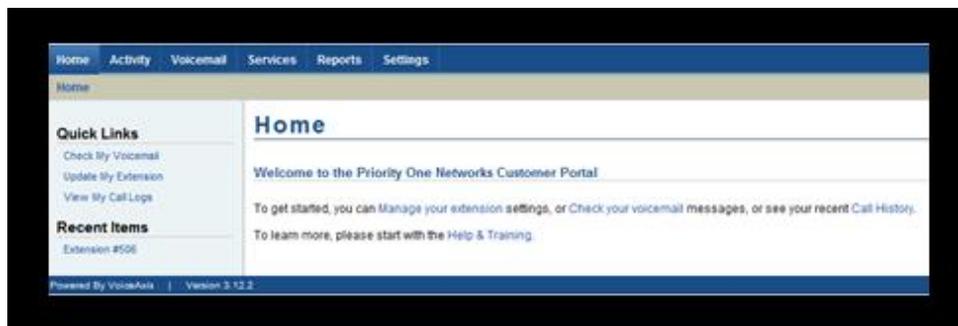


TeleDynamic | *we get it*
COMMUNICATIONS

Administrator web portal Guide

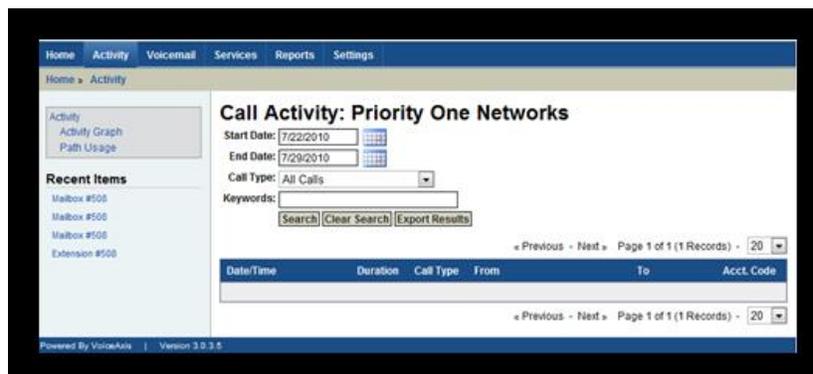
ACCESSING YOUR PBX ACCOUNT

Navigate to <https://pbx.teledynamic.com> and log in to the PriorityOne portal account. If you would like your web browser to keep you logged in when you navigate away from the page, check the **Remember Me** box. You will be welcomed by the **Home screen** of the portal once logged in.

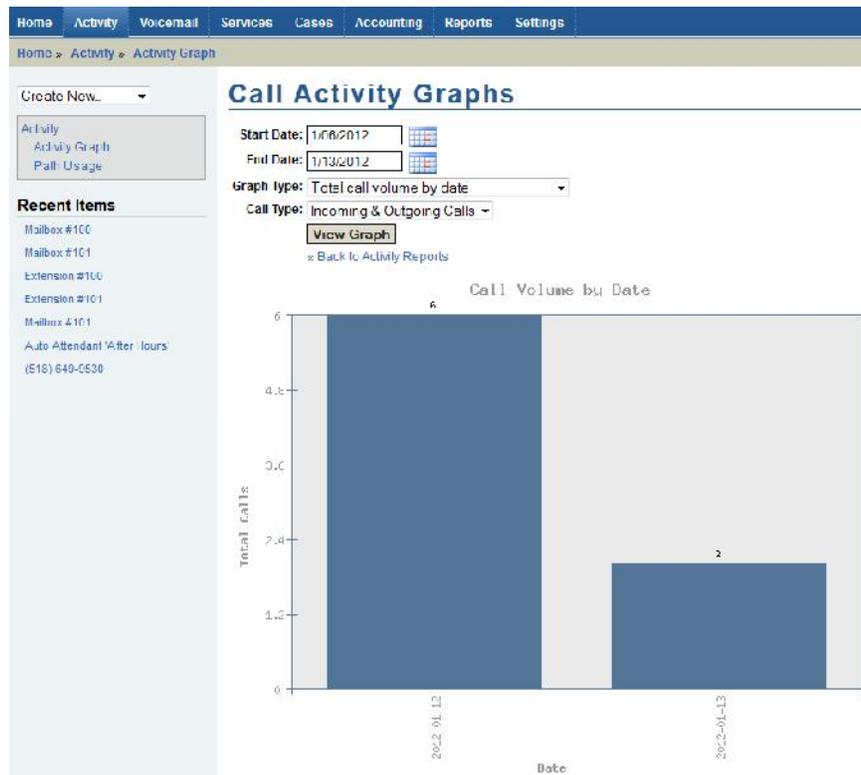


CHECKING ACCOUNT ACTIVITY

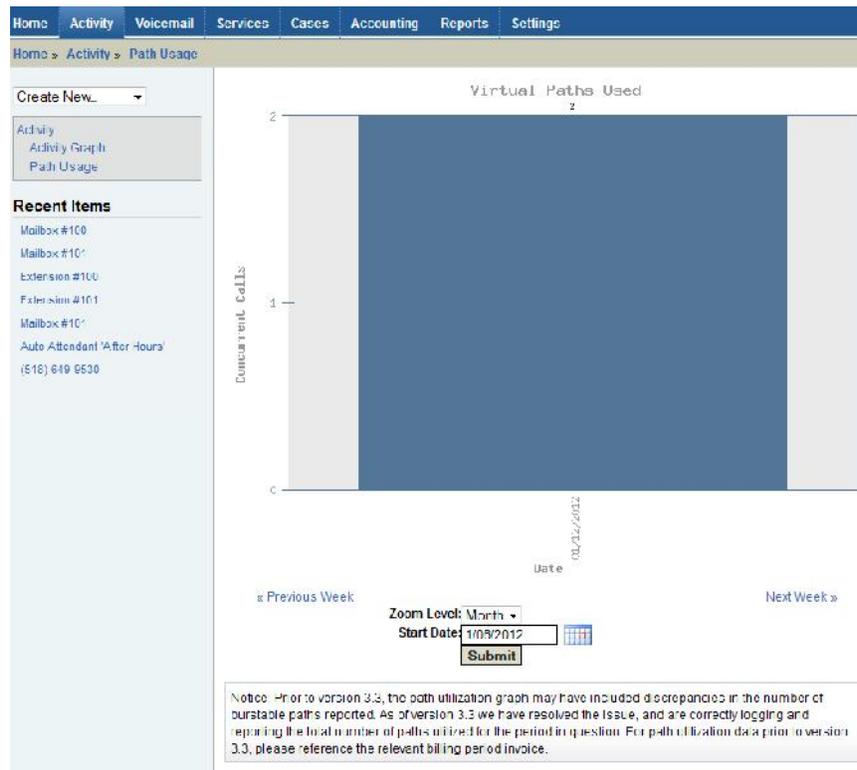
To view call activity of the PBX, click **Activity** at the top of the screen. It is searchable by date, call type, extension, or phone number. Select a start and end date, call type (incoming, outgoing, or both), an extension, or a phone number, and click **Search**. You will be presented with a list of all calls matching your search criteria.



Located underneath the **Activity** menu, you will find **Activity Graph**. Here, you can view a report in graph form of incoming and outgoing calls. Select the start date, end date, graph type, and call type. **Click View Graph** to view the graph according to your specifications.



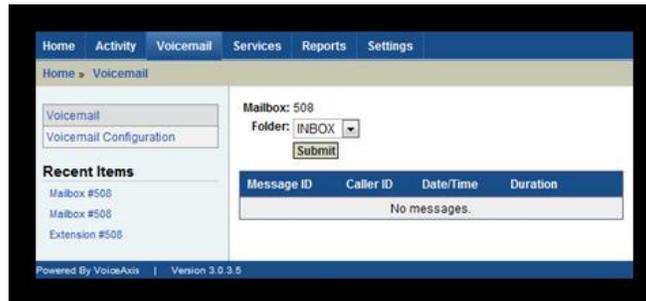
Below **Activity Graph**, is **Path Usage**. This page displays the virtual paths used in relation to concurrent calls. Select the Zoom level, Start date, and **click Submit** to view the graph.



VOICEMAIL

Voice-mails can be accessed by **clicking on the Voicemail tab at the top of the screen**. The Voicemail screen shows the list of voicemail messages currently in user mailboxes. Each message can be downloaded for listening or be deleted.

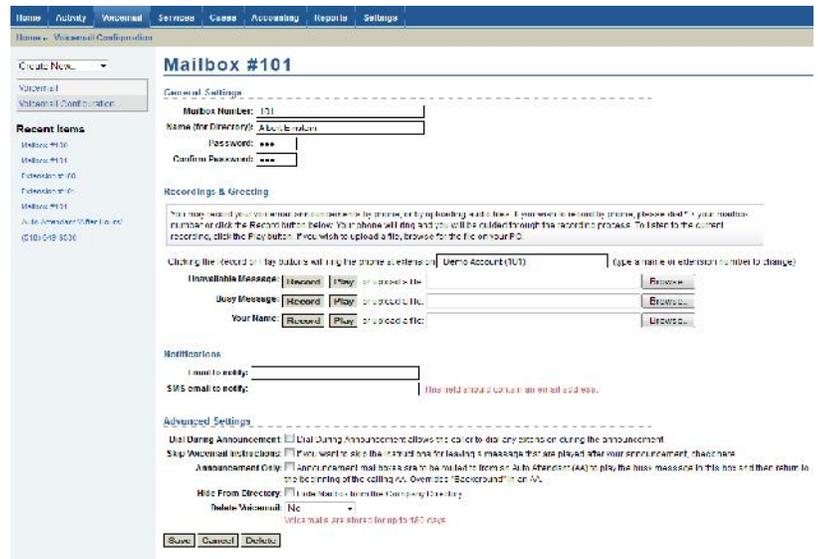
To view the contents of a mailbox, **select a folder, and click Submit**. You will be presented with a list of messages. To listen to or download the message, **click the Listen** link for the message you wish to hear. To delete the message from the mailbox, **click the Delete button**.



VOICEMAIL CONFIGURATION

The **Voicemail Configuration** screen, located under **Voicemail**, shows the settings of the voice mailbox associated with extensions. You can modify general settings such as name and password, recordings and greetings, notifications, and advanced settings.

- **General Settings:** Edit the mailbox number, name, and password in General Settings.
 1. **Mailbox Number:** Each mailbox number requires a unique number. It is suggested that you make this a 3-5 digit number. It may be different than the user's extension number, but it is usually the same.
 2. **Name (for directory):** This is the name that is used for the company directory listing that callers can use to find a user. It should be a first and last name.
 3. **Password:** A numeric password that a user will enter to access their mailbox. This must not be the same as the mailbox number, or the user will be prompted with the mailbox setup wizard each time they log into their mailbox. Confirm password by typing the same password beneath Password.



General Settings	
Mailbox Number:	101
Name (for Directory):	Albert Einstein
Password:	●●●
Confirm Password:	●●●

- **Recordings and Greeting:** You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record by phone, please **dial * + your mailbox number or click the Record button below**. Your phone will ring and you will be guided through the recording process. To listen to the current recording, **click the Play button**. If you wish to upload a file, **Browse for the file** on your PC. You can set up a separate greeting for Unavailable Message, Busy Message, and Your Name.

- **Notifications:** Set up notifications to receive by Email or SMS messaging to notify you when a voicemail is received.
 1. **Email to Notify:** If a valid email address is entered, a message will be sent to that address every time a message is received. The audio of the message will be attached to the email in a .WAV file.
 2. **SMS email to Notify:** If a valid email address is entered, a message will be sent to that address every time a message is received. The audio of this message will not be attached, however.

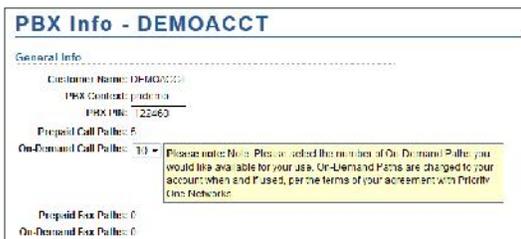
- **Advanced Settings:** Under Advanced Settings, you have the option to edit Dial During Announcement, Skip Voicemail Instructions, Announcement only, Hide from Directory, and Delete voicemail.
 1. **Dial During Announcement:** If checked, a caller will be able to dial an extension during the user's announcement.
 2. **Skip Voicemail Instructions:** If checked, the PBX system will not play generic instructions to the caller. Only the user's recording will be played, followed by a beep. Check the box if you want to skip the instructions for leaving a message that are played after your announcement.
 3. **Announcement Only:** If checked, the caller will not have the option to leave a message. The user's recording will play, then the caller will be returned to the attendant.
 4. **Hide from Directory:** If checked, mailbox will not show up in the directory.
 5. **Delete Voicemail:** Voicemails are stored for up to 180 days. Here, you can select the number of days you wish to keep them.

PBX CONFIGURATION

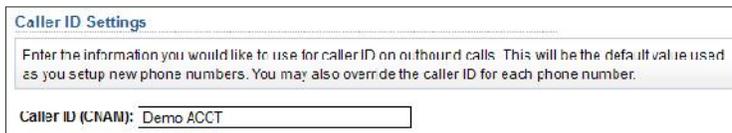
The bulk of the functionality of the Customer Portal is within the **PBX Configuration** module, **located under the Service tab** at the top of the screen. In this module, all PBX settings are administrated, including phone numbers, extensions, mailboxes, call routing, auto attendants, conference bridge, call blocking, after hours settings, and E911.

- **PBX Info:** The PBX Info screen shows basic information about your PBX account, such as General Info, Caller ID Settings, and PBX Features. **You will come right to the PBX Info screen when you click on Services at the top of the screen.**

1. **General Info:** Here you will see Customer Name, PBX Context, PBX pin, Prepaid Call Paths, On-Demand Call Paths, Prepaid Fax Paths and On-Demand Fax Paths. The PBX Pin is used by employees to verify their identity when speaking on the phone. Use this Pin when calling for support. Select the number of **On-Demand Paths** you would like available for your use. On-Demand Paths are charged to your account when and if used, per the terms of your agreement with PriorityOne Networks.

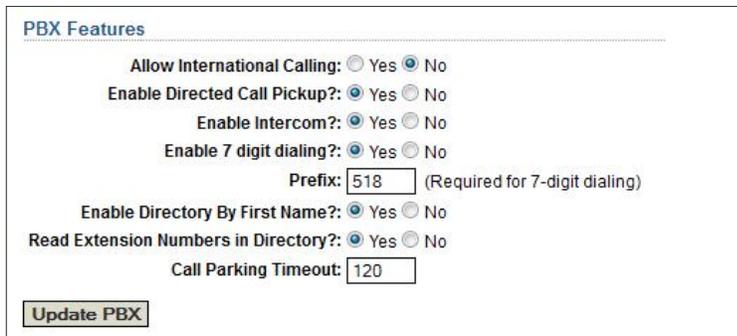


2. **Caller ID Settings:** Enter the information you would like to use for Caller ID on outbound calls. This will be the default value used as you setup new phone numbers. You may also override the Caller ID for each phone number. The **Caller ID (CNAM)** is the Caller ID name displayed to a called party for on-network outgoing calls.



3. **PBX Features:** Here you can enable and disable certain settings. **Click Update PBX to save and update features after editing.**

- **Allow International Calling:** If set to “No” then outbound international calls can not be made from this account.
- **Enable Directed Call Pickup?:** If enabled, all users of the PBX will be able to dial *8 plus an extension number to answer a call ringing another user’s phone.
- **Enable Intercom?:** If enabled, all users of the PBX will be able to dial *1 plus an extension to activate the intercom features of the phone. This currently only works with Polycom devices.
- **Enable 7 Digit Dialing?:** If enabled, all users will only be able to dial using 7 digits.
- **Enable Directory by First Name?:** If enabled, directory will go by first name instead of last name.
- **Read Extension Numbers in Directory?:** Directory will read the extension number to the caller before presenting dialing options.
- **Call Parking Timeout:** Displays call parking timeout in seconds. Default is 10 minutes = 600 seconds.



PHONE NUMBERS

Phone Numbers that are assigned to the PBX are visible in the **Phone Numbers** section of the Portal. Here, you have the ability to modify the call routing and behavior of incoming calls, as well as Caller ID Name. To modify the behavior or details of a phone number, **click Phone Numbers under the Services tab**, then **click Edit** on the phone number you wish to edit:

- **Phone Number:** At the top you will see the phone number configured to the PBX that you want to edit, which is also the Incoming Number. Then you will see Toll Free Number and State. The Toll Free Number is set to “Yes” then the configured phone number is a Toll Free number which all incoming calls are billed. Select the state where this PBX is located.

The screenshot shows the 'Phone Numbers - DEMOACCT' interface. On the left is a navigation menu with options like 'PBX Info', 'Phone Numbers', 'Extensions', etc. The main area displays a table of phone numbers with columns for 'Phone #', 'Caller ID (CNAM)', 'Rings To', 'Toll Free?', and 'Active?'. The table contains four entries, with the first one being '(518) 649-9530' with 'DEMOACCT' as the caller ID and 'SIP Trunk Test Standard' as the ring to destination.

Phone Number (518) 649-9531

Incoming Number: (518) 649-9531
Toll Free Number?: No
State: -- Select --

- **Caller ID Settings:** Enter the information you would like to use for caller ID on outbound calls. To use the default value setup for your account on the PBX Info screen, click the “Use Default” hyperlink.
 1. **Caller ID (CNAM):** The text that will appear on the called party’s called ID display when you make outgoing calls from this number. This may take up to 7 days to take effect.
 2. **Internal Presentation:** The settings of the field determine what will be displayed on the caller ID display of the phone or device. If “**Show Called ID**” is checked, then the caller’s ID will be presented.

Caller ID Settings

Enter the information you would like to use for caller ID on outbound calls. To use the default value setup for your account on the PBX Info screen, click the “Use Default” hyperlink.

Caller ID (CNAM): DEMOACCT (518) Use Default (Updated on 7/26/2011 02:33:57)
Internal Presentation: Show Caller ID

- **Call Routing:**
 1. **If Holiday:** This setting determines how incoming calls to this number will be routed on days marked as a Holiday.

Call Routing

If Holiday: -- Select --
Route To: Extension 100 (SIP Line 1)

The options for Call Routing on a Holiday are as follows:

The screenshot shows the 'Call Routing' configuration page. The 'If Holiday' dropdown is set to '-- Select --'. The 'Route To' dropdown is open, showing a list of options: Extension, SIP Trunk, Phone, Mailbox, Group, Auto Attendant, Time Frame, Conference, Conference Hub, Queue, Outside Number, Company Directory, Check Voicemail, and Custom Setting. The 'Route To' field currently displays '100 (SIP Line 1)'. Below the configuration fields are 'Save' and 'Cancel' buttons. At the bottom, there is a 'Record History' table.

Date	User	IP	Operation
08/31/2011 01:23:42 PM	Randy Zielinski (rzielinski@priorityonenet.com)	24.103.182.194	Modified
01/07/2010 09:41:55 AM	John Hopper (jhopper@priorityonenet.com)	24.97.144.66	Modified
01/07/2010 09:40:57 AM	John Hopper (jhopper@priorityonenet.com)	24.97.144.66	Created

From the drop down menu, there are fourteen options to select for **Call Routing If Holiday**. Select Extension from the first drop down menu and then select the exact extension you want to route to in the second drop down menu. Select SIP Trunk or Phone Number and then select the SIP Trunk or Phone Number to route to in the second drop down menu. The same goes for Mailbox, Group, Auto Attendant, Time Frame, Conference, Conference Hub, Queue, Outside Number, Company Directory, Check Voicemail or Custom Setting.

2. Route To: This settings determines how incoming calls to this number will be routed.

This screenshot shows the 'Call Routing' configuration page with the 'Route To' dropdown menu open. The first dropdown is set to 'Extension' and the second dropdown is set to '-- Select Extension --'. The list of options in the dropdown menu is the same as in the first screenshot. Below the configuration fields are 'Save' and 'Cancel' buttons. At the bottom, there is a 'Record History' table with columns for 'Date' and 'User'.

From the drop down menu, there are fourteen options to select for **Call Routing Route To**. Select Extension from the first drop down menu and then select the exact extension you want to route to in the second drop down menu. Select SIP Trunk or Phone Number and then select the SIP Trunk or Phone Number to route to in the second drop down menu. The same goes for Mailbox, Group, Auto Attendant, Time Frame, Conference, Conference Hub, Queue, Outside Number, Company Directory, Check Voicemail or Custom Setting.

- **Features:**

1. **Hold Music Group:** Select the Hold Music you wish to be played when a caller is placed on hold.
2. **Screen for Privacy:** If set to **“Yes”**, then incoming calls that do not have a 10-digit caller ID will be asked to enter a 10-digit number to identify themselves before the call will be connected.

Features

Hold Music Group: Default ▼

Screen for Privacy: Default
Music

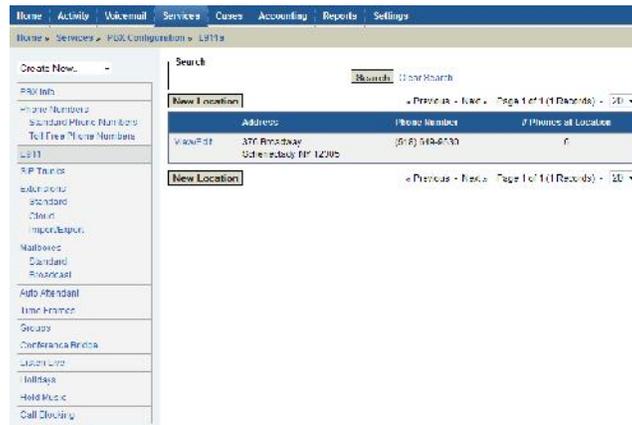
Features

Hold Music Group: Default ▼

Screen for Privacy: No
No
Yes

E911

To meet Federal regulations, each phone must have the ability to dial 9-1-1 and be connected to a **Public Safety Answering Point (PSAP)**. When 9-1-1 is dialed, the PSAP must be presented with a callback phone number, and a physical street address. Therefore, each extension entered into the Customer Portal must have an associated E911 address. To associate an E911 address with extensions, first you must enter E911 locations in the E911 module. **Click on New Location from the E911 locations list screen under Services.**



On the New E911 Location screen, you will be asked to enter an address. Enter the geographical street address of your office. If you have multiple locations, you will need to add multiple E911 Locations. Make sure the street address entered is valid, it will be verified by the national E911 system before being accepted. If you enter your address, and receive an error about not being able to verify the address, go to the United States Postal Service's Find a Zip Code utility, **enter your address and click Submit**. The USPS website will present you with a properly formatted version of the address you entered. Copy and paste that address into the form in the Customer Portal.

After filling in the street address, you must select which phone number to associate this address with. This phone number will be the callback number presented to the emergency personnel when someone dials 9-1-1 from this location. Note that each of your phone numbers can only be used for a single E911 location.

New E911 Location

Address

This is the street address of your location where phones will be present.

Name:

Street:

Street 2:

City:

State: Pennsylvania ▼

Zip Code:

Phone Number

Each E911 location must be associated with one and only one phone number for callback purposes. Please select the number for this location.

(518) 549-9530 (in use)

(511) 549-9531

(518) 549-9532

(518) 549-9533

(518) 549-9534

After selecting the phone number, you may optionally associate this new E911 location with any existing extensions, or none if you choose. **Click the check box** next to each extension that will be located at this address.

Associate with Phones		
Each phone must have an associated E911 Address. Please select the phones which will be present at the above address from the list below. This can be changed at any time.		
<input checked="" type="checkbox"/> All	Extension	Current Address
<input type="checkbox"/>	100 - SIP Line 1	375 Broadway Schenectady, NY 12305
<input type="checkbox"/>	530 - Rich Hall	375 Broadway Schenectady, NY 12305
<input type="checkbox"/>	501 - SIP Line 2	375 Broadway Schenectady, NY 12305
<input type="checkbox"/>	101 - Albert Einstein	375 Broadway Schenectady, NY 12305
<input type="checkbox"/>	399 - Cisco 7960	375 Broadway Schenectady, NY 12305
<input type="checkbox"/>	1001 - SIP Trunk	375 Broadway Schenectady, NY 12305

Before you create this E911 location, you must agree to the E911 Terms of Service in the text box at the bottom of the screen. **Click the “I agree to the Terms and Conditions” check box, then click Save.** After the E911 Location is added, it will be available in the select menu for “E911 Location” on the Extension screen. You may use this address for any existing extensions or new extensions.

1. EMERGENCY SERVICES - 911 DIALING

1.1 Non-Availability of Traditional 911 or E911 Dialing Service. The Service does not support traditional 911 or E911 access to emergency services in all locations. Where we do not offer traditional 911 or E911 access, we offer a feature known as “911 Dialing” which is a limited emergency calling service available only on Priority One networks, LLC-certified Devices or Equipment. The 911 Dialing feature may not work at all when used in conjunction with a Soft Phone, Virtual Numbers or Subscriber provided Customer Premise Equipment. Our 911 Dialing

I agree to the Terms and Conditions

EXTENSIONS

Extension Configuration, located under the **Services** tab at the top of the screen, shows the settings of the extension and phone. By clicking **Edit**, you can modify the Extension Details, Routing and Configuration, Voice Mailbox, and other settings.

- **Extension Details:** Under Extension Details, you will see Extension Number, Name, Outgoing Caller ID, E911 Location and Seconds to Ring.

1. **Name:** This is what is displayed on the Caller ID display of phones within the PBX. It does not affect the Caller ID settings of outgoing calls.
2. **Outgoing Caller ID:** Select the phone number which you want to be presented to the called party for outgoing calls made from this extension.

Home Activity Voicemail Services Cases Accounting Reports Settings									
Home > Services > PBX Configuration > Extensions									
Create New...									
PBX Info									
Phone Numbers									
Standard Phone Numbers									
Toll Free Phone Numbers									
Port									
SIP Trunks									
Extensions									
Standard									
Cloud									
Input/Output									
Mailboxes									
Standard									
Broadcast									
Auto Attendant									
Time Frames									
Groups									
Conference Bridge									
Custom Line									
Holidays									
Hold Music									
Call Forwarding									
Extension List									
Search									
<input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear Search"/>									
x Previous - Next Page 1 of 1 (0 Records) - 20									
Extension	Name	Type	Route To	Outgoing Caller ID	Mailbox	Device Type	MAC Address	Edit	
100	SIP Line 1	Standard	Phone 100	5186499530		EYOD		Edit	
101	Albert Einstein	Standard	Phone 101	5186499530	101	FSP320		Edit	
399	Cisco 7960	Standard	Phone 399	5186499530	399	C7960	001F4705178	Edit	
501	SIP Line 2	Standard	Phone 501	5186499530		EYOD		Edit	
530	Rich Hall	Standard	Phone 530	5186499530	530	FSP321	001F4720302F	Edit	
1001	SIP Trunk	Standard	Phone 1001	5186499530		EYOD		Edit	
x Previous - Next Page 1 of 1 (0 Records) - 20									

- E911 Location:** Select the address at which this extension will be located. Each extension must have an associated E911 location.
- Seconds to Ring:** Enter the number of seconds you would like the phone to ring before the call is forwarded to voicemail.

Standard Extension Detail

Extension Details

Extension Number:

Name:

Outgoing Caller ID:

E911 Location:

Seconds to ring:

- Routing and Configuration:** Routing and Configuration consists of **Call Routing, Find me features, and other Advanced settings as follows:**

The Call Routing tab, listed first under Routing and Configuration, determines how calls to this extension will be handled. You may route calls to a phone, another extension, a mailbox, or any other location within your PBX system. By default, all calls are routed to the phone associated with your extension. Unanswered calls are routed to the voice mailbox associated with your extension. Any of these settings may be overridden by modifying the following settings:

Routing & Configuration

Call Routing | Find Me | Advanced

How would you like incoming calls to be handled? The system will send all calls to the "Try First" setting. If you are busy, unable to answer the phone, or the phone is offline, the system will handle the call based on the settings below.

Try First:	Phone	100 (SIP Line 1)	Ring Time:	<input type="text" value="25"/>
If Busy:	Phone	100 (SIP Line 1)	Ring Time:	<input type="text" value="25"/>
If Not Answered:	Phone	100 (SIP Line 1)	Ring Time:	<input type="text" value="25"/>
If Offline:	Phone	100 (SIP Line 1)	Ring Time:	<input type="text" value="25"/>

- Try First:** The system will send all calls to the **Try First** setting. If you are busy, unable to answer the phone, or the phone is offline, the system will handle the call based on the settings below Try First (If Busy, If Not Answered, If Offline). The system will send all calls to the setting you choose in the drop down menu in Try First, when you are not on the phone, unavailable or offline. **Options include:** Extension, SIP Trunk, Phone, Mailbox, Group, Auto Attendant, Time Frame, Conference, Conference Hub, Queue, Outside Number, Company Directory, Check Voicemail, Custom Setting or Find Me. **Note:** If you've selected to send calls to a **Phone**, then the next three options should be configured. Otherwise, they are unavailable.

Routing & Configuration

Call Routing | Find Me | Advanced

How would you like incoming calls to be handled? The system will send all calls to the "Try First" setting. If you are busy, unable to answer the phone, or the phone is offline, the system will handle the call based on the settings below.

Try First:	Phone	101 (Albert Einstein)	Ring Time:	<input type="text" value="25"/>
If Busy:	-- Select --	101 (Albert Einstein)		
If Not Answered:	Extension	101 (Albert Einstein)		
If Offline:	SIP Trunk	101 (Albert Einstein)		

Phone

Mailbox

Group

Auto Attendant

Time Frame

Conference

Conference Hub

Queue

Outside Number

Company Directory

Check Voicemail

Custom Setting

Find Me

2. **If Busy:** Calls that come in when you are on another call will be routed to the setting chosen in the drop down menu. The options for routing are the same as in the Try First menu. **Note:** Notice Try First is set to Phone so the If Busy field can be modified.

Routing & Configuration

Call Routing Find Me Advanced

How would you like incoming calls to be handled? The system will send all calls to the "Try First" setting. If you are busy, unable to answer the phone, or the phone is offline, the system will handle the call based on the settings below.

Try First: Phone 101 (Albert Einstein) Ring Time: 25

If Busy: Mailbox 101 (Albert Einstein)

If Not Answered: 101 (Albert Einstein)

If Offline: 101 (Albert Einstein)

Phone
Mailbox
Group
Auto Attendant
Time Frame
Conference
Conference Hub
Queue
Outside Number
Company Directory
Check Voicemail
Custom Setting
Find Me

3. **If Not Answered:** Calls that come in when your extension is not answered will be routed to the setting chosen in the drop down menu. The options for routing are the same as in the previous menus.

Routing & Configuration

Call Routing Find Me Advanced

How would you like incoming calls to be handled? The system will send all calls to the "Try First" setting. If you are busy, unable to answer the phone, or the phone is offline, the system will handle the call based on the settings below.

Try First: Phone 101 (Albert Einstein) Ring Time: 25

If Busy: Mailbox 101 (Albert Einstein)

If Not Answered: Mailbox 101 (Albert Einstein)

If Offline: 101 (Albert Einstein)

Phone
Mailbox
Group
Auto Attendant
Time Frame
Conference
Conference Hub
Queue
Outside Number
Company Directory
Check Voicemail
Custom Setting
Find Me

4. **If Offline:** This setting determines how all incoming calls will be handled when this extension is offline or not connected to the internet. Choose from the drop down menu the option you would like to enable for If Offline. The menu items are the same as in the previous menus.

Under **Routing and Configuration**, the next tab is **Find Me**. The Find me feature attempts to locate you by dialing a list of extensions or phone numbers until you accept or reject the call. The caller is placed on hold while the system attempts to locate you, until you have either accepted or rejected the call. Once you answer the call, you have the option to accept the call, or reject it. You also have the option to reject the call and leave a short message for the caller. Define your locations by entering information for each of the 5 available Find Me locations. You have three options:

- **My Extension:** selecting this option will ring the phone associated with your extension.
- **Outside Line:** this is a phone number such as a cell phone or your home phone.
- **Other Extension:** selecting this option will give you the ability to select any extension configured in your PBX.

Routing & Configuration

Call Routing | **Find Me** | Advanced

The Find Me feature attempts to locate you by dialing each of the following locations until you accept or reject the call. The caller is placed on hold until you are found. Once you answer the call, you have the option to accept the call, or reject the call. You also have the option to reject the call and leave a short message for the caller.

1. My Extension | Rings your extension | Active?
2. Ours de Lire | (518) 256-8919 | Active?
3. Ours de Lire | | Active?
4. Ours de Lire | | Active?
5. Ours de Lire | | Active?

Ring each location for 10 seconds

Record caller's name and announce them to you before connecting.

Give the caller the option of transferring to voicemail between each location defined above.

Active during the hours below Always active

You have the ability to define up to 5 locations. If you do not have 5 locations to be tried, simply leave the settings blank for the additional locations you will not need. Be sure to check the check box labeled **“Active?”** for each location that you want the system to try. In addition to defining your locations, there are a few options that can be changed:

- **Ring each location for ‘n’ seconds:** The system will ring each location for this number of seconds, before attempting to reach you at the next location in the list.
- **Record caller’s name:** If this check box is selected, the caller will first be prompted to record their name. When you answer the call, the system will play “You have an incoming call from...”, then the caller’s name that was recorded. This is useful for call screening.
- **Give the caller the option of transferring to voicemail:** If this check box is selected, the caller will hear a brief prompt asking them if they’d like to continue locating you, or leave you a voicemail; between each location defined.
- **Define Active Hours of the Find Me feature:** Modify the hours that the Find Me feature is active by filling in the **From and To fields**. Set these hours to be active only during certain periods or **click Always Active** to have the Find Me feature enabled at all times. Saturday and Sunday can be included by checking the boxes for each. Select the option you would like calls to be sent to in the drop down menu.

Active during the hours below Always active

From: 8:00 AM To: 5:00 PM

Include: Saturday Sunday

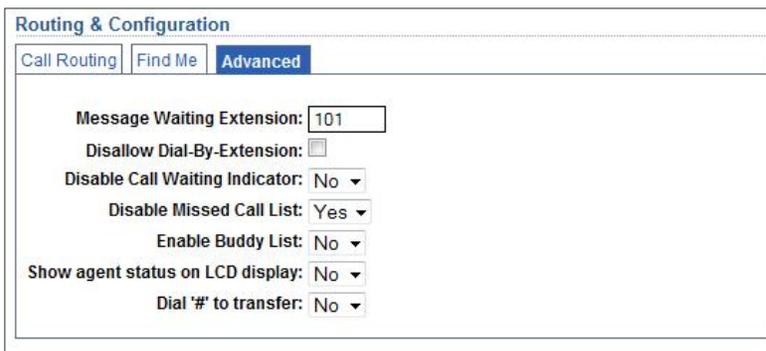
Then send calls to: -- Select --

- Select --
- Extension
- SIP Trunk
- Phone
- Mailbox
- Group
- Auto Attendant
- Time Frame
- Conference
- Conference Hub
- Queue
- Outside Number
- Company Directory
- Check Voicemail
- Custom Setting

The next tab under **Routing and Configuration is Advanced Settings:**

- **Message Waiting Extension:** Enter the mailbox number for which you would like to receive notifications of new messages. Multiple mailbox numbers can be entered, separated by commas.
- **Disallow Dial by Extension:** If checked, then this extension cannot be dialed from any auto attendant. It can only be routed to by PBX Settings.

- **Disable Call Waiting Indicator:** If set to Yes, the user will not hear a beep or tone when they are on a call and another call comes in.
- **Disable Missed Call List:** If set to Yes, missed call list will be disabled.
- **Enable Buddy List:** If set to Yes the Buddy feature of Polycom phones will be active for this device.
- **Show Agent Status on LCD Display:** If set to Yes, then the LCD display of this phone will show the agent status screen. If an agent is logged into the phone, their current status will be displayed. If no agent is logged into the phone, the LCD display will be the default logo.
- **Dial # to Transfer:** If checked, then the caller can dial # to initiate a blind transfer.



Routing & Configuration

Call Routing Find Me **Advanced**

Message Waiting Extension:

Disallow Dial-By-Extension:

Disable Call Waiting Indicator: No ▾

Disable Missed Call List: Yes ▾

Enable Buddy List: No ▾

Show agent status on LCD display: No ▾

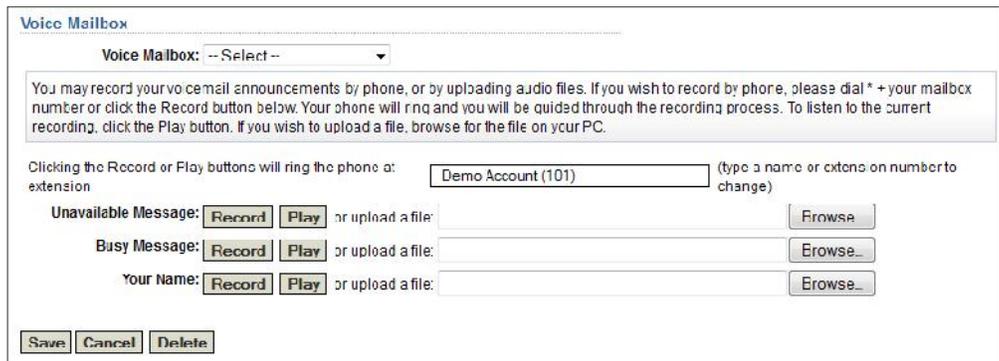
Dial '#' to transfer: No ▾

Beneath the Routing and Configuration module is **Voice Mailbox**. First, **select the Voice Mailbox to be associated with this extension**. Unanswered calls will be sent to this mailbox. If you would like to create a new mailbox to be associated with this extension, select **“Create New Mailbox.”** If you would like this extension to not be associated with a mailbox select **“No Associated Mailbox.”**

You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record your voice mailbox announcements by phone, **dial * + your mailbox number or click the Record button** on the screen. Your phone will ring and you will be guided through the recording process. To listen to the current recording, click the Play button. If you wish to upload a file, click Browse to find the file on your computer. There are three Voice Mailboxes available for recording:

- **Unavailable Message:** Record your Unavailable Message that callers will hear when you are unavailable, or Browse for the file you would like to use on your computer.
- **Busy Message:** Record your Busy Message or Browse for the file you would like to use on your computer.
- **Your Name:** Record your Name or Browse for the file you would like to use on your computer.

Click Save to apply and save new settings.



Voice Mailbox

Voice Mailbox: -- Select -- ▾

You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record by phone, please dial * + your mailbox number or click the Record button below. Your phone will ring and you will be guided through the recording process. To listen to the current recording, click the Play button. If you wish to upload a file, browse for the file on your PC.

Clicking the Record or Play buttons will ring the phone at: (type a name or extension number to change)

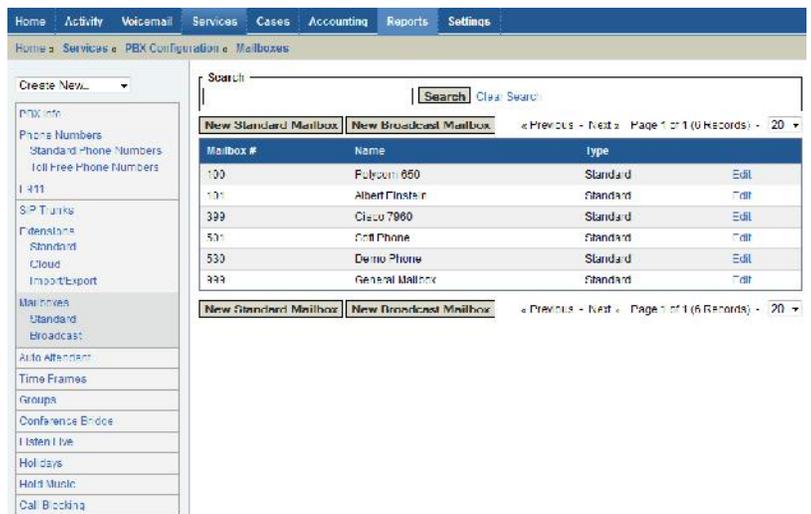
Unavailable Message: or upload a file:

Busy Message: or upload a file:

Your Name: or upload a file:

MAILBOXES

You have the ability to create as many mailboxes as needed for the PBX. A mailbox can have any number and be assigned to any user, or accessed via an auto attendant or other means. To create a new mailbox, click **Mailboxes**, located under the **Services** tab at the top of the screen, then click **New Standard Mailbox**:



- **General Settings:** Under New Mailbox, the first group you will see is General Settings.

1. **Mailbox Number:** Each mailbox number requires a unique number. IT is suggested that you make this a 3-5 digit number. It may be different than the user's extension number, but it is usually the same.
2. **Name (for directory):** This is the name that is used for the company directory listing that callers can use to find a user. It should be a first and last name.
3. **Password:** A numeric password that a user will enter to access their mailbox. This must not be the same as the mailbox number, or the user will be prompted with the mailbox setup wizard each time they log into their mailbox. Confirm password by typing the same password beneath Password.

New Mailbox

General Settings

Mailbox Number:

Name (for Directory):

Password:

Confirm Password:

Recordings & Greeting

You may record your own mail and greetings by phone, or by uploading audio files. If you wish to record by phone, please dial in your mailbox number or click the Record button below your phone number and you will be guided through the recording process. To stop the current recording, click the Play button. If you wish to upload a file, browse for the file on your PC.

Clicking the record or play buttons will ring the phone at: User's Account (TUT) (ask a user to enter extension number to outsource)

Unavailable Message: or upload a file

Busy Message: or upload a file

Your Name: or upload a file

Notifications

Email to notify:

SMS email to notify: This field can't contain an email address.

Advanced Settings

Use During Announcements: Call During Announcement allows the caller to dial any extension during the announcement.

Skip Voicemail Instructions: If you want to skip the instructions for leaving a message (usually played after each announcement), check this.

Announcement Only: announcement mailboxes can be included in them in auto attendants (AAs) to play the busy message in this box and then return to the beginning of the calling AA. Override "Background" in an AA.

Hide From Directory: Hide Mailbox from the Company Directory.

Delete Voicemail: No voicemail is recorded for up to 100 days.

New Mailbox

General Settings

Mailbox Number:

Name (for Directory):

Password:

Confirm Password:

- **Recordings and Greeting:** You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record by phone, please **dial * + your mailbox number or click the Record button below.** Your phone will ring and you will be guided through the recording process. To listen to the current recording, **click the Play button.** If you wish to upload a file, **Browse for the file** on your PC. You can set up a separate greeting for Unavailable Message, Busy Message, and Your Name.

Recordings & Greeting

You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record by phone, please dial * + your mailbox number or click the Record button below. Your phone will ring and you will be guided through the recording process. To listen to the current recording, click the Play button. If you wish to upload a file, browse for the file on your PC.

Clicking the Record or Play buttons will ring the phone at (type a name or extension number to change)

Unavailable Message: or upload a file:

Busy Message: or upload a file:

Your Name: or upload a file:

- **Notifications:** Set up notifications to receive by Email or SMS messaging to notify you when a voicemail is received.
 1. **Email to Notify:** If a valid email address is entered, a message will be sent to that address every time a message is received. The audio of the message will be attached to the email in a .WAV file.
 2. **SMS email to Notify:** If a valid email address is entered, a message will be sent to that address every time a message is received. The audio of this message will not be attached, however.

Notifications

Email to notify:

SMS email to notify: This field should contain an email address.

- **Advanced Settings:** Under Advanced Settings, you have the option to edit Dial During Announcement, Skip Voicemail Instructions, Announcement only, Hide from Directory, and Delete voicemail.
 1. **Dial During Announcement:** If checked, a caller will be able to dial an extension during the user's announcement.
 2. **Skip Voicemail Instructions:** If checked, the PBX system will not play generic instructions to the caller. Only the user's recording will be played, followed by a beep.
 3. **Announcement Only:** If checked, the caller will not have the option to leave a message. The user's recording will play, then the caller will be returned to the attendant.
 4. **Hide from Directory:** If checked, mailbox will not show up in the directory.
 5. **Delete Voicemail:** Voicemails are stored for up to 180 days. Here, you can select the number of days you wish to keep them.

Advanced Settings

Dial During Announcement: Dial During Announcement allows the caller to dial any extension during the announcement.

Skip Voicemail Instructions: If you want to skip the instructions for leaving a message that are played after your announcement, check here.

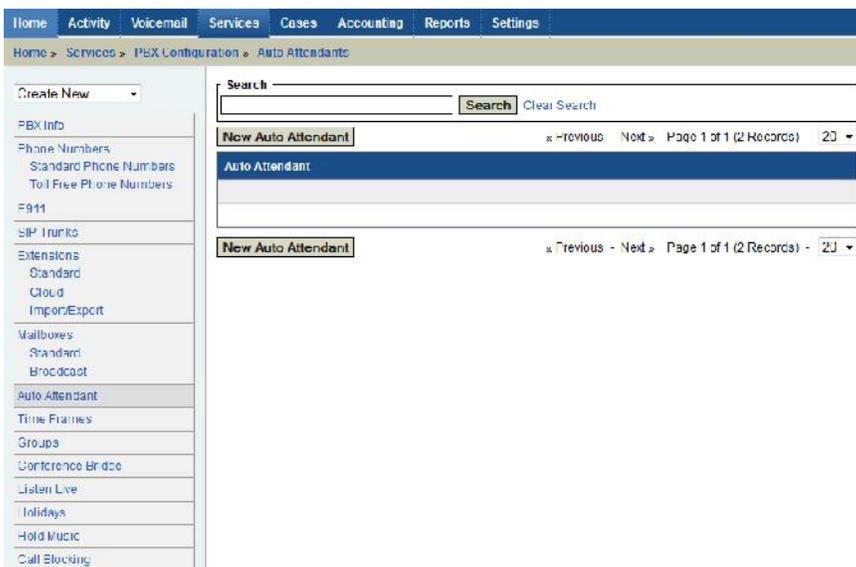
Announcement Only: Announcement mail boxes are to be routed to from an Auto Attendant (AA) to play the busy message in this box and then return to the beginning of the calling AA. Overrides "Background" in an AA.

Hide From Directory: I hide Mailbox from the Company Directory

Delete Voicemail: Voicemails are stored for up to 180 days.

AUTO ATTENDANTS

An **Auto Attendant** is a recorded greeting and associated menu at which the caller has the ability to select from multiple options to choose how their call is routed. The caller can dial any extension defined for the PBX, as well as a set of options that map to the digits on a phone dial pad. Customers of the PBX are not limited to a given number of Auto Attendants, there can be as many as the customer wishes. To create an Auto Attendant, **click Auto Attendants, under the Services tab** at the top of the screen, then **click New Auto Attendant**:



- **General Settings:** In General Settings you will see Attendant Name, Attendant Timeout, and Digital Timeout.
 1. **Attendant Name:** A unique name must be given to each Auto Attendant. This is used to identify the Auto Attendant in the PBX Configuration Module.
 2. **Attendant Timeout:** The amount of time, in seconds, after the announcement is played before the PBX executes the **“Timeout”** option configured below if the caller does not press any buttons.
 3. **Digit Timeout:** The amount of time, in seconds, between key presses before the PBX attempts to connect the caller to the dialed digits.

New Auto Attendant	
General Settings	
Attendant Name:	<input type="text"/>
Attendant Timeout:	<input type="text" value="5"/>
Digit Timeout:	<input type="text" value="2"/>

- **Announcement:** There are four different ways to select and record an Announcement for the Auto Attendant.
 1. **Record via Phone:** Click the **“Record”** button to record the Attendant greeting by phone. Click the **“Play”** button to listen to the current greeting. Your phone will ring and you will be guided through the recording process. Alternatively, you may dial *323.
 2. **Upload:** You may upload a file with your announcement in .mp3 or .wav format. The maximum file size is 10 MB.
 3. **Default Recording:** The following pre-recorded message will be played to callers: “Hello and thank you for calling. If you know your party’s extension, you may dial it at any time. For a company directory, please press * now. To leave a message in our general company voice mailbox, continue to hold or press 1. To hear these options again, press 9 now. Thank you for calling.”
 4. **Mailbox:** Older versions of the system used voice mailbox recordings for the auto attendant greetings. This method is no longer preferred, as there are now easier options available. It is recommended that you use the “Record via Phone” or “Upload a File” options.

1. **Time Frame Name:** A unique name must be given to each Time Frame setting. This is used to identify the Time Frame setting in the PBX configuration module.
 2. **During hours forward call:** Determine how the call is routed during business hours.
 3. **After hours forward call:** Determines how the call is routed after business hours.
- **Define the Days, Before and After times** of this Time Frame.
 - **Click All Day** to enable this Time Frame for all hours of the day.
 - **Click Save.**

New Time Frame

Time Frame Name:

During hours forward call: -- Select --

After hours forward call: -- Select --

Day	Before	After
<input type="checkbox"/> Monday	<input type="checkbox"/> All Day	11:00 AM - 05:00 PM
<input type="checkbox"/> Tuesday	<input type="checkbox"/> All Day	8:00 AM - 5:00 PM
<input type="checkbox"/> Wednesday	<input type="checkbox"/> All Day	8:00 AM - 5:00 PM
<input type="checkbox"/> Thursday	<input type="checkbox"/> All Day	8:00 AM - 5:00 PM
<input type="checkbox"/> Friday	<input type="checkbox"/> All Day	8:00 AM - 5:00 PM
<input type="checkbox"/> Saturday	<input type="checkbox"/> All Day	8:00 AM - 5:00 PM
<input type="checkbox"/> Sunday	<input type="checkbox"/> All Day	8:00 AM - 5:00 PM

GROUPS

A **Group** is a collection of extensions which are to be rung at the same time by the same call. For example, you may have a customer support department with 4 support representatives, and you might want all support phones to ring simultaneously when a caller hits key 2 at your auto attendant. To achieve this, create a Group. To create a new Group, click on **Groups, located under the Services tab** at the top of the screen, then **click on New Ring Group**:

Search (Clear Search)

New Ring Group « Previous Next » Page 1 of 1 (0 Records) 20 ▾

Group	Ring Extensions	# of Extensions
No records found.		

New Ring Group « Previous - Next » Page 1 of 1 (0 Records) - 20 ▾

- **New Ring Group:** On top you will see general settings of your new ring group.
 1. **Group Name:** A unique name must be given to each group. This is used to identify the group in the PBX Configuration Module.
 2. **Ring all extensions:** If **At the same time** is selected, then all extensions will ring simultaneously. If **Sequentially** is selected, then each extension will ring for **Seconds to Ring (see below)**, then the call can be sent to the next extension.
 3. **Seconds to ring:** The amount of time in seconds, that the phones will ring before “After ringing group forward call” is executed. If the phones are set to ring Sequentially, as stated above, then this determines the amount of time each phone will ring before the call is routed to the next extension.

New Ring Group

Group Name:

Ring all extensions: At the same time ▾

Seconds to Ring:

Caller ID Settings: Original Caller ID ▾

- **Extensions:**
 1. **Available Extensions:** This lists all extensions defined in the PBX.
 2. **Selected Extensions:** To move an extension into this box, highlight the corresponding extension in the **Available Extension** box, and click the **Add** button. To remove the extension, highlight it and click **Remove**.
- **After ringing Group forward call:** If none of the extensions answer the call in the time defined in the **Seconds to Ring field**, the call is routed in the manner defined by this field.

Extensions

<p>Available Extensions:</p> <div style="border: 1px solid gray; padding: 2px; min-height: 150px;"> 100 (SIP Line 1) 530 (Rich Hault) 501 (SIP Line 2) 101 (Albert Einstein) 399 (Cisco 7960) 1001 (SIP Trunk) </div>	<p>Add »</p> <p>« Remove</p>	<p>Extensions to Ring:</p> <div style="border: 1px solid gray; padding: 2px; min-height: 150px;"> (Empty) </div>	<p>↑ Up</p> <p>↓ Down</p>
---	--	---	---

After ringing Group forward call: -- Select --

Add Group
Cancel

CONFERENCE BRIDGE

To create a new **Conference Bridge** room, **click on Conference Bridge under the Services tab** at the top of the screen, then **click New Conference Room**:

Home	Activity	Voicemail	Services	Cases	Accounting	Reports	Settings
------	----------	-----------	----------	-------	------------	---------	----------

Home » Services » PBX Configuration » Conference Bridges

<p>Create New... ▼</p> <p>PBX Info</p> <p>Phone Numbers</p> <ul style="list-style-type: none"> Standard Phone Numbers Toll Free Phone Numbers <p>E911</p> <p>SIP Trunks</p> <p>Extensions</p> <ul style="list-style-type: none"> Standard Cloud Import/Export <p>Mailboxes</p> <ul style="list-style-type: none"> Standard Broadcast <p>Auto Attendant</p> <p>Time Frames</p> <p>Groups</p> <p style="color: #0070C0;">Conference Bridge</p> <p>Listen Live</p> <p>Holidays</p> <p>Hold Music</p> <p>Call Blocking</p>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Search <input style="width: 80%;" type="text"/> Search Clear Search</p> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>New Conference Room « Previous - Next » Page 1 of 1 (0 Records) - 20 ▼</p> <table style="width: 100%; border-collapse: collapse; background-color: #0070C0; color: white;"> <thead> <tr> <th style="width: 30%;">Conference ID</th> <th style="width: 70%;">Name</th> </tr> </thead> <tbody> <tr> <td colspan="2" style="text-align: center; padding: 5px;">No records found.</td> </tr> </tbody> </table> </div> <div style="border: 1px solid gray; padding: 5px;"> <p>New Conference Room « Previous - Next » Page 1 of 1 (0 Records) - 20 ▼</p> </div>	Conference ID	Name	No records found.	
Conference ID	Name				
No records found.					

- **New Conference Room:** Define the properties of your new conference room as follows below.
 1. **Conference Number:** A unique number must be given to each Conference Room. This is used to identify the Conference Room in the PBX Configuration Module.
 2. **Password:** A numeric password that callers will enter to access the Conference Room.
 3. **Enable Music on Hold:** If checked, then music will play when there is only one participant in the conference room.
 4. **Play Enter/Exit Sounds:** If checked, a sound will play each time a participant enters or exits the conference room.
 5. **Announce Attendee Count:** If checked, then each participants will be told the number of existing participants when entering.
- **Click Add Conference Bridge to create and save this Conference Room.**

New Conference Room

Conference Number:

Password:

Enable Music On Hold:

Play Enter/Exit Sounds:

Announce Attendee Count:

LISTEN LIVE

Listen Live, located under the Services tab at the top of the screen, gives you the ability to listen and barge in on calls taking place within the PBX.

Listen Live Configuration

Listen Live is Disabled.

Listen Live Settings: **On**

Password:

Users who can use this feature:

Users who may not listen:

- 100 (SIP Line 1)
- 530 (Rich Haul)
- 501 (SIP Line 2)
- 101 (Albert Einstein)
- 358 (Cisco 7960)
- 1001 (SIP Trunk)

Users who may listen:

Buttons: ,

Users that may be listened to:

Extension	Name
<input type="checkbox"/> 100 (SIP Line 1)	SIP Line 1
<input type="checkbox"/> 530 (Rich Haul)	Rich Haul
<input type="checkbox"/> 501 (SIP Line 2)	SIP Line 2
<input type="checkbox"/> 101 (Albert Einstein)	Albert Einstein
<input type="checkbox"/> 358 (Cisco 7960)	Cisco 7960
<input type="checkbox"/> 1001 (SIP Trunk)	SIP Trunk

Buttons: ,

Under Listen Live Configuration, you will see Listen Live Settings and Password.

- **Listen Live Settings:** If “Off” is selected, Listen Live is Disabled. If “Listen” is selected, you are able to listen

in on a conversation, but not talk to either party. If **“Barge”** is selected, you are able to barge in on a call and speak to the extension that you dialed. If **“Both”** is selected, you can use both the listen and barge features independently.

- **Password:** Users must enter a password to use the Listen Live feature. The password must be 3 or more numbers, letters are not allowed.

Listen Live Configuration

Listen Live is disabled.

Listen Live Settings: Off

Password:

- **Users who can use this feature:** This module will give a list of users who may be allowed to use the Listen Live feature. Select the extensions who will be able to use Listen Live under **“Users who may not listen,”** and click **Add**, to add them to the list of **“Users who may listen.”**

Users who can use this feature:

Users who may not listen:

100 (SIP Line 1)
 530 (Rich Hoult)
 501 (SIP Line 2)
 101 (Albert Einstein)
 399 (Cisco 7960)
 1001 (SIP Trunk)

Add »

« Remove

Users who may listen:

(Empty list)

- **Users that may be listened to:** Below **“Users that may be listened to”** is a list of extensions that may be selected to Listen Live. **Check the boxes next to the users and click “Add Listen Live”** to enabling listening to those users.

Users that may be listened to:

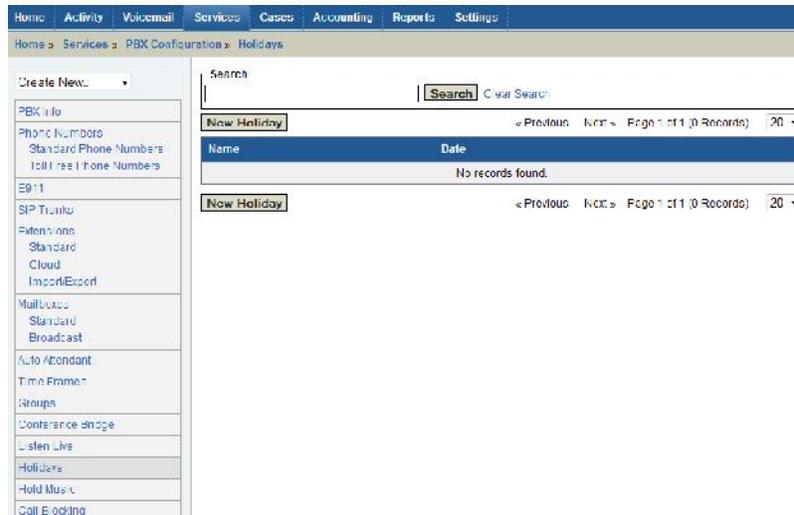
Extension	Name
<input type="checkbox"/> 100 (SIP Line 1)	SIP Line 1
<input type="checkbox"/> 530 (Rich Hoult)	Rich Hoult
<input type="checkbox"/> 501 (SIP Line 2)	SIP Line 2
<input type="checkbox"/> 101 (Albert Einstein)	Alber: Einstein
<input type="checkbox"/> 399 (Cisco 7960)	Cisco 7960
<input type="checkbox"/> 1001 (SIP Trunk)	SIP Trunk

Add Listen Live

Cancel

HOLIDAYS

You may define any day of the year to be a company holiday. Once a day has been declared a holiday, then all calls into any of your phone numbers will be routed based on the “**If Holiday**” field on the **Phone Number screen under Services**. To define a new Holiday, click on **Holidays located under Services**, then **New Holiday**.



Enter a name for the holiday, select the date, then click **Add Holiday**. For more information on Holidays, please see the section **Phone Numbers** above.

New Holiday

Name:

Date: January 1

Add Holiday

HOLD MUSIC

You have the ability to customize the music your callers hear when a call is placed on hold. By default, the PBX was configured with standard classical music for calls on hold. But you may upload new music in mp3 format to the PBX to be used instead of the default music. You may upload multiple audio tracks, which will play in a random order when a caller is on hold. Each track may have a maximum size of 10MB, and you can upload a total of 60MB altogether. To customize your hold music, **select Hold Music under the Service tab on the top of the screen**, then click **New Group**:



- To create a new Hold Music Group, **provide a name in the Name field**.
- To add tracks (music files) to the Group, **click "Save & Add Tracks"**, otherwise **click "Save"** to save the Group without adding Tracks.
- To use this Hold Music Group for all outbound calls, **select "Yes" for "Use for outbound calling?"** Your PBX may use only one single Hold Music Group for outbound calling.
- **File:** select an mp3 file from your local computer to be uploaded to the PBX server. The file must be in mp3 format and no larger than 10MB.

When finished, click **Save**. It may take a few minutes for the file to upload, so do not leave the screen until you receive confirmation that the file upload was successful. Also note that newly uploaded tracks may not take effect for up to 30 minutes.

New Hold Music Track

✔ Hold Group successfully created.

A Hold Music Track is an audio file that is played to a user on hold. Each Hold Group can contain one or more tracks. To add a new Track, supply a name, select a file from your computer, and select which Hold Group this track will be contained in.
 To add a single Track, click "Save". To add more than one Track, click "Save & New Track".

The maximum size allowed for an uploaded file is **10MB**.
 Your uploaded file may be converted to a different format which takes up more space after you upload.
 The converted file format will count against your quota of **60MB**.

Name:

Hold Music Group: Music ▼

File:

CALL BLOCKING

The PBX system allows you to block given phone numbers from being dialed, or from calling into the PBX. To create a new Call Block, click on **Call Blocking under the Services tab** at the top of the screen, then click **New Call Block**:

The screenshot shows the PBX configuration interface. At the top, there are navigation tabs: Home, Activity, Voicemail, **Services**, Cases, Accounting, Reports, and Settings. Below the tabs, the breadcrumb path is: Home > Services > PBX Configuration > Call Blocking.

On the left side, there is a sidebar menu with the following items: Create New, PBX Info, Phone Numbers (Standard Phone Numbers, Toll Free Phone Numbers), 911, SIP Trunks, Extensions (Standard, Cloud, Import/Export), Mailboxes (Standard, Broadcast), Auto Attendant, Time Frames, Groups, Conference Bridge, Listen Live, Holidays, Hold Music, and **Call Blocking**.

The main content area shows a search bar with a search button and a clear search button. Below the search bar, there are two instances of a 'New Call Block' entry. Each entry has a 'New Call Block' button, a '< Previous - Next >' navigation link, and a 'Page 1 of 1 (0 Records) - 20' dropdown menu. Below the search bar, there is a table with the following structure:

Phone Number	Direction	Play
No records found		

- **Phone Number:** Enter the phone number to be blocked, either for incoming or outgoing calls.
- **Direction:** Defines whether you want to block this number from making incoming or outgoing calls.
- **Comment:** This field is optional, perhaps provide a reason why this number is being blocked, who the number belongs to, or other general information about the call block.

New Call Block

Phone Number:

Direction: Inbound ▼

Comment:

USER MANAGER

The Customer Portal has its own user access system. It is important to note that a user of the Portal is not the same as a phone user. It is a user who is granted access to the Portal via the web. As an administrator, you have the ability to grant access to the Customer Portal to other users within your organization. There are two different types of users in the Customer Portal:

- **Administrator:** a user who has the ability to administrate all aspects of their assigned PBX. Can create other users who will have access to the Customer Portal, modify phone number and extension settings, create and modify all other PBX settings.
- **Employee:** a user who has the ability to administrate only their assigned extension. Cannot change the routing of calls within the PBX or any other settings not directly related to their extension and voice mailbox.

USER PERMISSIONS

In addition to user types, each user is given permissions to access each area, or module, of the application. Each user type has a default set of permissions (full access to all available modules) that is assigned to each newly created user. Each user's specific permissions can be modified at the time of creation or later.

- To modify a user's permissions, click the **Settings** button at the top of the screen. Select **Users** on the left menu and click the user you wish you edit. Click the **Edit** button next to **Permissions** on the **User Details** screen. A list of all available modules will be displayed. Check the check box next to each module that you'd like this user to have access to.

User Demo Account

User Type: Administrator ▼

Customer: DEMOACCT

Extension: Albert Einstein (101) ▼

Username: demo01

New Password:

Confirm New Password:

First Name:

Last Name:

Email:

Enabled: Yes ▼

Permissions:

CREATING USERS

To create a new user, first click the **Settings** button at the top of the screen. Select **Users** on the left menu.

The screenshot shows the 'My Profile' form in the system settings. The navigation bar at the top includes Home, Activity, Voicemail, Services, Cases, Accounting, Reports, and Settings. The left sidebar has a 'Create New' dropdown and a 'Users' link. The main form area is titled 'My Profile' and contains the following fields: User Type (Administrator), Customer (DEMOACCT), Extension (Albert Einstein (101)), Username (demo01), New Password (masked with asterisks), Confirm New Password (empty), First Name (Demo), Last Name (Account), Email (support@priorityonenet.com), and Enabled (Yes). A red error message states: 'Password must be at least 8 characters and contain at least one uppercase letter, one lowercase letter and one number'. At the bottom are 'Update User' and 'Cancel' buttons.

- Click the **New User** button.

The screenshot shows the 'User List' table with a search bar at the top. The search bar contains a search input, a 'Search' button, a 'Clear Search' link, and a 'Show Disabled Users' checkbox. Below the search bar are 'New User' buttons and pagination controls. The table has the following data:

User ID	Username	Full Name	PBX	Email	User Type
2643	user	Albert Einstein	pridemo	testlogon@priorityonenet.com	Employee
9005	demo01	Demo Account	pridemo	support@priorityonenet.com	Administrator

Below the table are another 'New User' button and pagination controls.

- **Select a user type** (See “User Manager” for more information about user types).
- **Select the extension with which this user is associated.** If the extension does not exist, it must first be created.
- **Enter a unique username for this user.** It can be an email address, and this is recommended to avoid duplicates.
- **Enter a password for the user.**
- **Enter the user’s first and last names.**
- **Enter the user’s email address.**
- **Permissions:** if you’d like the default permissions settings to be used, leave **Default** selected. Otherwise, select **Custom.** **After clicking Add User,** you will be presented with the permissions settings screen. (See “User Permissions” for more information).
- **Click Add User** when finished. The user is now about to log in.

The screenshot shows the 'New User' form. The navigation bar at the top includes Home, Activity, Voicemail, Services, Cases, Accounting, Reports, and Settings. The left sidebar has a 'Create New' dropdown and a 'Users' link. The main form area is titled 'New User' and contains the following fields: User Type (Employee), Customer (DEMOACCT), Extension (-- Select --), Username (empty), New Password (masked with asterisks), Confirm New Password (empty), First Name (empty), Last Name (empty), Email (empty), and Permissions (Default selected, Custom unselected). A red error message states: 'Password must be at least 8 characters and contain at least one uppercase letter, one lowercase letter and one number'. At the bottom are 'Add User' and 'Cancel' buttons.