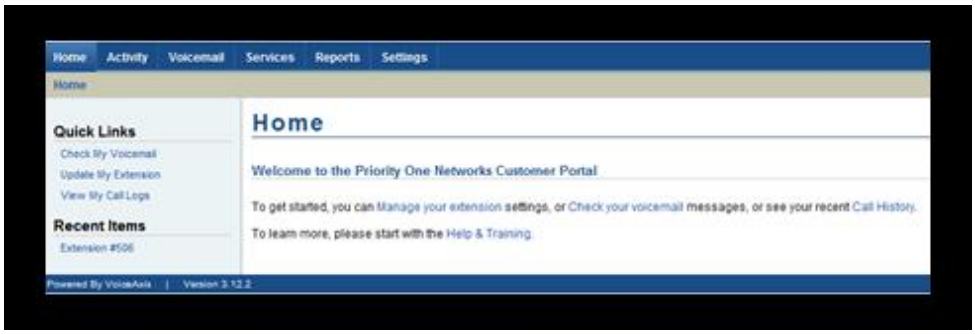
TeleDynamic COMMUNICATIONS | we get it

Administrator web portal Guide

TeleDynamic COMMUNICATIONS | we get it

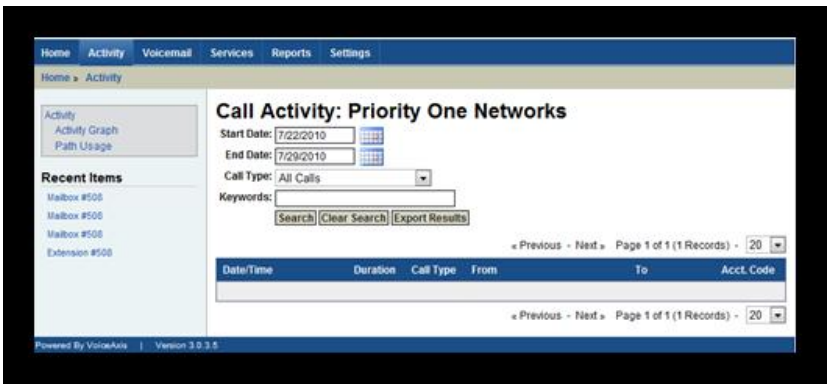
ACCESSING YOUR PBX ACCOUNT

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.

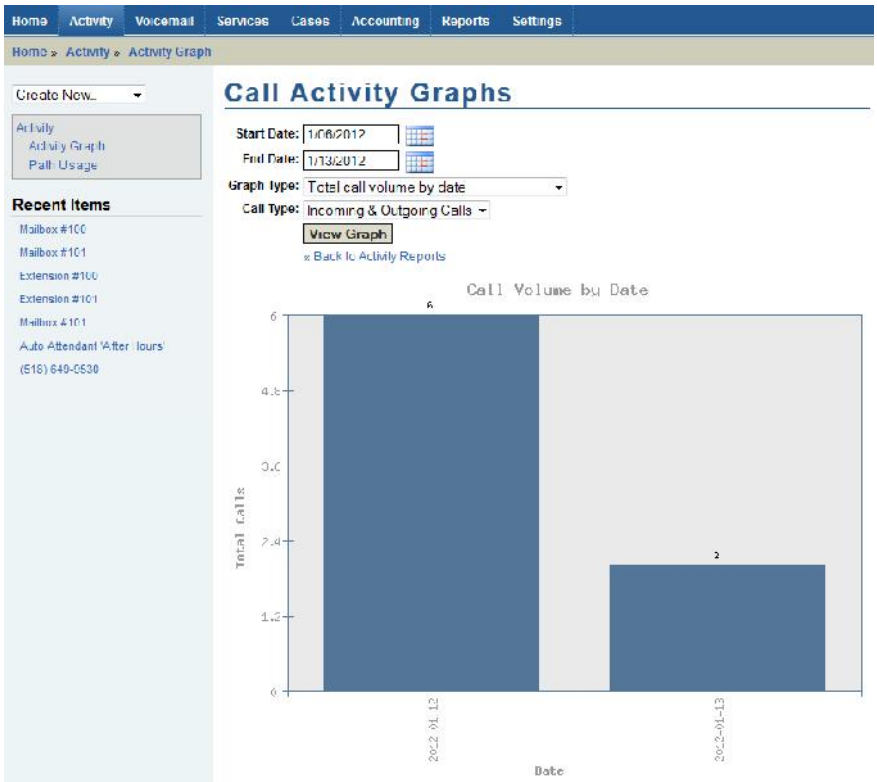


CHECKING ACCOUNT ACTIVITY

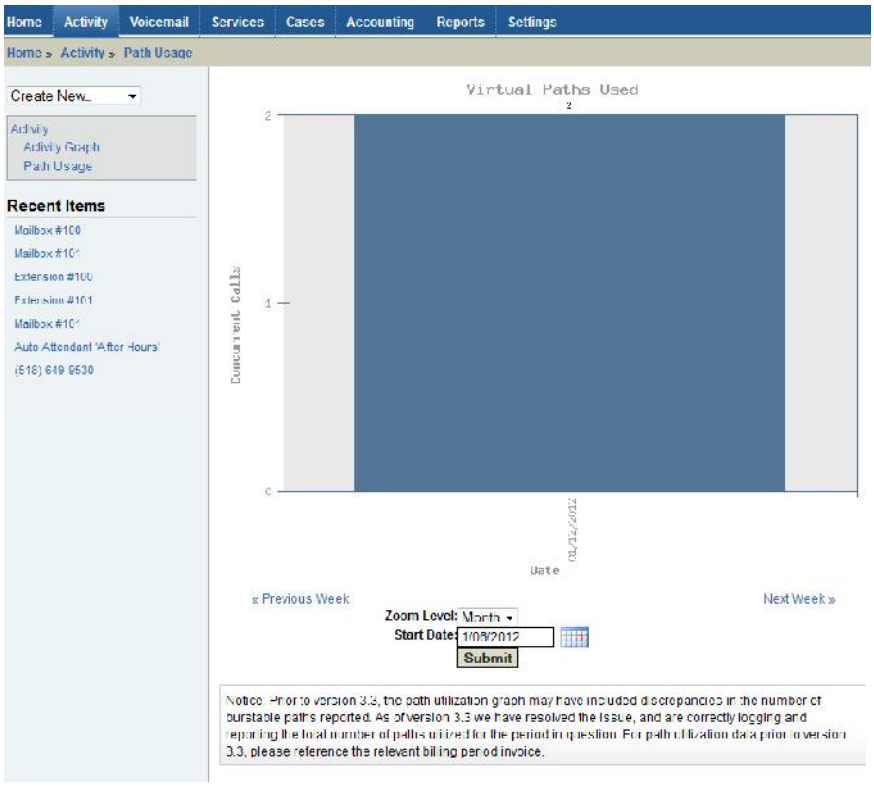
To view call activity of the PBX, click **Activity** at the top of the screen. It is searchable by date, call type, extension, or phone number. Select a start and end date, call type (incoming, outgoing, or both), an extension, or a phone number, and click **Search.** You will be presented with a list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



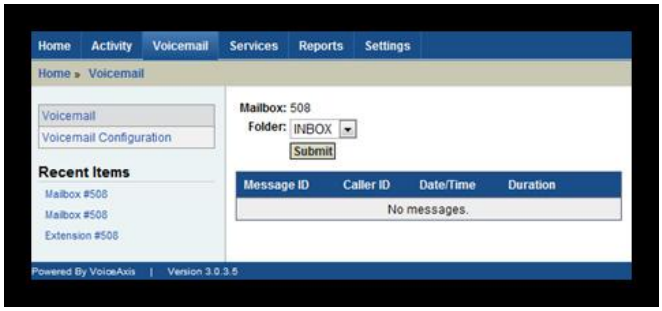
Below Activity Graph, is Path Usage. This page displays the virtual paths used in relation to concurrent calls. Select the Zoom level, Start date, and **click Submit** to view the graph.



VOICEMAIL

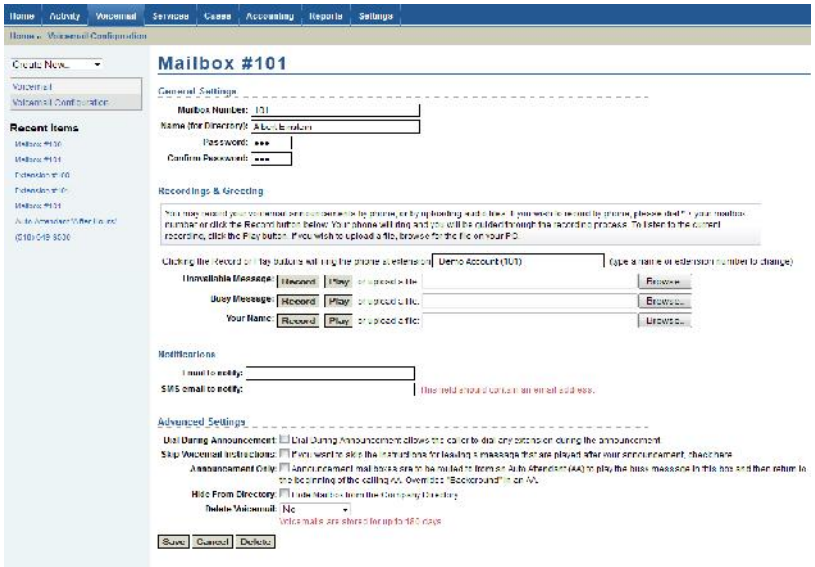
Voicemails can be accessed by **clicking on the Voicemail tab at the top of the screen.** The Voicemail screen shows the list of voicemail messages currently in user mailboxes. Each message can be downloaded for listening or be deleted.

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**.

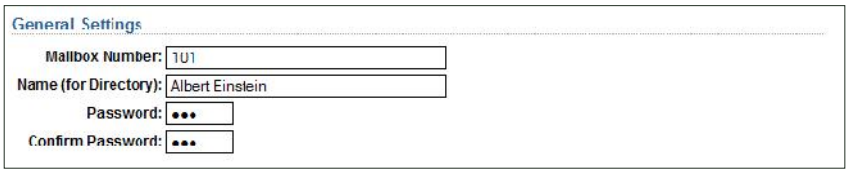


VOICEMAIL CONFIGURATION

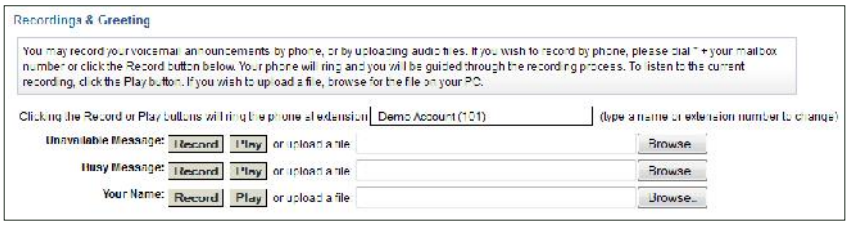
The **Voicemail Configuration** screen, **located under Voicemail**, shows the settings of the voice mailbox associated with extensions. You can modify general settings such as name and password, recordings and greetings, notifications, and advanced settings.



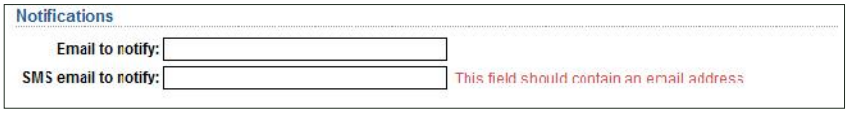
- **General Settings**: Edit the mailbox number, name, and password in General Settings.
  1. **Mailbox Number**: Each mailbox number requires a unique number. It is suggested that you make this a 3-5 digit number. It may be different than the user's extension number, but it is usually the same.
  2. **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.



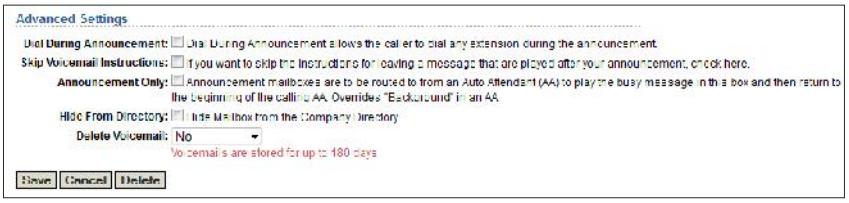
- **Recordings and Greeting**: You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record by phone, please **dial * + your mailbox number or click the Record button below.** Your phone will ring and you will be guided through the recording process. To listen 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.

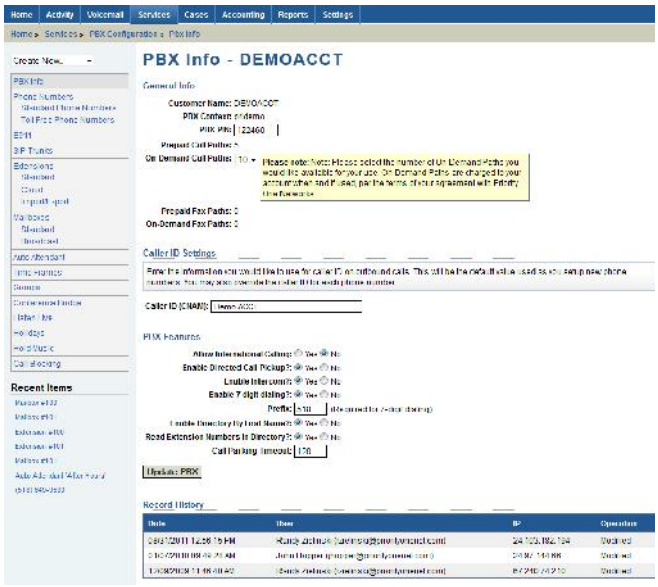


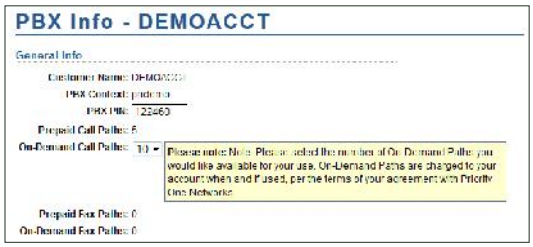
PBX CONFIGURATION

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.

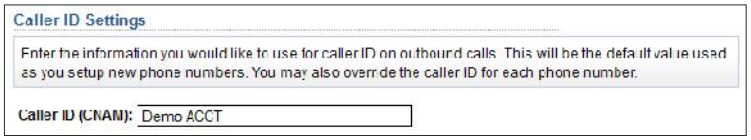
- **PBX Info**: The PBX Info screen shows basic information about your PBX account, such as General Info, Caller ID Settings, and PBX Features. **You will come right to the PBX Info screen when you click on Services at the top of the screen.**

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.

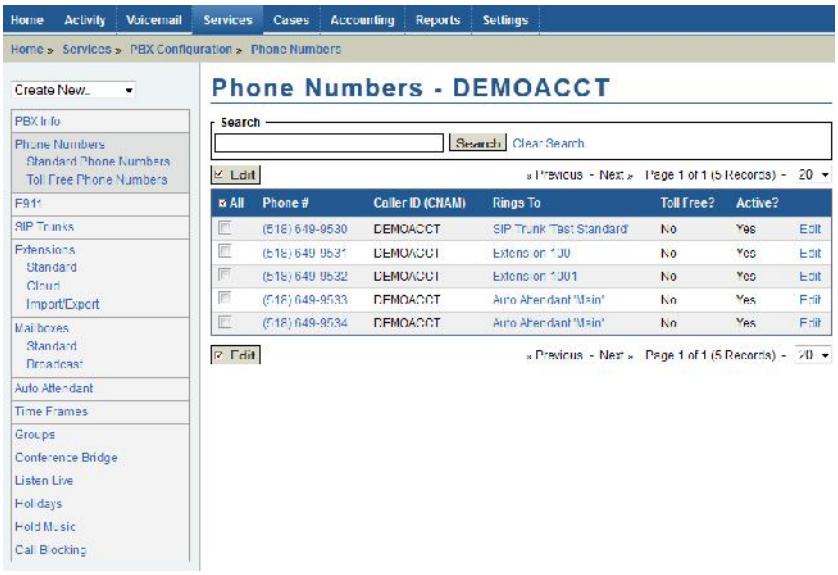


3. **PBX Features:** Here you can enable and disable certain settings. **Click Update PBX to save and update features after editing.**
   - **Allow International Calling**: If set to "No" then outbound international calls can not be made from this account.
   - **Enable Directed Call Pickup?**: If enabled, 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.

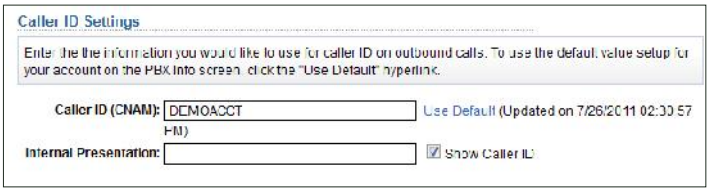
PHONE NUMBERS

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:

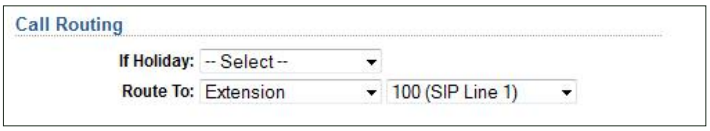


- **Phone Number**: At the top you will see the phone number configured to the PBX that you want to edit, which is also the Incoming Number. Then you will see Toll Free Number and State. The Toll Free Number is set to "Yes" then the configured phone number is a Toll Free number which all incoming calls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

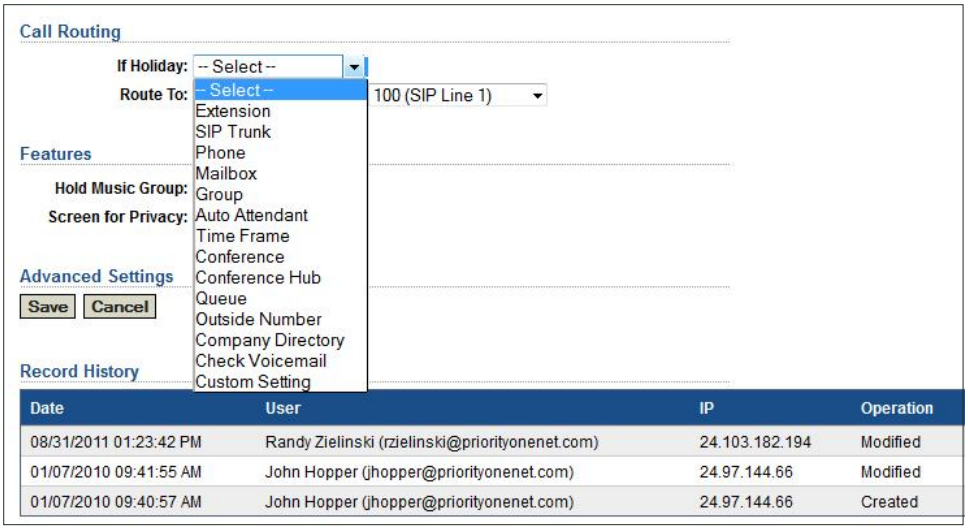
- **Caller ID Settings**: Enter the information you would like to use for caller ID on outbound calls. To use the default value setup for your account on the PBX Info screen, click the "Use Default" hyperlink.
  1. **Caller ID (CNAM):** The text that will appear on the called party's called ID display 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.



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

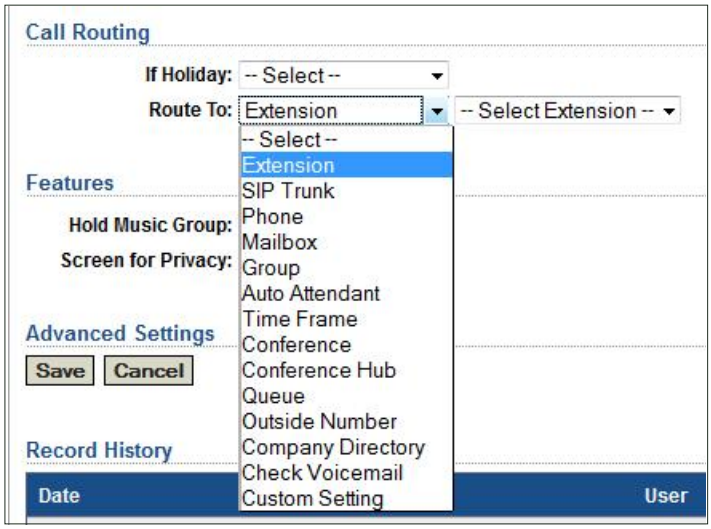


The options for Call Routing on a Holiday are as follows:



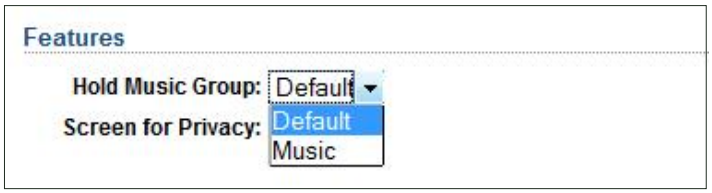
From the drop down menu, there are fourteen options to select for **Call Routing If Holiday**. Select Extension from the first drop down menu and then select the exact extension you want to route to in the second drop down menu. Select SIP Trunk or Phone Number and then select the SIP Trunk or Phone 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.



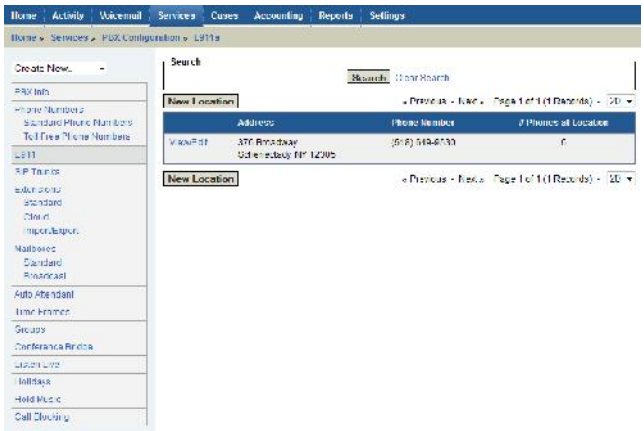
From the drop down menu, there are fourteen options to select for **Call Routing Route To**. Select Extension from the first drop down menu and then select the exact extension you want to route to in the second drop down menu. Select SIP Trunk or Phone Number and then select the SIP Trunk or Phone Number 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.



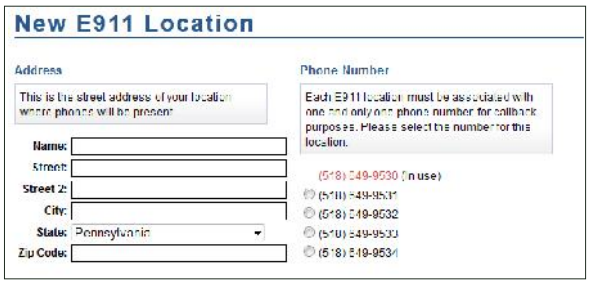
E911

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**.

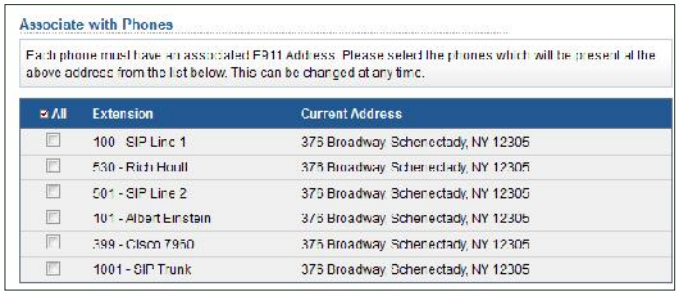


On the New E911 Location screen, you will be asked to enter an address. Enter the geographical street address of your office. If you have multiple locations, you will need to add multiple E911 Locations. Make sure the street address entered is valid, it will be verified by the national E911 system before 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.

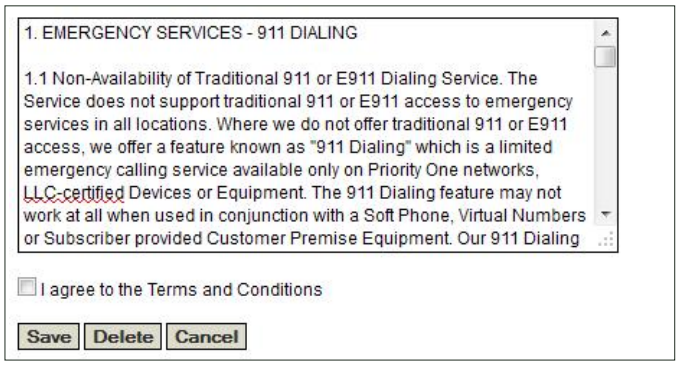
After filling in the street address, you must select which phone number to associate this address with. This phone number will be the callback number presented to the emergency personnel when someone dials 9-1-1 from this location. Note that each of your phone numbers can only be used for a single E911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



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.

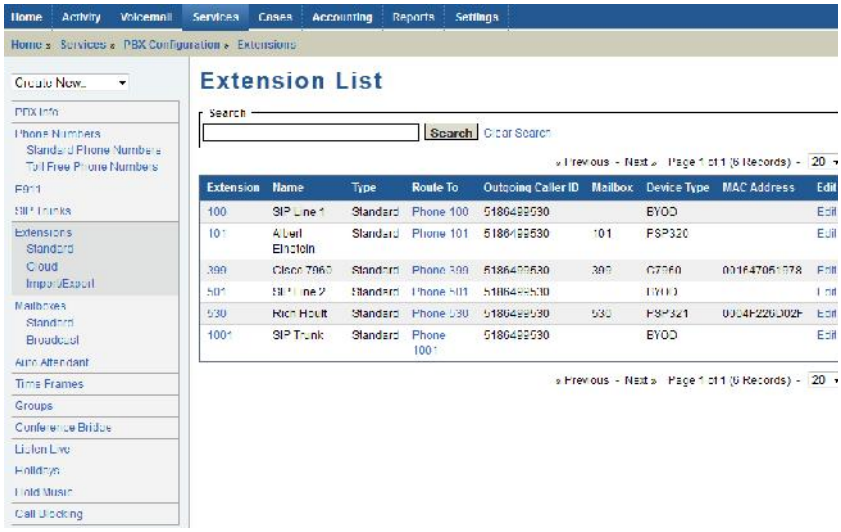


Before you create this E911 location, you must agree to the E911 Terms of Service in the text box at the bottom of the screen. **Click the "I agree to the Terms and Conditions" check box, then click Save.** After the E911 Location is added, it will be available in the select menu for "E911 Location"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



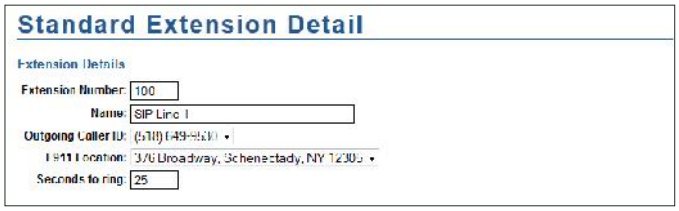
EXTENSIONS

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.



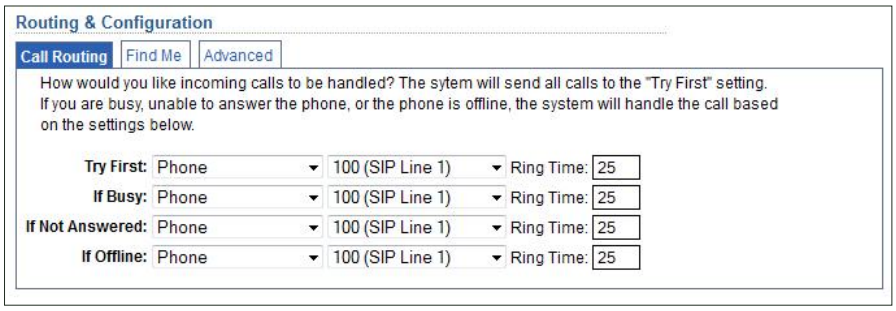
- **Extension Details**: Under Extension Details, you will see Extension Number, Name, Outgoing Caller ID, E911 Location and Seconds to Ring.
  1. **Name**: This is what is displayed on the Caller ID display of phones within the PBX. It does not affect the Caller ID settings of outgoing calls.
  2. **Outgoing Caller ID**: Select the phone number which you want to be presented to the called party for outgoing calls made from this extension.

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

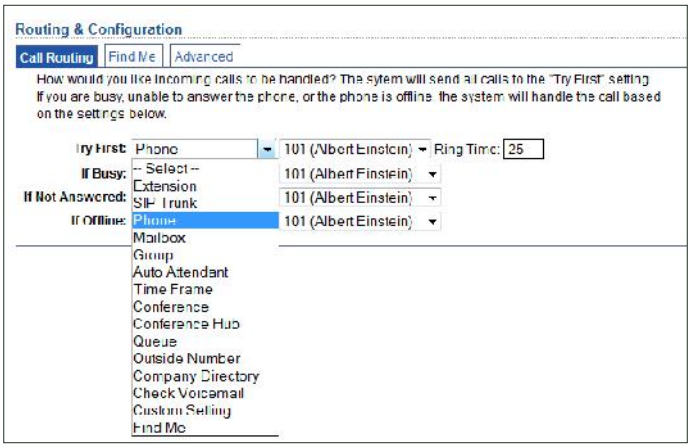


- **Routing and Configuration**: Routing and Configuration consists of **Call Routing, Find me features, and other Advanced settings as follows:**

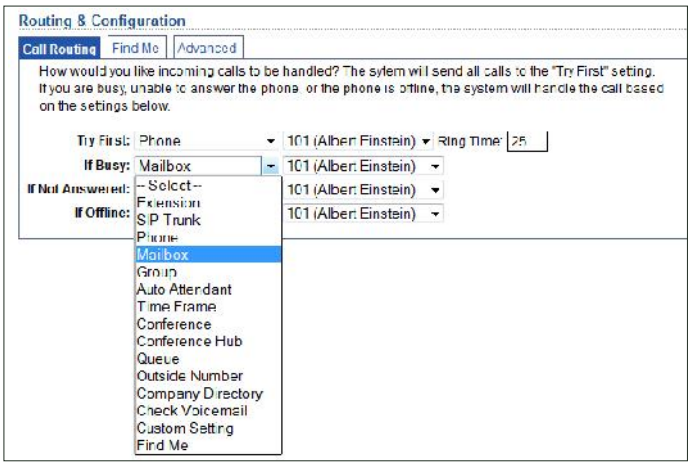
The Call Routing tab, listed first under Routing and Configuration, determines how calls to this extension will be handled. You may route calls to a phone, another extension, a mailbox, or any other location within your PBX system. By default, all calls are routed to the phone associated with your extension.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



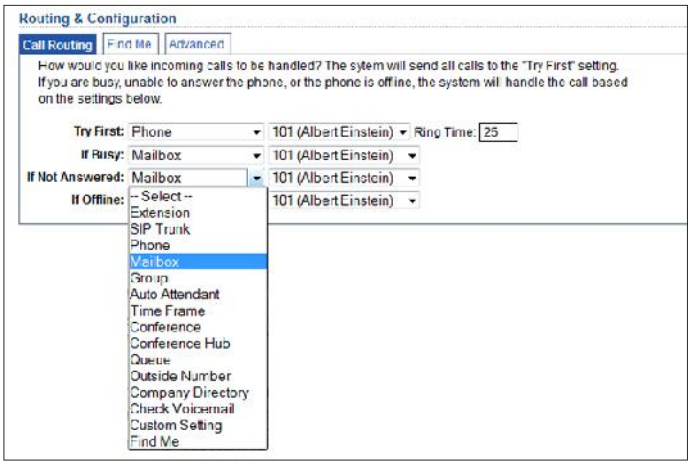
1. **Try First**: The system will send all calls to the **Try First** setting. If you are busy, unable to answer the phone, or the phone is offline, the system will handle the call based on the settings below Try First (If Busy, If Not Answered, If Offline). The system will send all calls to the setting you choose in the drop down menu in Try First, when you are on the not on the phone, unavailable or offine. **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.



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.



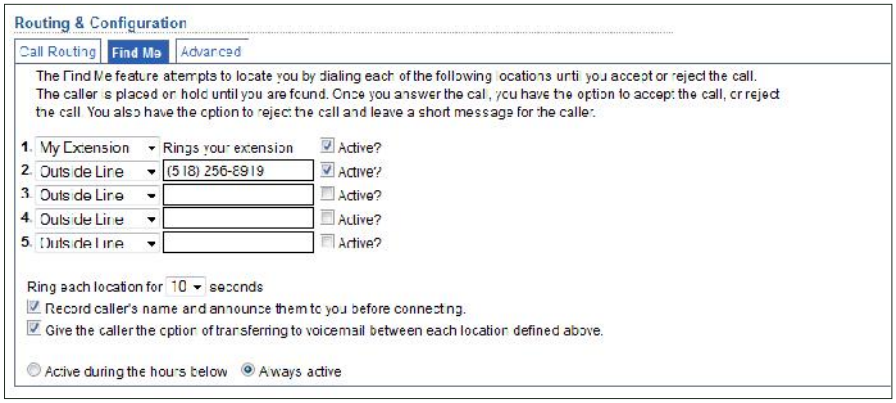
3. **If Not Answered**: Calls that come in when your extension is not answered will be routed to the setting chosen in the drop down menu. The options for routing are the same as in the previous menus.



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.

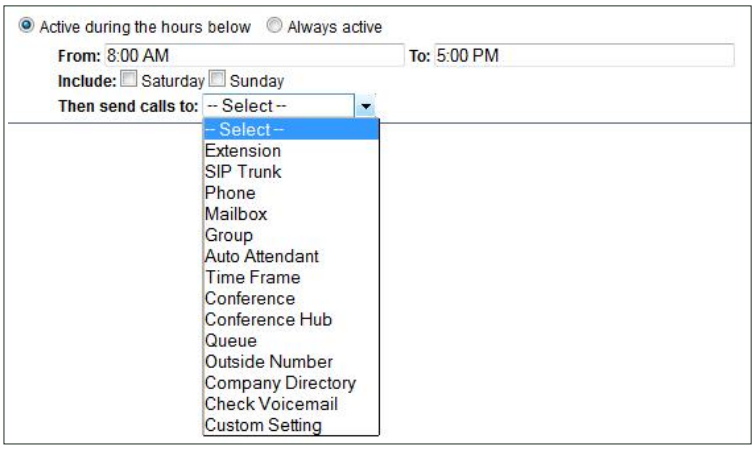
Under **Routing and Configuration**, the next tab is **Find Me.** The Find me feature attempts to locate you by dialing a list of extensions or phone numbers until you accept or reject the call. The caller is placed on hold while the system attempts to locate you, until you have either accepted or rejected 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.



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.



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.

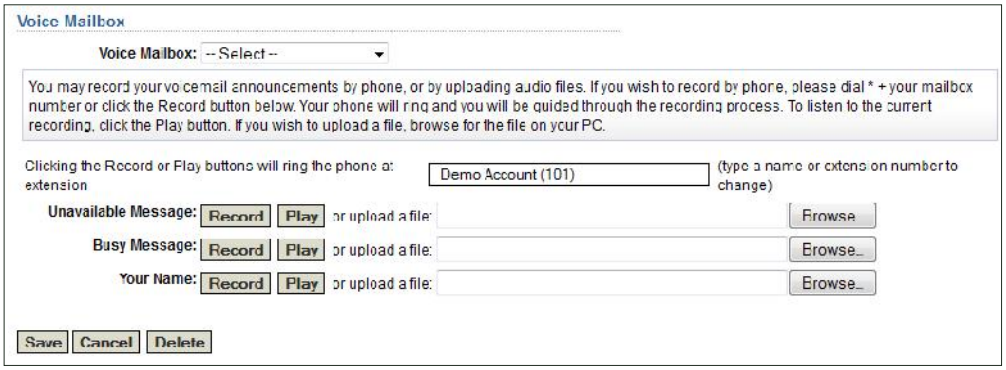
- **Disable Call Waiting Indicator:** If set to Yes, the user will not hear a beep or tone when they are on a call and another call comes in.
- **Disable Missed Call List**: If set to Yes, missed call list will be disabled.
- **Enable Buddy List**: If set to Yes the Buddy feature of Polycom phones will 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.

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."**

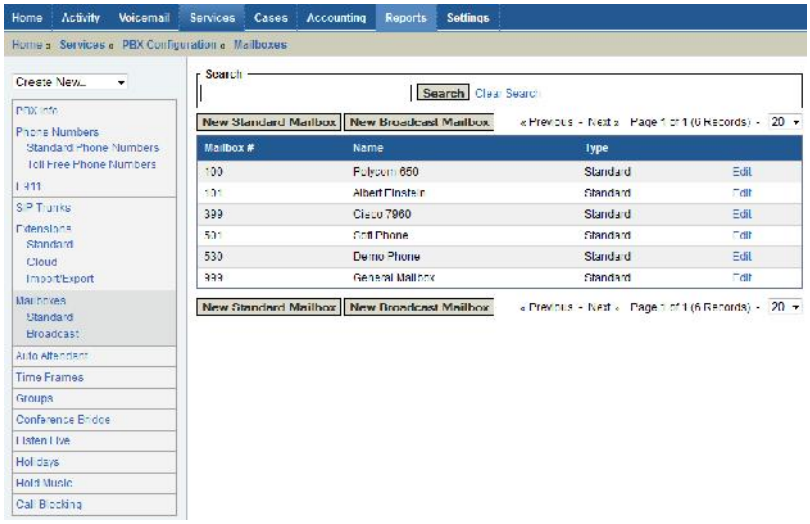
You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record your voice mailbox announcements by phone, **dial * + your mailbox number or click the Record button** on the screen. Your phone will ring and you will be guided through the recording process. To 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 here 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.



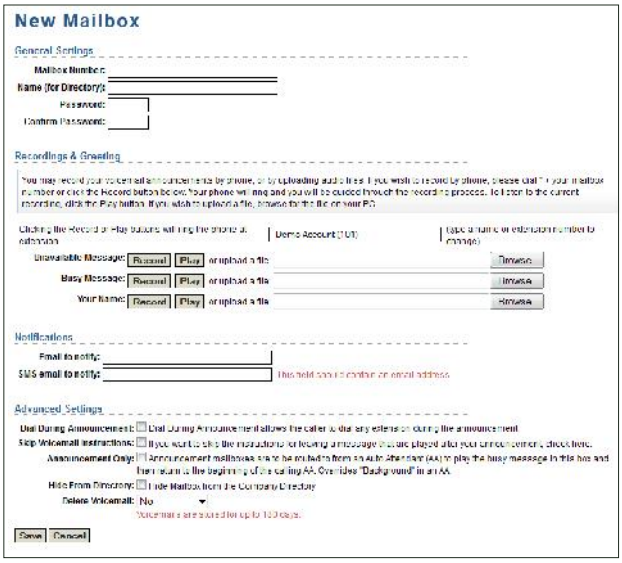
MAILBOXES

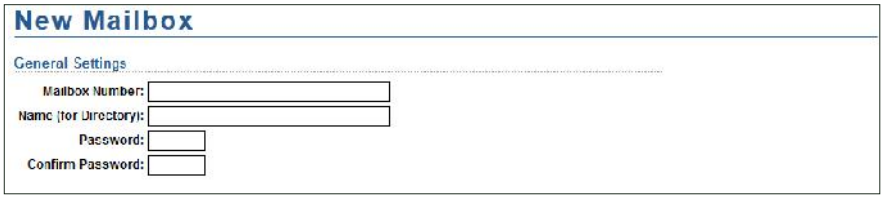


You have the ability to create as many mailboxes as needed for the PBX. A mailbox can have any number and be assigned to any user, or accessed via an auto attendant or other means. To create a new mailbox, click **Mailboxes**, located under the **Services** tab at the top of the screen, then click **New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

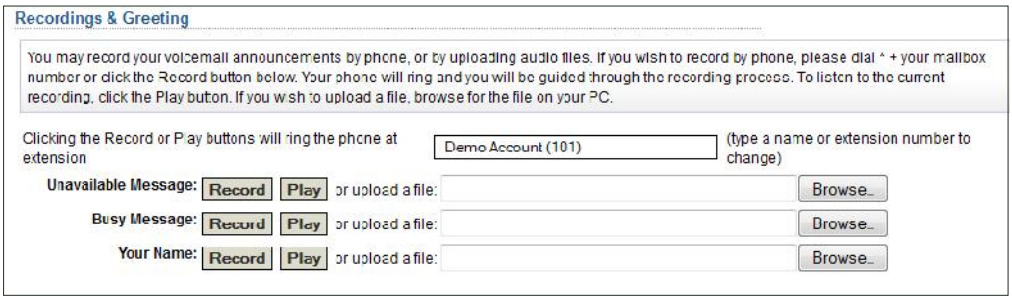
- **General Settings**: Under New Mailbox, the first group you will see is General Settings.

  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.

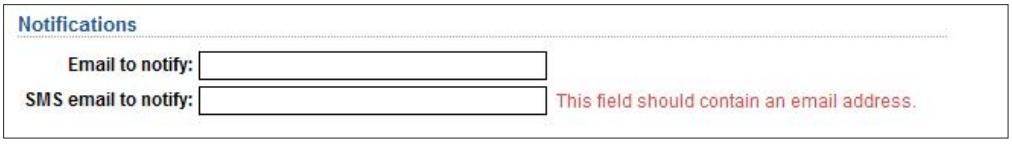




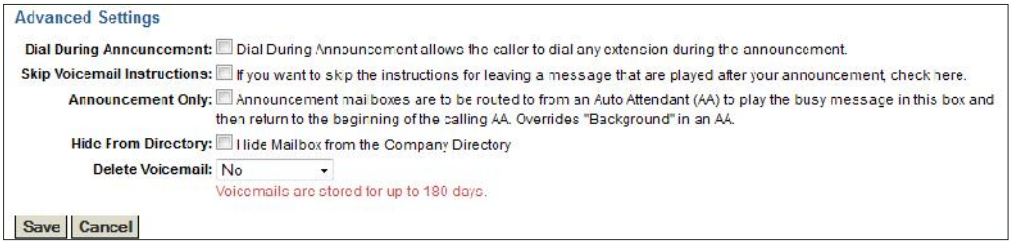
- **Recordings and Greeting**: You may record your voicemail announcements by phone, or by uploading audio files. If you wish to record by phone, please **dial * + your mailbox number or click the Record button below.** Your phone will ring and you will be guided through the recording process. To listen 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.

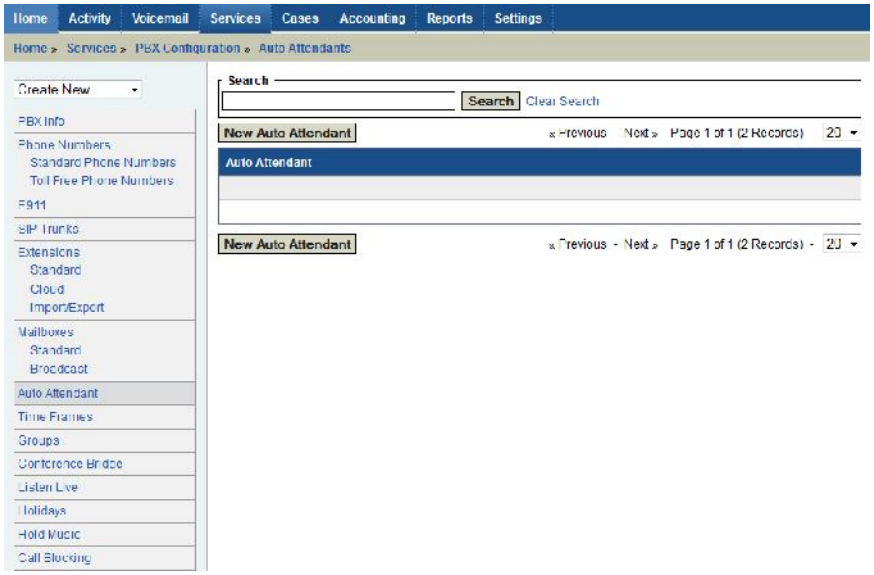


- **Advanced Settings**: Under Advanced Settings, you have the option to edit Dial During Announcement, Skip Voicemail Instructions, Announcement only, Hide from Directory, and Delete voicemail.
  1. **Dial During Announcement**: If checked, a caller will be able to dial an extension during the user's 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.
  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.



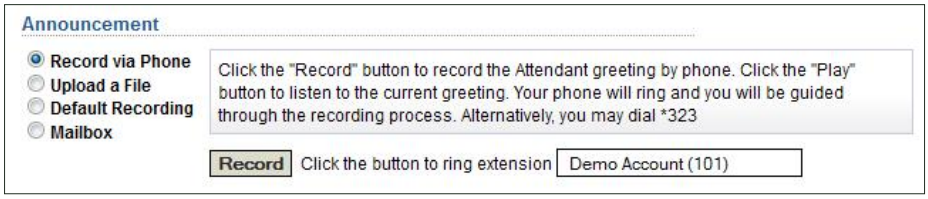
AUTO ATTENDANTS

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**:

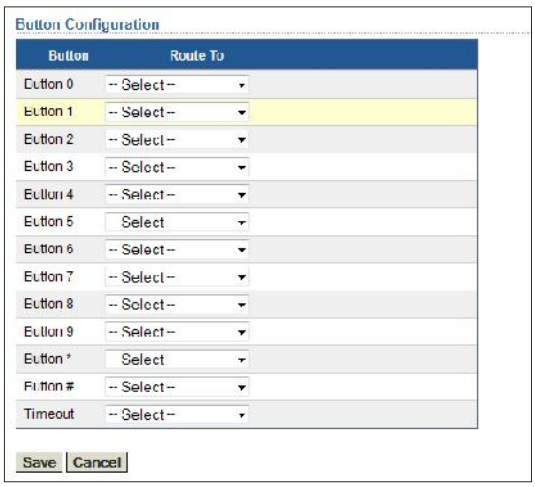


- **General Settings**: In General Settings you will see Attendant Name, Attendant Timeout, and Digital Timeout.
  1. **Attendant Name:** A unique name must be given to each Auto Attendant. This is used to identify the Auto Attendant in the PBX Configuration Module.
  2. **Attendant Timeout**: The amount 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.

- **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.

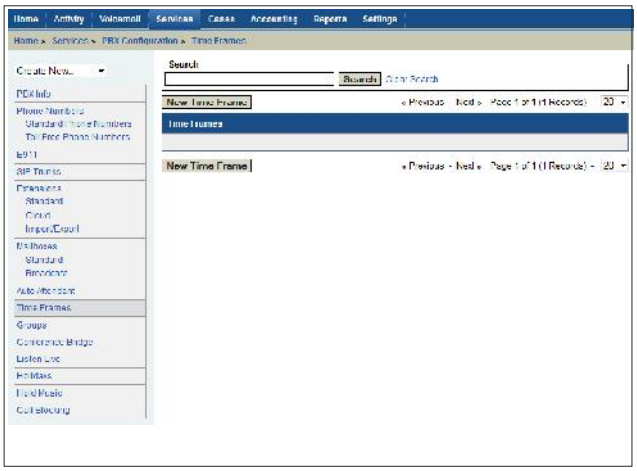


- **Button Configuration**: Button Configuration, **located under Announcement in the Auto Attendant menu**, defines where buttons dialed by a caller are directed. For example, if 0 is selected to go to an Extension, you will pick the extension for 0 to route to when a caller presses 0. If 1 is selected to a Mailbox, the caller will be routed to the Mailbox that is selected when they press 1, and so on.



TIME FRAMES

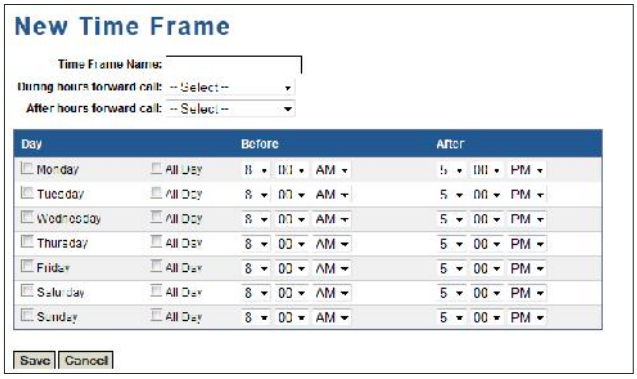
Time Frames are defined hours you set within the PBX. Time Frames can be business hours or after business hours. **Time Frames are located under the Services tab** at the top of the screen. **Click Time Frame and then New Time Frame.**



- **New Time Frame**: Here you will see properties including Time Frame Name, During hours forward call, After hours forward call.

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.**

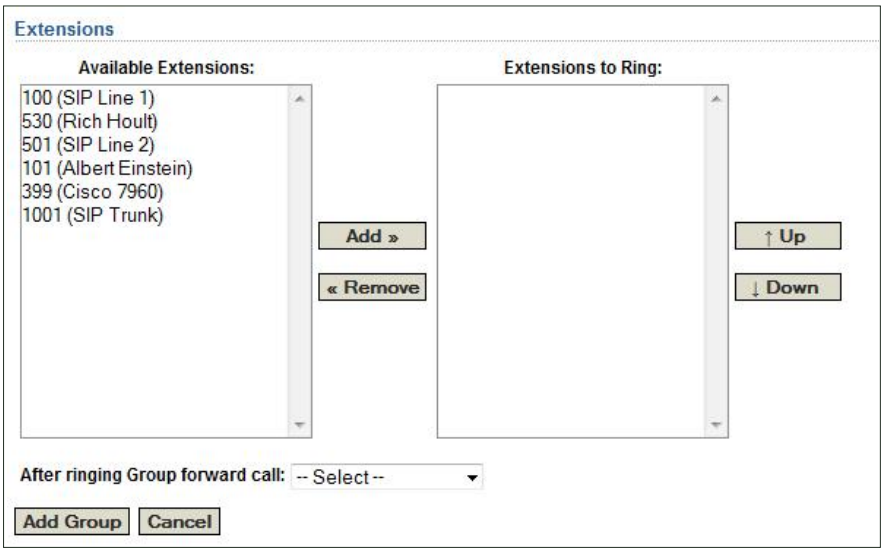


GROUPS

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**:

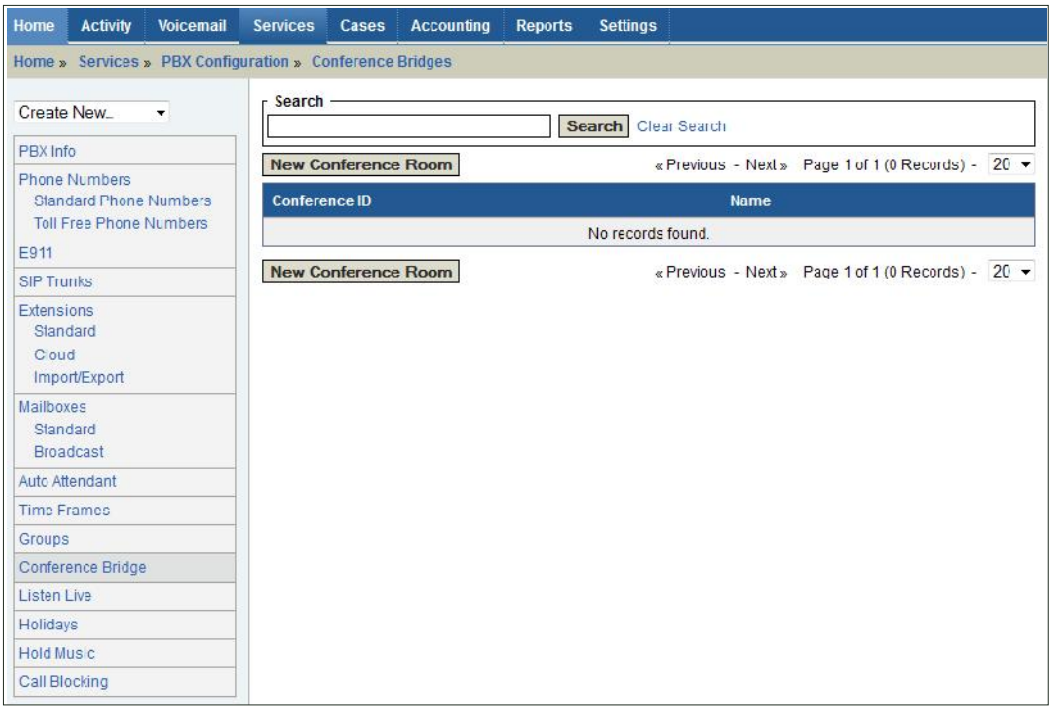
- **New Ring Group**: On top you will see general settings of your new ring group.
  1. **Group Name:** A unique name must be given to each group. This is used to identify the group in the PBX Configuration Module.
  2. **Ring all extensions:** If **At the same time** is selected, then all extensions 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.

- **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.

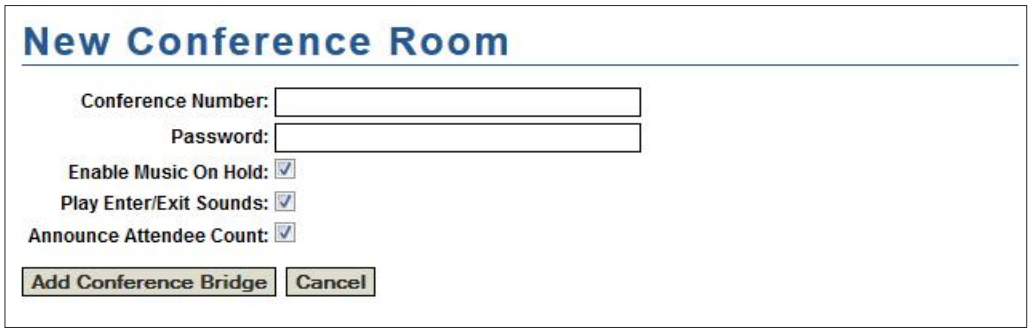


CONFERENCE BRIDGE

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**:

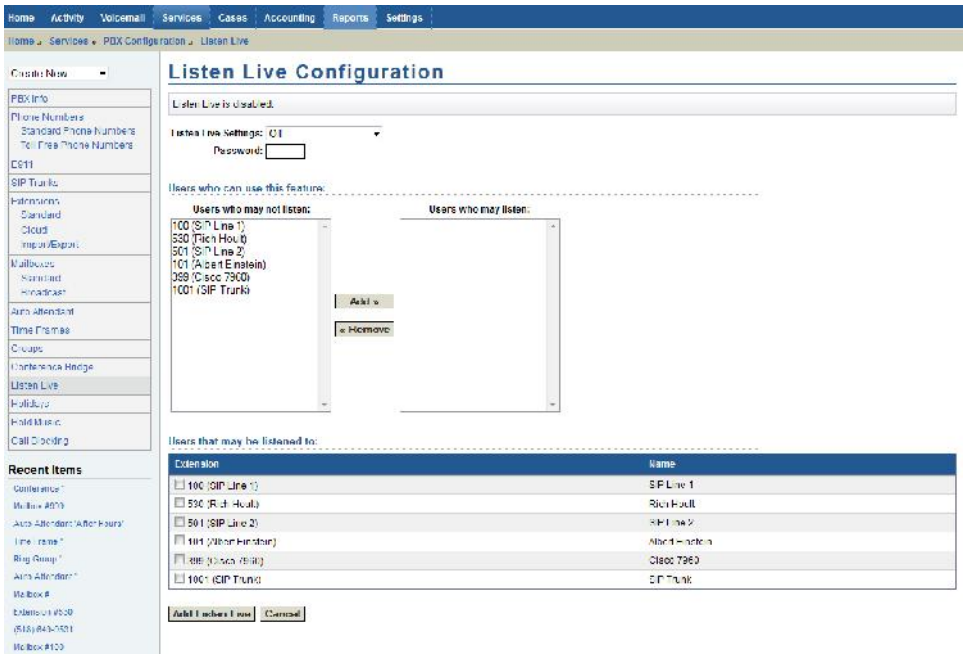


- **New Conference Room**: Define the properties of your new conference room as follows below.
  1. **Conference Number:** A unique number must be given to each Conference Room. This is used to identify the Conference Room in the PBX Configuration Module.
  2. **Password:** A numeric password that callers 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.**



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.



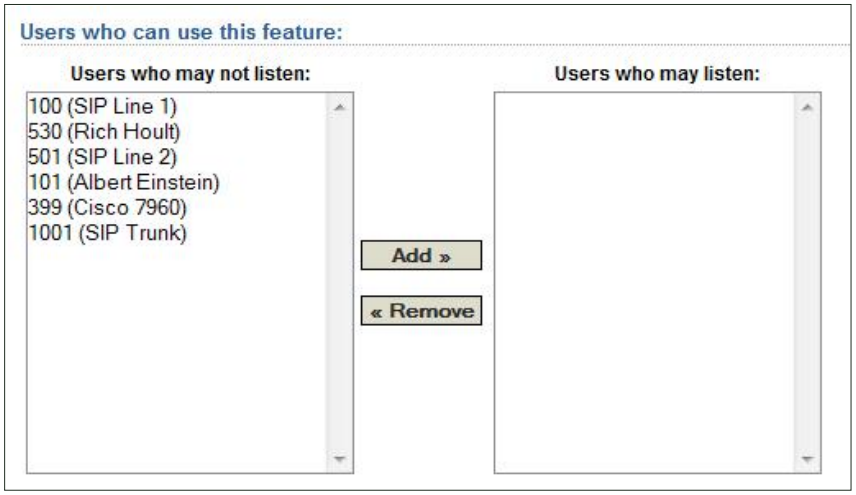
Under Listen Live Configuration, you will see Listen Live Settings and Password.

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

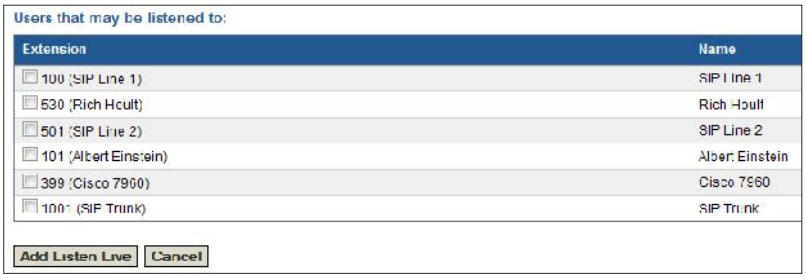
in on a conversation, but not talk to either party. If **"Barge"** is selected, you are able to barge in on a call and speak to the extension that you dialed. If **"Both"** is selected, you can use both the listen and barge features independently.

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

- **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."**

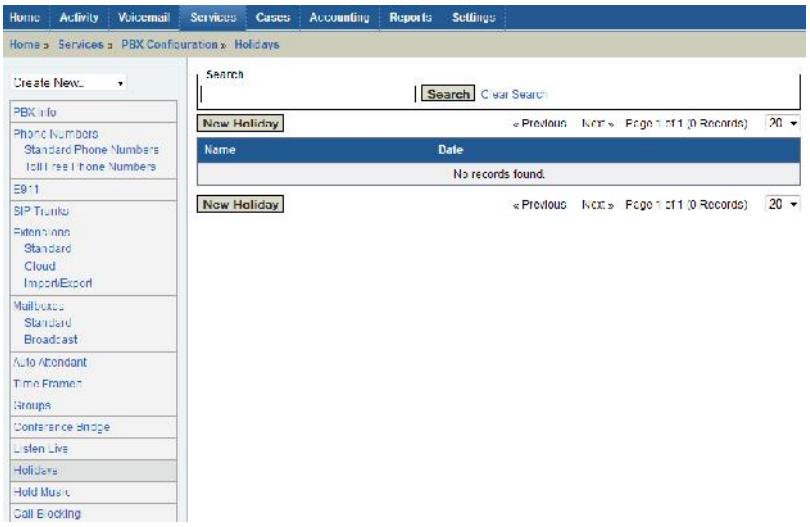


- **Users that may be listened to:** Below **"Users that may be listened to"** is a list of extensions that may be selected to Listen Live. C**heck the boxes next to the users and click "Add Listen Live"** to enabling listening to those users.

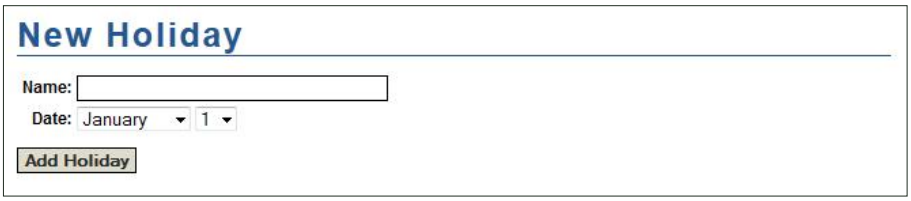


HOLIDAYS

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**.

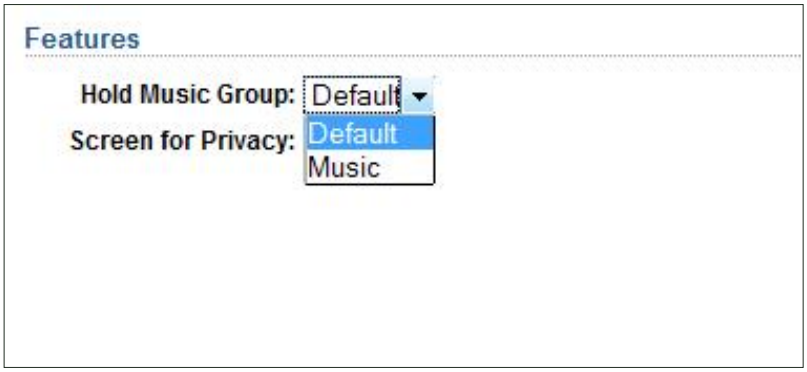


Enter a name for the holiday, select the date, then click **Add Holiday**. For more information on Holidays, please see the section **Phone Numbers** above.



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:**

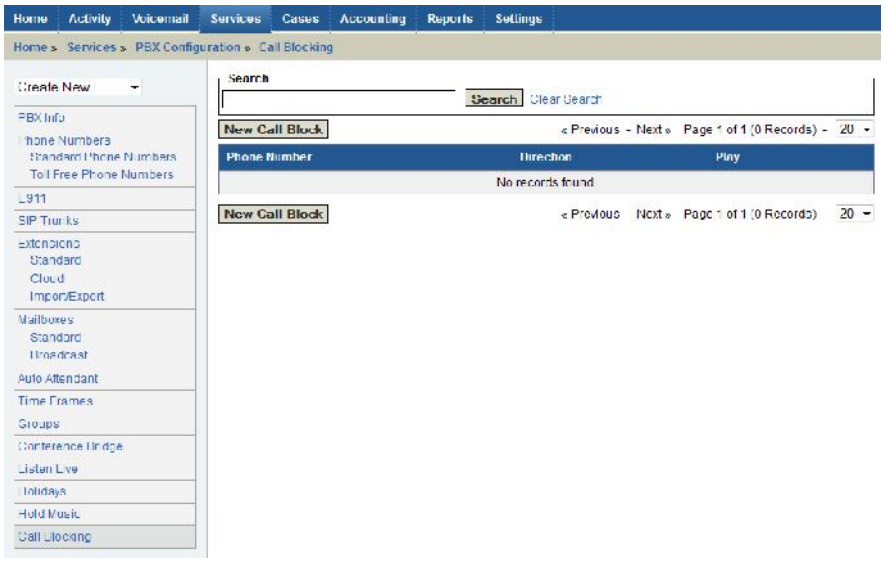


- To create a new Hold Music Group, **provide a name in the Name field**.
- To add tracks (music files) to the Group, **click "Save & Add Tracks"**, otherwise **click "Save"** to save the Group without adding Tracks.
- To use this Hold Music Group for all outbound calls, **select "Yes" for "Use for outbound 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.

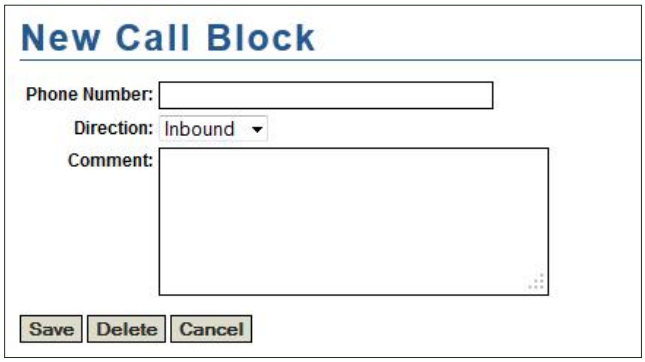
When finished, click **Save**. It may take a few minutes for the file to upload, so do not leave the screen until you receive confirmation that the file upload was successful. Also note that newly uploaded tracks may not take effect for up to 30 minutes.

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**:



- **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.



USER MANAGER

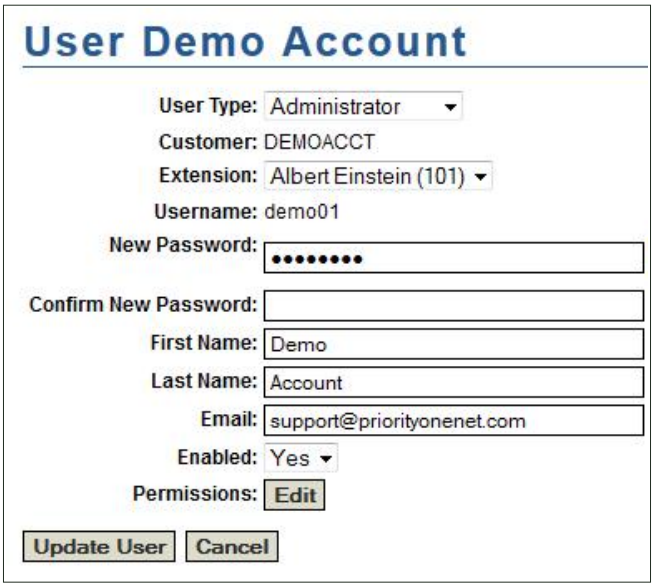
The Customer Portal has its own user access system. It is important to note that a user of the Portal is not the same as a phone user. It is a user who is granted access to the Portal via the web. As an administrator, you have the ability to grant access to the Customer Portal to other users within your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

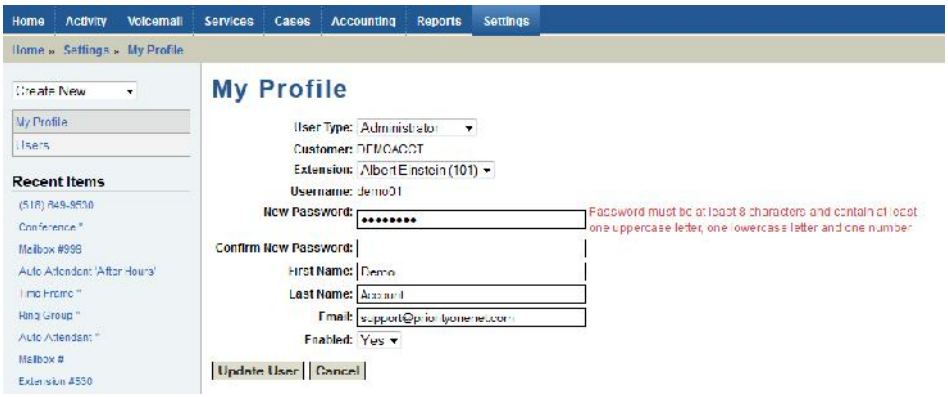
In addition to user types, each user is given permissions to access each area, or module, of the application. Each user type has a default set of permissions (full access to all available modules) that is assigned to each newly created user. Each user's specific permissions can be modified at the time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

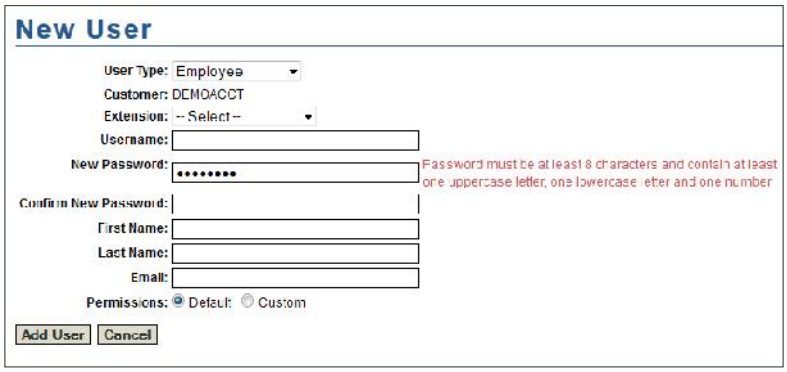
- To modify a user's permissions, click the **Settings** button at the top of the screen. Select **Users** on the left menu and click the user you wish you edit. Click the **Edit** button next to **Permissions** on the **User Details** screen. A list of all available modules will be displayed. Check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



CREATING USERS

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



- **Click the New User button.**

- **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.