TeleDynamic COMMUNICATIONS | we get it

Teledynamic
Hosted Admin Guide

Teledynamic Hosted Admin Guide

Managing PBX Settings

The bulk of the functionality of the Teledynamic Customer Portal is within the "PBX Configuration" module. In this module, all PBX settings are administrated, along with call activity and voicemail settings. PBX Info Screen

PBX Info (General PBX Settings)

The PBX Info screen shows basic information about the PBX account, such as the PBX context, the On-network Caller ID Name, The number of prepaid Virtual Paths assigned your account, and whether or not international calling is allowed for your account. The Caller ID Name and International calling settings can be changed. On this screen, you also have the ability to create a backup file of your current PBX configuration. This file is saved on the Teledynamic servers in an encrypted format. Teledynamic will be able to re-create your PBX configuration from this file if this ever becomes necessary.

- **Allow International Calling** - If set to "No", then outbound international calls cannot 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 + another user's extension to activate the intercom feature of the phone. This currently works only with Polycom™ brand devices.
- **Enable 7 digit dialing?** - If enabled, instead of requiring the user to dial 10 digits for local calls, the caller can now dial the number without the area code in the local calling area.
- **Prefix** - If 7 digit dialing is enabled, then the local calling area's area-code must be entered here.

Managing Phone Numbers

Phone Numbers that are assigned to your account 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 E911 information.

To modify the behavior or details of a phone number, click "Phone Numbers", then click "Edit":

- **Global Caller ID Name** - the value of this field will be displayed on the called party's Caller ID display when you make outgoing calls from this phone number. This field is limited to 15 characters including spaces, commas and periods. No other punctuation should be used. Please allow between 7-10 days for changes to this field to take effect.
- **Screen for Privacy** - one feature of the PBX System is to have incoming calls screened for telemarketers or other automatic dialer programs. If "Yes" is selected, than all callers who do not present a caller ID will hear a greeting asking them to enter a caller ID number using the dial pad of their phone. If they do not enter a number, they are disconnected.
- **Internal Presentation** - If you have a need for the caller ID name for incoming calls to be presented differently than the caller has supplied, the settings can be changed here. If any text is entered into the text box, it will be pre-pended to the beginning of the caller ID name that the caller has presented, and displayed to the called party. If the checkbox is checked, then the caller ID name that the caller has presented will be displayed to the customer, otherwise it will not be.
- **If Holiday** - you have the option to configure specific dates to be holidays, using the "Holidays" module. If a call comes in on a day that is configured as a holiday, the call be be routed based on the rule defined in this field.
- **Route To** - all incoming calls to this number are routed based on the rule defined by this field.

Calls can be routed to a:

- Mailbox
- Extension
- Phone
- Group
- Conference
- Outside Phone Number
- Company Directory
- Auto Attendant
- After Hours setting
- Checkmail application

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. 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 checkbox 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" checkbox, 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.

Managing Extensions

The Extension Configuration screen shows the settings of your extension and phone. You can modify the mailbox associated with your extension, your E911 information, caller ID and forwarding settings, and other settings. Modifying an Extension

To modify an extension, click on “Extensions”, then click “Edit”:

- **Name**: presented to all users in your organization when you make calls within the PBX system.
- **Voice Mailbox**: select an existing mailbox to send the caller to if you are unable to answer your phone.
- **Outgoing Caller ID**: select a phone number to be presented on the Caller ID display of phones you call outside the PBX.
- **E911 Location**: select the address at which your phone will be located. If the address is not available in the menu, please contact your system administrator for assistance. This is a required field, and if a valid address is not

Call Routing

The Call Routing settings determine 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:

- **Try First**: the system will send all calls to this setting. If you've selected to send calls to a Phone, then the next three options should be configured. Otherwise, they are unavailable.
- **If Busy**: if you've selected "Phone" as the "Try First" setting, then calls that come in when you are currently on another call will be routed to this setting.
- **If No Answer**: if you've selected "Phone" as the "Try First" setting, then calls that you do not answer will be routed to this setting.
- **If Offline**: if you've selected "Phone" as the "Try First" setting, then calls that come in when your phone is offline or your internet connection is down, will be routed to this setting.

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 the call. You also have the option to reject the call and leave a short message for the caller.

To configure your Find Me settings, 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 checkbox labled "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 checkbox 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 checkbox 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

Advanced

There are a few advanced options which you may modify:

- **Message Waiting Extension** - By default, the same as the associated mailbox. The value of this field should be a mailbox number or blank. If a mailbox number is supplied, then the message waiting indicator on the phone is illuminated when a message is waiting in the specified voice mailbox.
- **Disallow Dial-by-Extension** - if you do not want this extension to be able to be dialed from any of the auto attendants, check this box. It will still be possible to dial this extension by picking up a phone in the PBX and dialing it.
- **Disable Call Waiting** - If set to Yes, the in-call call waiting tone will be disabled if this extension is a Polycom™ phone.
- **Disable Missed Call List** - If set to Yes, Missed Calls list on the LCD display of the Polycom™ phone will be disabled.
- **Enable Buddy List** - If set to Yes, the "Buddy" feature will be active for this device if it is a Polycom™ phone.
- **Show agent status on LCD display** - If set to "Yes", then the phone will display the Visual Queue Indicator on the LCD display of the phone, instead of the default logo. (Only works with Polycom brand phones).
- **Dial '#' to transfer** - If checked, then the callee can dial # to initiate a blind transfer.

Mailboxes

To create a new voice mailbox, click “Mailboxes”, thenk click “Create Mailbox”:

- **Mailbox Number** – the number to be used for this mailbox. Commonly, this should be the same as the extension number of the user.
- **Name (for Directory)** – this field, combined with the “Mailbox Number” field, is used to populate the company directory.
- **Password** - by default, the same as the mailbox number. Please note that if the password is the same as the mailbox number, then the user will hear the voicemail setup wizard each time they check their voicemail. It is common to set the password to be the same as the mailbox number at the time the mailbox is created, but users should immediately change their password to something different once they have recorded their greetings. Any time the password is changed to be the same as the mailbox number, the user will hear the voicemail setup wizard again.
- **Dial During Announcement** – if checked, then the caller will be able to dial any PBX extension while listening to the user’s greeting before being asked to record their message.
- **Skip Voicemail Instructions** - if you want to skip the instructions for leaving a message to be played after your unavailable message check this box.
- **Announcement Only** – used for creating "Announcement Box" within an auto attendant (eg: "Our FAX number is"). Record your message in the "Busy" greeting, check this box, and inside an auto attendant map to this mailbox. When a caller listens to your greeting and hears "Press <some number> for our FAX number, they will hear the message you recorded in the "Busy" announcement and then return to the top of the auto attendant that this announcement was selected from.
- **Email to notify** – if an email address is entered into this box, a message will be sent to the address each time a voicemail is received. The audio file will be attached in .wav format.
- **Pager to notify** – if an email address is entered into this box, a message will be sent to the address each time a voicemail is received. The message will be very short, and is intended for small devices such as pagers or mobile phones. The audio file will not be attached.
- **Timezone** – the US timezone in which the user is located, for setting the timestamp of received messages correctly.

Auto Attendants

An auto attended 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 Teledynamic 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", then click "New Attendant":

- **Attendant Name** – a short name given to each attendant, just for something to refer to the attendant by within the Teledynamic Customer Portal.

- **Announcement** – if "Default Recording" is selected, then a generic, pre-recorded message is played to the caller. The customer has the option of recording their own greeting. If they wish to have their own greeting, then "Mailbox Recording" should be selected. See "Recording Your Auto Attendant Greeting" below for more information.

- **Attendant Timeout** – the amount of time after the greeting is finished playing, before the "Timeout" rule is executed.

- **Digit Timeout** – the amount of time between key presses before the attendant attempts to connect the user to the extension or option dialed.

To configure the options of the attendant, use the table on the screen to determine which each key of the phone dial pad does. If you wish for any given key to have no function, just leave it to the default setting of "----". Keys 0 to 9, * (star) and # (pound) refer to the keys on a phone dial pad. The "Timeout" option is executed if the caller does not press any keys in the time defined in the "Attendant Timeout" field above.

Recording Your Auto Attendant Greeting

To make it easiest for the customer to record their own greeting, the Teledynamic PBX system uses voice mailbox recordings for the auto attendant greetings. In order to record a greeting, the user must first create a mailbox in the "Mailboxes" module (see "Mailboxes" above). The mailbox number should be outside of the pattern or scheme used for user mailboxes. The mailbox will not be used for taking messages, it will only be used for recording the attendant greeting.

Once the mailbox has been created, the customer should call the check mail application (by pressing the "Messages" button on their phone, or dialing * and their mailbox number). Once they've entered their password, they can record their attendant greeting into the Busy, Greeting, or Unavailable recordings. Then, on the auto attendant screen in the Portal, the user should select "Mailbox Recording" for "Announcement", then select the mailbox which was created for this attendant, then select Busy, Greeting, or Unavailable, depending on which recording they recorded their greeting into.

Time Frames

Call routing inside the Teledynamic PBX can behave differently at different times of the day or different days of the week. This concept is know as After Hours. For example, the customer may want calls from 9 AM to 5 PM to be routed to their main auto attendant, but calls from 5 PM to 9 AM to be routed to a voice mailbox.

Time Frame settings are applied by creating the Rules in the Time Frame module, then routing a phone number, extension or other feature to that Time Frame setting. For example, if the You wanted calls to your phone number to ring an auto attendant during business hours, but ring a mailbox after hours, you would first create the Time Frame setting. For the "During Hours" option, select the auto attendant. For the "After Hours" setting, select the mailbox. Then go to the settings for the phone number, and select "Time Frame" as the option for the "Route To:" field.

To create a Time Frame setting, click on "Time Frame, then click on "New Time Frame":

- **Time Frame Name** - a short name given to each Time Frame setting, just for something to refer to the setting by within the Teledynamic Customer Portal.
- **During hours forward call** – select how you'd like incoming calls to be routed during normal hours
- **After hours forward call** – select how you'd like incoming calls to be routed after normal hours

For each day that you'd like timed settings to take effect, check the check box in the first column, then select the start of the business day and end of the business day. If the entire day is to be considered "after hours", then check the "All Day" check box.

Groups

A "Group" is a collection of extensions which are to be rung at the same time by the same call. For example, the customer may have a customer support department with 4 support representatives. The customer might want all support phones to ring simultaneously when a caller hits key 2 at their auto attendant. To achieve this, create a Group. To create a new Group, click on "Groups", then click on "New Group":

- **Group Name** - a short name given to each group, just for something to refer to the group by within the Teledynamic Customer Portal.
- **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", then the call be be sent to the next extension.
- **Seconds to Ring** – the number of seconds to ring before the timeout option is executed.
- **Extensions**
    - **Available Extensions** – this lists all extensions defined in the PBX
    - **Selected Extensions** – to move an extension into this box, highlight the corresponding extension in the "Available Extensions" 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", then click "New Conference":

- **Conference Name** - a short name given to each conference room, just for something to refer to the conference room by within the Teledynamic Customer Portal
- **Password** – the password that will be required for a caller to enter the conference room
- **Enable Music On Hold** – if checked, then music will play when there is only one participant in the conference room.
- **Play Enter/Exit Sounds** – if checked, a sound will play each time a participant enters or exits the conference room.
- **Announce Attendee Count** – if checked, then each participant will be told the number of existing participants when entering.

Listen Live and Barge

"Listen Live" is the ability to listen to another user's calls from your own phone. "Barge" is the ability to listen to another user's calls, and be able to speak with them as well.

- To Listen to a user's conversations, dial *57 plus their extension number. You will not be able to speak to either party.

- To Barge into a user's conversation, dial *58 plus their extension number. You will be able to speak to the user whose extension you dialed.

Instructions for setting up Listen Live:

- **Listen Live Settings** - This determines if Listen Live is enabled, and if so, which features are enabled:
  - *Off* - Listen Live and Barge are disabled
  - *Listen Live Only* - Users may listen in on a conversation, but not speak to either party
  - *Barge Only* - Users may listen in on a conversation, and speak to the party whose extension number was dialed
  - *Listen Live and Barge* - Users may use either of the above features

- **Password** - In order to use this feature, you will be prompted for a password after you dial. Enter a number with at least 3 digits into this field to set the password.

- **Users who can use this feature** - This determines which user extensions may use the Listen Live feature. Select extensions in the left box and click the "Add" button. The selected extensions will be moved to the right box. All extensions listed in the right box will be able to use the Listen Live and Barge features, as long as they enter the password above. If a user attempts to use either feature from an extension that is not listed in the right box, they will receive an error message, even if they know the password.

- **Users that may be listened to** - This determines which user extensions may be listened to or barged on by authorized users. Check the checkbox of any extension that you'd like authorized users to be able to listen to. If the checkbox is not checked, no users will be able to listen in on calls to or from that extension.

Call Center

Depending on your Teledynamic Service plan, your PBX may include certain Call Center features. There are three main components of the Call Center are call Queues, Automatic Call Distribution (ACD), and Agents. Please contact your Teledynamic Representative or Teledynamic Customer Care to see if your plan includes these features.

Queues

- **Name** - Enter a name to identify this queue.
- **Caller ID Prefix** - This determines the settings of the Caller ID display when ringing an *agent's* phone. There are four options:
  - *Original Caller ID* - Display the caller's original Caller ID name
  - *Custom Text Only* - Enter text into the box at the right, only that text is displayed on the agent's LCD display
  - *Custom Text: Original Caller ID* - Enter text into the box at the right. That text is displayed, followed by a colon (:), followed by the caller's original Caller ID name.
  - *None* - Display nothing on the agent's LCD display.
- **Queue Timeout** - Enter the number of minutes that a caller should remain in the queue, before their call is forwarded to another location within the PBX. If you would like callers to remain in the queue forever, enter 0.
- **After Timeout** - If you have a timeout set in the above field, this determines where the caller is forwareded to after the timeout expires.
- **Can Callers Join an Empty Queue?** - If "Yes" is selected, then a caller will be able to join the queue, even if no agents are logged into the queue. Otherwise, the queue will immediately time out, and the caller will be sent to the "After Timeout" setting.

- **Ring Strategy** - This determines the strategy of ringing agents. There are five available strategies:
  - *Ring All* - Rings all logged-in agents at the same time until one of the agents answers
  - *Least Recent* - Rings the agent who least recently answered a queued call
  - *Fewest Calls* - Rings the agent who has taken the least amount of calls than all other logged-in agents
  - *Random* - Rings agents in a random manner
  - *Round Robin* - Rings agents in a round-robbin manner. (Even distribution of calls)
- **Ring Each Agent For** - When sending a call to an agent, how long should the agent's phone ring before sending the call to the next available agent?
- **If Agent Doesn't Answer** - If an agent does not answer in the time entered in the above field, should they be penalized? There are three options:
  - *No penalty* - Do not penalize the agent, just send the call to another agent. This agent will continue to receive queued calls.
  - *Automatically Pause Agent* - Set the agent's status to "Paused" or "Make Busy". The agent will not receive any more calls until they un-pause.
  - *Automatically Logoff Agent* - Log the agent out of the queue. They will no longer receive calls from this queue until they log in again.
- **Wrap-up Time** - After an agent finishes a queued call, how long should the queue wait before attempting to send the agent another call? (0 seconds is acceptable)
- **Play Periodic Announcements** - While the caller is waiting in the queue, they will hear the hold music from your PBX. You may configure an announcement to periodically interrupt the hold music and play to the waiting caller. You may enable or disable this periodic announcement with this control. The following two fields determine which announcement will play, and how often it should repeat.
- **Announcement Audio** - Similar to the way an auto attendant works in the Teledynamic system, you will record the periodic announcement into a voice mailbox that will be used only for this purpose. Please select the mailbox into which you will record your periodic announcement audio. Be sure to record the audio into the "Busy" greeting of this mailbox.
- **How Often (seconds)** - How often should the periodic announcement repeat?
- **Can Caller Press 0 to Exit Queue?** - While the caller is waiting in the queue, should they have the ability to press 0 to exit the queue? If yes, then your periodic announcement should instruct the caller that they are able to do so.
- **If Caller Presses 0** - If the caller presses 0 while waiting in the queue, where should there call be forwarded to within the PBX?
- **Agents Assigned to this Queue** - You must select which agents belong as members to this queue. Otherwise, the agents will not receive calls from this queue. Select agents from the left list, then click the "Add" button to the right list. All agents listed in the right "Agents to Ring" list will receive calls from this queue. Agents can be removed from the queue by selecting their name in the right list then clicking the "Remove" button.

Agents

Agents are employees of your company that have an identification number to login to their assigned queues to accept queued calls. In order for any person to receive queued calls, they must be first configured as an agent, and second assigned to one or more queues.

To create an Agent, click on the "Agents" menu item under "Call Center" on the menu. You will see a list of all existing agents configured in your PBX. Click the "New Agent" button to create a new agent. Fill in the following fields:

- *Agent ID*: This can be any number from 1 to 5 digits long. The Agent will use this number to log in and out of the queues.
- *Name*: This is the agent's name. It will appear in the Call Center reports as entered here.
- *Password*: The agent will use this password when logging into the queues. It may be any number from 1 to 4 characters long.

After you've created your list of agents, you can assign each agent to one or more Queues. Please see queues for information on assigning agents to queues.

Agent Login and Pause

Once you have a queue and agents configured, agents may login to each queue. Agents may log in to multiple queues at the same time. Each queue has its own login dial code to be dialed. The login, logout, pause and un-pause dial codes for each queue can be found at the top of the Queue edit screen once the queue has been saved.

- To Login to the queue(s): Agent dials *01 + Agent ID
- To Logout of the queue(s): Agent dials *00 + Agent ID
- To Pause in the queue(s): Agent dials *02 + Reason Code + Agent ID (see Reason Codes for more info.)
- To Unpause in the queue(s): Agent dials *03 + Agent ID

Reason Codes

When an Agent needs to stop receiving calls from the queue(s), but does not want to log out of the queue(s), they can pause themself. They will stop receiving queue calls until they un-pause, but will still be reported as logged into the queue(s). In addition, the agent can provide a "Reason Code" to indicate the reason that they are currently paused. This reason code is logged with their pause event, and reported on the Realtime Console.

There are 10 Reason Codes listed. The system will have default values for each of the Reason Codes, such as "Wrap Up Time", "Restroom", "Break" and "Lunch. Any of these Reason Codes can be changed by the user. Update the textbox next to each Reason Code, and click "Save". To reset all codes to the default values, click "Restore Defaults".

Tally Codes

When an Agent receives a call from the queue(s), and needs to assign that call a specific category for billing or other purposes, the agent can provide a "Tally Code" to indicate the nature of the call. This Tally Code is logged in the Queue Call Activity Report.

There are 10 Tally Codes listed. The system will have default values for each of the Tally Codes. Any of these Tally Codes can be changed by the Administrator. Update the textbox next to each Tally Code, and click "Save". T

Queue Reports

The Call Center has 7 reports available:

- Real-time Console - A real-time view of all queues showing calls waiting, hold time, and agents' status.
- Queue Performance - A historic metrics report searchable by date, showing metrics by queue.
- Agent Performance - A historic metrics report searchable by date, showing metrics by agent.
- Agent Events - A historic metrics report searchable by date and by agent, showing agent activity by session.
- Queue Call Activity - A call log report showing calls by date, by queue, and by agent.
- Answer/Abandon Report - A historic metrics report searchable by date, by queue, or by agent, showing metrics of answered or abandoned calls.
- Queue Summary by Number - A historic metrics report, searchable by date, by phone number, and by queue, showing metrics of calls inbound to specified phone numbers and queues.

Visual Status Indicators

The Call Center has the option to display the agent's queue status on the LCD screen of Polycom brand phones. If this option is enabled for a given phone, then the phone will display a screen showing the agent ID of the agent who is logged in at that phone, the agent's current status ("Logged In" or "Paused"), and the list of queues that the agent is currently logged into. If no agent is logged into a queue at that phone, the screen displays "No agent logged in".

To enable this feature, the phone must be configured to display the status. Please see Managing Extensions, under "Advanced" for details about enabling this feature on a phone.

Call Blocking

The Teledynamic PBX system allows customers to block given phone numbers from being dialed, or from calling into the PBX. To create a new Call Block, click on "Call Blocking", then click "New Call Block":

Phone Number – the phone number to be blocked, either for incoming or outgoing calls

Direction – defines whether we're blocking this number from making incoming or outgoing calls

Play – if we're creating an outbound call block, then we need to select what we want the caller to hear when they attempt to call this number. They can either hear a busy signal, or a generic, pre-recorded message stating that the number has been blocked.

Comment – optional, perhaps a reason why this number is being blocked, who the number belongs to, or other general information about the call block.

Holidays

To define a new Holiday, click on "Holidays", 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 "Managing Phone Numbers" above.