audio that is already playing while a customer is on hold. For example, when a customer is on hold, the music can be briefly interrupted with a message such as "Your call is important to us. Please continue to hold and a representative will be with you shortly." This is often referred to as a comfort message – a message or recording that reassures the caller to not hang up. This message can be used for advertising, to announce scheduling changes, announce promotions or to specify wait times. You can copy this message and the time between messages is configurable.

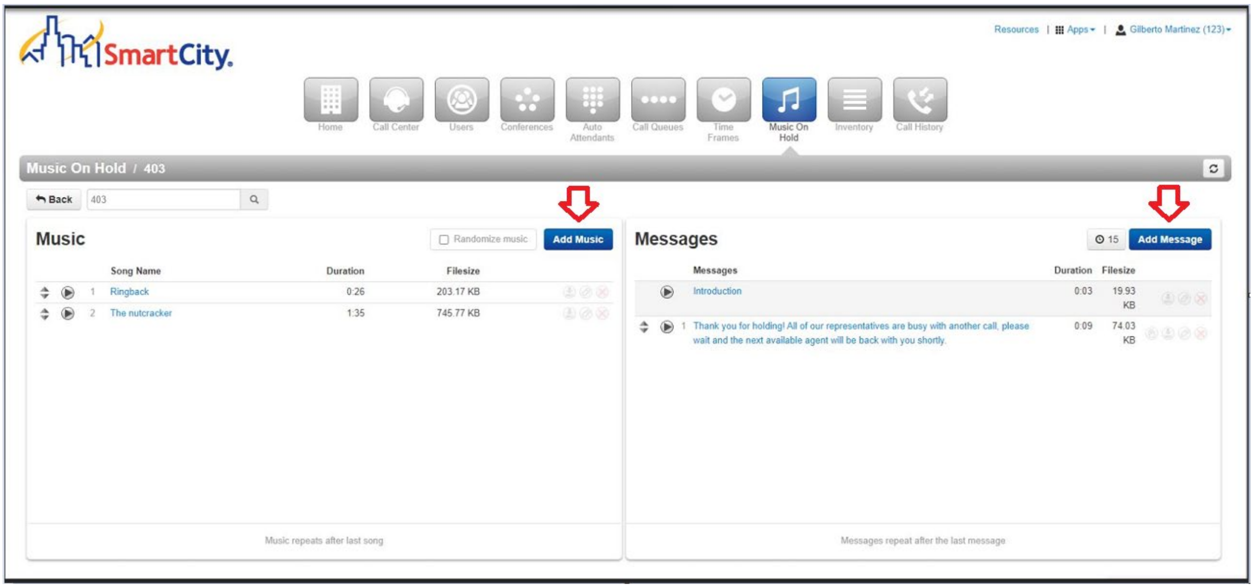
Add & Copy Music/Messages

Music can be added and copied from all Music on Hold user interfaces (UI) except for the **Domain Level Layout** where only the MoH inventory table is available. This section uses the **Call Queue MoH Layout** as an example for adding and copying music / messages.

1. In the portal, navigate to **Call Queues**. Across from a call queue, select the option to "Edit MoH".



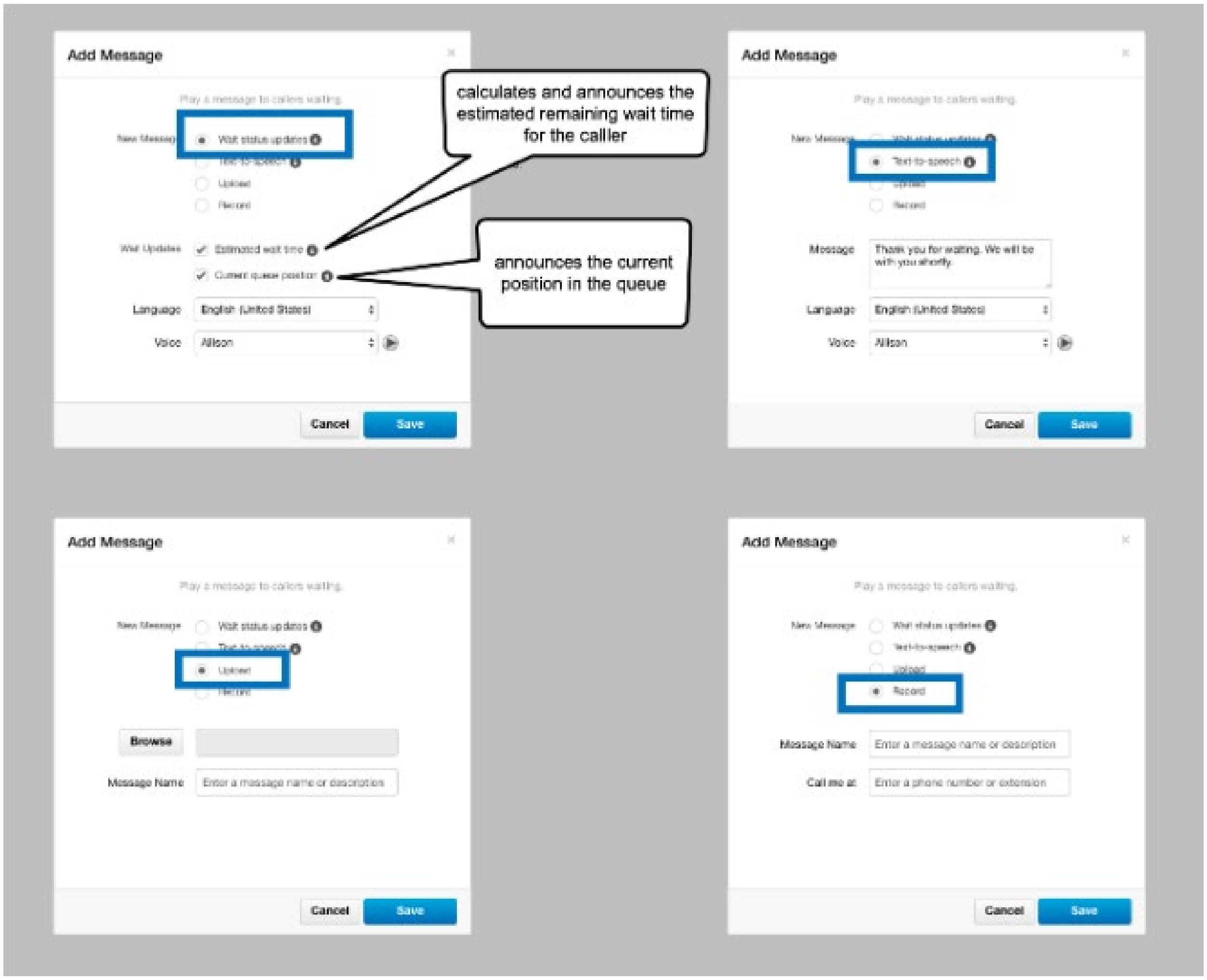
2. To add music or messages, click on the respective buttons on the MOH Screen: **Add Music** or **Add Message.**



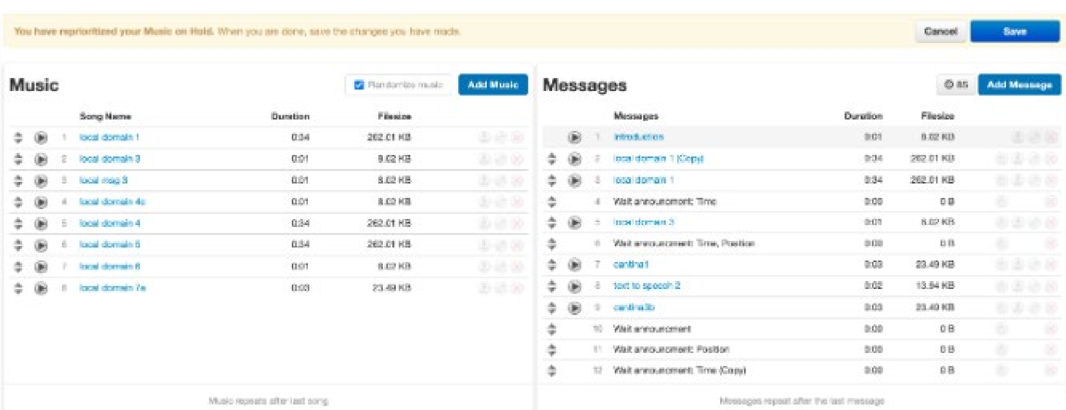
For **Music**, follow the prompt to upload an audio file and type in a descriptive name.

For **Messages**, select from the following options:

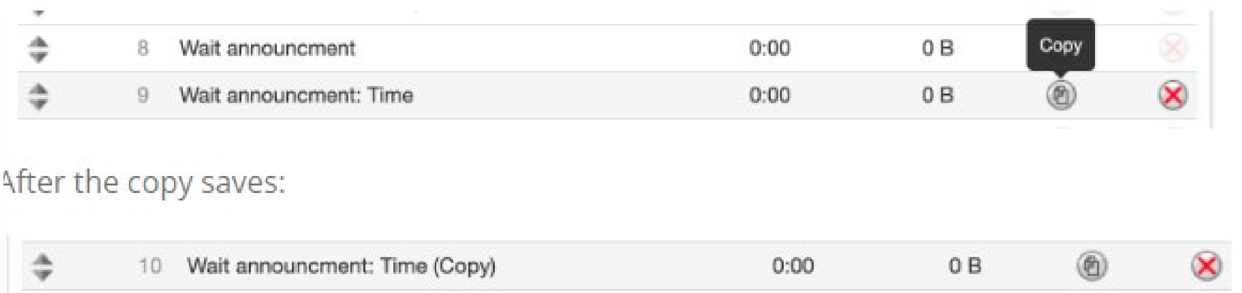
Message Options	Description
Wall Status Updates	Calculates and announces the estimated wait time and/or current queue position in a call queue.
Text-to-Speech	Translates your typed message to audio.
Upload	Allows you to select a file to upload.
Record	Ability to receive a call to record a message.



3. To **change the order or music or message**, drag and drop the row. Click **Save**. Music and messages can be re-ordered at the same time.



4. To **copy an existing message,** click the **Copy** icon within the row action tools. Clicking this will add the same message to the bottom of the list with "Copy" appended to the message name.



5. **Copy and modify the music from the organization** is an available selection in all Music on Hold user interfaces (UI) except for the **Domain Level Layout** where only the MoH inventory table is available.

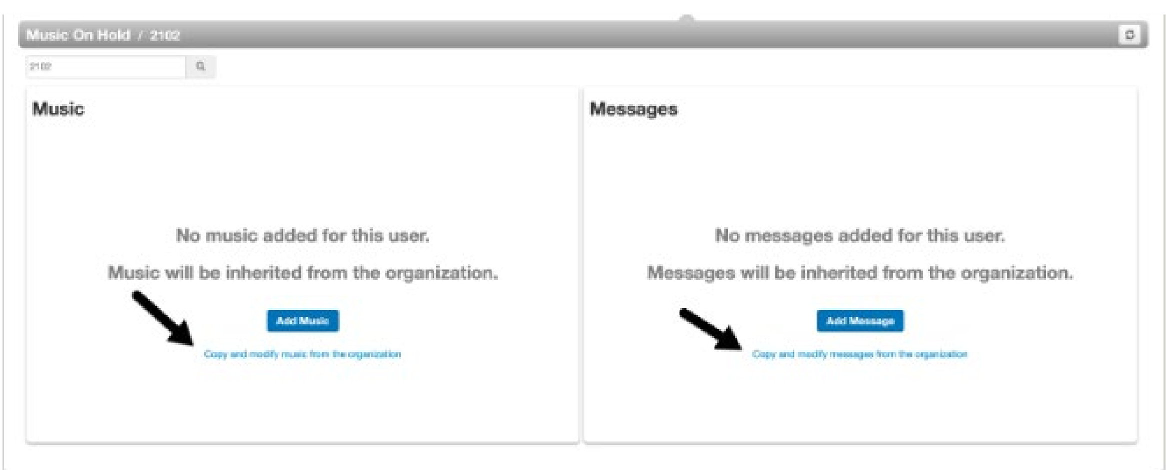
   If a user or call queue decides to copy music and/or messages from the organization, these become "static". While a user's UI is empty, they are dynamically inheriting their organization's defaults.

   After choosing to "copy and modify...", users can then modify or delete these music/messages as needed. This does not modify or delete the message/music from the entire organization. It only modifies it for the user or call queue - whoever is making the change.

   There are two instances where the "copy and modify" option is not available:

   1. If the user has added their own custom music and/or messages.

   2. If the organization does not have music or messages set.



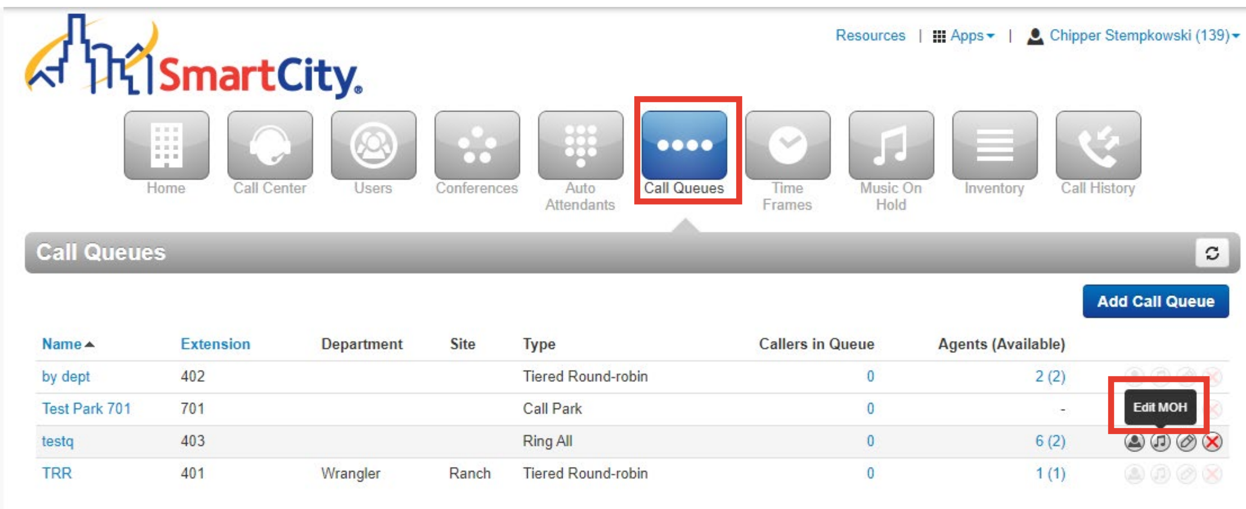
Randomize Music & Time Between Messages

Previously in the "Settings" modal, randomize music and time between messages is now available in both panels on the **Music on Hold** page.

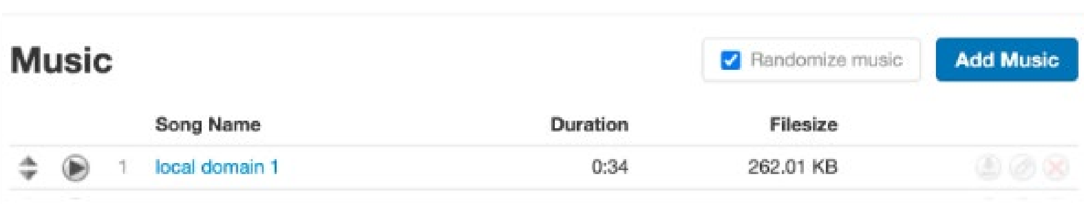
These options are available at all levels except for the **Domain Level Layout** where only the MoH inventory table is available.

This section uses the **Call Queue MoH Layout** as an example for randomizing music and setting the time between messages.

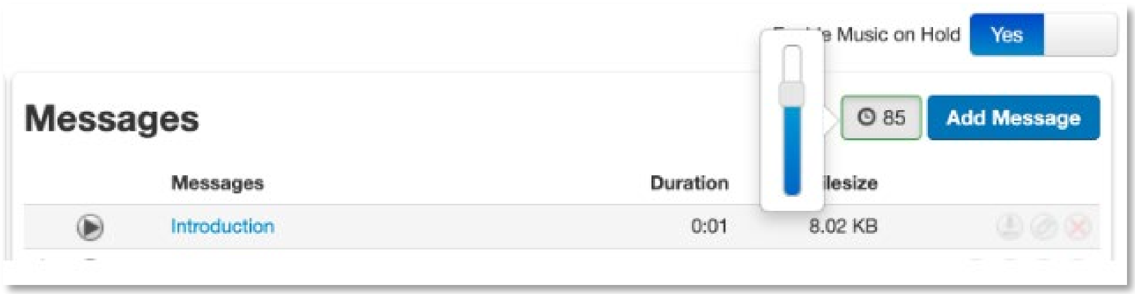
1. Navigate to the **Call Queue** screen and select the **Edit MoH** icon across from a call queue.



Randomize Music randomly orders the music when a user is calling in and is put on hold.



Time Between Messages is a slider (in seconds) of increments of 5. The range is from 15-120 seconds and defaults to 30 seconds. This will set the time between the end of one message and the start of the next one; within each of these breaks the music will resume.



Inheritance

Music and messages are inherited separately. One can be inherited without the other and vice versa. The more granular the level, the more priority. Continue reading for important clauses and things to remember:

Randomize / Time Between

Settings are inherited along with their corresponding table. The setting to "Randomize" is inherited along with music. The setting for "time between messages" is inherited along with messages.

No Music / No Messages

A user can set their own music and messages. If the user does not set either of these, they will automatically inherit from first their site and then if their site is empty as well, then finally from their domain. In this specific situation, the Portal will not display what a user has inherited. Inheritance is happening "behind the scenes". Their tables will appear blank.

For the user to see and modify what they have inherited, then they must select "copy and modify [...] from the organization". However, at this point, after clicking to copy, now their music/messages are static and no longer dynamically inherited. To revert to dynamically having the latest organization defaults, the user would have to delete all of their rows back to a blank UI.

Copy & Modify from Site/Organization

The option to "copy and modify" in each of the tables is only present when there is no visible music and there are no visible messages (the user has set neither of them up). After a user has added their own music or their own messages, the option to copy is gone. They can delete all their own added rows in order to view the copy option again.

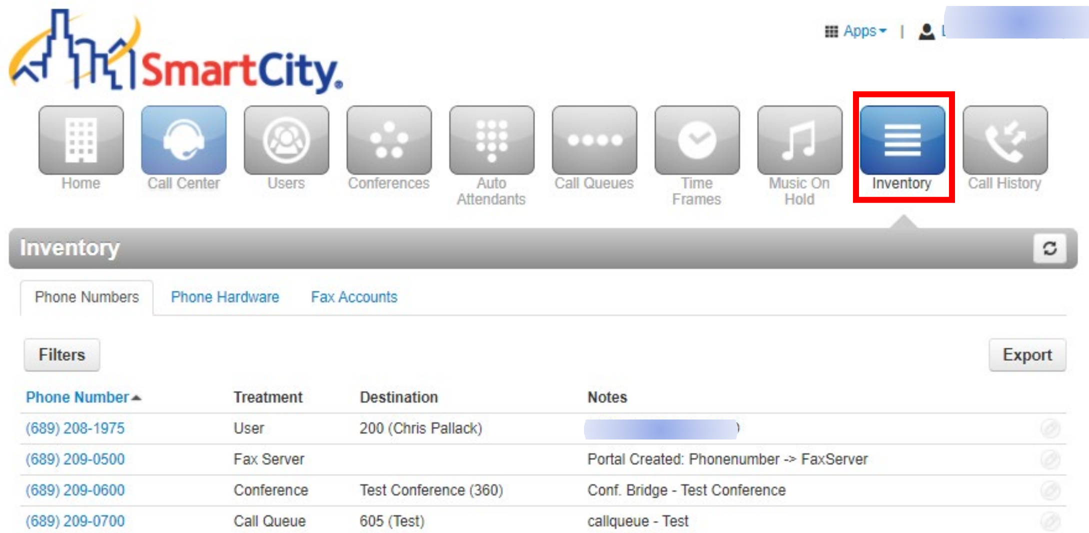
"Introduction" Greeting

The introductory greeting is an audio prompt with similar language to this: "Welcome to Company XYZ" It is a **greeting-1.wav** file managed in the Admin UI of the Core Module.

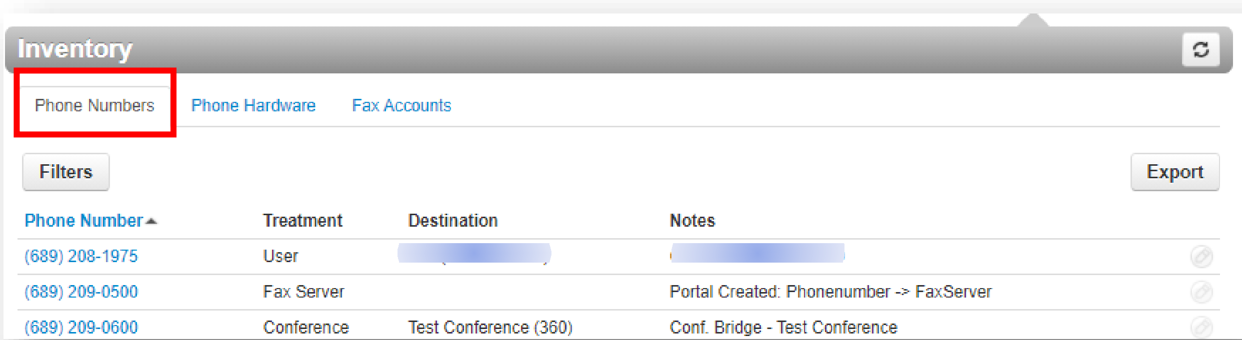
When it is inherited, this greeting exists in the first row of the **Messages** table by default. If a user has added custom music to their account, then they will no longer be able to inherit their site or domain "introduction" greeting.

Inventory

The Inventory icon is where you can control where phone numbers are routed for voice calls and SMS messages. This is also where you can configure devices to user's accounts.



Clicking the Inventory icon will take you to the Inventory Phone Numbers tab as shown below. The Phone Numbers tab lists all the phone numbers available to your organization.



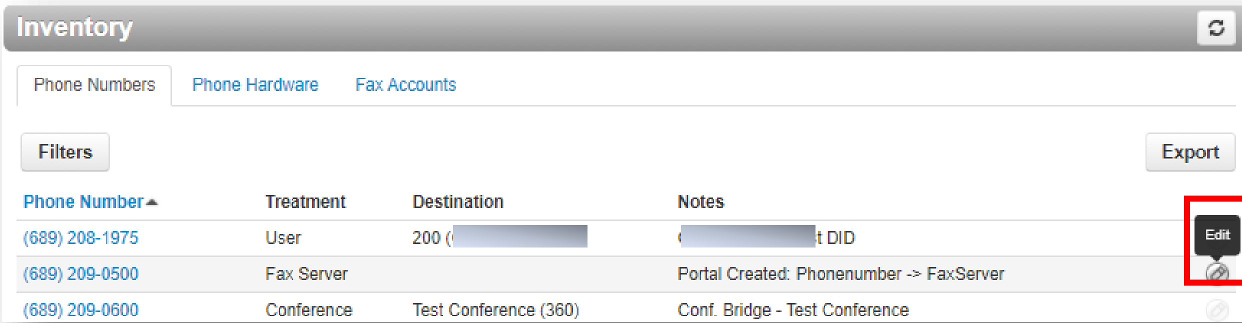
In this section, we will explain how to work with Inventory, including:

- Managing Phone Numbers
- Managing Phone Hardware

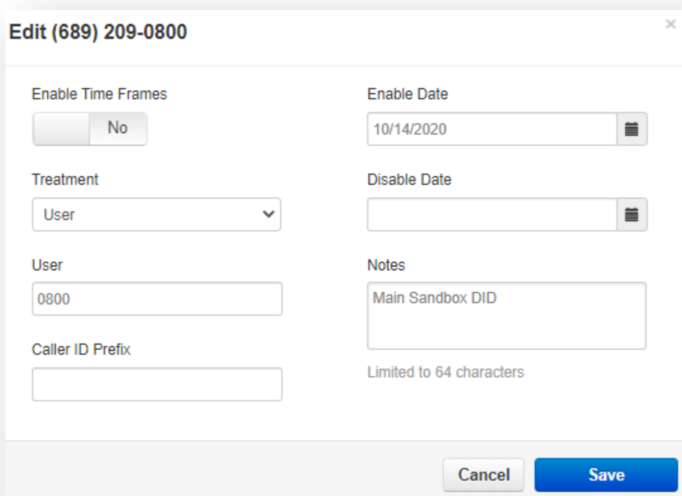
Editing Phone Numbers

The Phone Numbers tab allows you to filter, edit, and export phone numbers.

1. From the Phone Number tab, click the **Edit** icon to the far right next to the phone number will allow you to change control how the call will be handled.



2. When you click the **Edit** icon, you will get an Edit pop-up window.

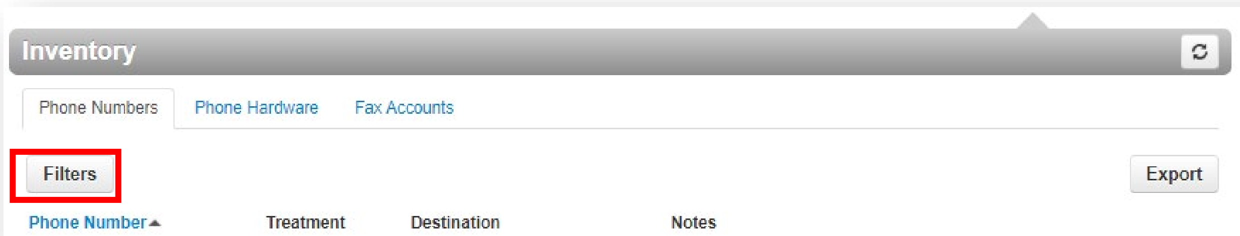


3. Complete the field as per the [Phone Number Filtering Table](#).

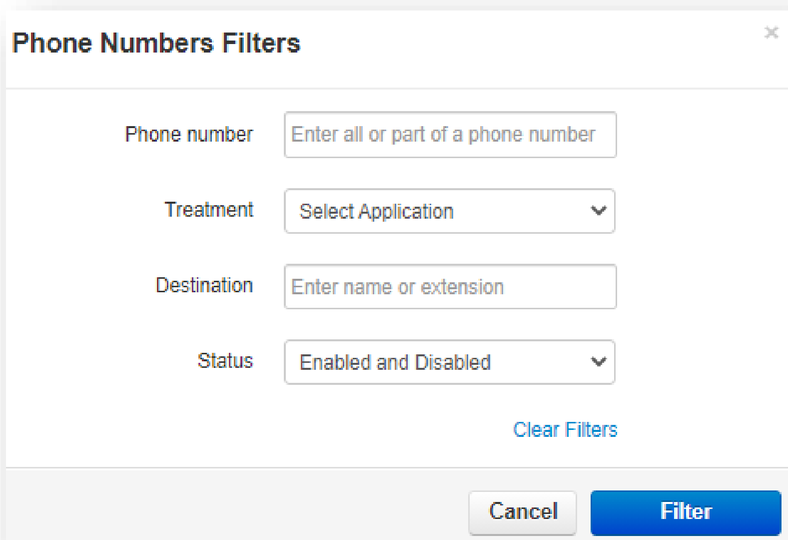
4. Click the **Save** button.

Filtering Phone Numbers

Using the **Filter** button, you can filter phone numbers and view only certain numbers you are interested in viewing. The Filter button allows you to search for phone numbers based on the Phone Number, Treatment, Destination, or Status.



1. Clicking on the **Filters** button gives the following pop-up window that displays the Phone Number Filters window.



2. Complete the fields are per the Phone Number Filter Settings table below.
3. Click the **Filter** button. The **Phone Numbers** tab shows only the phone numbers that match your criteria. If no phone numbers match your criteria, you will get a message that there are no matches to your filter.

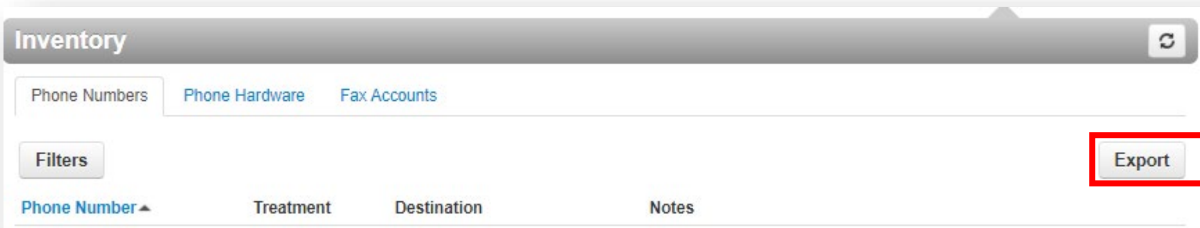
Phone Number Filter Settings

Filter Setting	Description
Phone number	Enter the phone numbers you want to view.
Enable Time Frame	Allows you to configure the phone number to route the call to different destinations throughout the day based off the time frame selected. After selecting **Yes,** select the time frame for the new rule and time zone drop down appears. Select a time frame from the drop down, select the application and destination you would like the call routed to.
Treatment	Select a treatment for the phone numbers you want to view. Choices are: • Available Number – Shows unassigned telephone numbers. • User – Allows you to select a user's extension in the organization to route calls to. • Conference – Allows you to select a conference bridge to send the call to. • Call Queue – Allows you to select a call queue to route the phone number to. • Voicemail – Routes to the specified user's voicemail box. • Auto Attendant – Routes to a specified Auto Attendant. • PSTN Number – Allows you to route the call to another phone number for the call to be sent to. This is helpful if you need to route calls to a 3rd party call center. • Fax Server – Routes to a fax number.
Caller ID Prefix	You can add a prefix to the Caller ID before sending it to the destination to help relay information to the person receiving the call such as which telephone number the call came in over.
Destination	Enter the name or extension of the phone destination.
Notes	Enter optional notes about this phone number.

Exporting Phone Numbers

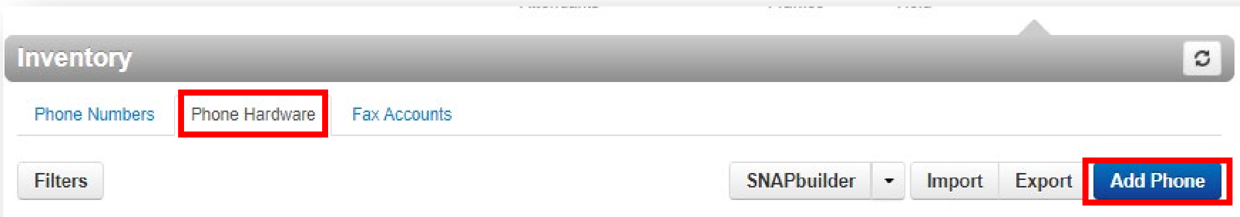
You can export phone number in CSV format, and then open the phone numbers in Microsoft Excel for further manipulation.

From the **Phone Number** tab, click the **Export** button on the right side of the screen. The file will automatically download as a CSV file. Save the file to your computer.



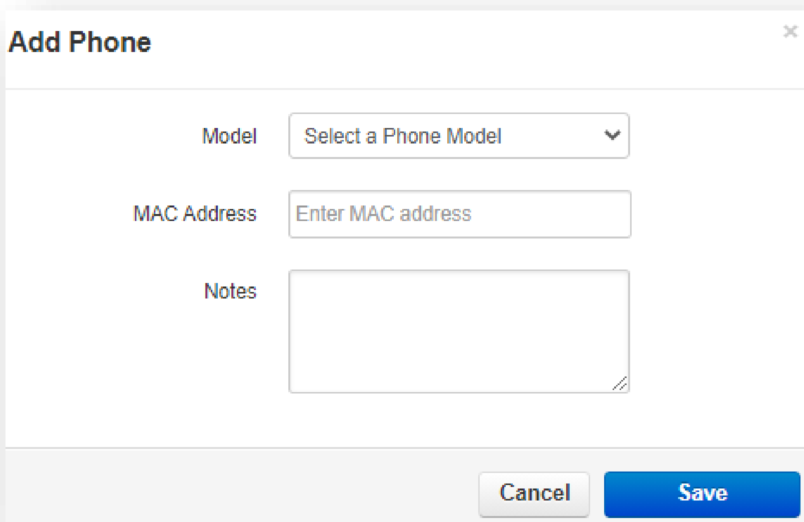
Managing Phone Hardware

The **Phone Hardware** tab lists all the devices configured on your organization, It allows you to filter, add, edit, and export information about the phone hardware in your platform.



Add a Phone

You can add phones to your organization and point them to Users by clicking the **Add Phone** button as shown above. When you click on the **Add Phone** button, the Add Phone pop-up window will appear.



Select the model of the device you want to add. Then, enter the MAC Address of the device. The user field will appear and allow you to select a user you would like to associate with this device. The **Notes** field allows you to add additional information you may find helpful.

Click the **Save** button.

Basic Phone Settings

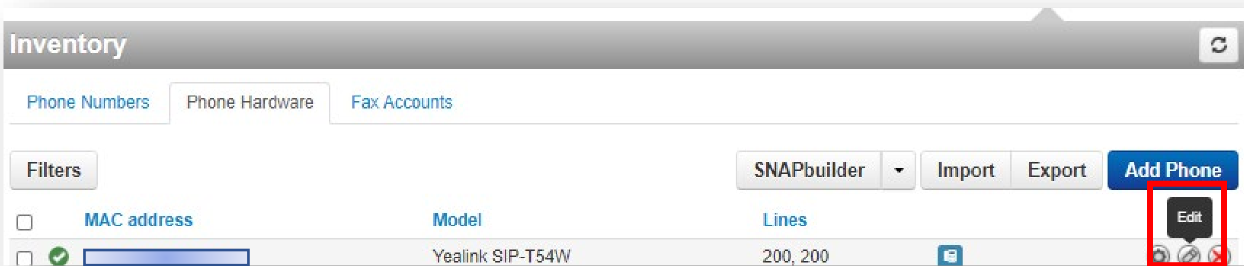
Setting	Description
Model	To add a phone, enter the telephone's make and model. The remaining fields that appear in this window depend on the make and model selected.
MAC Address	**Adding a phone:** Enter the telephone's MAC address. **Editing a phone:** Read-only field that shows the phone's MAC address.
Line	If your make and model have one more lines, enter them in these fields. The lines available for selection appear if the Add Phone Extension check box is checked when adding a user.
Notes	Enter optional notes about this phone.

Advanced Phone Settings

Setting	Description
Directory	After the device has been created, you can click the Edit icon and the Advanced Tab will appear allowing you to configure the device with a directory. The Directory drop down allows for you to configure if the device display by first name or last name. If you would like to create a company directory or your favorite contacts displayed on the device directory. If this setting is available for your make and model of phone, select a directory of this phone.
Preferred Server	If this setting is available for your make and model of phone, select the preferred server you want to associate with this phone.
Transport Method	Select a transport method for this phone. Choices are: • UDP • TCP • TLS

Editing a Phone

1. To edit phones, from the **Phone Hardware** tab, either click a MAC address or hover over a phone number, and then click the edit icon on the far-right side.

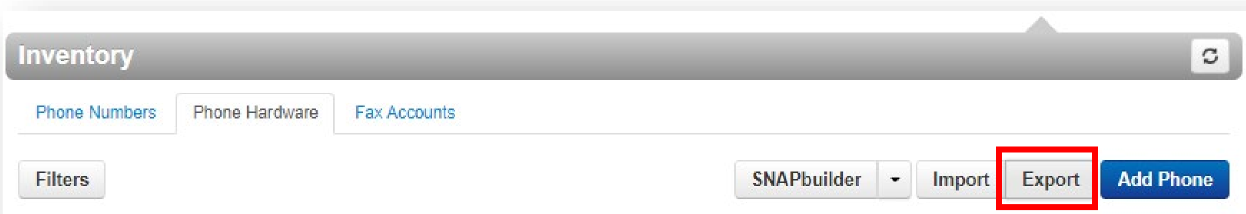


2. Either option will pop up an **Edit** phone pop-up window.
3. Complete the fields the in the Basic and Advanced tabs as found in the Phone Settings Tables.
4. Click **Save.**

Exporting Phone Hardware Information

You can export phone hardware information in CSV format, and then open the information in Microsoft Excel for further manipulation.

1. From the **Phone Hardware** tab, click the **Export** button.



Exporting Phone Hardware Information

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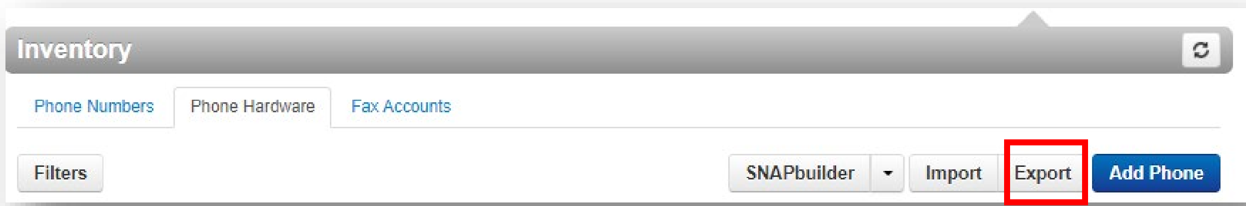
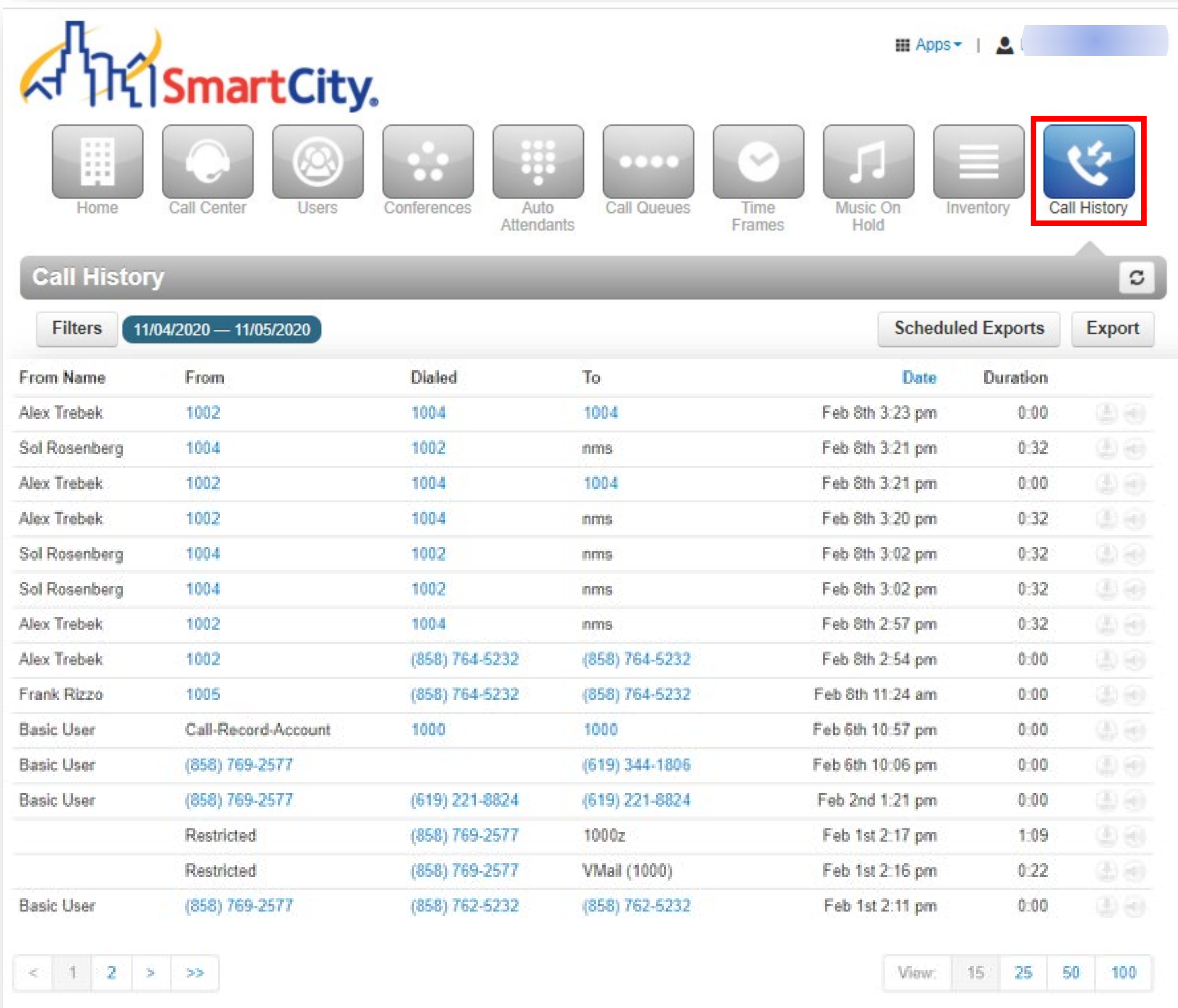


2. When prompted, click **Save.**

Call History

Call History is a list of all calls made to and from your organization and can be found by clicking on the Call History icon on the main menu bar. From here, you will have the ability to review, filter, and export call logs for greater analysis.

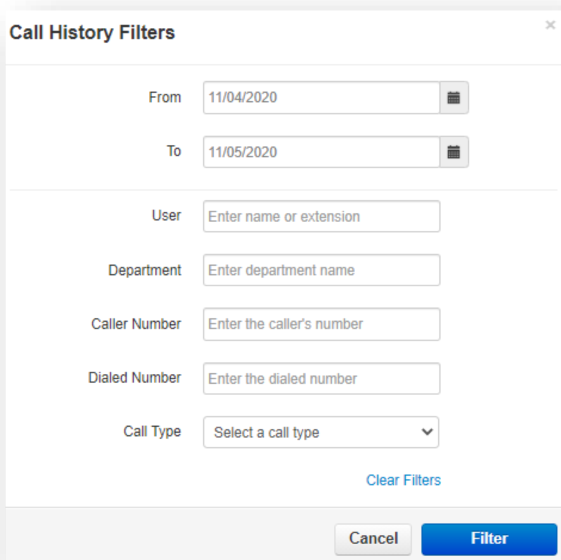


Call History Filters

The Filter button will open the Call History Filters window, as shown below, and will allow you to filter for calls from a specific:

- **Date Range** – Select the From and To dates for the events you want to review. The maximum From-To range is 31 days.
- **User** – Enter the name or extension you want to view.
- **Caller Number** – Enter the caller's number to view.
- **Dialed Number** – Enter the dialed number you want to view.
- **Call Type** – Enter the type of call you want to view. Choices are Inbound, Outbound, and Missed.

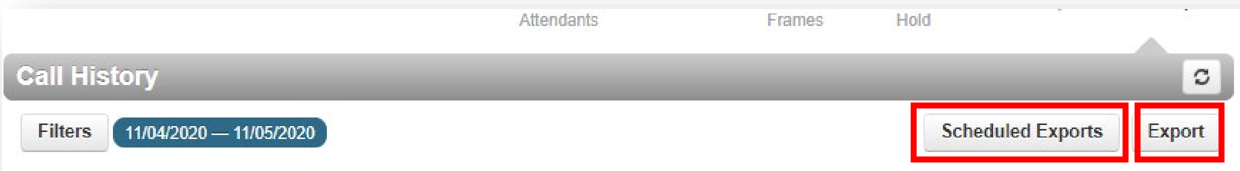
Only the calls that meet the Filter criteria are displayed.



Exporting Call History

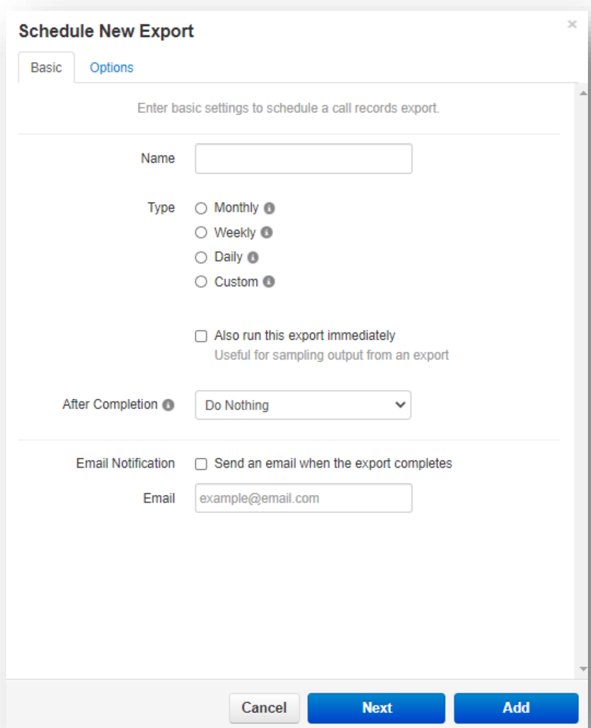
You can export the call history in CSV format, and then open the information in Microsoft Excel for further manipulation.

1. From the Call History page, click the **Export** button.
2. When prompted, click **Save**.



Scheduled Exports

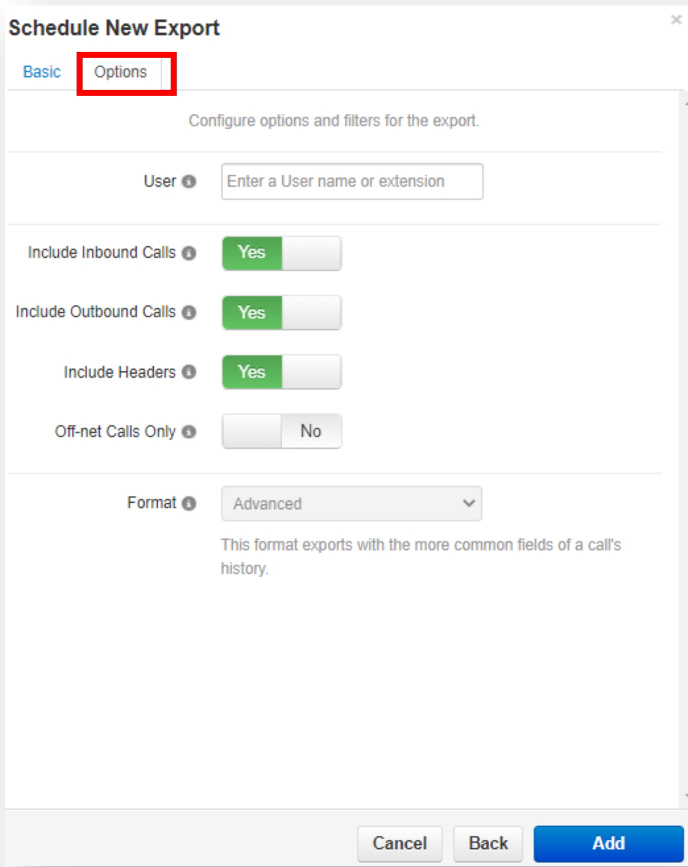
You can also configure a scheduled export by clicking the Scheduled Exports button. The following Schedule New Export window will pop-up.



Complete the fields and hit the **Add** button.

Scheduled Export Settings	Description
Name	Give the export a name that you can identify.
Type	This will allow you to select the frequency that you want the report to run: • Monthly – Select the day of the month for the report to run • Weekly – Select the day of the week and time of day to start • Daily – Select the time you want the report started. • Custom – Will allow you to select the period of time you want to capture, the time you would like the export to start, the time zone you want the export calls to be in. It will allow you configure if you would like the export to repeat and at what interval to repeat.
Also run this export immediately	Allows you to run this export immediately. It will send an export as soon as the scheduled export has been created.
After Completion	Allows you to determine how you would like to receive the export. Options include: • Do nothing • Email attachment • Upload via FTP • Upload via SFTP
Email Notification	Allows you to send an email when the export is completed.

The **Options** tab will allow you to filter for a specific extension. Select if you want the export to include Inbound Calls, Outbound Calls, Headers, or filter for off-net calls only. You can select the format of the CSV file.



Click the **Add** button when you are completed.

After the Schedule export has been created, you can edit any of the options by clicking the edit icon. Download the scheduled export.