sctelcom

Business Cloud Communications User Guide

Updated October 2024

Table of Contents

sctelcom

Welcome

Cymbus Business Cloud Communications (BCC) is a robust, flexible, and expanding full-stack communications solution that is purpose-built with mobility and unified communications in mind. It is compatible with an extensive and [growing list of IP phones](#) and the Cymbus UC app.

Feature Plans

Business Cloud Communications offers three tiers of service, all of which include a variety of voice features like auto-attendant, extension-to-extension dialing, and other advanced call handling features. The Advanced and Professional plans also include the Cymbus UC app, which enables you to access your voice services and collaboration tools—including messaging, video conferencing, and screen sharing—from your smartphones, tablets, and desktops.

Here's a closer look at the features in each plan:

Feature	Standard	Advanced	Professional

Auto-Attendants
  - Call Groups and Queues
  - Group Night Forwarding
	✓	✓	✓

Cloud PBX	✓	✓	✓
Call Park	✓	✓	✓
Extension Dialing	✓	✓	✓
Find Me/Follow Me	✓	✓	✓
Hold Music	✓	✓	✓
Presence	✓	✓	✓
Visual Voicemail	✓	✓	✓
Mobile & Desktop UC App		✓	✓
Team Messaging		✓	✓
Screen Sharing			✓
Video Conferencing			✓

sctelcom

Star Codes Guide

Dial these codes to activate and deactivate certain features on your account.

ACCOUNT CALL SCREENING	
*41	All Other Callers: Block
*42	All Other Callers: Allow
*45+tn	Custom Caller: Block
*46+tn	Custom Callers: Allow
*47+tn	Custom Callers: Block w/Message
*48	Anonymous Callers: Block
*49	Anonymous Callers: Allow
*50	Anonymous Callers: Block w/Message
*51	Anonymous: Disable Block w/Message
Custom	Auto-Attendant Group Forwarding
*57	Call Trace

MID-CALL STAR CODES	
Custom	Account Codes
*21	Start Recording
*22	Pause Recording
*23	Resume Recording
*24	Stop Recording

USER CALL HANDLING	
** + Ext.	Directed Call Pickup
*40	Pick Up Group
*43	Call Waiting: Enable
*44	Call Waiting: Disable
*70+TN	Call Waiting: Disable Next Call
*62	Call Park
*66+Slot	Call Park Retrieval
*11	Call Pull
*65+TN	Caller ID: Enable Next Call
*67+TN	Caller ID: Block Next Call
*89	Group Log In/Out
*69	Last Call Return
*98	Voicemail Management

USER CALL FORWARDING	
*72+	Call Forward: All (On/Off)
* 90+	Call Forward: Busy (On/Off)
* 92+	Call Forward: No Answer (On/Off)
* 94+	Call Forward: Out of Service (On/Off)
*00+Ext.	Send Call Directly to Voicemail

USER CALL SCREENING	
*58+	Custom Caller: Block w/Message
*59+	Custom Caller: Allow
*60+	Custom Caller: Block
*63+	Custom Caller: Forward
*64	All Other Callers: Block
*74	All Other Callers: Allow
*77	Anonymous Callers: Block
*87	Anonymous Callers: Allow
*95	Anonymous Callers: Block w/Message
*97	Anonymous: Disable Block w/Message
*78	Do Not Disturb: Enable
*79	Do Not Disturb: Disable

SOCIAL & PUBLIC SERVICES	
211	Essential Community Services
411	Directory Assistance
511	Traveler Information (US)
611	Customer Service
711	Telecommunications Relay Service
811	Utility Location Services (US)
811	Canadian Health Services (CAN)
911	Emergency Services
933	Emergency Services Verification (US)
988	National Suicide Prevention Lifeline

sctelcom

Social & Public Services

The following services provide quick access to special services based on your location, according to caller ID, without the need for an area code.

CODE	DESCRIPTION
211	**ESSENTIAL COMMUNITY SERVICES** Access to community information and referral services, such as essential needs, crisis, and disaster assistance. Visit http://www.211.org to learn about services in your area.
411	**DIRECTORY ASSISTANCE** Phone service used to look up a published telephone number and/or address listing.
511	**TRAVELER INFORMATION (US)** Local hotline for real-time information regarding traffic and road conditions. Not available in all states.
611	**CUSTOMER SERVICE** Dials Customer Service.
711	**TELECOMMUNICATIONS RELAY SERVICE** TRS uses operators to facilitate phone calls between people with hearing and speech disabilities and other individuals. A TRS call may be initiated by a person with or without a disability. Visit www.fcc.gov to learn more.
811	**UTILITY LOCATION SERVICES (US)** "Call Before You Dig" routes the caller to their local utility location services. Call a few days before beginning an excavation project to find out the location of underground utilities.
811	**CANADIAN HEALTH SERVICES (CAN)** Call to speak to a local health care professional about medical advice, mental health, healthy eating, and more.
911	**EMERGENCY SERVICES** Calls to 911 (US or CAN) will be sent to the nearest Public Safety Answering Point (PSAP) based on the registered address. Both callback number and address are available to the PSAP on each call.
933	**EMERGENCY SERVICES VALIDATION (US)** Calls to 933 are sent to the caller's emergency services provider, who will then connect the call to their automated 911 verification service. The service will play back the dialing phone number and the address associated with it.

988   NATIONAL SUICIDE PREVENTION LIFELINE (US)

When a user dials 988, they will be connected to the National Suicide Prevention Lifeline (US) or Talk Suicide Hotline (CA) to speak with a trained crisis counselor who will listen, offer support, and get them the help they need.

E911 Emergency Services

When you call 911, the address associated with your phone number is used to direct the call to the correct local emergency response units, known as Public Safety Access Points (PSAPs). The PSAP, in turn, uses that address to direct the emergency response units to your location.

To ensure rapid response times, 911 addresses are standardized so that they are accurate and unambiguous for the emergency response units. The PSAPs are responsible for standardizing all addresses in their jurisdiction. That record of standardized addresses is known as the MSAG (Master Street Address Guide).

Address Validation

When activating a number, we require an address to be associated with it. Sometimes the address provided initially isn't in a standard format (referring to a street by a nickname versus the official name, omitting the directional, outdated street name, etc.), which can cause confusion with and delay response times for emergency services, or worse.

To best serve you, we validate every address back to the MSAG. If the address cannot be validated, we will contact you to correct it.

If an address is not validated, calls to 911 will not only be charged a fee but will also add a delay to the routing process while the national call center agents ask the address. In worst-case scenarios, if the caller is unable to communicate clearly, the call could not get routed at all, which could result in **death** and **legal action**. It is important to address rejections in a timely manner and to ensure your address recorded with us is the correct address.

911 for Remote Office Users

Each phone is set with a 911 callback number and an associated location address. This allows remote users to be part of the company phone system and still send their remote office address and direct callback number to the 911 operator if they dial 911.

> ### WARNING
>
> If there is a power or internet outage, your phone may not be able to place a 911 call.

Using Your IP Phone

Every IP phone is different, so the steps described below may be slightly different on your device. Refer to your device user guide for more information.

Placing Calls

There are multiple ways to place a call on an IP phone. If you misdial the number, you can "backspace" to correct it without starting over.

1. Do one of the following:
   - Select **New Call**.
   - Pick up the handset.
   - Press a line key.
   - Press the Speakerphone button.
   - Press the Headset button.
2. Enter a number or choose a contact from the Directory or Recent Calls.
3. Press **Dial** or **Send**.

> ### Dial 9
> To call a number that isn't an extension, you may need to first dial 9 to reach an outside line. When you hear the dial tone, you can finish entering the phone number.

Answering Calls

To answer a call, do one of the following:

- Press **Answer**.
- Pick up the handset.
- Press the Speakerphone button.
- Press the Headset button.

When you answer an incoming call while on an active call, the call you were in will be placed on hold and the incoming call will be active.

Holding Calls

While on a call, press **[Hold]**. The caller will hear hold music. To retrieve the call, press **[Resume]**.

Call Transfer

Attended Transfer

Use this method when you want to talk to the party you're transferring the call to. The recipient will see your caller ID on the call.

1. While on a call, press **[Transfer]**.
2. The caller will begin to hear hold music.
3. Dial the extension or phone number of a contact.
4. When the call is answered, inform your contact of the transfer.
5. Hang up to complete the transfer.

Blind Transfer

Use this method if you don't need to talk to the party the call is being transferred to. The recipient will see the call as if it is coming from the original caller.

1. While on a call, press **[Transfer]**. The caller will begin to hear hold music.
2. Press **[Blind]**.
3. Dial the extension/phone number where the call should be transferred.
4. Hang up. The caller will be transferred over to the new extension/phone number.

> ### Yealink Phones
>
> Press **[Transfer]**, dial the extension or phone number, and press **[Transfer]** again.

Transfer Call to Voicemail

When you want to transfer a current call to the correct person without interrupting their current call or having it ring at their desk, you can transfer the current call directly to that user's voicemail box.

1. Place caller on hold. The caller will begin to hear hold music.
2. Dial the star code + the extension.

3. Press **Dial > More > Join**.

4. Hang up. The caller will be in the other user's voicemail box.

> **Yealink Phones**
>
> On Yealink phones, press **[Transfer]**, dial the star code + the extension, then press **[B Transfer]**.

Conference Calls

Three-way calling lets you bring two parties into the same call to all participate in the same conversation.

Use Call Conference on Polycom VVX

1. While on a call, press **[More]** then **[Confrnc]**.

2. Enter the second number/extension to have on the call.

3. When the second party answers, press **[More]** then **[Confrnc]**.

To split the conference call back into individual calls, press **[Split]**. To re-join the callers again, press **[Join]**.

Use Call Conference on Yealink

1. While on a call, press [Conference].

2. Enter the second number/extension to have on the call.

3. When the second party answers, press **[Conference]**.

To split the conference call back into individual calls, press **[Split]**. There is not a way to rejoin the callers once split.

Paging

You can make a one-way announcement to all the phones on your account by using the paging service. All phones that are not in use will use the speakerphone to play the message. This allows you to send a message to the people in your company without disturbing the lobby or other sensitive areas.

Contact Customer Support to set up a paging group and assign it to a line on your device. Each group is assigned a Page Priority level:

- Standard: All devices except those on a call and with Do Not Disturb enabled.

- Priority: All devices except those on a call.

- Emergency: All devices regardless of status.

Make an Announcement

1. Press the line key assigned to the paging group or dial the group's extension.

2. You are now connected to all users in the paging group. Make your announcement and then hang up.

Calling Features

Call Screening

You have control to ensure you receive important calls. You can limit the callers who ring your phone, filter callers, or forward important callers to another number.

Calls from anonymous callers, or other callers, can be given special treatment, such as being blocked, sent directly to voicemail, forwarded to another phone number (like your mobile), or having a custom ring pattern assigned.

All Other Callers

If you don't want to receive calls from anyone, use this feature to block all callers and then enable only custom (specific) callers to reach you.

Code	Description
*64	**Block All Other Callers** All other callers (not otherwise specified in Call Handling settings) will be blocked. 1. Dial the star code. 2. You will hear, "Your selective call accept service has been activated."
*74	**Allow All Other Callers** All other callers (not otherwise specified in Call Handling settings) will be allowed. 1. Dial the star code. 2. You will hear, "Your selective call accept service has been deactivated."

Anonymous Callers

Calls from anonymous callers (those without caller ID) can waste your time and distract you from other calls you want to take. Block them from even ringing your phone.

Code	Description
*77	**Block Anonymous Callers** Calls without caller ID will be blocked and the caller will hear a busy tone. 1. Dial the star code. 2. You will hear, "Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line."
*87	**Allow Anonymous Callers** Calls without caller ID will be allowed. 1. Dial the star code. 2. You will hear, "Your anonymous call rejection service has been deactivated."
*95	**Block Anonymous Callers with Message** Calls without caller ID will be blocked and the caller will hear a message. 1. Dial the star code. 2. You will hear, "Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line."
*97	**Unblock Anonymous Callers with Message** Disables "Anonymous Callers: Block with Message." Anonymous calls will be allowed. 1. Dial the star code. 2. You will hear, "Your anonymous call rejection service has been deactivated."

Custom Callers

Use this feature to control who can call your phone and what happens when they do. These settings can be managed in the Voice Portal or by star code.

Code	Description
*59	**Allow Custom Callers** Calls from the number specified will be blocked with a message. Use this feature if you've blocked all callers and want to allow a specific caller to contact you. 1. Dial the star code. 2. Enter your voicemail PIN followed by #. 3. Enter the 10-digit phone number, starting with 1, followed by #. 4. You will hear, "Calls from [phone number] will be allowed."
*60	**Block Custom Callers** Calls from the number specified will be blocked. Blocked callers will hear a busy signal. 1. Dial the star code. 2. Enter your voicemail PIN followed by #. 3. Enter the 10-digit phone number, starting with a 1, followed by #. 4. You will hear, "Calls from [phone number] will be blocked."
*58	**Block Custom Callers with Message** Calls from the number specified will be blocked with a message. 1. Dial the star code. 2. Enter your voicemail PIN followed by #. 3. Enter the 10-digit phone number, starting with 1, followed by #. 4. You will hear, "Calls from [phone number] will be blocked."
*63	**Forward Custom Callers** Calls from the number specified will be forwarded. 1. Dial the star code. 2. Enter your voicemail PIN followed by #. 3. Enter the 10-digit phone number, starting with 1, followed by #.

4. You will hear, "Calls from [phone number] will be forwarded."

> For forwarding to work, a *Forward To* number must be set up in the Voice Portal. If a number is not set, forwarded calls will fail over to the *All Other Callers* setting.

Call Trace

Call Trace allows you to mark a harassing or threatening phone call in your Call History. If necessary, you must take additional actions to establish a case with your local law enforcement agency.

Code	Description
*57	Call Trace 1. After ending the call, dial the star code. 2. You will hear, "The previous call will be marked in your call history." 3. A new line for the trace will be entered in the Call History.

Do Not Disturb

When you don't want your phone to ring, activate Do Not Disturb to send all incoming calls directly to your voicemail box.

Code	Description
*78	Enable Do Not Disturb 1. Dial the star code. 2. You will hear, "Do Not Disturb enabled." 3. All calls will be sent to voicemail.
*79	Disable Do Not Disturb 1. Dial the star code. 2. You will hear, "Do Not Disturb disabled."

Nomorobo Robocall Blocking

Nomorobo is a free service for users in the US that will block the telephone numbers of known telemarketers and robocallers. Basically, Nomorobo intercepts and screens users calls. If the call is legitimate, it will ring through. But if the call is from a robocaller or

known telemarketer, Nomorobo hangs up. Learn more about it at
https://www.nomorobo.com/.

1. Sign Up for Nomorobo
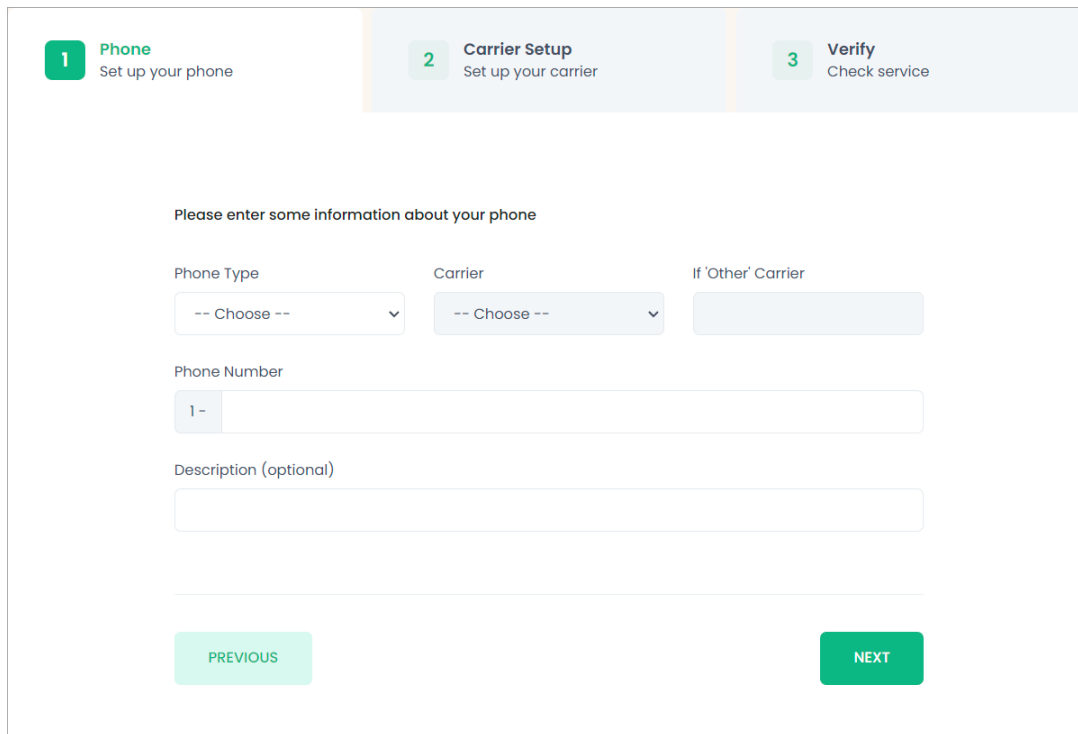
To get started, you first need to create a free account with Nomorobo.

1. Go to https://www.nomorobo.com/ and click **[Get Started]** in the navigation menu.

2. For phone type, select *Internet/VoIP Landline*.

3. Select your service provider.

4. Enter your email address, then click **[Sign Up]**.

2. Set Up Your Account

1. Check your email and open the *Welcome to Nomorobo!* message. Click the link in that email to begin the setup process.

2. Enter your first and last name, create a password, then click **[Create Account]**.

3. Your account has been created! Click the button to set up your phone.

3. Phone

1. Enter the following information:

   – Phone Type: Landline/VoIP.

   – Carrier: Choose your service provider.

   – Phone Number: Enter your phone number.

2. Click **[Next]**.

4. Carrier Setup

1. Log in to your Voice Portal and go to your Call Handling settings.

2. Choose your preferred call handling type: **Sim Ring** or **Find Me**.

3. Enter your carrier's Nomorobo number in the *Phone Number* field.

    – For *Find Me*, Nomorobo should be the first destination. Subsequent destinations should follow your call preferences.

4. Click **Save**.

SIM RING

Sim Ring enables a call to ring to multiple lines and/or phone numbers simultaneously. When a call comes in, Nomorobo will be the first to intercept the call. Legitimate calls will continue to ring your number, but if the call is from a robocaller or known telemarketer, Nomorobo hangs up for you. Your phone will ring once to let you know the robocall has been answered and stopped.

FIND ME/FOLLOW ME (Preferred)

Find Me/Follow Me will ring each destination sequentially. When the first destination is set to Nomorobo, they will field the call and allow legitimate calls to ring the next destination. You will not hear the call come through, nor will you be notified that a call was intercepted and blocked.

5. Verify

1. Go back to your Nomorobo account.

2. On Step 3 Verify, click **[I'm Ready. Call Me Now.]**

3. You will immediately receive a call letting you know if everything is set up correctly. Please answer the phone after the third ring.
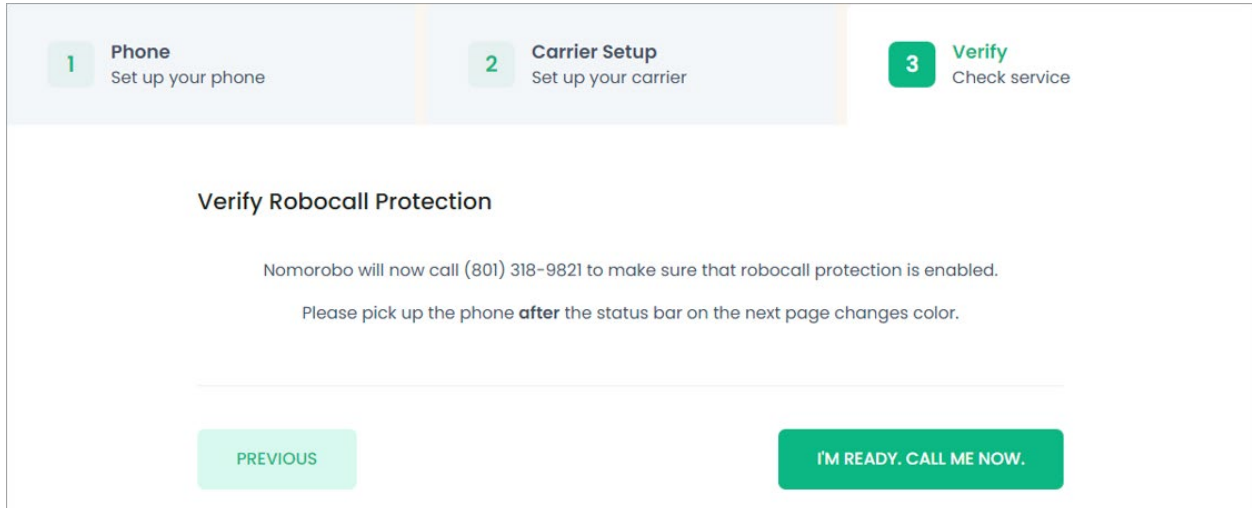
That's it! Your phone number is now listed as "Protected."

Call Forwarding

When you aren't available to answer calls on your phone, you can forward your calls somewhere else. Call Forwarding can be set up in the voice portal or by star codes. In the Voice Portal, you can set up a schedule to forward calls during certain hours, like your lunch break.

Call Forwarding Star Codes

These star codes are applied to the line. For each Call Forwarding star code, the call handling options are: *Busy Tone*, *Forward*, and *Send to Voicemail*.

Code	Description
*00	Forward Call to Voicemail
	Send a call directly to another user's voicemail box.
	1. Place the caller on hold. The caller will hear hold music.
	2. Dial the star code + the user's extension.
	3. Press **Dial > More > Join**.

4. Hang up. The caller will be in the other user's voicemail box.

*72   Call Forward: All (On/Off)

Choose where to forward all calls to your line.

1. Dial the star code.
2. Enter your voicemail PIN followed by #.
3. Choose an option:
    -   Enable: Press 1 to enter a forwarding number followed by #.
    -   Disable: Press 2 to disable forwarding.

*90   Call Forward: Busy (On/Off)

Choose where to forward calls when you're on another call.

1. Dial the star code.
2. Enter your voicemail PIN followed by #.
3. Choose an option:
    -   Press 1 to enter a forwarding number followed by #.
    -   Press 2 to send calls to voicemail.

*92   Call Forward: No Answer (On/Off)

Choose how calls will be handled when your line isn't answered.

1. Dial the star code.
2. Enter your voicemail PIN.
3. Choose an option:
    -   Press 1 to enter a forwarding number followed by #.
    -   Press 2 to send calls to voicemail.

*94   Call Forward: Out of Service (On/Off)

Choose how calls will be handled when your line is out of service or not registered.

1. Dial the star code.
2. Enter your voicemail PIN followed by #.
3. Choose an option:
    -   Press 1 to enter a forwarding number followed by #.
    -   Press 2 to send calls to voicemail.

Remote Access Forwarding

When you're away from your phone but still want to receive calls, you don't need to get back to your phone to set things up. Unconditional call forwarding, or forwarding of all calls, is available remotely using the voicemail system, so it will continue to function even if there is a power outage, internet outage, or device failure.

1. From a phone not connected to your account, dial your 10-digit phone number.
2. When you hear your voicemail greeting, press #.
3. Enter your voicemail PIN followed by #.
   - Press 8 for Personal Options.
   - Press 5 to access the Call Forwarding menu.
   - Press 1 to forward all calls. Enter forwarding destination number followed by #.
   - Press 2 to send all calls to your line.

Call Handling

Call Park

Call Park combines the elements of transferring a call and placing it on hold. Rather than asking a caller to call back later or sending them to voicemail, the user can transfer the call to a virtual parking spot where the caller will remain on hold until the person they are calling becomes available. To create parking spots on the account, contact Customer Support.

- Auto Ringback. If the call isn't answered after a period of time (typically 180 seconds), the call will be returned to the user who parked it, following the user's call handling settings. This feature is optional and managed by Customer Support.

- Caller ID. When a call is retrieved from a parking spot, the caller ID displays the original calling name and number. If caller ID is not available, it is presented as *Not Available* or *Anonymous*.

Call Park via Line Key

When a parking spot is assigned to a line on your phone, you can park and retrieve calls with the click of a button. To set it up on your device, contact an account Admin.

Code	Description
Line	**Call Park** Places a call in a parking spot. 1. While on a call, press the line key assigned to the parking spot. 2. The call will be placed in that parking spot.
Line	**Call Park Retrieval** Retrieves a parked call from a parking spot. 1. Press the line key on the phone for the parking spot the call is in. 2. You will be connected to the caller.

Call Park via Star Codes

When parking calls using star codes, you will be automatically assigned a numbered parking spot, and the call can be retrieved by anyone who knows the parking location.

Code	Description
*62	**Call Park** Place a call in a parking spot. 1. While on a call, press **[Transfer]** and dial the star code. 2. The system indicates the parking spot the call has been placed in. 3. Hang up.
*66	**Call Park Retrieval** Retrieve a parked call from a parking spot. 1. Dial the star code + the parking spot the call was placed in. – For example: *6601 2. You are now connected to the parked caller.

Call Pull

Call Pull is the ability to seamlessly move a live call from one device to another. For example, you can answer or place a call on the Alianza UC app from your car, then pull it to your desk phone once you get to the office. The caller won't hear the star code being dialed or even know the call was moved.

Code	Description
Custom	Call Pull

Seamlessly move a live call from one device to another.

1. While on an active call, pick up the device you want the call moved to, then dial the Call Pull star code.
2. The call will be pulled to the device, so you can continue the conversation.
   - If there isn't a call to pull, you will hear a fast busy signal.
   - If you have multiple calls, you will hear, "You cannot use Call Pull when you have more than one active call."

Call Pickup

Directed Call Pickup

When you want to be able to answer calls for other people in your office, you can use the Directed Call Pickup feature to answer a call ringing at a specific extension.

Code	Description
**	Directed Call Pickup

Answer a call ringing at a specific extension.

1. When you hear the call ringing, pick up your phone and dial ** followed by the extension the call is ringing to.
2. You are now connected to the caller.

Pick Up Group

A Pick Up Group allows incoming calls to be answered by another member of the group. To create a group, please contact Customer Support.

Code	Description
*40	**Pick Up Group** Answer a ringing extension for another user in the same Pick Up Group. 1. When you hear a call ringing on another group member's phone, pick up your phone and dial the Pick Up Group star code to answer it. – If multiple calls are ringing, the call that has been ringing the longest will be answered. – If you belong to multiple groups, the longest ringing call in any of your groups will be answered.

Call Waiting

If a second call comes in while you're on a call, you'll hear the Call Waiting tone. To answer that call, you can choose to place your current call on hold and pick up the incoming call. Additionally, you can temporarily or completely enable or disable Call Waiting from your phone or in the Voice Portal.

Code	Description
*43	**Call Waiting: Enable** Enable Call Waiting for ALL your calls. 1. Dial the star code. 2. You will hear a message indicating the call waiting service has been activated.
*44	**Call Waiting: Disable** Disable Call Waiting for ALL your calls. 1. Dial the star code. 2. You will hear a message indicating the call waiting service has been deactivated.

*70   Call Waiting: Disable Next Call

Keep the next phone call you make from being interrupted. If call waiting is enabled on the line, this star code will disable call waiting on the current call.

1. Dial the star code + the phone number.

2. Call Waiting is disabled for the current call, and any incoming call will follow the "busy" call behavior.

3. After you hang up, Call Waiting will be active again.

Switching Calls

When Call Waiting is enabled on your phone, you can switch between your current call and a new incoming call.

- When notified of a second incoming call, press the line button on your phone. Your first call will be placed on hold, and your second call will be active.

- You can switch between the two calls by pressing the line button for the call you want to switch to.

Caller ID

The name sent with caller ID, sometimes referred to as CNAM, is a setting on your phone number. If the name on your caller ID is incorrect, please contact Customer Support to update it.

- Outbound Caller ID: The caller ID number sent with outbound calls is set on each user. You can choose to send out the main company number, a specific user-assigned number, or not send out any caller ID.

- Internal Caller ID: When calling another user on your PBX, your caller ID is your name and extension.

Use the following star codes to manage your caller ID settings.

Code	Description
*65	Caller ID: Enable Next Call

If your caller ID is disabled (blocked) for all calls, this will enable it for this current call only. Future calls will not be affected.

1. Dial the star code + the number for the party you're trying to reach.

2. Caller ID will be displayed to the party on this call.

*67 Caller ID: Block Next Call

If your caller ID is enabled for all calls, this will block it from being sent with this current call only. Future calls will not be affected.

1. Dial the star code + the number for the party you're trying to reach.

2. Caller ID will be displayed as "BLOCKED" to the party on this call.

*68 Caller ID: All Calls (On/Off)

Manage your caller ID setting for all calls.

1. Dial the star code.

2. Enter your 4-digit PIN followed by #.

3. Follow the prompts to enable or disable caller ID.

Caller ID Name On Mobile

Most mobile phone carriers do not send the CNAM because mobile phones look up the calling phone number in the device's contact list. Also, calls to 911 will always send the 911 callback number set on the device, regardless of your caller ID settings.

Do Not Disturb

When you don't want your phone to ring, activate Do Not Disturb to send all incoming calls directly to your voicemail box.

Code	Description
*78	Enable Do Not Disturb

1. Dial the star code.

2. You will hear, "Do Not Disturb enabled."

Code	Description
*79	Disable Do Not Disturb

1. Dial the star code.

2. You will hear, "Do Not Disturb disabled."

Group Log In/Out

Code	Description
*78	Group Log In/Out

Users can log in or out of an auto-attendant group they are assigned to.

1. Dial the star code + the group number.

2. Press 1 to log in or 2 to log out.

3. When prompted, dial the group number to log in or out.

Last Call Return

Code	Description
*69	Last Call Return

Dials the last caller ID number that rang the line. It does not redial the last outbound call.

1. Dial the star code.

2. Your phone will redial the last number that called you.

Voicemail Local Access

Your voicemail box can be accessed in the Voice Portal, remotely, or by dialing a star code from a phone connected to the account.

Access a Voicemail Box

Direct Access

1. From a line assigned to your voicemail, dial the Voicemail Management star code.

2. Enter your voicemail PIN and press #.

Remote Access

1. From a line *not* assigned to the voicemail box, dial your 10-digit phone number.

2. When the greeting plays, press #.

3. Enter your voicemail PIN and press #.

Voicemail PIN

The default PIN is 1234. The first time you access your voicemail box, you will be prompted to set a new PIN which must be 4-digits or longer.

Listen to Messages

Access the voicemail box and press 1 to listen to your messages. Use the following to navigate the menu:

- Press 1: Skip message and mark the message as "unread"

- Press 2: Save message and mark the message as "read"

- Press 3: Erase message

- Press 9: Repeat message

- Press 0: Exit menu

Personal Options

Access the voicemail box and press 8 for personal options. Use the following to navigate the menu:

- Press 1: Change the PIN

- Press 2: Manage the greetings

- Press 5: Forward your calls

- Press 9: Repeat personal options

- Press 0: Exit menu

Change the PIN

1. Access your voicemail box and press 8 for personal options.
2. Press 1 to change the PIN.
3. Enter a new PIN that is at least 4-digits long, then press #.
4. When you're done, hang up or press 0 to go back to the main menu.

Change Your Greetings

1. Access your voicemail box and press 8 for personal options.
2. Press 2 to change your greetings.
    – Press 1 to change the default (basic) greeting.
    – Press 2 to change the "busy" greeting.
    – Press 3 to change the "no answer" greeting.

3. When you're done, hang up or press 0 to go back to the main menu.

Forward Calls

1. Access your voicemail box and press 8 for personal options.

2. Press 5 to forward your calls.

   – Press 1 to forward all calls (then enter your destination).

   – Press 2 to send calls to your line.

3. When you're done, hang up or press 0 to go back to the main menu.

Voice Portal User Guide

User Voice Portal
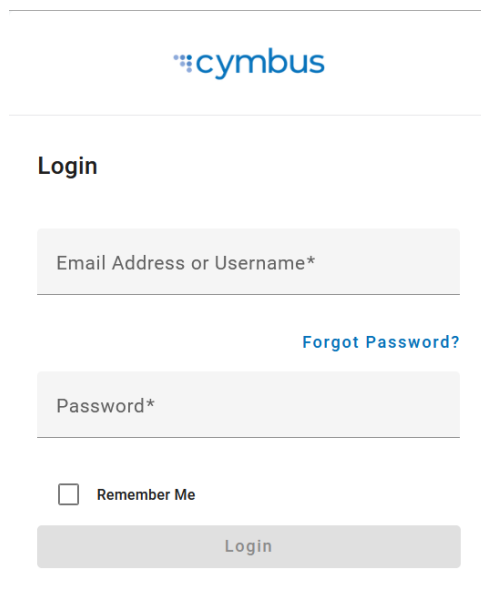
Log In

The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

When your account was created, an email was sent to you containing your username, a link to create your password, and the portal URL. Keep that email safe so you can refer to it later.

If you haven't received it, contact Customer Support at 18777236875 or dial 611 from your SCTelecom phone to get your login information.

1. Go to https://user.cymbus.com/login.
2. Enter your username or email address and password.
3. Check *Remember Me* to save your username and password.
4. Click [Login].

Forgot Password

If you can't log in, click *Forgot Password?* and an email will be sent to you with a link to reset it. Your new password must be at least eight characters long and include at least one number and one special character (^ $ * . [ ] { } ( ) ? " ! @ # % & / \ , > < ' : ; | _ ~ ` = + -).

If you don't have an email address on your account, please contact Customer Support for assistance.

User Information

The User Info section displays your account name and number, the phone number (if any) used as your outbound caller ID, and whether caller ID is enabled for outgoing calls.

User Information

Account Name
nobledonna

Account Number
Doyut-BFSbGTbCCzfaT6Yw

Outbound Caller ID
13854553080

Enable Caller ID ✔

Enable Caller ID

Enable Caller ID determines if your caller ID is or is sent when placing an outbound call. Check this box if you want to send your name and phone number to the call recipient or uncheck it to display your caller ID as BLOCKED. Please note, even if the setting is disabled, the number listed in the *Outbound Caller ID* field will still be sent with 911 calls.

This setting can also be managed by [dialing star codes](#).

Phone Numbers

This is a list of the phone number(s) that are routed to you and your device(s). To add or remove a phone number, please contact Customer Support.

Phone Numbers

Phone number

1 (385) 455-3080

Devices

The device(s) assigned to you are listed here.

Devices

Device	Line
CP-8851	Line 1

E911 Address

In the event a 911 call is placed from your phone number, emergency services will be dispatched to the address listed here.

E911 Address

Phone number	Address	
1 (385) 323-1426	425 N 835 E, Lindon, UT, 84042	✏️

Edit E911 Address

If this is not the address of your physical location, click the pencil icon on the right to update it. Once saved, it may take several hours for the changes to take effect.

> **Important**
>
> If any of your account information is NOT correct, or if you cannot edit your E911 Record (either the button isn't there or you get an error), please contact Customer Service right away to get it updated.

Phone Number - 1 (385) 323-1426

Customer Service Record

Address Preview

Lindon, UT 84042

E911 Record

☐ Same as customer service record

Postal code*
84042

Enter address
Lindon, UT 84042 ✕

Address Preview

⌄ **Manual entry**

Lindon, UT 84042

☐ Provide lat/long ⓘ

Cancel   **Save**

Call Screening

Call Screening can help block unwanted calls from reaching you, and you can decide what happens to the calls you turn away. Are they hung up on automatically, or do they hear a message first? Do you forward them to another number, or do you send them to your voicemail?

Choose how calls from anonymous numbers, toll-free numbers, and other callers — including Custom Callers (specific phone numbers) — will be handled. For each category, choose an [action (behavior)](#) from the menu.

Call Screening

Screening forward number

Forwarded calls are routed to this number.

Anonymous callers
Block with message ▼

Toll-free callers
Voicemail ▼

All other callers
Allow ▼

Feature	Description
Screening forward number	Enter a destination phone number that will be used when a call screening category is set to *Forward*.
Anonymous callers	Choose what happens to incoming calls that don't send caller ID.
Toll-free callers	Choose what happens to incoming calls from a toll-free number.
All other callers	Choose what happens to all other incoming calls that are not otherwise defined by a custom screening rule.

Custom Screening

Custom screening rules define the call handling action for inbound calls from specific phone numbers. The screened phone numbers and associated action are listed here.

To add a custom rule, click [Add Rule], then enter the phone number and select an action, and click [Save] when you're done. To create a rule for a group of phone numbers with the same area code and/or prefix, enter the first few digits of the phone number instead.

Custom Screening   Add Rule

Number*
18015556789

Action
Forward ▼   🗑

Items per page: 5   1 – 1 of 1 |< < > >|

Save

Feature	Description
Number	Enter the phone number for which this custom rule will apply.
Action	Choose what happens to incoming calls from this number.

Call Screening Actions

For each category, choose a screening action from the menu.

Feature	Description
Allow	Allow the caller to ring through.
Allow with priority ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
Block	Block the caller from ringing through. Callers will hear a busy signal.
Block with message	Block the call with a message: • Custom Callers: "The number you have dialed is not accepting calls at this time." • Toll-Free Callers: "The number you have dialed is not accepting calls from toll-free numbers at this time." • Anonymous Callers: "The number you have dialed is not accepting calls from anonymous numbers."
Forward	If you choose to forward calls from caller, you **must** choose the number those calls are forwarded to in the *Screening forward number* field.
Voicemail	Send the caller directly to voicemail.

Call Handling

Call Handling determines how incoming calls are routed under various circumstances. In the first section, create or manage your Call Waiting and Do Not Disturb settings. Just below that, select and configure a ring strategy: Ring Phone, Forward All, Simultaneous Ring, and Find Me/Follow Me.

Call Handling

- Call Waiting
- Do Not Disturb

Call Waiting

Call Waiting allows a second call will be allowed to ring through while you are already on the phone.

- On: While on an active call, you will hear a tone that indicates a second caller is trying to reach you.

- Off: While you're on an active call, incoming calls hear a busy tone.

IP PHONES

If Call Waiting is enabled and the IP phone has multiple instances of the same line assigned to it, the first line will ring even if the line is on a call. If Call Waiting is disabled, the second device line will ring.

Do Not Disturb

This feature allows you to mute all incoming alerts and notifications.

- On: Incoming calls are routed directly to your voicemail box.

- Off: Incoming calls follow your call handling settings.

VOICEMAIL BOX

If you don't have a voicemail box, callers will hear a busy tone. If you have a voicemail box but want callers to hear a busy tone, the voicemail box will need to be removed.

Ring Phone

This is the path incoming calls will follow when the call isn't answered, the line is busy, or the device is out of service. For each circumstance, callers can be sent to voicemail, hear a busy tone, be forwarded to another number, or ring forever.

For *Forward*, enter the phone number to which calls will be forwarded and an optional description.

| Ring Phone | Forward All | SIM Ring | Find Me |

No answer
Send to voicemail ▼

Timeout (seconds)*
20

Busy
Busy tone ▼

Out of service
Forward ▼

Forwarding number | Description

Feature	Description
No answer	Choose what happens to the call after it is unanswered after the number of seconds specified in the field below.
Timeout	The number of seconds a call will ring before it follows the *No answer* action.
Busy	Choose what happens to the call when the device is busy (already in use and Call Waiting is not enabled).
Out of service	Choose what happens to the call when the device is not registering on the server.

Forward All

Working on the go and need all the calls that come into your desk phone to reach you? Do all incoming calls need to be redirected elsewhere? Forward All can do this by sending your callers to an alternative phone number that you enter here.

Once a forwarding phone number is saved, this feature can be enabled or disabled from the device by dialing star codes.

| Ring Phone | Forward All | SIM Ring | Find Me |

Forwarding number | Description

Simultaneous Ring

Simultaneous Ring, or SIM Ring, will ring all numbers added to the list at the same time until the call is answered or times out. The first phone number to pick up takes the call.

Ring Phone	Forward All	SIM Ring	Find Me

Simultaneous Ring will ring all of the user's registered devices and the phone numbers listed below at the same time. The first to answer will take the call. If the call is not answered, it will follow the timeout action.

Phone Numbers   Add Number

Number

Timeout action
Send to voicemail

Timeout (seconds)*
20

Feature	Description
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [Add Number].
No Answer	Choose what happens when the call is unanswered: • Busy tone • Forward to (add a forwarding number) • Ring forever • Send to voicemail
Timeout (seconds)	Enter the number of seconds the call will ring before the action is triggered. Calls that ring longer than 120 seconds may be disconnected by the carrier.

Find Me/Follow Me

Life happens and often drags you away from the desk. What's a caller to do when they need to find you? Find Me/Follow Me routes your incoming calls to a customizable sequence of destinations to create a unique dial plan just for you and your line.

1. Click [Add Destination] to add a device or phone number destination.

2. Drag ☰ to reorder a destination or click the trash icon to delete it.

Feature	DESCRIPTION
Destination	Indicate if calls should ring to all the user's devices or a specific phone number. To add another one, click [Add Destination].
Devices	Enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.
Phone Number	Enter the phone number and number of seconds calls will ring on that number before progressing to the next destination.
Timeout Action	Choose what happens to the call after all destinations have timed out: • Busy tone • Send to voicemail

Schedules

Schedules provide custom call handling for your callers based on when they call in, down to the very minute. Start and end times follow the account's default time zone. The user's primary Call Handling settings will take effect *outside* of these scheduled hours.

The user's schedules are listed here. To add a new one, click [Add Schedule]. To edit an existing schedule, click the row.

Add Schedule

1. Click **[Add Schedule]**. The Scheduling window will open in a popup.

2. Enter the name of the schedule.

3. Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).

    – Custom (per day). Enter the date and time this schedule will be in effect. Click **[Add Day]** to add another one, or the trash icon to remove a day.
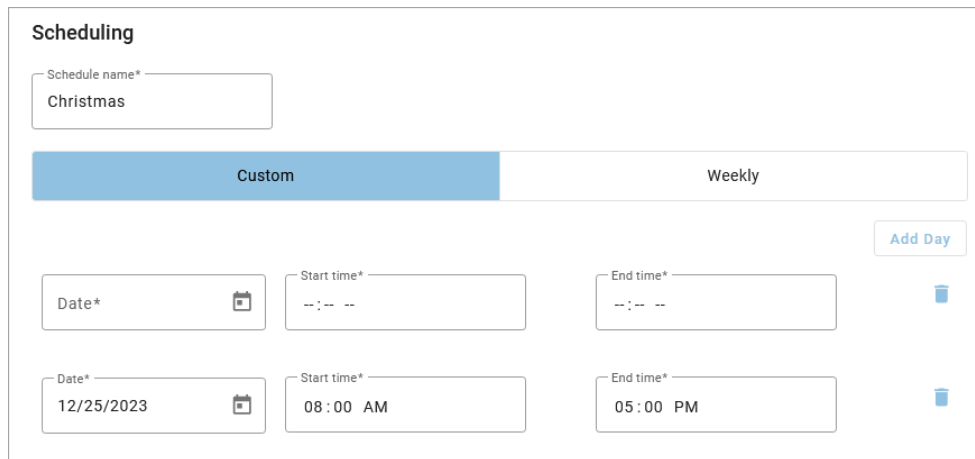
– **Weekly (recurring).** Enter the start and end times for each day of the week this schedule will be in effect.

Scheduling

Schedule name*

Custom	Weekly

Sun — Start time -- : -- -- — End time -- : -- --

Mon — Start time -- : -- -- — End time -- : -- --

Tue — Start time -- : -- -- — End time -- : -- --

Wed — Start time -- : -- -- — End time -- : -- --

Thu — Start time -- : -- -- — End time -- : -- --

Fri — Start time -- : -- -- — End time -- : -- --

Sat — Start time -- : -- -- — End time -- : -- --

Cancel   OK

sctelcom

4. Call Handling: **Scroll down** and select the call handling actions that will occur *during* the specified times.

Call Handling

Call Waiting

Do Not Disturb

| Ring Phone | Forward All | SIM Ring | Find Me |

No answer

Send to voicemail

Timeout (seconds)*

20

Busy

Busy tone

Out of service

Forward

Forwarding number

5. When you're done, click **[Save]**.

Custom Schedule Example

In the custom schedule example below, calls received between 8:00 AM and 5:00 PM on December 25, 2023, will be forwarded to 1-208-555-1234. Any call outside of that specific time will follow the user's primary call handling settings.

Scheduling

Schedule name*
Christmas

| Custom | Weekly |

Add Day

Date*
12/25/2023

Start time*
08 : 00 AM

End time*
05 : 00 PM

Call Handling

✓ Call Waiting

⊘ Do Not Disturb ⓘ

| Ring Phone | Forward All | SIM Ring | Find Me |

Forwarding number
12085551234

Cancel   OK

Call Recording

Call Recording is available only with Advanced and Professional feature plans.

The Call Recording section displays your settings in a view-only format. If this feature is not listed and you wish to use it, or if you want to modify your settings, please contact your service provider for assistance.

Recording Type

The recording type selected determines the level of input required to initiate a call recording. There are two recording types available:

- Automatic. All your inbound and outbound calls are recorded automatically.

- On Demand. You can start, stop, pause, or resume recording the call by dialing a star code.

Recording Features

For each call recording type, optional features can be enabled, including the ability to pause or resume a recording and automatically announce to the caller that the call is being recorded.

- Allow user to pause recording. When checked, you can pause or resume the recording by dialing a star code. This feature can be used while gathering sensitive information from the caller, like a credit card.

– This setting is only available for the Automatic recording type; On Demand includes this functionality by default.

- Announce when call is being recorded. Announces "Your call is being recorded" to the caller whenever you dial the Start or Resume star codes. If enabled for the Automatic recording type, the message will automatically play at the beginning of each call.

    – The message will play only once, even if the call is transferred or forwarded to another party.

    – While this setting is optional, it is strongly recommended if you might make calls to areas that require two-party consent.

Call Recording Star Codes

Each star code is designed to perform a specific recording function. However, the star codes available to you depend on which recording type and optional features are configured. If you dial a star code that is not compatible with your configuration, the star code will not register or function.

Automatic Star Codes

The **Automatic** recording type begins recording as soon as the call connects and stops recording when the call disconnects, so the Start and Stop star codes are unnecessary.

- If *Allow user to pause recording* is enabled, you can dial the Pause or Resume star codes at any time.

- If *Announce when call is being recorded* is enabled, callers will hear "Your call is being recorded" at the beginning of each call and again whenever you dial the Resume star code.

Star Code	Function
Pause Recording	Stops recording and keeps the recording file open. You will hear "Recording paused."
Resume Recording	Resumes recording on the open file. You will hear "Recording resumed." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."

On Demand Star Codes

The **On Demand** recording type allows you to dial a star code mid-call to Start, Pause, Resume, or Stop a recording.

- If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded" whenever you dial the Start or Resume star code.

Star Code	Function
Start Recording	Opens a new recording file and starts recording. You will hear "Recording started." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."
Pause Recording	Stops recording and keeps the recording file open. You will hear "Recording paused."
Resume Recording	Resumes recording on the open file. You will hear "Recording resumed." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."
Stop Recording	Stops recording and closes the recording file. You will hear "Recording stopped."

Manage Call Recordings

All call recording files are stored and managed in the Dubber Portal. Once recordings are available, they can be accessed by clicking the **Manage Recordings** link and entering your credentials on the Dubber login page.

See Call Recording Management for details about managing your recordings.

Voicemail

A voicemail box was assigned to you with your Business Cloud Communication service. In the Voice Portal, you can upload your voicemail greetings and personal name recordings, view and manage any saved messages, and set up voicemail forwarding to email.

Voicemail messages and greetings can also be managed by **calling the voicemail box**. See Voicemail Local Access for more information.

Voicemail Box Greetings

Here, you can upload and manage your voicemail greetings (Basic, Busy, No Answer) and personal name recording. Click the field to select a file from your computer, then click [Upload]. The upload will accept WAV, MP3, and OGG files that are less than 10MB.

Voicemail Greetings ⓘ

Basic Greeting

Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

Personal Name

Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

Custom Greetings ⓘ

Custom voicemail greetings override Basic and Personal Name greetings.

Busy Greeting

Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

No Answer Greeting

Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

Messages

Voicemail messages saved to the box are listed here. Messages can be sorted by Time/Date, Length, and Status (New or Saved). Hover over an individual message to see the management tools on the right.

Messages   Delete All

Date ↓	Caller	Length	Status			
Jun 16, 2024, 3:58 PM	8012017261	53 seconds	New	↓	✉	🗑
Jun 15, 2024, 3:58 PM	8015197075	1 minutes	New	↓	✉	🗑
Jun 14, 2024, 3:58 PM	8017248811	1 minutes	New	↓	✉	🗑
Jun 13, 2024, 3:58 PM	8012024934	33 seconds	New	↓	✉	🗑

Option		Description
↓	**Download**	Save a copy of the message to your computer as an MP3 file.

✉	**Save**	Change the status of the message to **Saved**.
🗑	**Delete**	Delete this message from the box. To delete all messages at once, click **[Delete All]** in the top right.

> ### Message Waiting Indicator
>
> The message waiting indicator (MWI) on your device notifies you when a new voicemail message waiting to be retrieved. When you've listened to, saved, or deleted the message, the MWI will turn off.

Message Settings

Forward Voicemail to Email

Messages left on your voicemail box can be forwarded as an MP3 file to one or more email addresses. Users also have the option to keep a copy of the message in their voicemail box when it's forwarded.

1. Check *Forward Voicemail to Email*.
2. Optionally, check *Keep a copy in voicemail box*.
3. Enter one or more email addresses, each separated by a comma.
4. Click **[Save]**.

Enable Voicemail Transcription

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an MP3 file (depending on if you also have forwarding enabled).

1. Check the box for **Enable Transcription**.

2. In the field below, enter one or more email addresses in the field below separated by commas (required).

3. Click **[Save]**.

Voicemail messages will be transcribed and sent to the email address(es) indicated here from *noreply@cymbus.com*. If "Forward Voicemail to Email" is also enabled, an MP3 of the message will be attached to the email. Here's an example of what that may look like:
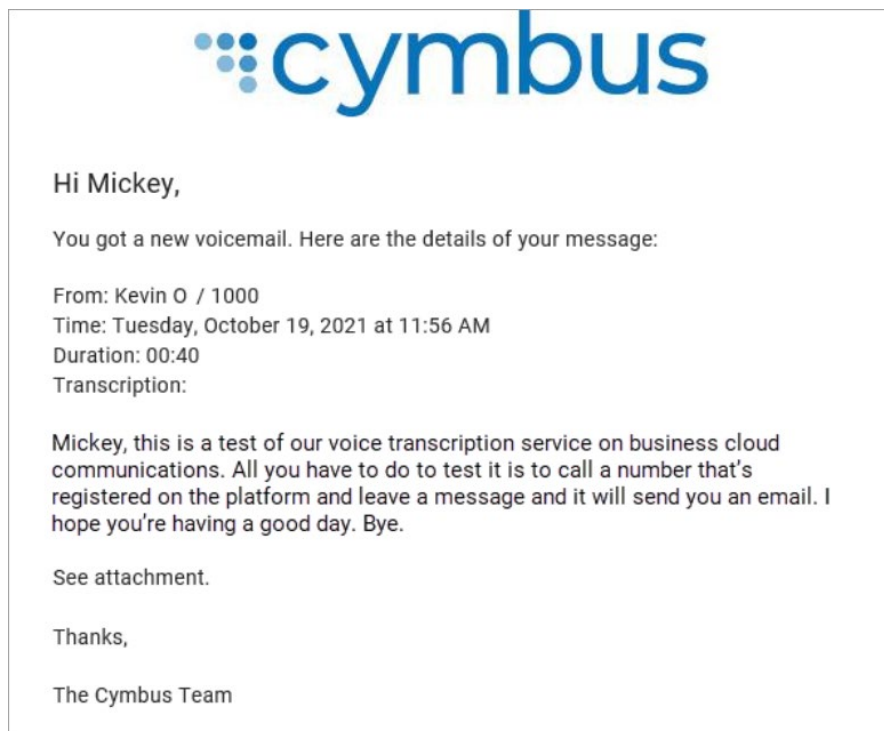
US English

Voicemails can only be transcribed from US English. If a message cannot be transcribed for any reason, such as poor audio quality, an email will still be sent with a message saying, "Message could not be transcribed."

Voice Portal Admin Guide

Admin Voice Portal

The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

As an Account Manager or Admin user, you have access to manage not only your own services but those of other users on the account. You may also have access to manage Auto-Attendants and Phone Numbers (E911 addresses). If you don't see those sections in the menu, please contact your service provider for assistance.

Log In

When your account was created, an email was sent to you containing your username, a link to create your password, and the portal URL. Keep that email safe so you can refer to it later. If you haven't received it, contact Customer Support at [NUMBER] or dial 611 from your [SERVICE PROVIDER] phone to get your login information.

1. Go to https://user.cymbus.com/login.
2. Enter your username or email address and password.
3. Check *Remember Me* to save your username and password.
4. Click [Login].

∷cymbus

Login

Email Address or Username *

Forgot Password?

Password *

☐ Remember Me

Login

Forgot Password

If you can't log in, click *Forgot Password?* and an email will be sent to you with a link to reset it. Your new password must be at least eight characters long and include at least one number and one special character (^ $ * . [ ] { } ( ) ? " ! @ # % & / \ , > < ' : ; | _ ~ ` = + -).

Users

All users on the account are listed here. You can use the search bar to filter the list by username, first or last name, extension, device, MAC address, phone number, caller ID number, or user tag. Additionally, you can use the menu next to the search bar to filter by a specific user type or sort the table by heading.

To edit the settings for a specific user, hover over the user and click ✏ **Edit** on the right. For each user, there are four tabs that organize the user's settings: Calls, Devices, Settings, and Voicemail.

Calls

The Calls tab lists the user's phone number(s), caller ID, and the settings that control how incoming calls to this user are handled.

Call Details

All phone numbers pointing to this user are listed here. Incoming calls to these numbers will follow the user's Call Handling and Call Screening options as defined below. To add or remove a phone number, please contact Customer Support.

Call Details

Phone number
1 (206) 555-5102

Extension*
202

Caller ID
1 (206) 555-5102 — Jane Sarah

Setting the caller ID to "None" could result in some carriers rejecting the call.

Enable Caller ID

Save

Feature	Description
Phone number	The phone number(s), if any, routed to this user. If a number has not yet been assigned, see Phone Number Route Management.
Extension	The dialable extension the user can be reached at on the account. This field is required.
Caller ID	The phone number and name sent with outbound calls from this user which is displayed on the phone of the person being called. Users can choose the main account number, their phone number, or choose *None* to not send out any caller ID at all. This field is required.
	It is important to choose a **number** here, even if you choose to disable caller ID (below). If this field is set to *None*, outbound calls—even to 911—will be sent out as *Anonymous*, and the carrier may reject the call.
Enable Caller ID	This toggle determines if the caller ID name is or is not sent with outbound calls. This setting can also be managed in the user's Voice Portal or via star codes.
	• On: Caller ID will be sent on all outbound calls.
	• Off: Caller ID will be sent as BLOCKED. The phone number selected in the *Caller ID* field will still be sent with calls to 911.

Call Screening

Call Screening can help block unwanted calls from reaching you, and you can decide what happens to the calls you turn away. Are they hung up on automatically, or do they hear a message first? Do you forward them to another number, or do you send them to your voicemail?

Choose how calls from anonymous numbers, toll-free numbers, and other callers will be handled. For each category, choose an [action (behavior)](#) from the menu. The options for each category are *Allow*, *Allow with priority ring*, *Block*, *Block with message*, *Forward*, and *Voicemail*.

Call Screening

Screening forward number

Forwarded calls are routed to this number.

Anonymous callers
Block with message ▼

Toll-free callers
Voicemail ▼

All other callers
Allow ▼

Feature	Description
Screening forward number	Enter a destination phone number that will be used when a call screening category is set to *Forward*.
Anonymous callers	Choose what happens to incoming calls that don't send caller ID.
Toll-free callers	Choose what happens to incoming calls from a toll-free number.
All other callers	Choose what happens to all other incoming calls that are not otherwise defined by a custom screening rule.

Custom Screening

Custom screening rules define the call handling action for inbound calls from specific phone numbers. The screened phone numbers and associated action are listed here.

To add a custom rule, click **[Add Rule]**, then enter the phone number and select an action, and click **[Save]** when you're done. To create a rule for a group of phone numbers with the same area code and/or prefix, enter the first few digits of the phone number instead.

Custom Screening   Add Rule

Number*
18015556789

Action
Forward

Items per page: 5   1 – 1 of 1 |<   <   >   >|

Save

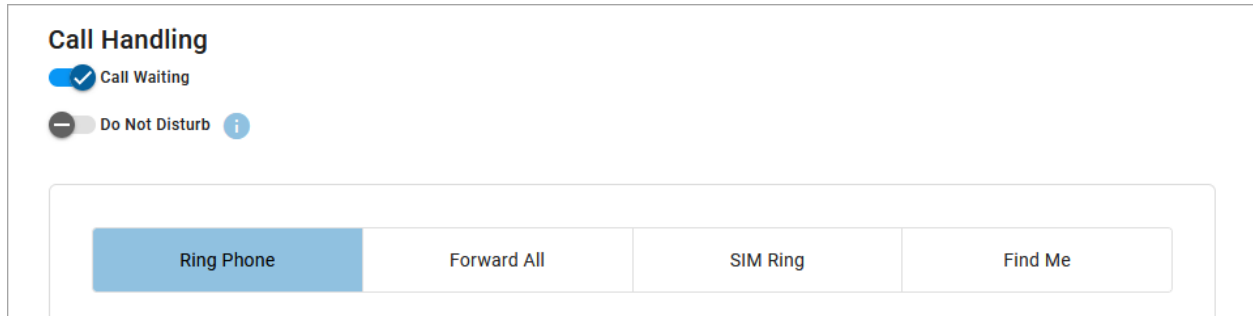| Feature	Description
Number	Enter the phone number for which this custom rule will apply.
Action	Choose what happens to incoming calls from this number.

Call Screening Actions

For each category, choose a screening action from the menu.

Feature	Description
Allow	Allow the caller to ring through.
Allow with priority ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
Block	Block the caller from ringing through. Callers will hear a busy signal.
Block with message	Block the call with a message: • Custom Callers: "The number you have dialed is not accepting calls at this time." • Toll-Free Callers: "The number you have dialed is not accepting calls from toll-free numbers at this time." • Anonymous Callers: "The number you have dialed is not accepting calls from anonymous numbers."
Forward	If you choose to forward calls from caller, you **must** choose the number those calls are forwarded to in the *Screening forward number* field.
Voicemail	Send the caller directly to voicemail.

Call Handling

Call Handling determines how incoming calls are routed under various circumstances. In the first section, create or manage your Call Waiting and Do Not Disturb settings. Just below that, select and configure a ring strategy: Ring Phone, Forward All, Simultaneous Ring, and Find Me/Follow Me.

Call Waiting

Call Waiting allows a second call will be allowed to ring through while you are already on the phone.

- On: While on an active call, you will hear a tone that indicates a second caller is trying to reach you.

- Off: While you're on an active call, incoming calls hear a busy tone.

> ### IP PHONES
> If Call Waiting is enabled and the IP phone has multiple instances of the same line assigned to it, the first line will ring even if the line is on a call. If Call Waiting is disabled, the second device line will ring.

Do Not Disturb

This feature allows you to mute all incoming alerts and notifications.

- On: Incoming calls are routed directly to the user's voicemail box.

- Off: Incoming calls follow the user's call handling settings.

> ### VOICEMAIL BOX
> If the user doesn't have a voicemail box, callers will hear a busy tone. If they have a voicemail box but want callers to hear a busy tone, the voicemail box will need to be removed.

Ring Phone

This is the path incoming calls will follow when the call isn't answered, the line is busy, or the device is out of service. For each circumstance, callers can be sent to voicemail, hear a busy tone, be forwarded to another number, or ring forever.

For *Forward*, enter the phone number to which calls will be forwarded and an optional description.

Ring Phone	Forward All	SIM Ring	Find Me

No answer
Send to voicemail ▾

Timeout (seconds)*
20

Busy
Busy tone ▾

Out of service
Forward ▾

Forwarding number

Feature	Description
No answer	Choose what happens to the call after it is unanswered after the number of seconds specified in the field below.
Timeout	The number of seconds a call will ring before it follows the *No answer* action.
Busy	Choose what happens to the call when the device is busy (already in use and Call Waiting is not enabled).
Out of service	Choose what happens to the call when the device is not registering on the voice server.

Forward All

Working on the go and need all the calls that come into your desk phone to reach you? Do all incoming calls need to be redirected elsewhere? Forward All can do this by sending your callers to an alternative phone number that you enter here.

Once a forwarding phone number is saved, this feature can be enabled or disabled from the device by dialing star codes.

Ring Phone	Forward All	SIM Ring	Find Me

Forwarding number	Description

Simultaneous Ring

Simultaneous Ring, or SIM Ring, will ring all numbers added to the list at the same time until the call is answered or times out. The first phone number to pick up takes the call.

Ring Phone	Forward All	SIM Ring	Find Me

Simultaneous Ring will ring all of the user's registered devices and the phone numbers listed below at the same time. The first to answer will take the call. If the call is not answered, it will follow the timeout action.

Phone Numbers   Add Number

Number

Timeout action
Send to voicemail ▼

Timeout (seconds)*
20

Feature	Description
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [Add Number].
No Answer	Choose what happens when the call is unanswered: • Busy tone • Forward to (add a forwarding number) • Ring forever

     sctelcom

- Send to voicemail

Timeout (seconds)	Enter the number of seconds the call will ring before the action is triggered. Calls that ring longer than 120 seconds may be disconnected by the carrier.

Find Me/Follow Me

Life happens and often drags you away from the desk. What's a caller to do when they need to find you? Find Me/Follow Me routes your incoming calls to a customizable sequence of destinations to create a unique dial plan just for you and your line.

- Click **[Add Destination]** to add a device or phone number destination.

- Drag ≡ to reorder a destination or click the trash icon to delete it.

Feature	Description
Destination	Indicate if calls should ring to all the user's devices or a specific phone number. To add another one, click **[Add Destination]**.
Devices	Enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.
Phone Number	Enter the phone number and number of seconds calls will ring on that number before progressing to the next destination.
Timeout Action	Choose what happens to the call after all destinations have timed out: • Busy tone • Send to voicemail

Schedules

Schedules provide custom call handling for your callers based on when they call in, down to the very minute. Start and end times follow the account's default time zone. The user's primary Call Handling settings will take effect *outside* of these scheduled hours.

The user's schedules are listed here. To add a new one, click [Add Schedule]. To edit an existing schedule, click the row.

Add a Schedule

4. Click [Add Schedule]. The Scheduling window will open in a popup.

5. Enter the name of the schedule.

6. Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).

   – Custom (per day). Enter the date and time this schedule will be in effect. Click [Add Day] to add another one, or the trash icon to remove a day.

- – Weekly (recurring). Enter the start and end times for each day of the week this schedule will be in effect.

5. Call Handling: **Scroll down** and select the call handling actions that will occur *during* the specified times.

6. When you're done, click [Save].

Custom Schedule Example

In the custom schedule example below, calls received between 8:00 AM and 5:00 PM on December 25, 2023, will be forwarded to 1-208-555-1234. Any call outside of that specific time will follow the user's primary call handling settings.

Scheduling

Schedule name*

Christmas

| Custom | Weekly |

Add Day

Date*
12/25/2023

Start time*
08:00 AM

End time*
05:00 PM

Call Handling

☑ Call Waiting

⬤ Do Not Disturb ⓘ

| Ring Phone | Forward All | SIM Ring | Find Me |

Forwarding number
12085551234

Cancel   OK

Devices

All devices assigned to the user are listed in the **Device Lines** section. If the user has a shared line on another user's device, it will be listed under **Referenced Devices**.

The user's Cymbus apps are listed both under Device Lines and under **UC Apps**. The UC Apps section indicates the type of device (desktop or mobile), the operating system, app version, and whether it is currently able to receive calls. Apps which are logged out or otherwise not connected to the network show a red X.

Calls	Devices	Settings	Voicemail **0**

Device Lines

Add Device

Device Type	MAC Address	Line Number	
Cymbus	None	0	✏️
Cymbus	None	0	✏️
Cymbus	None	1	✏️

Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
		No Devices	

UC Apps

#	Device	OS	App Version	Call Enabled
1	DESKTOP	MAC macos21.5.0	1.0.0	❌
2	DESKTOP	WINDOWS win10.0.22621	1.2.2	✅
3	MOBILE	android android34	1.2.2	✅

Devices can be managed at the user level (here) or from the main [Devices](#) section in the left navigation menu. In either location, find the device and click **Edit** on the right to manage its settings:

- Device Info: View the MAC Address, Device Type, and Configuration Status. There you can also Swap the device for a new one or upload a Bulk Configuration file.

- Line Configuration: On an IP phone, you can assign features to lines, including Call Park, Device Line, Paging Group, Presence/BLF, Shared Line, and Speed Dial.

- Sidecar: Configure a sidecar (key expansion module) on the device.

See [Devices](#) for detailed information about these features and settings.

Settings

The user's Settings tab provides some quick information about the selected user. In this tab, you can reset the user's Voice Portal access and login information, grant Admin privileges (end user role), and manage their calling plans.

User Information

Calls	Devices	Settings	Voicemail 0

User Information

First name*
Sarah

Last name*
Jane

Language

English

Time zone*
US/Mountain

Email*
sarah.jane@demo.com

Username*
sarah.jane

User tags
Admin ⊗   Headquarters ⊗

Feature	Description
Name	The first and last name of the user of the account.
Language	The language, English or French, heard in the telephone user interface (TUI) audio prompts for star codes and the IVR. This is separate from the language setting in a voicemail box.
Time zone	The time zone displayed on the user's device and call records.
Email	A valid email address is required for every user who has access to the Voice Portal. This is where their *Welcome* and *Forgot Password* emails are sent.
Username	A unique username which can be used to log in to the portal. Cannot be edited.
User tags	This is an optional mechanism to organize and search for users by one or more custom identifiers, such as department, location, or anything else. If it would be useful to search for this user by a particular term, enter it here.

User Tags

User Tags is an optional mechanism to organize and search for users by one or more custom identifiers, such as department, location, or anything else. If it would be useful to search for users by that term, enter it as a tag on the users it applies to.

Add User Tags

1. Log in to the Admin Portal and go to **Account > Users**.
2. Select the user you want to edit.
3. In the Settings tab, enter one or more tags in the *User tags* field.
4. Scroll down and tap **[Save]**.

Search for Users by Tags

1. Go to **Account > Users**.
2. Enter a tag in the *Search users* field and hit enter. The matching users are displayed below.

Feature Plan & User Type

Feature Plan

The user's current feature plan determines what features they have access to:

- Standard: All basic voice features.

- Advanced: All standard features + the UC app with team messaging.

- Professional: All standard and advanced features + video meetings with whiteboarding and screen sharing.

Customer Support

To update a user's feature plan, contact Customer Support for assistance.

Voice Portal Access

The end user Voice Portal is where users log in to manage their accounts online. Voice Portal access is required and automatically enabled for users with Advanced or Professional feature plans. However, it is optional for users with a Standard feature plan.

Feature	Description
Voice Portal Access	For users with a Standard feature plan, choose whether to enable Voice Portal access: • Disabled: The user does not have access to the Voice Portal, and the *Email* field is optional. • Enabled: The user has access to the Voice Portal, and the *Email* and *Username* fields are required.
[Resend Welcome Email]	Resend the *Welcome* email with the Voice Portal URL, a link to create a password, and their UC app information (if applicable).
[Reset Password]	Send the user an email with a link to reset their password.

Admin Access

For users who need it, turn on Voice Portal Access and Admin Access, then select an Admin Type to determine the user's level of access:

- Super Admins: **Create, edit, delete.** They have full account-level permissions and can administer all other admin users.

- Advanced Admins: **Create, edit, delete (modified).** They have the same level of access as Super Admins but cannot manage Super Admin users.

- Standard Admins: **Edit and view.** They can manage most existing settings but cannot create anything new. Most of your admins will fit in this category.

- Basic Admins: **View only.** This is great for support representatives who need to see what's going on and can escalate to a higher-level admin if needed.

Account Managers have the same level of access as Super Admins, but because they do not have their own voice services, they are managed separately from users.

Call Recording

The Call Recording section displays the user's call recording settings. If this section is not displayed, contact your service provider to enable it on your account.

Call Recording is only available for users with Advanced and Professional feature plans, and it must be enabled for each user who wants it. Once enabled, the user can dial star codes to start, pause, resume, or stop a recording mid-call, depending on their configuration.

Enable Call Recording for a User

1. Log in to the Voice Portal and go to **Business Cloud > Users**.
2. Locate and select the user from the list.
3. Navigate to the **Settings** tab.
4. Under **Feature Plan & User Type**, confirm the user's feature plan is set to *Advanced* or *Professional*. Users with a Standard feature plan must upgrade if they want to use this feature.
5. Scroll down to **Call Recording** and toggle on *Enable call recording*.

6. From the **Product** menu, select a call recording product. If the preferred product is not available, please contact Customer Support.

   – BCC Call Recording is included in the Advanced and Professional feature plans. Users with this product can manage their own recordings in the Dubber Portal.

   – Dubber Recording, Dubber Unified Recording, and Dubber Insights may also be available. These products offer advanced call recording capabilities and the ability for a Dubber Administrator to manage the recordings for all users on the account. For more information about these packages, contact Customer Support.

7. Select a **Recording Type**:

   – Automatic. All calls to and from this user will be recorded automatically.

- *On Demand.* The user must dial a star code mid-call to begin recording.

8. Customize the recording features (optional):

- *Announce when call is being recorded.* Plays the "Your call is being recorded" announcement to the caller whenever the Start or Resume star codes are dialed by the user. If enabled for the Automatic recording type, the message will automatically play at the beginning of each call.
    - The message will play only once, even if the call is transferred or forwarded to another party.
    - While this setting is optional, it is strongly recommended if users might make calls to areas that require two-party consent.
- *Allow user to pause recording.* Allows the user to pause or resume a recording by dialing a star code. This feature can be used while gathering sensitive information from the caller, like a credit card.
    - This checkbox only appears as an optional feature for the Automatic recording type; On Demand recordings offer this functionality by default.

9. Click **[Save]**. A *Welcome* email is sent to the user with a verification link to log in. The user must click the link and enter a password to access their new Dubber account.
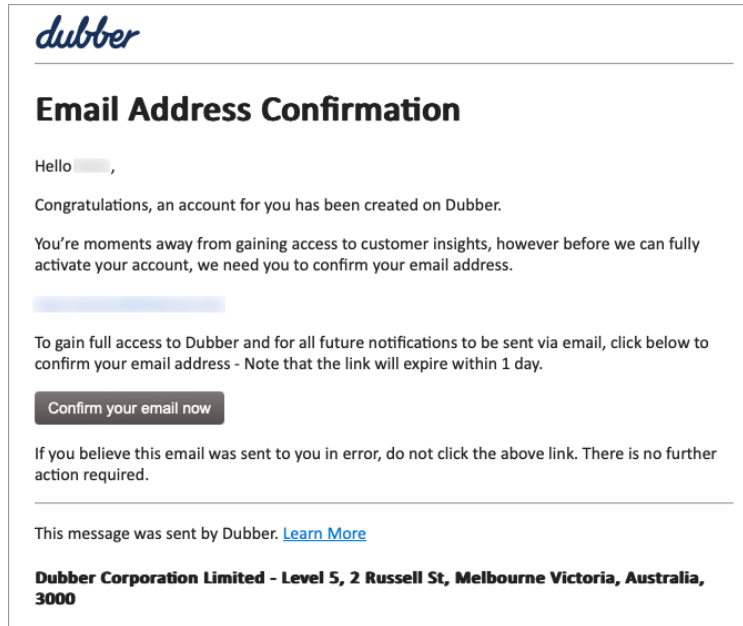
Call Recording Star Codes

Each star code is designed to perform a specific recording function. However, the star codes available to each user depend on which recording type and optional features are configured. If a user attempts to dial a star code that is not compatible with their configuration, the star code will not register or function.

Automatic Star Codes

- The **Automatic** recording type begins recording as soon as the call connects and stops recording when the call disconnects, so the Start or Stop star codes are unnecessary.

- If *Allow user to pause recording* is enabled, the user can dial the Pause or Resume star codes to pause or resume the recording at any time.

- If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded" at beginning of the call and again whenever the user dials the Resume star code.

Star Code	Function
Pause Recording	Stops recording and keeps the recording file open. The user will hear "Recording paused."
Resume Recording	Resumes recording on the open file. The user will hear "Recording resumed." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."

On Demand Star Codes

The **On Demand** recording type allows users to dial a star code mid-call to start, pause, resume, or stop a recording.

- If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded" whenever the user dials the Start or Resume star code.

Star Code	Function
Start Recording	Opens a new recording file and starts recording. The user will hear "Recording started." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."
Pause Recording	Stops recording and keeps the recording file open. The user will hear "Recording paused."
Resume Recording	Resumes recording on the open file. The user will hear "Recording resumed." If *Announce when call is being recorded* is enabled, the caller will hear "Your call is being recorded."
Stop Recording	Stops recording and closes the recording file. The user will hear "Recording stopped."

Manage Call Recordings

All call recording files are stored and managed in the Dubber Portal. Once recordings are available, they can be accessed by clicking **Manage Recordings** and entering your credentials on the Dubber login page. Recordings can only be managed by the user who owns them or by a Dubber Administrator (Dubber products only).

See [Call Recording Management](#) for details about managing your recordings in the Dubber Portal.

Disable Call Recording for a User

In some cases, you may need to disable a user's call recording capabilities. This can be completed by navigating to the user's Settings tab and toggling off Call Recording.

1. Log in to the Voice Portal and go to **Business Cloud > Users**.
2. Locate and select the user from the list.
3. Navigate to the **Settings** tab, then scroll down to **Call Recording**.

4. Toggle off *Enable call recording*. The feature will be greyed out.
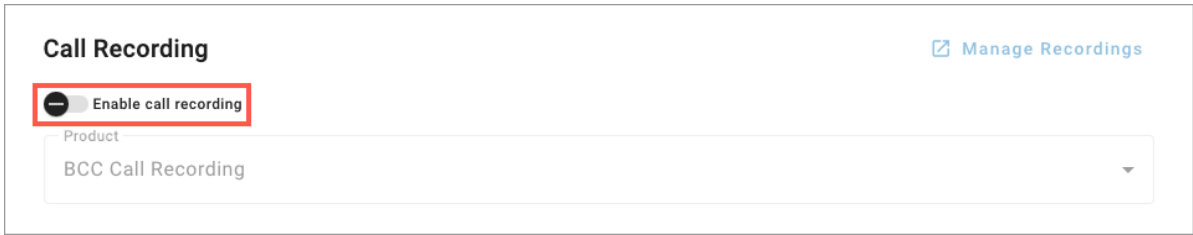
5. Click [Save].

6. In the **Deactivate Call Recording** modal, choose whether to keep or delete the user's recordings. The options here may vary depending on which product is being disabled.

   – Keep Recordings (Dubber products). Select this option to delete the user from Dubber but keep their recordings in the Dubber Portal. The user's recordings can only be accessed by a Dubber Administrator.

   – Deactivate/Delete Recordings. Depending on your product, select [Deactivate] or [Delete Recordings] to delete the user and all their recordings from the Dubber Portal. Proceed with caution; recordings cannot be recovered after they are deleted.

<div style="text-align:center">
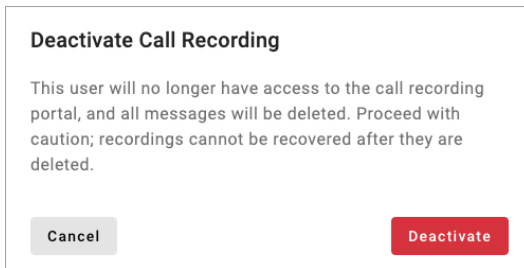
BCC Call Recording   Dubber Products

</div>
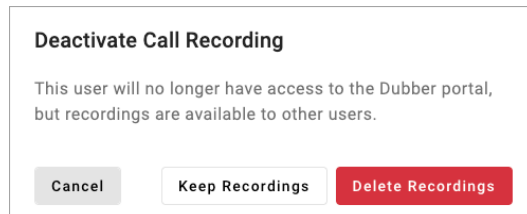
7. The user's Dubber account is deleted. They will no longer have access to the Dubber Portal.

RE-ENABLE CALL RECORDING

If call recording is disabled and then re-enabled, a brand-new account is created for the user in the Dubber Portal, and they will not have access to their old recordings unless they are a Dubber Administrator.

Calling Plans

Calling plans dictate where that user can call and if calls will be rated or use plan minutes. Multiple calling plans can be assigned to a user, and the most permissive settings will apply. A call will go through if any of their calling plans allows it. A call will be blocked if the location is blocked in all the user's calling plans.

The calling plan(s) assigned to the user and the number of minutes used on each plan are listed here. To add or modify the user's Calling Plan, including changes to permitted calling areas, please contact Customer Support.

Calling Plans

Calling Plan	Minutes Used	Total Minutes
Default	0	50000

Account Codes

Account codes are used to tag (classify) calls for billing and reporting purposes. For example, if an agency needs to keep track of billable client calls, they can dial the code that corresponds to the client, and the code will be tagged in the call history record. See Account Codes for details.

The default settings configured at the account level apply to all users who have Account Codes enabled. However, the settings can be customized here for individual users if needed. See Account Codes User Settings for more information.

Account Codes

Enable account codes

Override account level settings ⓘ

Require account codes for internal calls

Validate account codes when dialed

Save

Reassign Users

This feature allows you to reassign an end user's account settings to another user. So, if one employee leaves the organization, their phone number, caller ID, device lines, IVR/Auto-Attendant references, etc. can be reassigned to their replacement.

When an end user account is reassigned, the current user is removed from the system and their account settings are reassigned to a new user. Not all settings will make the switch, though. Here's how it works:

New User Default Settings

The name, username, and email address are updated with the new user's information. For privacy reasons, the following features and settings are reset to default:

- Account History

- Call History

- Call Handling

- Call Screening

- Voicemail greetings, messages, and PIN

Features and Settings That Switch

The previous end user's features and settings will be assigned to the new user, including but not limited to:

Steps to Reassign an End User Account

1. Go to **Users** and edit the user whose account you want to reassign.

2. In the user's **Settings** tab, scroll down to the bottom and click [Reassign].

   – If you don't see this button, you may need additional permissions to use this feature. Please contact Customer Support for assistance.

Reassign User

If you reassign the user, the current user will be removed from the system, and their account settings will be reassigned to a new users. This process cannot be reversed.

> Reassign

3. Enter the new user's name, username, and email address. If you do not want the user to access their account yet, check *Block the welcome email*. Then click [Save].

Reassign User Account

Enter the new user's information to reassign the account

First name *
Donna

Last name *
Noble

Must change first or last name

Username *
d.noble

Email *
doctordonna@demo.com ✓

☐ Block the welcome email

Cancel **Save**

4. Read the warning message carefully to understand what will and will not be switched. If you still want to proceed with the reassignment, click [Save].

Reassign user account?

The current user will be removed from the system, and their account settings will be reassigned to a new user. The following changes will apply:

- **Access.** The name, username, and email address will be updated with the new user's information. The Voice Portal and Cymbus app passwords will be reset.

- **Settings.** The new user will retain most of the account settings, including any phone number(s), caller ID, device lines, IVR/Auto-Attendant references, etc. For privacy reasons, the voicemail box (messages, greetings, and PIN), call handling, and call screening settings will be erased.

This process cannot be reversed. Do you want to continue?

[Cancel] [**Save**]

5. The previous user's account settings have been successfully reassigned to a new user. Unless the welcome email was blocked, the new user can click the link in that email to create a password and log in to the Voice Portal.

> ## Important
> Please remind the new user to configure their own call handling, call screening, and voicemail settings. Users can visit the Cymbus Help Center if they have any questions.

Voicemail

A voicemail box was assigned to each user with their Business Cloud Communication service. In the user's Voicemail tab, you can manage their voicemail greetings, messages, and message settings such as Voicemail to Email and Voicemail Transcription.

Please note, you can download only your own voicemail messages from the Voice Portal.

Voicemail Box Details

Calls	Devices	Settings	Voicemail 2

Voicemail Box Details

Voicemail box name
Sarah Jane ▼

Owner
Sarah Jane

Language
English

Reset PIN

Feature	Description
Voicemail box name	The name of the voicemail box assigned to this user. To change the user's box, click the drop-down menu and select one from the list. To change the name of the voicemail box, go to Account > Voicemail and search for the box.
Owner	The name(s) of the user(s) this voicemail box is assigned to.
Reset PIN	If the user cannot remember their voicemail box PIN to sign in, click Reset PIN to reset it for them. The default PIN is 1234. The first time the user logs in to their voicemail box with the default PIN, they will be asked to set a new one.

Voicemail Management

Voicemail boxes can be managed at the user level (here) or in the Voicemail section of the Voice Portal. The settings for Greetings, Messages, and Message Settings are the same in both locations.

Calls   Devices   Settings   Voicemail **0**

Voicemail Box Details

Voicemail box name

Rose Tyler

Owner
Rose Tyler

Language
English

Reset PIN

Voicemail Greetings ⓘ

Basic Greeting

⬆
Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

Personal Name

⬆
Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

Custom Greetings ⓘ

Custom voicemail greetings override Basic and Personal Name greetings.

Busy Greeting

⬆
Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

No Answer Greeting

⬆
Drop file or click to browse

Accepted files: WAVE, MP3, and OGG files under 10MB

Message Settings

☐ **Forward voicemail to email**

Save

Messages

Delete All

Date ↓	Caller	Length	Status
		No messages	
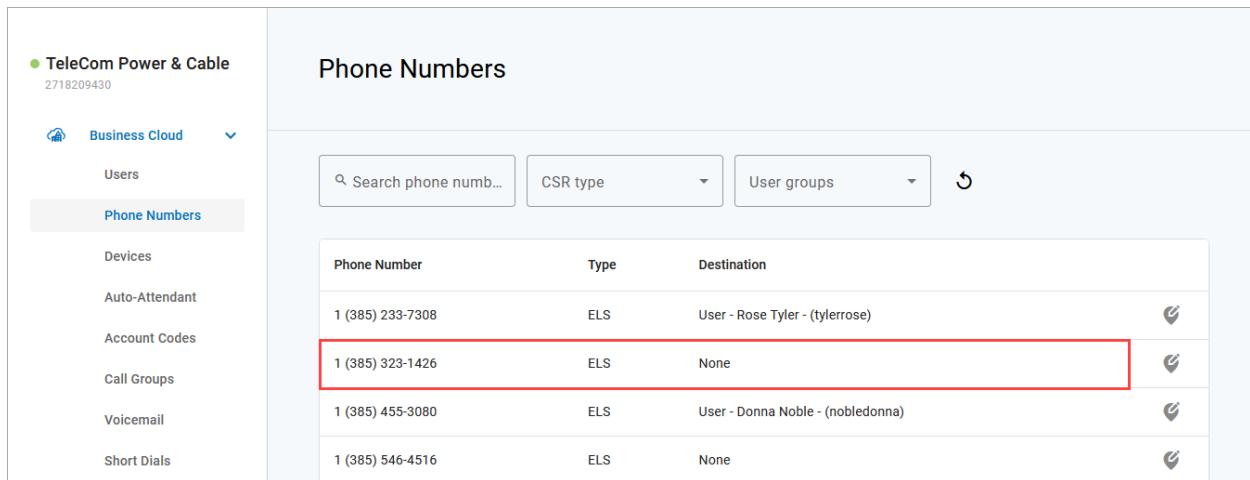
Items per page: 20   0 of 0 |<   <   >   >|

Phone Numbers

In Phone Numbers, you can see and manage all the phone numbers on the account, including their [routing destinations](#) and caller ID. If you don't see Phone Numbers in the menu, please contact Customer Support.

Using the *Search* field, you can filter the results by phone number, destination, or address (including City, State, and Postal Code) associated with the Customer Service Record or E911 Record. As you type, the results of your search are displayed below.

Locate and select the phone number to view the Customer Service Record and edit the E911 record. Click the ⬤ map icon on the right to edit the destination. If you cannot access these settings, contact Customer Support for assistance.

Customer Service Record

The customer service record (CSR) includes the person's or company's name, postal code, and street address. This information is entered when the phone number is added to the account and can only be changed by Customer Support.

E911 Record

An E911 address allows emergency services to determine the location of each phone or device in case they need to call 911. The registered address must be the physical address where the device is located and include any additional information (such as a suite, apartment, building, etc.) necessary to identify the caller's location.

If the E911 address is the same as the CSR, check the **Same as CSR** box. If not, uncheck the box and enter the correct information in the fields below. When you're done, click [Save]. It may take several hours for the changes to take effect.

E911 Record

☐ Same as customer service record

Postal code* | Enter address   ✕

ˇ Manual entry

☑ Provide lat/long ⓘ

Latitude*
40.403741

Longitude*
-111.767273

View lat/long in Google Maps

Cancel   **Save**

Feature	Description
Postal code	The postal code of the address.
Enter address	The address associated with the phone number. Start typing an address and options will populate below. Select the correct address.
Manual entry	Enter the address manually. These fields will automatically populate with the existing information and are optional unless otherwise indicated. If the address is for a multi-unit building, you can add the Unit Type and Unit Number here.
Provide lat/long	Check this box to view and/or modify the latitude and longitude coordinates for the E911 address. **These coordinates determine the PSAP responsible for receiving the 911 call, not the ambulance dispatch location.** This additional information is useful for new addresses that haven't yet been registered with the Master Street Address Guide (MSAG).

Phone Number Destination

When a phone number is added to the account, a destination is assigned so callers are directed to the right place. The destination can be changed at any time, such as when activating a new auto-attendant or to reassign a phone number from one user to another.

If you don't have access to the Phone Numbers page, please contact Customer Support for assistance.

To change a phone number's destination

1. On the **Phone Numbers** page, locate the phone number you want to modify and click the ⌖ map icon on the right to expand the destination settings.

2. In the **Phone Number Destinations** popup, fill out the following:

   – User Groups: Select a group to narrow the *Phone Number Rings To* options below to only those users (optional) or leave it blank to show all possible destinations.

   – Phone Number Rings To: Select a new destination, such as an auto-attendant, user, or virtual fax box.

   – Assign Phone Number as Caller ID: If the destination is to a user, choose whether to assign this phone number as the user's caller ID.

     – To assign a different number as the user's caller ID, go to the user's Calls tab and select a number from the Caller ID field.

   – Priority Ring: Select a priority ring tone (optional).

3. Click **[Save]**. The changes will be applied immediately.

Phone Number Destinations

User groups ▾

Phone number rings to
User - Rose Tyler - (tylerrose) ▾

☑ Assign Phone Number as Caller ID

Priority ring
Standard Ring ▾

Cancel | **Save**

Devices

This section allows you to see all the devices on the account without having to go to the specific user. To locate a particular device, you can search for the owner's name, or MAC address. The list can also be sorted by MAC address or device type.

To view and manage device settings:

1. Go to either:
   – Account > Business Cloud > Users > Devices tab
   – Account > Business Cloud > Devices
2. Locate the device you want to manage and click ✏ **Edit** on the right.

The breadcrumbs at the top of the page include the name of the user assigned to the device, so you always know what you're working on.

Device Info

Here you can see the device's MAC address, device type (make and model), and configuration status.

Device Info

MAC Address
0010fa6e384a

Device Type
Polycom VVX 300

Configuration Status

Yes ✔   **Details**

Configuration Status Details

IP Address
123.30.156.68

Most Recent Download
Apr 6, 2023, 3:35 AM

Download Response
200

User Agent
FileTransport PolycomVVX-VVX_300-UA/5.9.6.2327 Type/Application

[Close]

Configuration Status

The Configuration Status indicates if the device is provisioned and registering on the voice server.

- Yes: The device is online and available for use. Click [Details] for more information.

- No: The device is not online. Make sure it is turned on and the MAC address is correct. If necessary, please contact Customer Support to update it.

Bulk Line Configuration

Using Bulk Line Configuration, you can import (upload) a CSV file to quickly set up the lines on an IP phone, or to export (download) the current line configuration.

If you need to configure multiple IP phones in basically the same way, you can use a single CSV file with the standard configuration and upload it to each device. When necessary, you can make minor changes to the CSV file to give a user a unique setup. It's an easy way to configure multiple IP phones quickly and easily.

Bulk Line Configuration

Export Current Configuration

Device Lines

Import New Configuration

Drop file or click to browse

Expected header row of LINE_NUMBER, LINE_TYPE, REFERENCE, REFERENCE_NAME

Import File Format

An import file for IP phone setup requires specific headers and must be a Comma Separated Value (CSV) file to be accepted. These are the required header and field values:

Header Row	Field Values
LINE_NUMBER	The numeric line number on the device. The import does not accept line numbers that don't exist on the device.
LINE_TYPE	Enter one of the following values to assign a feature to that line: • Line: Device line assigned to the owner of the IP phone. – Line 1 <u>must</u> be set to *Line*. It cannot be set to another type. • ReferencedUser: Shared line with another user on the account. • PresenceBlfUser: Assignment of the device line to monitor the state of another user on the same account. • SpeedDialUser: Assignment of the device line to another user on the account as a speed dial. • SpeedDialTn: Assignment of the device line to a phone number or star code. • CallParkingSpot: Assignment of the device line to a parking spot. • SipPaging: Assignment of the device line to a paging group. • Blank: Device Line is *Deactivated.*
REFERENCE	The 3- to 6-digit extension of other users on the account (SpeedDialUser), or a speed dial phone number (SpeedDialTN).
REFERENCE_NAME	The user or object that owns the *Reference*. This field is listed on an export but is not required for an import.

Example Import File

LINE_NUMBER	LINE_TYPE	REFERENCE	REFERENCE_NAME
1	Line		
2	ReferencedUser	4000	Gary Summers
3	SpeedDialUser	4000	Gary Summers
4	PresenceBlfUser	8888	Doug Manager
5	SpeedDialTn	18014403529	Higgins Mobile
6	CallParkingSpot	103	Parking Spot 4

Device Security

Each device has a unique encryption key which is used for provisioning. If a device is factory reset or unable to decrypt its configuration file (troubleshooting), you will need to reset the encryption key to reprovision the device. Please note, this is not required for devices that use HTTPS provisioning.

1. Go to **Devices > Edit**.
2. Scroll down to **Device Security** and click **[Reset Key]**.
3. Read the warning, then click **[Confirm]** if you want to continue.

Reset Encryption Key

- Each device has a unique encryption key to maximize security.
- If the device has been factory reset or needs to be factory reset please follow these steps to ensure that the device is successfully integrated.
    1. Factory reset device
    2. Click the reset encryption key button
    3. Configure the device to provision to http://adpm.co or http://adpm.co/$PN for Cisco, Linksys, or Sipura devices

Are you sure you want to reset your encryption key?

Warning: The device will need to be reset back to factory defaults and configured to provision to http://adpm.co

Dismiss   **Confirm**

4. Configure the device to provision to **http://adpm.co** or, for Cisco, Linksys, or Sipura devices, **http://adpm.co/$PN**.

Line Key Features

Individual lines on an IP phone can be assigned to a custom feature. Line 1 is the device owner's main line and is always a *Device Line* type; it cannot be changed. All other lines are set to *Deactivated* by default, but another feature can be assigned from here, including:

- Advanced Shared Line
- Call Park
- Device Line

- Intercom
- Paging Group
- Presence/BLF

- Shared Line
- Speed Dial

Line Configuration

Line Number	Type	Assignment	
1	Device Line		✎
2	Call Park	Parking Spot 1	✎
3	Shared Line	Donna Noble	✎
4	Presence/BLF	Mickey Smith	✎
5	Presence/BLF	Donna Noble	✎
6	Paging Group	Back Office	✎
7	Deactivated		Edit Device Line ✎

To assign a feature to a line on a user's device:

1. Go to either:
   – Account > Business Cloud > Devices
   – Account > Business Cloud > Users > Devices tab.
2. Locate and expand the device you want to configure.
3. Under **Line Configuration**, edit the line you want to assign a feature to.
   – Line 1 will always be assigned the *Device Line* type. It cannot be changed.
4. Fill out any required fields and click **[Save]** when you're done.

Contact Support

For any other device changes, please contact Customer Support.

Advanced Shared Line

Advanced Shared Line enables a group of up to 35 IP phones to monitor and share the same target line. Any phone in the group can make and receive calls, hold and resume held calls, and park and retrieve parked calls using the shared line.

The line status is updated across all shared devices in real time. Incoming calls ring on all devices, and any user can answer. When the shared line is busy, it appears as busy on all devices, and no one else in the group can make or receive a call on that line. Additionally, if the target device line loses registration, incoming calls will still ring to the line on the shared devices.

One device can be assigned as many Advanced Shared Line references as needed, making it an especially useful feature for administrative assistants or receptionists who regularly handle calls for other users.

- Type: Advanced Shared Line
- Target User: Select the user whose line will be referenced on this device.
- Device: Select a device assigned to the target user.
- Line: Select an active line on the target user's device.
  - The target line must be configured as a *Device Line*.
- Display Name: Enter the name that will be displayed for the device key, such as the name of the monitored user.

Device Line Info

Line Number

3

Type

Advanced shared line ▼

Target user

Joey Tribiani ▼

Device

Device 1 ▼

Line

Line 1 ▼

Advanced shared line display name

Joey

Cancel   Save

Shared Line vs Advanced Shared Line

A Shared Line can be referenced on only one device and enables speed dialing between users, while an Advanced Shared Line can be referenced on and shared by up to 35 devices. Both types enable the user(s) with the referenced line to monitor the status of the target line.

Key System Emulation

The Advanced Shared Line feature can be used to emulate a key system in which all phones have the same lines instead of extensions.

On all devices, Line 1 is reserved for the device itself and cannot be assigned a feature. However, it can be referenced on another device as an Advanced Shared Line. The name displayed on the device for Line 1 is the username on their account; however, the name can be customized on each shared device when configuring the Advanced Shared Line.

In the example below, we have three phones, each of which has a shared line for the other two, and Line 4 is a shared parking spot which is owned by the first phone.

	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
Line 1	Phone 1 — Sarah	Phone 2 — Rose	Phone 3 — Donna
Line 2	Phone 2 — Rose	Phone 1 — Sarah	Phone 1 — Rose
Line 3	Phone 3 — Donna	Phone 3 — Donna	Phone 2 — Sarah
Line 4	Parking Spot (Target)	Parking Spot (ASL)	Parking Spot (ASL)

Call Park

Parking spots can be assigned to a line on the device. This allows a user to take an active call and put the caller in a designated parking spot at the press of a button. The call can then be picked up on any phone that has the parking spot set up in their line configuration by picking up the phone and pressing the line key assigned to the Call Park feature.

To add parking spots to the account, please contact Customer Support.

- Type: Call Park
- Assignment: Choose a parking spot.

Device Line Info

Line Number
2

Type
Call Park

Assignment *
Parking Spot 2

Cancel   Save

Device Line

A Device Line functions as an additional line assigned to the owner of the device. It is a traditional line, able to place calls with the user's outbound caller ID as well as receive or pick up calls sent to the user.

Line 1 is always set to Device Line; it cannot be changed. This is the primary line belonging to the device's owner.

Device Line Info

Line Number
2

Type
Device Line

911 callback number
1 (206) 320-5102 - 1555 Broadway E, Seattle, WA...

Registration Status
No ✗

Cancel   **Save**

Fax Enabled

To enable fax on this line, expand the **SIP Credentials** menu and check the box. This should only be enabled if this line is primarily for receiving faxes as these settings will *negatively* affect voice quality.

Intercom

Intercom allows users to establish two-way communication between devices without requiring the recipient to manually answer the call. It is typically used in scenarios where immediate and hands-free communication is desired, such as door entry systems and office to classroom interactions.

An intercom feature key can be configured to dial only one user and one device, which is typically a line on another user's phone. However, it could be assigned to a dedicated doorphone or speaker device, such as those from Algo, to increase the reach of audio alerts and notifications in larger spaces where two-way communication is useful.

- **Type:** Intercom
- **Target user:** Select a user to dial from the list.
- **Device:** Select a device assigned to the target user.
- **Line:** Select a line to dial on the target user's device.
- **Intercom display name:** Enter the name of the intercom line that will display on the device, such as "Main Entrance" or "Mrs. Smith's Classroom."

Device Line Info

Line Number
2

Type
Intercom

Target user*
Main Entrance

Device*
ALGO 8201

Line*
Line

Intercom display name*
Main Entrance

Cancel   **Save**

Use Intercom Feature Key

1. Press the line key assigned to dial the target user's device.
2. The target user's device beeps twice before automatically answering the call on speakerphone.
   - If the target user is on an active call or has Do Not Disturb enabled, the caller hears a busy signal.
3. When the call is finished, either party can end the call.

Paging Group

[Paging Groups](#) are used to make one-way announcements to one or more devices.
To set up a Paging Group, please contact Customer Support.

- Type: Paging Group
- Assignment: Select a group from the list

Device Line Info

Line Number
2

Type
Paging Group

Assignment *
Back Office

Cancel   Save

Presence/BLF

This feature will let you add other users to extra lines on your phone, so you'll know when they are on a call, have a call coming in, or are free. Presence/BLF keys also enables speed dialing between the users.

- Type: Presence/BLF
- Assignment: Select a user from the list

Device Line Info

Line Number
2

Type
Presence/BLF

Assignment *
Sarah Jane

Presence states include busy, available and ringing of 1 or more of their devices is on a call. Lines assigned to presence will also enable speed dialing between users.

Cancel   Save

Shared Line

A shared line allows this user to receive and place calls as another user from their own phone. Inbound calls ring on both devices and either user can answer it on their IP phone. Outbound calls from the shared line utilize the outbound caller ID as the shared user. Dialing a star code (for forwarding calls, accessing voicemail, etc.) while on a shared line also affects the assigned user.

For users that have been assigned as a shared line on another device, that device will be listed in the user's Devices tab under Referenced Devices.

- Type: Shared Line
- Assignment: Select a user

Device Line Info

Line Number
2

Type
Shared Line

Assignment *
Sarah Jane

Cancel   **Save**

Example of a Shared Line

In the first image, when we edit Sarah Jane's device, we see that Line 3 is shared with Donna Noble.

Users < Details

Edit Device

Line Configuration

Line Number	Type	Assignment	
1	Device Line		✏️
2	Call Park	Parking Spot 1	✏️
3	Shared Line	Donna Noble	✏️
4	Presence/BLF	Mickey Smith	✏️

In the second image, we see in Donna's Devices tab that the Cisco 8851 belonging to Sarah Jane is shown in the Referenced Devices section.

Users ‹ Details

Donna Noble
donna.noble

| Calls | Devices | Settings | Voicemail 0 |

Device Lines

Device Type	MAC Address	Line Number	
Yealink T58W	0010fa6e386a	1-27	✏️

Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
Cisco 8851 (3PCC)	0010fa6e384a	3	Sarah Jane

Speed Dial

Speed Dial type allows you to configure quick one-touch dialing from your IP phone. Speed Dial can be configured to dial other users on your account, an outside line, or a star code, like a Pick Up Group.

Assigning a Speed Dial

This will allow you to dial other users on your account at the touch of a button.

- Type: Speed Dial
- Assignment: Choose a user from the list

Device Line Info

Line Number
2

Type
Speed Dial

Assignment *
Sarah Jane

Cancel   **Save**

Assigning a Custom Speed Dial

This will allow you to speed dial an outside line or a star code, like a Pick Up Group.

- Type: Speed Dial
- Assignment: Custom Speed Dial
- Speed Dial: Enter a star code or a phone number or star code + phone number (*0018005551234). Up to 30 digits max.
- Speed Dial Display Name: Enter a name for the group that will be displayed on your phone for the line.

Device Line Info

Line Number
2

Type
Speed Dial — Custom

Speed Dial *

Speed Dial Display Name *
Line 2

Cancel   **Save**

Sidecar

Sidecars, also called expansion modules, can be provisioned on an IP phone for additional line keys and functionality.

Sidecar

Sidecar type
CP-8800-A-KEM-3PC ▾

Number of sidecars
1 ▾

Bulk Edit   Save

1. Edit an IP phone device and scroll down past Line Configuration to the Sidecar section.

2. Sidecar type: Select a sidecar type from the menu. This list will only display options that are compatible with the IP phone being managed.

3. Number of sidecars: Select the number of sidecars being added to the IP phone.

4. Click [Save]. The sidecar lines are displayed below.

5. To configure a line, click ✏ Edit and assign a feature to it as appropriate.

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Deactivated		✏
Sidecar 1 Page 1 Line 2	Deactivated		✏

Sidecar Bulk Edit

Use Sidecar Bulk Edit to automatically assign users (speed dial) to lines on the sidecar all at once. If there are more users than lines, some users may not be added.

> **Important**
>
> Any bulk setup operation will overwrite the current sidecar configuration. It cannot be undone!

1. To perform a sidecar bulk edit, click **[Bulk Edit]**.

Sidecar

Sidecar type
CP-8800-A-KEM-3PC ▾

Number of sidecars
1 ▾

Bulk Edit   **Save**

2. Select an option from the Setup menu, then click **[Save]** to implement it. There are three bulk sidecar setup options:

   – Alphabetically: Add all possible users in order by first name.

   – By Extension: Add all possible users in order by their extension number.

   – Custom: Choose specific users as sidecar lines in a single operation.

Sidecar Bulk Edit

Setup
Alphabetically ▾

Cancel   **Save**

Alphabetically

Users are assigned to lines in alphabetical order.

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	Bob Johnson	✏️
Sidecar 1 Page 1 Line 2	Speed Dial	Chris Jenson	✏️
Sidecar 1 Page 1 Line 3	Speed Dial	Donna Noble	✏️
Sidecar 1 Page 1 Line 4	Speed Dial	Jack Murphy	✏️
Sidecar 1 Page 1 Line 5	Speed Dial	John Miller	✏️
Sidecar 1 Page 1 Line 6	Speed Dial	Mickey Smith	✏️
Sidecar 1 Page 1 Line 7	Speed Dial	Ron Williams	✏️
Sidecar 1 Page 1 Line 8	Speed Dial	Timothy Lee	✏️
Sidecar 1 Page 1 Line 9	Speed Dial	Zack Davis	✏️

By Extension

Users are assigned to lines in order of the user's extension number.

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	Timothy Lee	✏️
Sidecar 1 Page 1 Line 2	Speed Dial	Mickey Smith	✏️
Sidecar 1 Page 1 Line 3	Speed Dial	Bob Johnson	✏️
Sidecar 1 Page 1 Line 4	Speed Dial	Donna Noble	✏️
Sidecar 1 Page 1 Line 5	Speed Dial	Jack Murphy	✏️
Sidecar 1 Page 1 Line 6	Speed Dial	Chris Jenson	✏️
Sidecar 1 Page 1 Line 7	Speed Dial	Zack Davis	✏️
Sidecar 1 Page 1 Line 8	Speed Dial	John Miller	✏️
Sidecar 1 Page 1 Line 9	Speed Dial	Ron Williams	✏️

Custom

Use the checkboxes to add or remove users on the sidecar.

Sidecar Bulk Edit

Setup
Custom ▼

Select	Username
☑	John Miller
☑	Zack Davis
☑	Jack Murphy
☐	Ron Williams
☐	Donna Noble
☐	Bob Johnson
☐	Chris Jenson
☐	Timothy Lee
☐	Mickey Smith

Cancel   Save

Line Number	Type	Assignment	
Sidecar 1 Page 1 Line 1	Speed Dial	John Miller	✎
Sidecar 1 Page 1 Line 2	Speed Dial	Zack Davis	✎
Sidecar 1 Page 1 Line 3	Speed Dial	Jack Murphy	✎
Sidecar 1 Page 1 Line 4	Deactivated		✎
Sidecar 1 Page 1 Line 5	Deactivated		✎
Sidecar 1 Page 1 Line 6	Deactivated		✎
Sidecar 1 Page 1 Line 7	Deactivated		✎
Sidecar 1 Page 1 Line 8	Deactivated		✎
Sidecar 1 Page 1 Line 9	Deactivated		✎

Swap Device

Got a user upgrading (or downgrading) from one device to another? Switching out the devices on the Voice Portal is fast and easy. The new device must have the same (or more) number of lines that are configured on the original device.

If a sidecar is currently enabled, disable it before switching the device, then set it up again after the switch.

1. Click [Swap].
2. Enter the information for the new device in the fields provided.
   - Device type: Select the new device type. If the device you're trying to use isn't listed here, please contact Support.
   - MAC address: Enter the device's MAC address.
   - Device name: Optionally, enter a name for the device.
3. Double-check the list of **Affected Device Lines** to make sure the swap won't break anything. Once the switch is complete, you may need to set up these lines again.
4. Click [Save] to complete the switch.

– If there are already schedules set up on the account, the button will say [Manage Schedules].

Auto-Attendant

Managing inbound calls is a crucial part of how an organization handles everyday business. Auto-attendants enable identification, segmentation, and routing of callers to the most appropriate agent within your team. It's a simple, effective, and completely customizable tool which will significantly reduce costs and increase efficiency within any company.

Auto-attendants are easy to build and modify. The editor lays out your routes into clear columns and rows so you can see exactly what you're building and how it all fits together. Changes are saved in real time, so you won't lose any edits—even if you close the window. Incomplete auto-attendants will also be saved so they can be edited and completed later.

Overview

In **Business Cloud > Auto Attendant**, you can see all the auto-attendants on the account, including the assigned phone number(s), last modified date, and status. You can build and keep as many auto-attendants as you need. Changes are saved in real time, so you can start building now and come back to finish it later.

If you don't see Auto-Attendant in the menu, please contact Customer Support.

Field	Description
[+ Add Auto-Attendant]	Start creating a new auto-attendant. The builder will open in a new window, so you can look back at the auto-attendant list if you need to reference it.
Name	The name of the auto-attendant. If a name wasn't saved, it will be named "untitled auto-attendant" by default.
Assigned Phone Number	The phone number(s) directed to this auto-attendant. A phone number must be assigned before calls can be directed through the auto-attendant. If this is blank, contact Customer Support for assistance.
Modified Date	The last date the auto-attendant was modified: month, day, year, time.
Status	- Incomplete: There are open routes that need to be closed before the auto-attendant can be launched. - Ready to Activate: All routes are closed and it's ready to be launched (activated). - Activated: The route has been launched and it can now be assigned to a phone number. – Assign Phone Number - Live: A phone number is assigned, and this auto-attendant is live.

Tools

Hover over an auto-attendant to see the tools on the right. The tools available are different for each status. For example, an incomplete auto-attendant cannot be launched, and live auto-attendant cannot be deleted.

Main Line	- - -	12/13/2023, 3:38:26 PM	Incomplete	🗑 🗐 🚀 ✏
Sales	- - -	12/13/2023, 3:38:15 PM	Ready to Activate	🗑 🗐 🚀 ✏
Sales	Assign Phone Number	12/13/2023, 3:38:15 PM	Activated, Assign TN	🗑 🗐 🚫 ✏

| Emergency Support | 1 (801) 867-8487 | 12/13/2023, 3:30:44 PM | Live | 🗑 📑 🔕 ✏ |

Field	Description
🗑 **Delete**	Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.
📑 **Duplicate**	Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one.
🚀 **Activate**	When the status is *Ready to Activate*, click the **Activate** icon to activate it so the attendant will be available as a destination in the Phone Number menu.
🔕 **Deactivate**	Deactivate the auto-attendant. *Activated* status will be downgraded to *Ready to Activate*. To deactivate a *Live* auto-attendant, unassign the phone number; the status will be downgraded to "*Activated, Assign TN*". The phone number must be unassigned before the auto-attendant can be edited. Please contact Customer Support for assistance.
✏ **Edit**	Make changes to an auto-attendant. For auto-attendants that are *Live* or *Activated*, only Group routes can be edited; all other routes are view-only.

Auto-Attendant Setup

Managing inbound calls is a crucial part of how an organization handles everyday business, and the process here is simple, straightforward, and fully customizable. By implementing auto-attendants, you can customize where your callers are routed based on a schedule. Whether they're calling the phone number for a specific user or trying to reach the regional office, you get to decide what happens when they call.

Add an Auto-Attendant

1. Click **[+ Add Auto-Attendant]**.
2. The auto-attendant builder will open in a new window. If your browser doesn't allow pop-ups, it may ask if you want to allow this one.
3. Enter a name for this auto-attendant.
4. Click the ⊕ **Add** icon to select and add a new route (see the summary below). When a route is selected, the editor will slide out on the right of your window.
5. Configure the route as needed, then click **Save**.

6. Back on the auto-attendant builder, there is now an ⊕ **Add** icon next to each new route. Click the icon to add the next route.

sctelcom

Auto-Attendant Routes Summary

Field	Description
Schedule	Routes the caller to a call flow based on a defined schedule.
Menu	Plays a recording, typically the readout of the phone menu, and waits for the touch-tone input from the user to determine the next route.
Message	Plays a pre-recorded sound clip.
Group	Routes the caller to a group of users (not devices). This route also supports call queuing, barge-in, night forwarding, and user log in/out. Group routes can be edited in real-time while the auto-attendant is live.
User	Routes the caller to a specific user's devices or the user's voicemail. The call will follow the user's call handling settings.
Hang Up	Ends the call.
Reference	Redirects the caller to another route in this auto-attendant. For example, if a call is routed to a user but the user doesn't answer, instead of ending the call there so they have to call back, you could reference the Main Menu so the caller can start over.

Activate an Auto-Attendant

When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to *Ready to Activate*. At this point, you can 🚀 **Activate** the auto-attendant and then assign a phone number to it.

Assign a Phone Number

Once the auto-attendant is activated, assign it to a phone number. This step is **required** before calls can be directed through the auto-attendant.

1. Click the *Assign Phone Number* link to go to the **Phone Numbers** page.

Name ↑	Assigned Phone Number	Modified Date	Status	
Emergency Support	1 (801) 867-8487	12/13/2023, 3:30:44 PM	Live	
Main Line	- - -	12/13/2023, 3:38:26 PM	Incomplete	
Main Office	Assign Phone Number	12/13/2023, 3:36:45 PM	Activated, Assign T…	
Sales	- - -	12/13/2023, 3:38:15 PM	Ready to Activate	

1-4 of 4

2. Locate the phone number you want to modify and click the right side to expand the settings.

1 (801) 867-8487   ELS   Auto-Attendant - Emergency Support

User Group	None
Phone Number Rings To	Auto-Attendant - Emergency Support
Priority Ring	Standard Ring

Cancel   Save

3. Click the *Phone Number Rings To* menu and choose the auto-attendant as the new destination.

4. Click [Save]. Calls to that phone number will now be directed through the auto-attendant.

If you don't have access to the Phone Numbers page, please contact Customer Support for assistance assigning the auto-attendant to a phone number.

Edit an Auto-Attendant

While an auto-attendant is live and processing calls, you can open the builder to see how it's set up and edit any groups and queues, but all other routes are view-only to avoid disconnecting calls or otherwise breaking the auto-attendant.

If you need to make changes to any of the other routes, you have a few options:

Option 1: Duplicate, Edit, Switch

1. In the Voice Portal, go to the **Auto-Attendant** page. Locate the one you want to modify and click 🔲 **Duplicate**.

2. Click ✏️ **Edit** to open the builder and make any necessary changes.

3. Go back to the **Auto-Attendant** page, find the one you just modified, and click 🚀 **Activate**.

4. When you're ready for the new version to go live, go to the **Phone Numbers** page and locate the phone number assigned to the original auto-attendant. Click the destination on the right and change it to the new auto-attendant.

5. Calls to that phone number will now be directed through the new auto-attendant.

6. Go to the **Auto-Attendant** page, locate the original, and click 🚫 **Deactivate**.

7. Delete the old version or rename it so users don't confuse them.

Option 2: Deactivate, Edit, Reactivate

To avoid breaking an active call flow, make these changes after-hours, when you are sure calls aren't coming in for the time it will take to make changes.

1. In the Voice Portal, go to the **Phone Numbers** page and locate the phone number assigned to the auto-attendant you want to modify.

2. Click the phone number destination on the right and change it to "None" or another viable option (like a temporary auto-attendant).

3. Go to the Auto-Attendant page and locate the one you want to modify. On the right, click 🚫 **Deactivate**.

4. Now click ✏️ **Edit** to open the builder and make any necessary changes.

5. When you're done, go back to the **Auto-Attendant** page, locate the auto-attendant you just modified, and click 🚀 **Activate**.

6. Click the *Assign Phone Number* link to go to the **Phone Numbers** page.

BUSINESS CLOUD COMMUNICATIONS

7. Locate the phone number you want to assign, then click the destination on the right and change it back to the auto-attendant.

8. Calls to that phone number will now be directed through the auto-attendant.

Auto-Attendant Routes

The auto-attendant builder is comprised of various routes that work together to route calls. As routes are added to the builder, they're arranged in neat rows and columns so you can see how it all fits together. Routes can be easily found, moved around, and connected as the auto-attendant is built.

When you're done configuring a route, click **[Save]**, and it will be added to the builder canvas. Routes that have an ⊕ **Add** icon after it *require* another route.

To edit a route, click on the primary card to open it on the right.

> **Info**
>
> For best results, use Chrome or Firefox (not Safari).

Schedule

Set your phone system to direct incoming calls to different destinations depending on when they call in, such as business hours, lunch hours, holidays, after-hours, etc.

A schedule requires at least one rule, but you can add as many as needed. Calls will be routed to the first rule that matches the time of the incoming call, based on the priority order in which the rules are set. To change the order of your rules, click the = icon to the right of the rule and drag it to the correct position.

1. Schedule Name: Enter a name for this schedule (20-character max).

2. Time Zone: Select which time zone should be applied.

3. Rule Name: Enter a name for this rule.

4. Weekly/Custom: Choose a rule type: Weekly (recurring) or Custom (one-time).

5. Day/Date: For a Weekly rule, select the days of the week that this rule applies to. For a Custom rule, choose one or more dates (but not a range).

6. Time: Enter the start and end times using the 00:00 AM/PM format.

    -   In Chrome, you can also click the **clock** icon on the right to select the time from a menu.

7. For a Weekly rule, you can split the rule into different times during the day. Click **+ Add Time Range** and then enter the other time.

8. Click the checkmark in the top right to save your changes.

9. If needed, click **[+ Add Rule]** to add another rule to this schedule.

10. When you're done adding rules to the schedule, click **[Save]**.

Delete a Rule

To delete a rule, click the 🗑 **trash** icon. The rule will be crossed out, but if you change your mind, it can still be 🗑 **restored** or ✏ **edited** until the schedule is saved. Once you save the schedule, though, any deleted rules will be deleted permanently.

Save

After you set up and save your schedule, the routes are added to the Auto-Attendant builder canvas. Click the ⊕ **Add** icon to add another route.

By default, an "All other times" route will be added to determine where calls are routed during times that aren't specified by a rule.

Menu

A Menu directs the caller to a message and DTMF (dual-tone multi-frequency signaling, commonly referred to as touch-tones) options for call routing based on the key dialed.

Menu Name

Enter a name for this menu, then continue to select the appropriate prompts.

Menu

Menu Name

Main Menu

Prompts

Prompts are the recorded audio files that callers hear upon entering the menu.

- The **Intro Prompt** plays right before the Menu prompt. Because it's a separate audio file, it can be easily switched out for various circumstances, such as announcing seasonal sales or temporary business hours. This prompt is optional.

- The **Menu Prompt** tells callers how to navigate the menu options. For example: *"Thank you for calling Acme Corp. Press 1 for Sales, 2 for Support, or 3 for Billing."* This prompt is required.

For each prompt, click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can ▶ **play** the file in your browser or ⬇ **download** it to your computer. ▶

- If the file you need isn't listed, you can upload or record a new one in <u>Media Files</u>.

Allow Barge-In

Toggle on to allow callers to interrupt the intro prompt by dialing an option (DTMF input) before they hear it.

Allow Extension Dialing

Toggle on to allow callers to dial their party's extension while the menu options are still playing. After dialing, there is a two second delay before the call is routed.

If "Allow Barge-in" is also enabled, callers can interrupt the Intro prompt as well. Because an extension may start with the same number as a menu option, there is a two second delay after a number is dialed before the call is transferred. If the dialed extension is invalid, the caller will hear "invalid extension," and the call will end.

Menu Options

Add DTMF (touchtone) options (0–9, *, #). Each option needs a name and a completed route.

1. Click **[+ Add Option]**.
2. Select a DTMF option (0–9,*, or #).
3. Enter a name for the menu option.
4. Repeat steps 1–3 for other menu options.

Menu Options

1	Sales	🗑
2 ABC	Support	🗑
3 DEF	Billing	🗑

+ Add Option ▾

Failure Routing

Choose what happens if the caller dials an invalid option or fails to make a selection within a specified time.

Failure Routing

Menu Timeout (Seconds)

Number of Seconds (1-999)

Timeout value is required.

Max Invalid Selections

5

Invalid Prompt (Optional)

+ Choose File

Field	Description
Menu Timeout	The number of seconds delay before directing the call into the failure route. (1–999)
Max Invalid Selections	The number of invalid DTMF (touchtone) selections that will be allowed prior to directing the call into the failure route.
Invalid Prompt	Upload a WAV or MP3 file under 5 MB that a caller will hear after dialing an invalid DMTF option (required). Example verbiage: "The number you entered was invalid. Please try again."
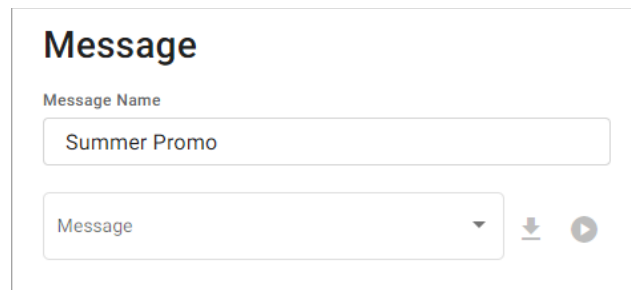
When you're done configuring the menu, click **[Save]**. The menu will be added to the auto-attendant builder canvas.

Message

Using the **Message** route, the caller will hear a prerecorded message.

Enter a name or description for the message that will be displayed in the auto-attendant editor, then click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can ▶ **play** the file in your browser or ⬇ **download** it to your computer.

- If the file you need isn't listed, you can upload or record a new one in Media Files.
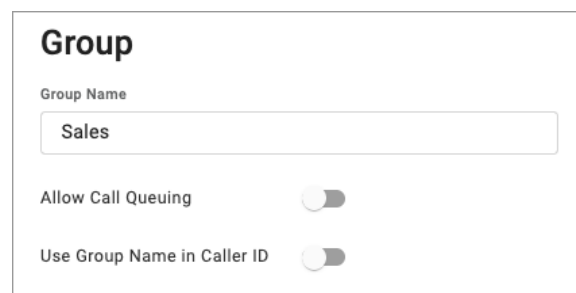
Group

A group allows a call to ring to multiple users (not devices). Rather than following each user's call handling rules, the group follows its own User Ring Strategy: Simultaneous, Sequential, or Round Robin. The first user to answer will get the call. If no one answers, the call will follow the group's failure route.

Group routes can be edited while an auto-attendant is *Live* or *Activated*; all other routes will be view-only.

The Group route also includes:

- Allow Call Queuing

- Use Group Name in Caller ID

- Night Forwarding

- [User Ring Strategy](#)

- [User Log In/Out](#)

Allow Call Queueing

Long calling queues have an undeniably negative impact on your customer's experience. For 66% of callers, two minutes on hold is their breaking point. While call queuing is not a new idea, not all tools are created equal. The Auto-Attendant feature helps your business pre-set and manage large call volumes without increasing operational costs, through the online Voice Portal.

1. In the Auto-Attendant, add a **Group** route.

2. Slide the toggle for **Allow Call Queueing**. This will enable the ability to have incoming calls placed in a "waiting room" where hold music will play while they wait for the next available representative.

3. Because hold music is set at the account level, not at the queue level, custom music cannot be set for each individual queue.

4. Enter the following information:

   – Max # of Calls: The number of calls that can be in the queue at one time (1–50).

   – Max Time: The number of minutes that a call is allowed be in the queue (limit 360). Once the max time is reached, the call is sent to the failure route.

– Ring Timeout (seconds): Enter the number of seconds a call will ring a user (sequential and round robin) or all users (simultaneous) in this group before it is pushed back to the front of the queue (limit 120). Keep this setting low to ensure calls are answered quickly.

> If a Group is set to ring all devices simultaneously and a phone becomes available after the call is already in the group, the phone will ring but not until the Ring Timeout setting is met.

5. Next, choose a ring strategy:

   – Simultaneous: Ring all users at the same time.

   – Sequential: Ring users in order. The amount of time it routes to each user added to the group until the max time parameter has been met which will then route the call to the next route.

   – Round Robin: Ring the next user in the list based on which user received the last call.

6. Finally, add individuals to the group.
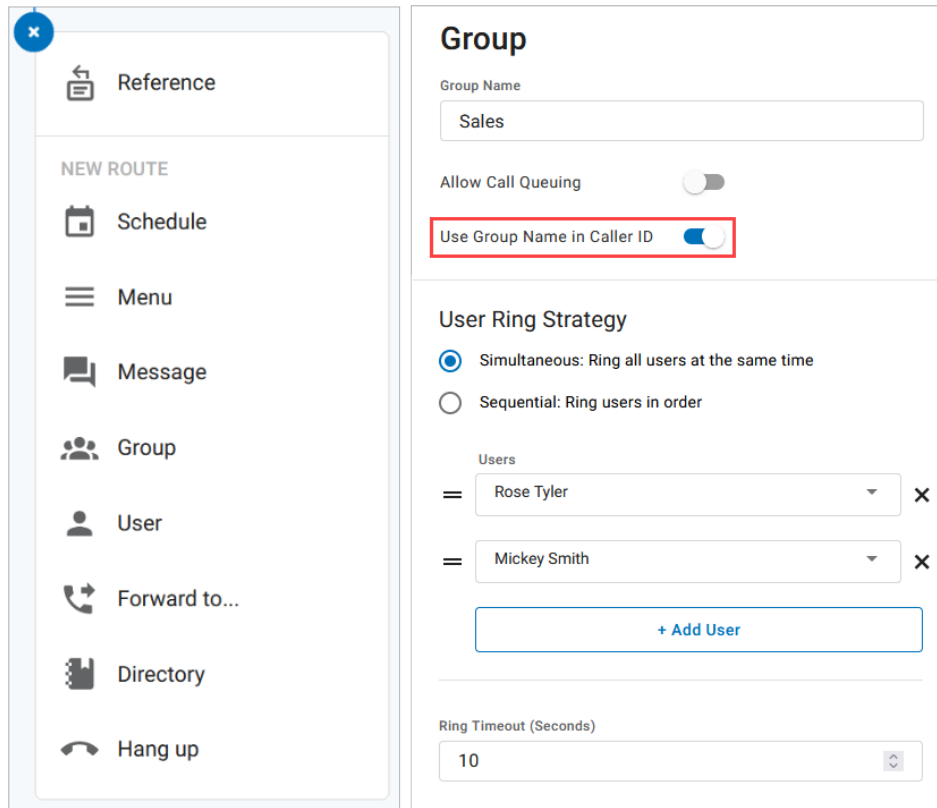
7. When you're done, click [Save].

Use Group Name in Caller ID

This feature prepends the Group name to the caller ID, so the user who receives the call can identify where it originated. This is especially helpful for users who are part of multiple auto-attendant groups.

For example, if a caller listens to the auto-attendant menu and presses 2 for Sales, when the call is delivered to a user, the caller ID will show the group name before the caller's name and phone number: *From:Sales JANE SMITH 18015551234*.

If a call is routed through multiple groups, only the most recent group name will be displayed. There are no character limitations, but a shorter Group name will allow more to be shown on the device screen.

Night Forwarding

Group Night Forwarding, also known as Night Mode, allows users in an auto-attendant group to turn their calls on in the morning and off at night by dialing a star code.

When enabled, incoming calls to the auto-attendant group are redirected to a pre-set phone number, which can be to another group, a voicemail box, a user, or an off-net number (like the night manager's cell phone). And because it's controlled by a star code, each group can manage it independently.

Set Up Group Night Forwarding

1. In the Voice Portal, go to Auto-Attendant.

2. Create a new auto-attendant or edit an existing one.

3. Add or edit a Group route in the auto-attendant path.

4. Under **Night Forwarding**, enter the following:

   – Forwarding Number: The on- or off-net phone number calls will be redirected to.

   – Description: A description to identify the phone number (optional).

   – Group Number: A three-digit identifier that will be used with the star code to enable or disable Night Forwarding.

5. Scroll down and click [Save].

Once the auto-attendant is live, users assigned to the group can dial the star code to enable or disable forwarding from this group.

Shared Group Numbers

> The group number does not have to be unique. When the same number is assigned to multiple groups, enabling/disabling Night Forwarding for one will enable/disable it for them all. This strategy is useful when multiple teams are on the same schedule, or one team is assigned to answer calls for multiple groups. However, to allow each group to manage their Night Forwarding setting independently, all auto-attendant groups must have a unique group number.

Enable or Disable Night Forwarding

Only a user assigned to the auto-attendant group can enable or disable Night Forwarding for that group. However, if multiple groups are assigned the same group number, the user who enables/disables it only has to belong to one of the groups.

1. A user in the auto-attendant group will dial the Group Forwarding star code + the group number.
2. For example, if the star code is 65 and the group number is 102, the user will dial *65102.
3. Follow the audio prompts:
   - *Press 1 to turn on Night Forwarding.*
   - *Press 2 to turn off Night Forwarding.*
   - *Press 3 to set the Night Forwarding number*.

> ### Call Queuing
> If calls are in the queue when Night Forwarding is enabled, those calls will remain in the queue until answered, and all new calls to the queue will be forwarded.

Change Forwarding Number

A group user can change the forwarding number by dialing the star code and pressing 3. Alternatively, an Admin user can change the forwarding number in the editor:

1. Open the Auto-Attendant editor for the one you need to modify.
2. Edit the **Group** route and change the Night Forwarding phone number.
3. Click **[Save]** to apply the new number.

Check Forwarding Status

To find out if Night Forwarding is currently enabled for a group, open the auto-attendant in **View Only** mode, then go to the Group route. The Night Forwarding flag will say either Inactive or Active.

Night Forwarding	INACTIVE
Forward Number	Description
🇺🇸 +1 ▾ 2015553214	Night Manager
Group Number	
102	

Night Forwarding	ACTIVE
Forward Number	Description
🇺🇸 +1 ▾ 2015553214	Night Manager
Group Number	
102	

User Ring Strategy

Choose if how incoming calls will ring to users in the group:

- Simultaneous: Rings all devices for users in the group at the same time; the first user to answer gets it. Additional settings are required.

- Sequential: Rings one device at a time, starting at the top of the list, until the call is answered. If the call reaches the end of the list unanswered, it will follow the failure route. This strategy is ideal if a specific person should be the first to receive incoming calls unless they're unavailable.

- Round Robin: Rings one device at a time, in order, starting with the next available user in the list based on who received the last call. If the call cycles through the entire list unanswered, it will follow the failure route. This strategy ensures a more equal distribution of calls to all members of the group.

- Longest Idle: Rings the user who has been idle (not on a call) the longest, to evenly distribute incoming calls among users in the group.

User Ring Strategy
- ● Simultaneous: Ring all users at the same time
- ○ Sequential: Ring users in order
- ○ Round Robin: Ring the next user in the list
- ○ Longest Idle: Ring the longest idle user

Ring Timeout (Seconds)
15

Ring next available line when user is busy ⬤

Simultaneous Ring

After selecting Simultaneous as your ring strategy, configure the following settings:

1. Ring Timeout: Enter the number of seconds for the call to ring before the unanswered call follows the failure route.

2. Ring next available line when user is busy: Toggle on or off.

   - Disabled: Incoming calls to the group *will not ring* to users who are busy.

   - Enabled: Incoming calls will ring all users, regardless of their call status.

     - If the user has a single line with Call Waiting enabled, they will hear the Call Waiting tone for the call on the same line as the existing call.

     - If they have multiple lines for their number and are busy, the call will ring on an idle line.

4. Scroll down and click [Save].

User Log In/Out

Enter your group users, their ring timeout settings, and specify whether they can log in or out of the group via star code.

Keep Users Logged In (or Don't)

Groups can function in two ways: keep users always logged in or allow users log in and out as needed. Choose the option that works best for this group:

- Enabled. Users will remain logged in to the group and will receive calls according to the auto-attendant's schedule. They cannot use the star code to log out.

- Disabled. Users assigned to this group can log in and out by dialing the Group Log In/Out star code + group number from their device. Additionally, you can open the auto-attendant editor to see who's logged in or out, and even change the user's status on their behalf.

Add Users

To add a user to the group, click the User drop-down menu and select their name from the list. To add additional users, click [+ Add User]. When you're done, click [Save].

- Group Filter. To narrow the list of options to users in a specific User Group, select the group name in the filter above (optional).

- Timeout. For each user in a sequential or round robin ring strategy, also specify the number of seconds calls will ring each user before moving on to the next.

- **Logged In.** The checkmark indicates the user's login status. An admin end user can change a user's status manually: To log a user in, check the box. To log a user out, uncheck the box.

- **Delete.** To remove a user from the list, click the trash icon on the right.

User

Routes to a single user whose personal call handling setting will apply as normal. If *"Send calls directly to user's voicemail"* is selected, the call bypasses the user's call handling rules and routes directly to the user's voicemail box.

Forward to...

The **Forward to Phone Number** route directs calls to an on- or off-net phone number. Select the country code from the drop-down menu on the left, then enter the phone number and a description (optional) in the fields on the right.

Directory

The **Directory** route allows the caller to dial a user in the directory using text to speech. When the caller reaches this point, they will hear, "Dial by last name" or "Dial by first name." The caller will dial 3 or more characters of the user's name and press #. If there is more than one matching user, the caller will select a user from a list of options.

Dial by...

Choose if callers will dial by the user's last name or first name.

Custom Audio

Optionally, select custom audio prompts to give callers custom guidance in the directory. For **Intro Prompt** and/or **Invalid Selection**, click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can ⏵ **play** the file in your browser or ⭳ **download** it to your computer.

- If the file you need isn't listed, you can upload or record a new one in [Media Files](#).

If custom audio is not used, the caller will hear the default "Dial by" prompts.

Failure Routing

A failure route is required in case the caller is unable reach the user they were looking for.

- Timeout (seconds): Enter the number of seconds (5–30) the call can be in the directory.

- Max Invalid Selections. Enter the number of invalid selections (1–10) the caller can try before the call is redirected to the failure route.

sctelcom

Hang Up

Terminates any call that reaches this point. Click **[Save]** to keep this route.

Hang_up

Hang up will terminate any call that reaches this route.
Click 'Save' to keep this route.

Reference

A Reference when you redirect the call to another route. When a change is made in the original route, any references that use it will also be updated.

Choose which Group, Menu, Message, Schedule, or User a caller will be redirected to once they reach this point in the route, then click **[Save]**.

Reference

When the the caller gets to this point, they will be redirected to the beginning of the referenced route.

Group
Sales Team

Menu
Main Menu

Message
Please leave a message

Schedule
Weekly Schedule

User
Chris Jenson

Donna Noble

Jack Murphy

Example of a Completed Route
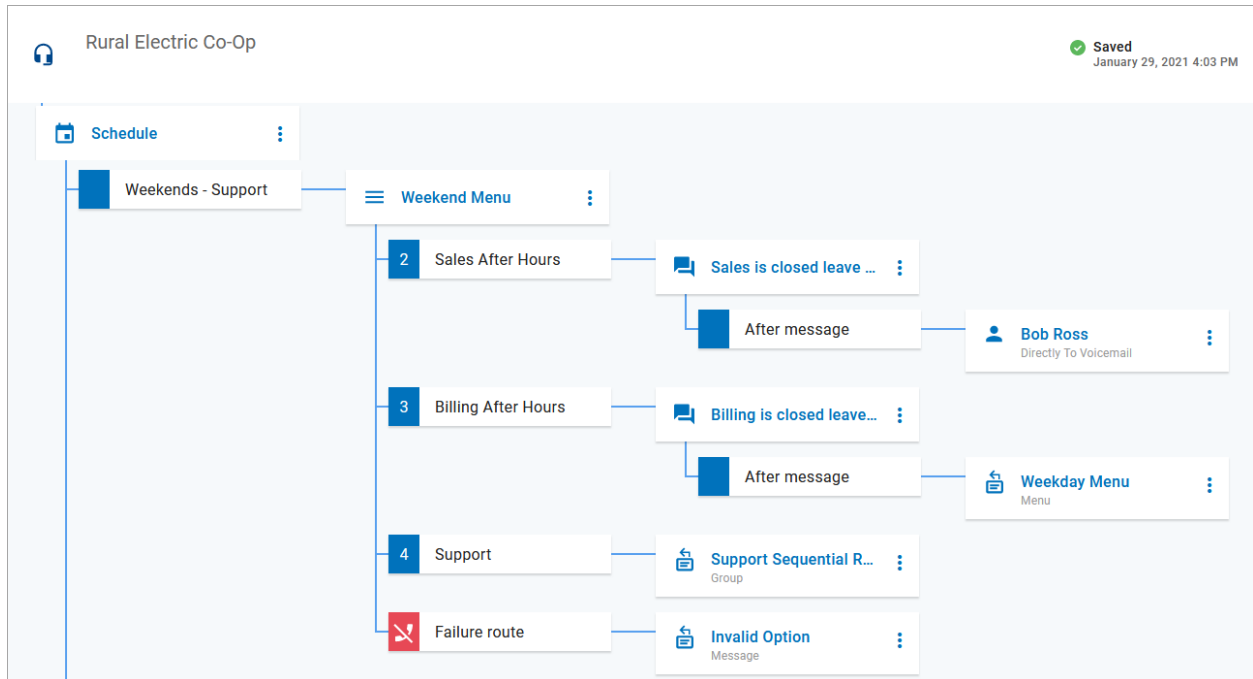
Account Codes

Account codes are used to tag (classify) calls for billing and reporting purposes. Admin users can create specific codes that users can dial to associate call activity to a department, project, client account, and more.

For example, if an agency needs to keep track of billable client calls, they can dial the code that corresponds to the client, and the code will be tagged in the call detail record (CDR), Call History, and Account History. Later, the billing department can review the call records and bill each client appropriately.

How Account Codes Work

The general flow for using an account code on inbound and outbound calls is outlined below. However, it will change depending on which settings are enabled and disabled. See How to Use Account Codes for details.

- **Outbound Calls:** Dial a phone number. When prompted, enter an account code (for example, 123).

- **Inbound Calls:** Answer an inbound call, then dial the star code + the account code (for example, *50123).

Account Setup

Account Codes is managed both at the account and user levels. Once it's enabled at the account level and the default settings are configured and saved, you can choose whether to enable Account Codes for all (current) users on the account. Then it can be enabled or disabled for individual users as needed.

- [Enable Account Codes for the account.](#)

- [Add at least one code.](#)

- Configure the default settings and enable Account Codes for users.

- Customize the settings for individual users as needed.

Enable Account Codes for Account

The following steps are only required the very first time Account Codes is enabled on an account.

1. Go to **Business Cloud > Account Codes**.

2. Fill out the following fields:

   - **Account code length:** Specify the number of digits (3–7) that will be required for all codes on this account. This setting cannot be changed later, so choose a length that will meet the account's needs in the long term.

   - **Max retries to validate code:** Specify how many times (1–9) a user can enter an incorrect account code. The industry average is 3–5 attempts.

5. Click **[Save]**. The page is refreshed and now Account Codes can be configured on the account.

Next Steps

Account Codes is now enabled at the account level. However, before it can be enabled for users, you must add at least one account code and configure the default settings.

Manage Account Codes

Account codes are used to tag (associate) calls with a specific department, project, client, etc. If the "Validate account codes when dialed" setting is enabled, the dialed code is checked against the codes on the account. At least one code must be added to the account to enable this setting; otherwise, users won't be able to place outbound calls.

We recommend creating at least one account code, such as 0000, that can be used as a default option.

Add Account Code

1. Go to **Business Cloud > Account Codes**.
2. Click **[+ Account Code]** in the top right.
3. Enter a name or brief description to remember what the code is assigned for.
4. Enter the code that will be dialed.
5. Click **[Create]**.
6. Repeat steps 2–5 for any additional codes.

New Account Code

Name or description*

Account code (4 digits)*

Cancel   **Create**

Edit Account Code

Click the edit icon to update the name or description of an existing account code. To change the number, create a new one and then delete the old one.

Edit Account Code

Name or description*

Demo Account Code 1

Account code*

101

Cancel   **Save**
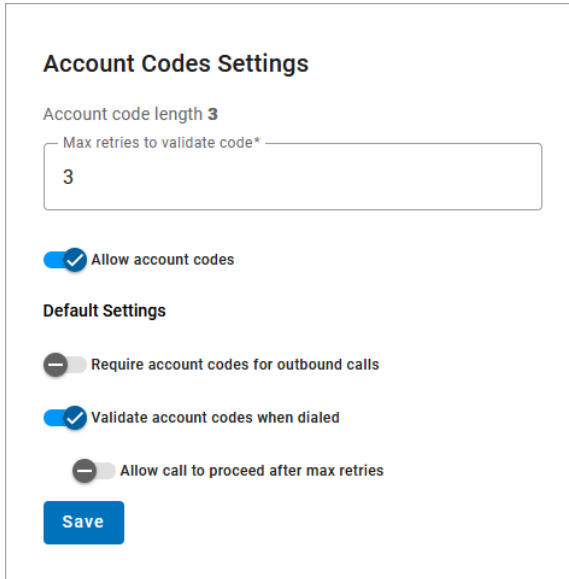
Account Codes Default Settings

Once Account Codes is enabled on an account, the account-level settings must be configured before enabling it for users. These settings are applied to all users who have Account Codes enabled, except those with custom settings.

1. Go to **Business Cloud > Account Codes**.

2. Under **Account Codes Settings**, switch on *Allow account codes*. Once these settings are saved (see step 5), Account Codes can be enabled or disabled at the user level as needed.

3. Choose which default settings to enable (optional). To see how each of these settings changes the flow of a call, see How to Use Account Codes.

   – **Require account codes for internal calls.** If enabled, users will be prompted to dial an account code on every outbound call to other users on the account. If disabled, the user can dial a star code + account code during a call if they want to tag it.

- **Validate account codes when dialed.** If enabled, the account code will be validated against the codes on the account. If disabled, the user can dial any number as an account code, as long as it's the right length. At least one account code must be added before enabling this option.
- **Allow call to proceed after max retries.** If account codes are validated and the user enters multiple invalid codes, this setting determines whether the call will proceed as intended or end once the user reaches the max retry limit. This setting can only be customized at the user level if it's enabled at the account level first.

4. Click **[Save]**.

Account Codes Settings

Account code length **3**

Max retries to validate code*

3

✅ Allow account codes

Default Settings

⊖ Require account codes for outbound calls

✅ Validate account codes when dialed

⊖ Allow call to proceed after max retries

Save

5. **Save Account Codes.** A pop-up will appear stating that these settings will be applied to all users who have account codes enabled, except those with custom settings, and ask if you want to enable this feature for all users who don't have it yet.

- **Yes:** Account Codes will be enabled for all existing users who don't have it yet. If Account Codes had been intentionally disabled for any users, it will have to be disabled for them again.
- **No:** Account Codes will *not be* enabled for users who don't have it yet. Choose this option if you want to enable it manually for individual users, rather than enabling it for everyone all at once.

6. Click **[Save]** to apply the settings.

About User Settings

Account Codes is *not enabled by default* for new users added to the account after these settings are saved. There are two ways to enable it for users after this point:

1. Re-save the **Account Codes Settings** (even if you haven't changed any settings) and choose *Yes* to enable it for all users who don't have it yet.

2. After a new user is created, go to their **Settings** tab and turn it on.

Account Codes User Settings

The default settings configured at the account level apply to all users who have Account Codes enabled. However, the settings can be customized for individual users if needed.

Enable Account Codes for User

When Account Codes is enabled, the user is prompted to dial a code on every outbound call. Whether or not the code must be valid (preconfigured on the account) depends on their settings. See How to Use Account Codes for details.

The Account Codes feature *is not enabled automatically* for new users, so it must be enabled manually. To enable it for a user, follow the steps below:

1. Go to the **Users** page and select the user whose settings you want to customize.

2. In the **Settings** tab, scroll down to **Account Codes**.

3. Switch *Enable account codes* on.

4. Click **[Save]**. Account Codes is now enabled with the default settings, which are greyed out below. If this user requires custom settings, see Override Account Settings.

Override Account Settings

In many organizations, especially larger ones, some teams may have different call tracking requirements, and some users may not need to track their calls at all. Follow these steps for each user who needs custom settings:

1. Go to the **Users** page and select the user whose settings you want to customize.

2. In the **Settings** tab, scroll down to **Account Codes**.

3. Toggle on *Override account level settings*. The account-default settings are displayed below.

4. Modify the settings as needed.

5. Click **[Save]**. If the <u>default settings</u> are ever updated, this user's settings will not be affected.

Disable Account Codes for User

If Account Codes is enabled for a user who doesn't need to track their calls, follow the steps below to disable it:

1. Go to the **Users** page and select the user whose settings you want to customize.

2. In the **Settings** tab, scroll down to **Account Codes**.

3. Switch *Enable account codes* on or off.

4. Click **[Save]**.

Account Codes

◯ Enable account codes

Save

How to Use Account Codes

The general flow for using account codes on inbound and outbound calls is outlined below. However, it will change depending on which settings (detailed below) are enabled and disabled at the account and user levels.

-   **Outbound Calls:** Dial a phone number. When prompted, enter an account code (for example, 123).

-   **Inbound Calls:** Answer an inbound call, then dial the star code + the account code (for example, *50123).

MID-CALL STAR CODE

For calls in which an account code is not required, dial the **star code + account code** during the call. Just remember, the other party will hear the dial tones, so let them know what you're doing first.

Require Account Codes for Internal Calls

If this setting is enabled, users are prompted to enter a code on all outbound calls to other users on the account.

-   **Enabled (Required):** The user dials a phone number or extension and hears, "Please enter a valid account code."

-   **Disabled (Optional):** The user dials a phone number or extension. If they want to tag the call, the user can dial the **star code + account code** once the call is answered.

Validate Account Codes When Dialed

If this setting is enabled, outbound calls are not connected unless the caller enters a valid code. However, an inbound call will continue even if an incorrect code is entered to the max retry limit.

- **Enabled (Validated):** The code is checked against the codes on the account. Outbound calls are not connected unless the caller enters a valid code. Inbound calls, however, will continue even if the user enters invalid codes up to the max retry limit.

  - If the code is valid, the user hears a splash tone to indicate the account code was accepted. The call continues and the code is added to the call detail record (CDR).
  - If the code is not valid, the user hears, "Invalid entry. Please enter an X-digit account code."

- **Disabled (Not Validated):** The user can enter any code they want as long as it's the right length.

- If the code is valid, the user hears a splash tone to indicate the account code was accepted. The call continues and the code is added to the call detail record (CDR).

  - If the code is too long or too short, the caller will hear, "Account codes must be X digits. Please re-enter your X-digit account code."

Allow Call to Proceed After Max Retries

The max retry limit is set in Account Codes Settings. Once the user reaches this limit on an outbound call, they hear:

- **Enabled (Allow):** "You have reached the maximum number of attempts. No account code will be assigned to this call." And the call continues without an account code.

- **Disabled:** "You have reached the maximum number of attempts to enter a valid account code. Goodbye." The call is disconnected.

Disable Account Codes on Account

If Account Codes is disabled at the account level, it will be disabled for all users regardless of their previous settings.

1. Go to **Business Cloud > Account Codes**.
2. Under **Account Codes Settings**, toggle off *Allow account codes* and click **[Save]**.

3. A pop-up will appear asking if you want to delete custom user settings.

    – **Enabled.** All user override settings will be deleted. If Account Codes are re-enabled in the future, all any custom settings will have to be set up again.

    – **Disabled.** All custom user settings will be preserved. If Account Codes are re-enabled in the future, users' previous custom settings will be restored.

4. Click **[Save]** to disable Account Codes for all users on the account. The account codes are preserved, so they can be used again if the feature is re-enabled later.

To disable Account Codes at the user level, see [Account Codes User Settings](#).

Call Groups

Groups allow you to reach multiple users simultaneously. Select a Pick Up or Paging Group to view and modify its settings. To create a new group, contact Customer Support for assistance.

Pick Up Groups

A Pick Up group allows incoming calls to be answered by any member in the assigned group by dialing a star code.

Edit a Pick Up Group

Select a group to edit the name and assigned users.

1. Select the group to expand its settings.
2. Update the name, if needed.
3. To add a user to the list, select their name from the menu.
4. Click **[Save]**.

Answer a Pick Up Group Call

When a user in the Pick Up Group hears a call ringing on another group member's phone, the user can answer the call on their own phone by dialing the Pick Up Group star code.

1. When you hear a call, pick up your phone and dial the **Pick Up Group star code** to answer it.
2. If multiple calls are ringing, the longest ringing will be answered.
3. If a user belongs to multiple groups, when they dial the Pick Up Group star code, it will answer the longest ringing call in any of their groups.

Answer with Speed Dial

To answer a call to a Pick Up Group on an IP phone with the press of a button, set a speed dial preset to the Pick Up Group star code. Follow these steps for each phone in the group:

1. Assign a new line on the device and choose or enter the following settings:
2. **Type:** Speed Dial
3. **Assignment:** Custom Speed Dial
4. **Speed Dial:** Enter your Pick Up Group star code.
5. **Speed Dial Display Name:** Enter a name for the Pick Up Group.
6. Click **[Save]**.

Paging Groups

Paging Groups are used to make one-way announcements to one or more devices — like the announcements you remember over the loudspeakers at school. All users assigned to a Paging Group can be contacted at once via their device's speaker by dialing the group's extension.

How Paging Groups Work

- Caller ID. The paging party must have their Caller ID enabled.

- Devices. Only certified devices capable of receiving a page will receive a page.

- If all devices are unregistered, offline, in DND, or unavailable, the paging party hears a busy tone.

- If a device has multiple lines and any line is busy, the user will not receive a Standard page.

- When swapping a device, you will see a warning if the new device does not support paging or have a valid Line 1 "Device Line" line type.

- Page Priority. The page priority determines which devices will receive the page.

- If a user belongs to more than one paging group and receives a page from both paging groups, the last page will have priority over the other pages.

- All devices within an Emergency Paging Group will receive the page, regardless of status. While an Emergency Page is in progress, incoming calls will not interrupt the page and Call Waiting will be disabled for users of the group.

- When paging a device that already has an active page elsewhere, the device will receive a busy tone or hang up.

- End Page. Users can end a page on their device by hanging up. This does not end the page for everyone else.

Edit a Paging Group

Select a Paging Group to view and edit its settings. When you're done, click [Save].

| Paging | Emergency Paging | 8999 | Sarah Jane - Yealink T46U | ^ |

Paging

Name	Emergency Paging
Group Extension	8999
Page Priority	○ Standard - All devices except on call and do not disturb users
	○ Priority - All devices except on call users
	● Emergency - All devices regardless of status
User	▼
Device	▼
	Sarah Jane - Yealink T46U ✕

Field	Description
Name	Enter the name that will appear on devices assigned to this Paging Group.
Group Extension	Enter the extension that will be dialed to page the group.
Page Priority	Assign a priority to ensure proper handling of incoming pages as an attempt to not interrupt current calls unless deemed necessary by the paging party: • Standard: All devices except those that are on an active call or set to Do Not Disturb will receive the page. Only Priority and Emergency pages will override. • Priority: All devices except those on an active call will receive the page. It disregards DND status. Emergency pages will override. • Emergency: All devices, regardless of status, will receive the page. Calls in progress will be placed on hold while the page is active.
User & Device	To add a user to the group, select their name and device. Repeat for all users who will be included in this group.

Voicemail

This section houses *all* the voicemail boxes set up on the account. The settings here are the same as they are in the Users > Voicemail tab. Expand a voicemail box to view the details.

Voicemail Box Details

The Voicemail Box Details includes the name of the box and its owner. The name of the voicemail box can be edited here, if needed.

Voicemail Box Greetings

Users can upload their voicemail greetings (Basic, Busy, No Answer) and personal name recordings. Click the field to select a file from your computer, then click [Upload]. The upload will accept WAV, MP3, and OGG files that are less than 10MB.

Messages

Voicemail messages saved to the box are listed here. Messages can be sorted by Time/Date, Length, and Status (New or Saved). Hover over an individual message to see the management tools (Save and Delete) on the right.

Please note, you can ⬇ download *your own* voicemail messages from the Voice Portal, but you will not have the option to download messages for other users.

Field	Description
✉ Save	Change the status of the message to *Saved*.
🗑 Delete	Delete this message from the box.

> To delete all or multiple messages at once, select the message on the left and then click the trash icon at the top right.

Message Waiting Indicator

The message waiting indicator (MWI) on the user's device notifies them when a new voicemail message is available. Once the message has been listened to or deleted, the MWI will turn off.

Message Settings

Forward Voicemail to Email

Messages left on the user's voicemail box can be forwarded as an MP3 file to one or more email addresses. Users also have the option to keep a copy of the message in their voicemail box when it's forwarded.

1. Check **Forward Voicemail to Email**.

2. Optionally, check *Keep a copy in voicemail box*.
   – When checked, the message waiting indicator (MWI) on the user's device will stay. on until they've listened to or deleted the message from their voicemail box.

3. Enter one or more email addresses, each separated by a comma.

4. At the bottom of the section, click **[Save]**.

Enable Voicemail Transcription

Sometimes reading a voicemail message is easier than listening to it. Voicemail transcription takes the audio from the voicemail message and converts it to text, which is then forwarded to one or more email addresses with or without the message attached as an MP3 file (depending on if you also have forwarding enabled).

1. Check the box for **Enable Transcription**.
2. Enter one or more email addresses in the field below separated by commas.
3. Click **[Save]**.

Voicemail messages will be transcribed and sent to the email address(es) indicated here from *noreply@cymbus.com*. If "Forward Voicemail to Email" is also enabled, an MP3 of the message will be attached to the email. Here's an example of what that may look like:
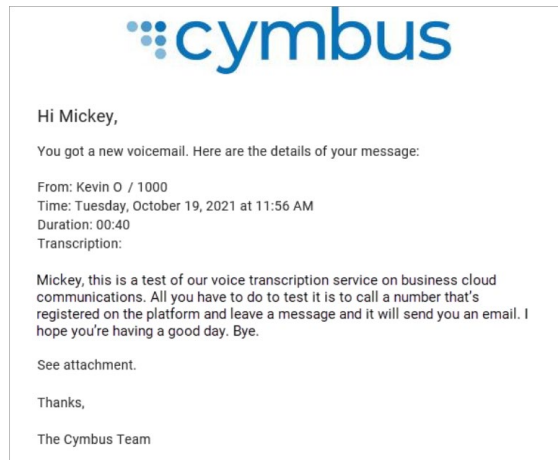
US English

Voicemails can only be transcribed from US English. If a message cannot be transcribed for any reason, such as poor audio quality, an email will still be sent with a message saying, "Message could not be transcribed."

Short Dials

Short dials are an easy way for everyone on the account to access frequently used internal or external phone numbers. They're like account-wide speed dials or extensions, except short dials can be routed to any phone number that is allowed by the calling plan, even international numbers.

The account supports up to 10,000 short dials to meet the needs of any organization. Use short dials to create extension-like dialing to:

- An on-site PBX or an international branch.

- Match the last few digits of phone numbers in the directory.

- Make it easier to reach top customers, contractors, or partners.

- And more.

To use a short dial, pick up the phone and enter the number, no star code necessary.

Go to **Business Cloud > Short Dials**. Short dials can be added individually, to a range of sequential phone numbers, or by importing a CSV file.

	Short Dial	Maps to	Description		
☐	2005	1 (801) 555-1239	Emergency Support Attendant	🗑	✏
☐	2004	1 (801) 555-1238		🗑	✏
☐	2006	1 (801) 555-1240		🗑	✏
☐	3854	1 (801) 555-1234	IT Helpdesk	🗑	✏
☐	2003	1 (801) 555-1237		🗑	✏
☐	2007	1 (801) 555-1241		🗑	✏
☐	2009	1 (801) 555-1243		🗑	✏

Items per page: 20 1 – 7 of 7

> **WHAT'S THE DIFFERENCE BETWEEN SHORT DIALS AND SHORT CODES?**
>
> In the telecom industry, a short code is a five or six-digit number that businesses use for one-way SMS and MMS messaging. However, the use of the term isn't consistent everywhere. For example, Metaswitch has a Short Codes feature which is like Cymbus' Short Dials, in that it allows users to dial common numbers from their desktop phones.

Add Short Dials

There are multiple ways to add Short Dials to the account: individually, to a range of sequential phone numbers, or by importing a CSV file.

Add Short Dials Individually

Follow the steps below to add a short dial to the account:

1. Go to **Business Cloud > Short Dials**.

2. Click **[+ Short Dial]** on the right.

3. In the **Add Short Dial** popup, enter the following information:

   Add Short Dial

   Short Dial*

   250

   3 digits
   Phone Number *

   8015551234

   Description (optional)

   IT Helpdesk

   Cancel   **Add**

   - Short Dial: The number that will be dialed. It must be the same length as extensions on the account (3–6 digits), as indicated by text below the field.

   - Phone Number: The phone number the short dial will route to, without any spaces or special characters. For example, 18015551234.

   - Description: A brief description for the short dial, such as the name of the destination (optional). For example: IT Helpdesk.

4. Click **[Add]**. The short dial is added to the account.

Add Short Dial Range

A short dial range is used to assign short dials to sequential phone numbers. For example, if the starting number is (214) 555-8536, and the range is 2000 to 2004, five short dials will be set up as follows:

- (214) 555-8536: 2000

- (214) 555-8537: 2001

- (214) 555-8538: 2002

- (214) 555-8539: 2003

- (214) 555-8540: 2004

This is most frequently used to set up extension dialing to an on-site PBX. For example, if an account has a PBX with sequential phone numbers ending in 1000–1250, they can add a short dial range of 1000 to 1250 to match the last 4 digits of the phone numbers.

Short dials can be mapped to any on- or off-net phone number, so be sure that you own the complete range of sequential phone numbers to avoid routing calls to an unknown third party.

Follow the steps below to add a short dial range:

1. Go to **Business Cloud > Short Dials**.

2. Click the menu at the top right and select **Add Range**.
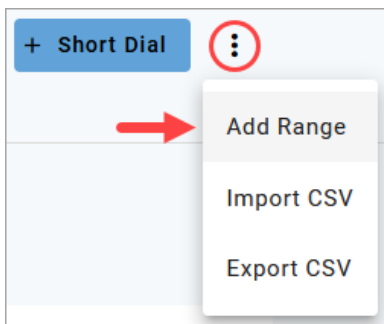
3. In the **Add Short Dial Range** popup, enter the starting and ending short dials. The range must have less than 250 numbers. In the example below, 25 short dials will be

created starting with 2000 and ending with 2025.

Add Short Dial Range

Enter a range of up to 250 codes and the first phone number it maps to. Short dials are assigned to phone numbers sequentially.

From
2000

To
2025

Starting phone number
(214) 555-2000

Cancel   Add

4. Enter the starting phone number.

5. Click [Add]. The short dials are added to the account.

Add a Description

To enter an optional description for any of these short dials, click the pencil icon on the right, enter a description, then click [Save]. See Manage Short Dials for details.

Import Short Dials

Rather than adding one at a time, you can migrate short dials from a previous account or provider using a CSV file.

Up to 250 short dial numbers can be imported to the account at a time. Imports are strictly additive; they cannot replace or edit short dials that are already on the account.

Create CSV

1. Create a CSV file with columns in the following order: **Short Dial**, **Maps to**, **Destination**, and **Description**.

   – Alternatively, export a list (CSV) of your current short dial numbers to use as a template. Remember to remove all existing numbers before importing it to the account.

2. Fill out the fields for every short dial you want to add, then save the file.

   – Short Dial: The code that will be dialed. It must be the same length as extensions on the account (3–6 digits).

- Maps to: PHONE_NUMBER

- Destination: The phone number this code will route to, without any spaces or special characters. For example, 18015551234.

- Description: A brief description or name for the Short Dial, such as the name of the destination. For example: IT Helpdesk. This field is optional.

	A	B	C	D
1	Short Dial	Maps To	Destination	Description
2	485	PHONE_NUMBER	18018678487	Emergency Support Attendant
3	484	PHONE_NUMBER	18015559821	Night Manager's Cell Phone

Import File

1. Go to **Account > Short Dials**.

2. Click the ⋮ menu on the right and select **Import CSV**.
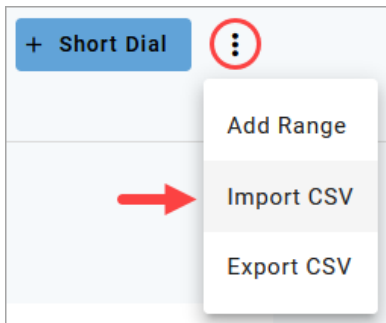
3. Drag and drop the file into the upload area or click the link and select the file from your computer.

4. Click **[Import]** to apply the changes to the account.
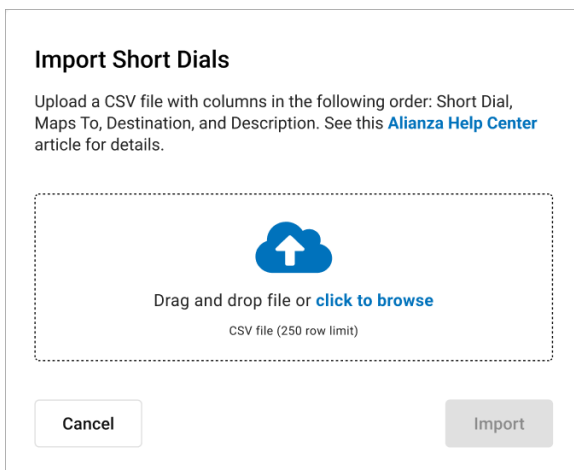
Troubleshooting

Multiple safeguards are in place to prevent short dials from interfering with other features on the account. If you get an error when adding a short dial, the error message should tell you the problem to correct. Once you fix it, try adding the short dial(s) again.

The most common errors include:

- Short dial overlaps with an existing short dial or extension.

- Short dial begins with an N11 service number, such as 311, 411, 911, etc.

- Short dial numbers are too long or too short; they must be the same length as extensions on the account.

Export Short Dial List

No matter how you use them, short dials make it easier for account users to reach frequently dialed phone numbers, inside or outside of the organization. But they won't do any good if users don't know which numbers are available to use.

The short dial list isn't available to end users, but you can export the list to a CSV file and share it with your organization.

1. Go to **Business Cloud > Short Dials**.

2. Click the ⋮ menu on the right and select **Export CSV**.
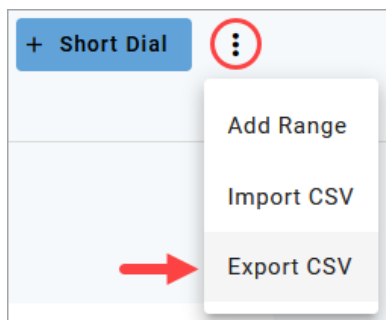
3. The CSV file is downloaded to your computer.
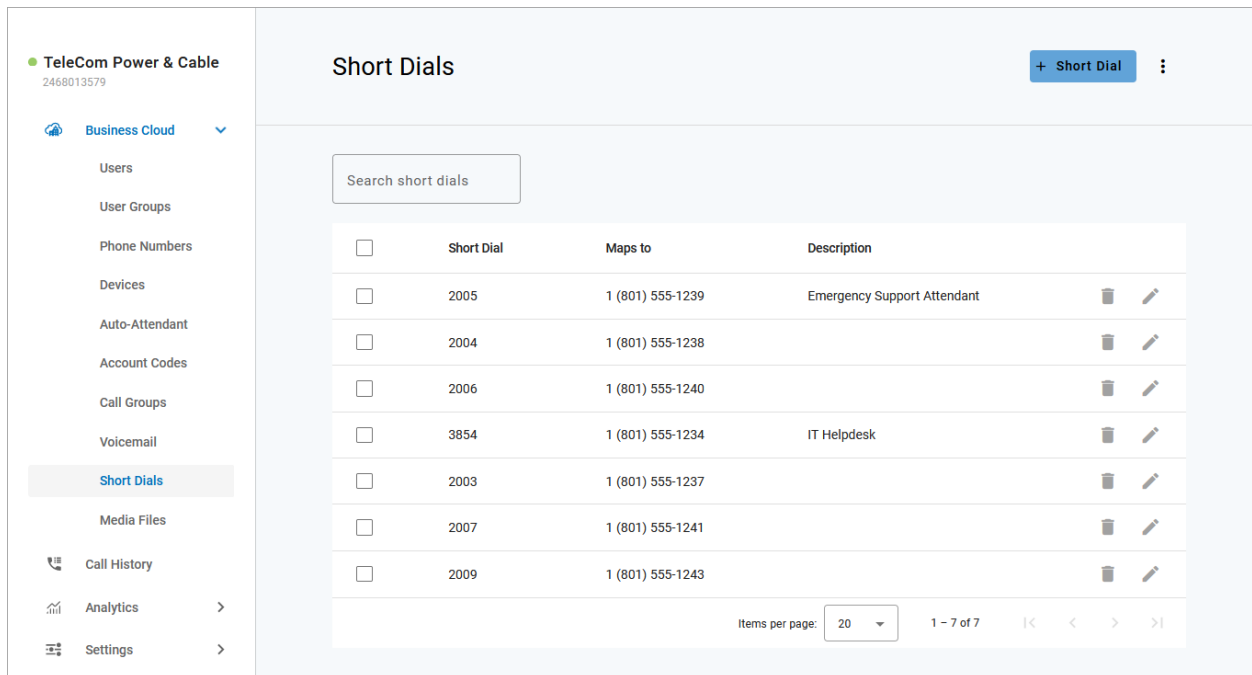
> **Info**
>
> If you choose to use this file as a template to import new short dials, remove the existing short dials first. Imports are strictly additive and cannot be used to edit or remove existing numbers.

Manage Short Dials

To view and manage the short dials on the account, go to **Business Cloud > Short Dials**. From here, you can add new ones, edit, or delete existing ones, or export a list to share with account users. Read the information in the tabs below for details.

There are multiple ways to add short dials to the account. See Add Short Dials for details.

Edit Short Dial

To update the name or description of an existing short dial, go to **Business Cloud > Short Dials**, then locate the short dial you want to edit and click the ✏ **edit** icon on the right.

The short dial number cannot be edited. However, multiple short dials can be routed to the same phone number. If you need to change a short dial number, create a new one and then delete the old one, or keep both to give users more options.

Edit Short Dial

Short dial (3 digits)*
485

Phone number *
1 (801) 555-8487

Description (optional)
Emergency Support Attendant

Cancel   **Save**

Delete Short Dials

There are two ways to delete short dial numbers that aren't needed anymore:

- Delete One: Locate the short dial, then click the 🗑 trash icon on the right.

- Delete Multiple: Check the box on the left for each short dial you want to delete (or check the top box to select them all), then click [Delete Selected].

Media Files

Media Files is a library of audio files stored on the account that can be reused throughout the Admin Portal. Rather than uploading a new prompt or message for each route, the user will select an existing audio file from the library. New audio files can be uploaded to the account or recorded directly from a browser, making it easier than ever to provide customized experiences for callers.

- Store up to 1,000 media files on the account.
- Play audio files in the browser to confirm you have the right one.
- Download media files to store a copy offline.
- Reuse a single file as many times as needed.
- Keep track of where each file is being used.

Add Media Files

There are two ways to add media files to the library:

1. Upload one or more MP3 or WAV files.
2. Record new prompts and messages.

Manage Media Files

Go to **Business Cloud > Media Files**. Files are listed alphabetically, each with a name, description, upload date, and usage count. Search by file name and description or click the column headers to sort the table. The buttons on the right can be used to play, download, edit (view), and delete each file.

Auto-Import

Audio files that were previously uploaded to an Auto-Attendant have been automatically added to the Media Files library with the description "Auto Import from" Auto-Attendant or Music On Hold. Edit each file to update the name and description as needed.

Play Audio

To listen to the audio file in your browser, click ▶ **Play.** The length of the file is listed on the bottom right.

Download File

To save a copy of the file to your computer, click ⭳ **Download.**

Edit Details

To view and edit the details of a media file, click ✏ **Edit** on the right. Here you can update the *Name*, *Description,* and *Media Type* fields and view the file details, including when it was added to the account, who added it, and where the file is being used.

The Media Type cannot be updated while the file is in use.

<table>
<tr>
<td>

Details

┌ Name* ─────────
│ Menu Holiday Hours.wav

┌ Description ───────
│ 2024 Holiday Hours

Added
3/26/24 - 3:20 PM

┌ Media Type* ──────
│ AA Prompt   ▼

Uploaded By
Ashley Roney

Used In

None

Save

</td>
<td>

Details

┌ Name* ─────────
│ Urban Sunrise.mp3

Description

Added
9/5/24 - 9:14 AM

┌ Media Type* ──────
│ Music On Hold   ▼

ℹ **Media In Use**
The media type cannot be updated while the file is in use

Uploaded By
Bob Johnson

Used In

Account Music On Hold

Save

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

Field	Description
Name	The file name which is displayed on the Media Files page and in the prompt selection menus throughout the auto-attendant editor. The name must be unique and can include the file type.
Description	An explanation of file contents or search terms to help identify the audience, language, etc. The description is displayed on the Media Files page and included in the search results (up to 1,024 characters).
Added	The date and time the file was added to the account.
Media Type	Where the file can be used in the Admin Portal:

- Music On Hold
- AA Prompt (Auto-Attendant)

Uploaded By	The name of the person who added the file to the account. If the file was automatically imported from an existing auto-attendant, it will say "Unknown."
Used In	The name of the auto-attendant(s) the prompt is used in.

Delete Media File

Before you delete a media file from the account, there are a few things you should know:

- **Deleting a media file is permanent.** If there's any chance the file may be needed later, download a copy of it first.
- **A media file cannot be deleted while in use.** Check to see if it's being used anywhere, then update the location to use a different media file if needed.

To delete a media file, locate the file and click the 🗑 **trash** icon on the right. When asked if you're sure you want to delete it, click **[Remove]** to confirm.

Are you sure?

Do you really want to delete this media file? This process cannot be undone

Cancel   🗑 Remove
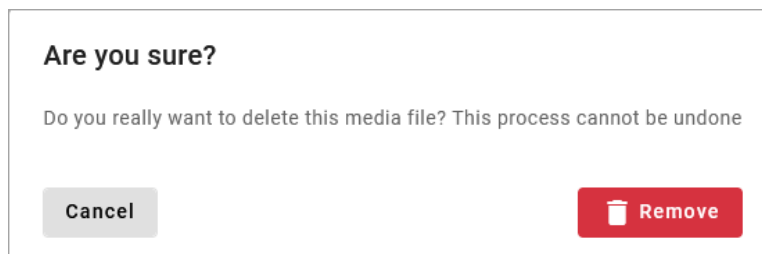
Assign File to Auto-Attendant

Media files set as AA Prompt can be used in the Menu, Message, and Directory routes in an auto-attendant. For each prompt, click the drop-down menu and select a media file from the list. To be sure you've got the right file, click ▶ **Play** on the right.

Live auto-attendants must be duplicated or deactivated before the prompts can be updated. See Edit an Auto-Attendant for details.

Prompts

Intro Prompt (Optional)

Holiday Hours.wav

Menu Prompt

Assign File to Music On Hold

Media files set as Music On Hold can be configured on the account in **Account > Settings > Calls**. See [Music On Hold](#) for details.
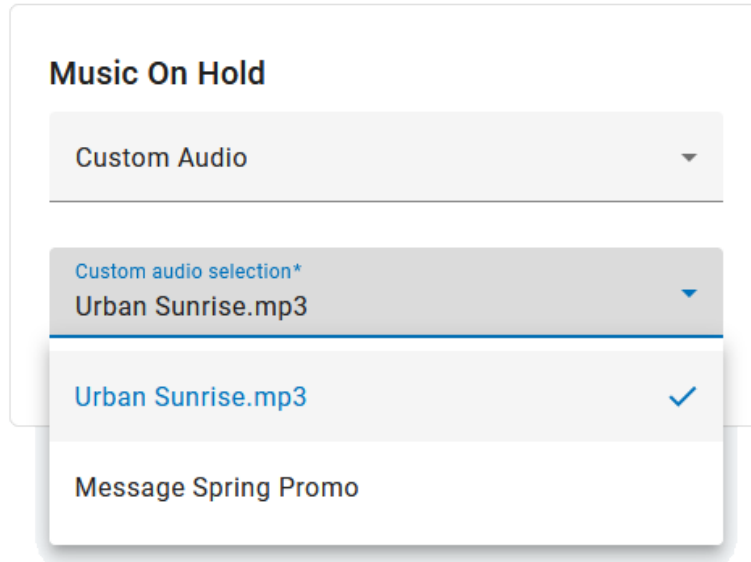
Upload Media Files

Media Files supports MP3 and WAV files under 10 MB each. Up to 50 audio files can be uploaded at a time.

1. Go to **Business Cloud > Media Files**.
2. Click **[Upload]** in the top right of the page.
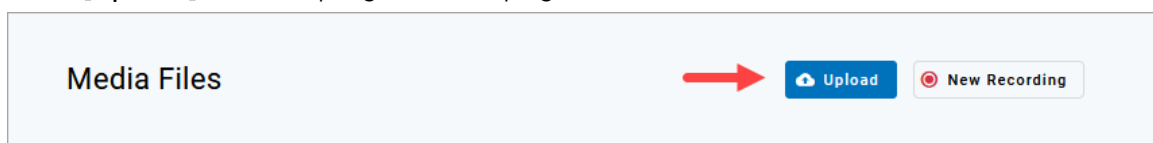
3. Click the **Media Type** menu and select how the file will be used:
   - **AA Prompts** can be used in auto-attendant [Menu](#), [Message](#), and [Directory](#) routes. See [Edit an Auto-Attendant](#) for details.
   - **Music On Hold** files can be assigned to the account in Account > Settings > Calls. See [Music on Hold](#) for details.

4. **Add Media Files.** Drag and drop up to 50 MP3 or WAV files into the upload area or click the link to select the file(s) from your computer.

5. **Name and Description.** Before uploading the file(s) to the account, edit the file name and add a description to make it easier to identify later (optional). Each file name must be unique.

– Click ▶ **Play** to listen to the file. If needed, click **X** to remove it.

– To add files to the upload, drag and drop them into the upload area.

6. When you're ready to add these files to the library, click **[Upload]**. The files will be added to the library shortly; small files will take a few seconds, while large files may take a few minutes. Do not retry the upload during this time.

Once the upload is processed, the audio files are added to the Media Files library.

Music On Hold

Music On Hold files are optimized for use by the phone system, which *will* result in some degree of quality loss. To hear what it sounds like, click the ▶ **play** button on the right or call a phone number on your account and ask to be placed on hold.

Record New Media File

Record a media file directly in your browser for use wherever Media Files are supported. For the best results, sit in a quiet room and speak into the microphone clearly and at a consistent volume. There is no time limit; however, final recordings must be less than 10 MB.

1. Go to **Business Cloud > Media Files**.
2. Click **[New Recording]** in the top right.
3. If prompted, allow the browser to use your microphone.
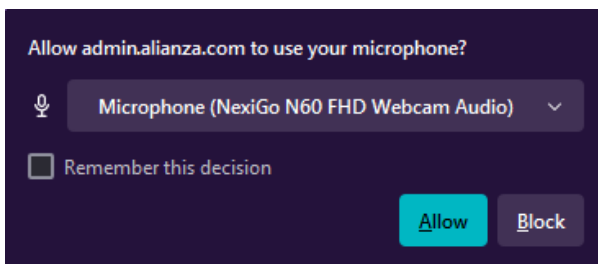
4. Enter a name and description for this recording. The file name must be unique.
5. Click the **Media Type** menu and select how the recording will be used:
   - **AA Prompts** can be used in auto-attendant Menu, Message, and Directory routes. See Edit an Auto-Attendant for details.
   - **Music On Hold** files can be assigned to the account in Account > Settings > Calls. See Music on Hold for details.

6. Select a microphone and playback device.

New Media File

Choose a recording device, position the microphone close to the sound source, and press the record button below. Speak clearly and at a consistent volume. When finished, press the stop button and listen to the recording to check for quality. If necessary, adjust your settings before saving the media file.

Name*

Name

Description

Description

Media Type*

AA Prompt

Select your microphone

Microphone (NexiGo N930E FHD Webcam Audio)   Playback device

00:00:00

7. When you're ready, click the ⦿ **Record** button, then dictate your prompt into the computer's microphone.

8. When you're done, click ⬛ **Stop** to complete the recording.

9. Click ▶ **Play** to listen to the recording.

    – If you're satisfied, click ✓ **Save** to add it to the library.

    – If you're not satisfied, click ✕ **Cancel** to discard the recording and try again.

    00:00:00 / 00:00:06

Once the recording is processed, the audio file is added to the Media Files library.

Call History

Call History holds the records of all calls made and received on the account. Calls are listed in chronological order with the most recent call at the top. Call data is organized into columns that show the date and time of the call, where the call originated (From), and where the call terminated (To).

At the top right of the page, the current record list can be emailed as a CSV file.

Filters

Apply call filters to locate specific call records. Once your parameters are set, the matching call records are displayed below.

- Search: Enter a number in the *Search phone numbers* field to search for a specific phone number or extension. Results automatically populate after the first three digits are entered.

- Date/Time: Modify the date and time ranges or delete them entirely to gather the data you need. By default, the last 30 days of call records are shown that occurred between 12:00 AM and 11:59 PM, based on the account's time zone settings.

- Filters: Click [Filters] to filter the call records by Direction, Number, and/or Call Flags.

- **Reset:** When you're finished with your search, click ↻ **Reset Filters** to remove any parameters and display all calls.

Call Options

To view a call's details, click the ⋮ menu on the right. The option to block the number is also available for inbound calls.

November 20, 2023 at 4:19 PM EST 0 seconds	1 (555) 555-0123 SANDY, UT	1 (222) 222-3456 PROVO-OREM, UT	⋮
November 20, 2023 at 4:14 PM EST 1 minutes	1 (555) 555-0123 SANDY, UT	1 (222) 222-3456 PROVO-OREM, UT	Block Number
November 20, 2023 at 4:14 PM EST 10 seconds	1 (555) 555-0123 SANDY, UT	1 (222) 222-3456 PROVO-OREM, UT	Details

Block Number

If necessary, you can block an inbound caller from making additional calls to either the user or the account.

1. Click **[Block Number].**
2. Select whether the number should be blocked on the user or the account.
3. Click **[Confirm]** to add the inbound phone number to the blocked caller list (in Call Screening).

Details

Call details include the date, time, and length of the call, as well as the cost, origination, dialed, and termination information.

Field	Description
Time and Length	When the call started, connected, and ended, what duration of the call was billed, and the actual length of the call.
Cost	The cost of the call, if the call was within the calling plan, and the rate per minute from the plan.
Origination	The number and location of the originating call, and if the call came from on or off the network.
Dialed	The number that was originally dialed by the caller.
Termination	The number and location of the call recipient user that received the call, and if they were on or off the network.

Email a Call History Report

Once you've applied the appropriate filters to locate the data you need, you can export the data into a CSV file.

1. At the top right of the Call History page, click [Email CSV]. A banner is displayed on the page to indicate that your report is being generated.
2. When the file is ready, an email is sent with a link to download the report. The link **expires in 7 days** and can only be used once. Here's an example of what the email looks like:

Hi John,

Your Call History report is ready to download. Here are the details:

Account Name: TeleCom Power & Cable
Account Number: 123456789
Dates: Sep 25 - Oct 25, 2023
Types: Any
Call Flags: Any
Download the report

The link will expire in 5 days. If you did not initiate this request, please contact support.

Analytics

Inventory

The inventory dashboard displays a read-only view of all the products, packages, and add-ons in an account. Visible only to Account Managers and Super Admins, this page can be used to quickly determine which products are in the account and whether any packages or add-ons have been added.

Each product is organized by name, the account status (Active, Suspended, or Disabled), the date the status was last updated, and any packages and/or add-ons that are included. Listed below each package or add-on is the number of associated users or lines.

For example, if an account has the Business Cloud Communications product, the packages indicate how many users have Standard, Advanced, or Professional feature plans, while integrations like Call Recording or Microsoft Teams are displayed as add-ons.

Inventory

Product	Product	Product
Specialty Lines	**Business Cloud**	**Virtual Fax**
Active · 5/2/24	Active · 5/30/24	Active · 5/1/24
Packages	Packages	Packages
Specialty Lines	Professional Standard	Fax Lines
1	302 16	1
	Advanced	
	1	
	Add-ons	
	Call Recording Microsoft Teams	
	25 10	

Settings

Most settings that apply to the entire account can only be managed by your service provider, but the settings you can manage are available here.

Emergency Call Notifications

In recent years, the FCC has passed Kari's Law and RAY BAUM's Act to help expedite response to emergency services to callers and improve outcomes. As part of Kari's Law, all multi-line telephone systems (MLTS) must be preconfigured to send a notification to an on-site location (like a front desk or security office) when a 911 call is made.

For Emergency Call Notifications to work, each phone number on the account must be successfully configured with a valid E911 record, which includes the physical address where the device is located and any other information necessary to precisely identify the caller's location. It is the end user's responsibility to keep this information up to date, but they may need a reminder.

Alternative Solution

Emergency Call Notifications are *required* for any and all MLTS manufactured, imported, sold, leased, or installed after **February 16, 2020**. If your account already meets this requirement with an on-premises solution, select *Alternative solution in use*.

Configure Notifications

It is important that you choose to notify a central location where someone will see or hear the notification, such as a managed distribution list of on-site personnel (front desk, security office, administrators, etc.), rather than an individual who may or may not be at the location 100% of the time. While there isn't a limit on how many contacts can be entered here, make sure the number is reasonable for your organization.

1. Go to **Settings > Emergency Notifications**.
2. Identify the email address(es) and SMS-capable phone number(s) that will be notified when an emergency call is placed from a number on the account. Enter those email addresses and phone numbers in the portal, then click **[Save]**.
3. Click **[Test Notifications]** to send a test to make sure it's working.
   - Alternatively, you can ask the end user to dial 933 to verify their emergency call record with their E911 provider. The call will be connected to an automated 911 verification service, which will play back the dialing phone number and its associated address and send a test notification to the ENS recipients.
4. Confirm with the recipients they have received the test notification, and they understand what it's for.

Now, when someone on your account dials 9-1-1, the emergency call is processed and a notification is sent to the recipients configured in the portal, so they are made aware of the situation and can assist emergency responders upon arrival. SMS text messages are sent from 1-833-210-3911 (toll-free).

Emergency Notification Log

The Emergency Notification Log contains a complete history of all test and emergency call notifications sent from this account. The notification type is identified on the left, followed by the date, time, and sent status:

- Successful: The notification was successfully sent to all parties.
- Partially Failed: The notification was sent to some but not all parties.

- Failed: The notification was not sent.

Emergency Notification Log

Notification Type	Date	Sent Status	
933 Test	12/14/2022 - 08:59 AM	Successful	⌄
933 Test	08/17/2022 - 04:11 AM	Partially Failed	⌄

Expand an entry for details.

933 Test	11/16/2022 - 12:20 PM	Successful	⌃

933 Test Log
1 (218) 555-6412

Email	Status
smith.mickey@demo.com	✓ Sent

No SMS recipients

933 Test	08/17/2022 - 04:11 AM	Partially Failed	⌃

933 Test Log

Email	Status	SMS	Status
s.jane@demo.com	✓ Sent	1 (385) 555-0459	✗ Failed
d.noble@demo.com	✓ Sent	1 (801) 555-3995	✗ Failed

sctelcom

Music On Hold

On hold music and messaging is a proven marketing tool for any company. Silence, bad music, or playing the radio is a wasted opportunity to create a positive customer experience. With the right audio, callers are less likely to hang up, have a positive mood, and not churn.

1. Go to **Settings > Music On Hold**.
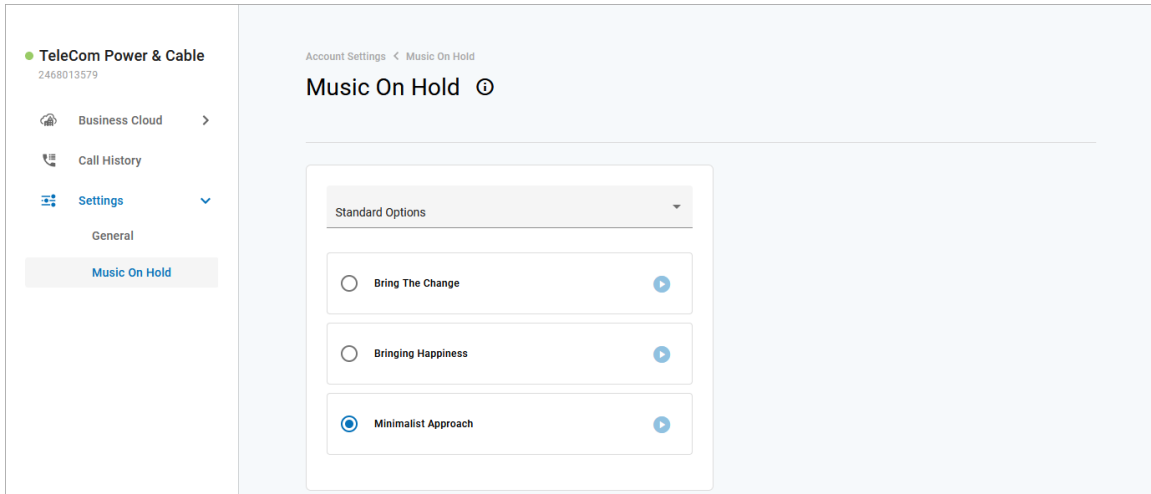
2. Select a setting:

    – None (Intermittent Beep): The caller will hear two short beeps every 15 seconds.

    – Standard Options: Choose one of three looped, copyright-free audio files.

    – Custom Audio: Select a Music On Hold file from the Media Files library.

3. The new setting will be applied to the account immediately — no saving necessary.

Listen to Audio Files in Your Browser

Music On Hold files are converted and optimized for use by the phone system, which will result in some degree of quality loss. To hear what it sounds like, click the ▶ **play** button on the right to play it in your browser, or call a phone number on your account and ask to be placed on hold.

Appendix

Call Recording Management

Recording conversations in every communication channel is crucial for compliance monitoring, legal proceedings, internal employee reviews, and more. We have partnered with Dubber, the world's leading provider of cloud-based call recording, to provide a high quality, compliant, network-based recording solution, so you can capture your own calls from any of your devices while ensuring compliance with call recording laws and regulations.

Call Recording Products

BCC Call Recording is included in the Advanced and Professional feature plans. Users with this product can manage their own recordings in the Dubber Portal.

Additional products, including Dubber Recording, Dubber Unified, and Dubber Insights, may also be available. These products offer advanced call recording capabilities including the ability for a Dubber Administrator to manage the recordings for all users on the account. For more information about these packages, contact Customer Support.

Access the Dubber Portal

All call recording files are stored in the Dubber Portal. Once you have recordings available, they can be managed by clicking **Manage Recordings** and entering your credentials on the Dubber login page.
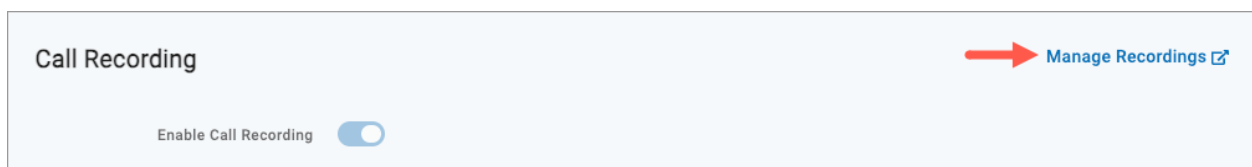
You should have already created a password by clicking the verification link in the *Welcome* email that was sent when the feature was originally enabled. If you can't remember your password, click *Forgot your password?* and enter your email address to receive further instruction.

> ### Dubber Portal
> The Dubber Portal is subject to change and may appear differently from how it is documented here.

Manage Recordings

The **Call Recording** page in the Dubber Portal displays all your available recordings and several management tools allowing you to listen to your recordings, add tags, favorite them, share them via email, or even download a copy of the MP3 file.

> ### Dubber Users
>
> All Call Recording users can manage their own recordings. However, only a Dubber Administrator (not available with BCC Call Recording) can manage the recordings for other users on the account.

Search for Recordings

Use the search bar located in the top-right corner of the page to quickly search through your recordings. Additional filters can be applied by clicking the arrow and selecting or entering your search preferences. Click **[Search]** to populate your results.

The filter bar can also be used to filter your recordings. Click **Show tagged** to display your tagged recordings or **Show Starred** to display your favorites. Please note, the integration does not support the **Show Voicemail** or **Show Meetings** tabs, so those will be empty.
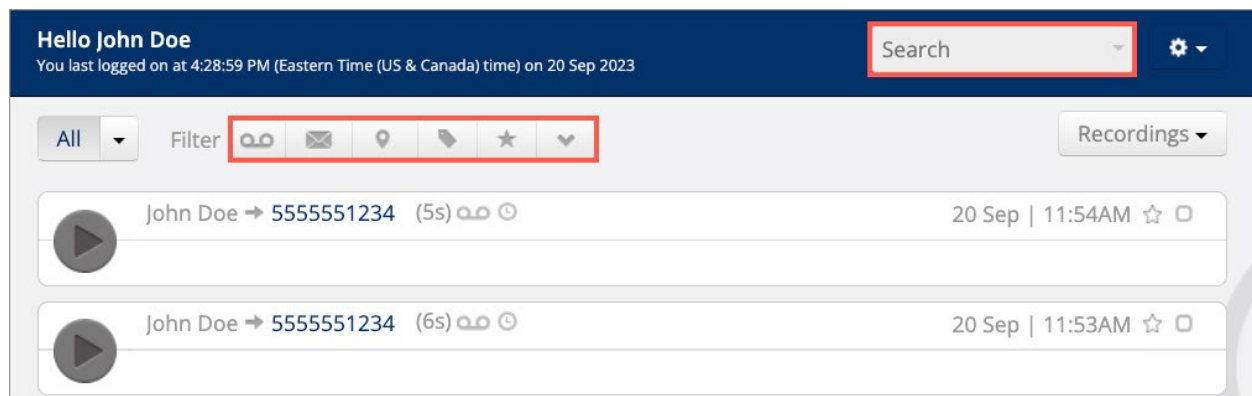
Listen to Recording

To listen to a recording, locate the recording from the list and click ▶ **Play**. The recording will begin playing and expand to display the audio's waveform. New UI elements will also appear, providing additional playback options. Click 🔁 to skip **forward 15 seconds** or click 🔁 to go **back 15 seconds**.

You can also adjust the playback speed by clicking `1.0x ▾` **Set playback speed** and selecting an option from the menu. Options include 0.5x, 1.0x (default), 1.5x, and 2.0x speed.

Share Recording

Within the Dubber platform, your recordings can be shared with a colleague or team member via email.

1. Locate the recording you want to share and click 👤 **Share** on the right.
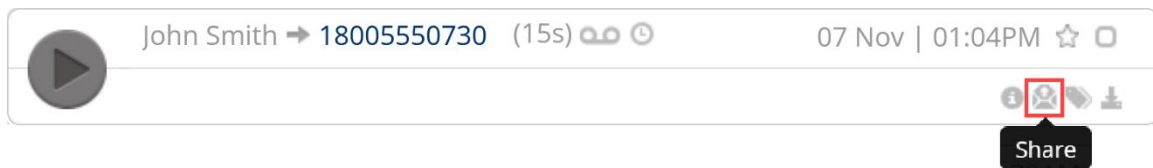
2. In the **Share this recording** modal, enter the recipient's email address.

3. Optionally, edit the Subject and Message fields. By default, these fields are pre-populated with generic text.

4. Check Do you understand you're sharing this recording? to accept the terms and conditions.

5. Click **[Share]**. The recipient will receive an email containing a link to the audio file. The recording will be available for 24 hours or 50 plays, whichever comes first.

Tag Recording

Tags add an extra layer of discoverability by attaching a searchable label to the recording file. Use tags to categorize recordings by department, team, or call type for example. After a tag has been added, it will display at the bottom of the recording.

1. Locate the recording you want to tag and click 🏷️ **Tags** on the right.

2. In the **Tags for this recording** modal, enter a name for the tag. The tag may be alphanumeric, up to 25 characters. To enter multiple tags, press the enter key after each entry or separate them with a comma.
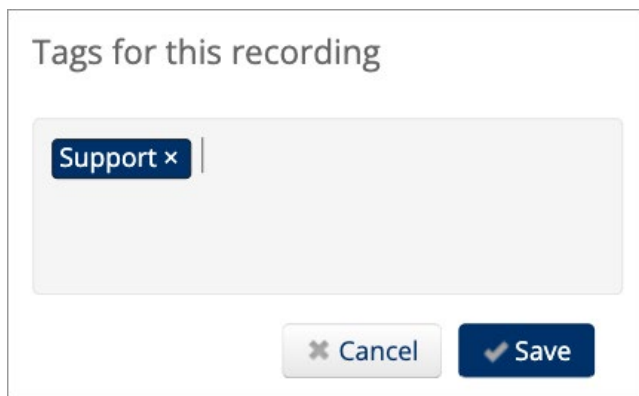
3. Click **[Save]**.

Download Recording

You can download an MP3 copy of your recordings within 30 days.

1. Locate the recording you want to download and click ⬇️ **Download** on the right.
2. Click the **[Download]** link to begin downloading the MP3 file to your device. The link is only valid for 60 seconds. If the link expires, close the modal and try again.
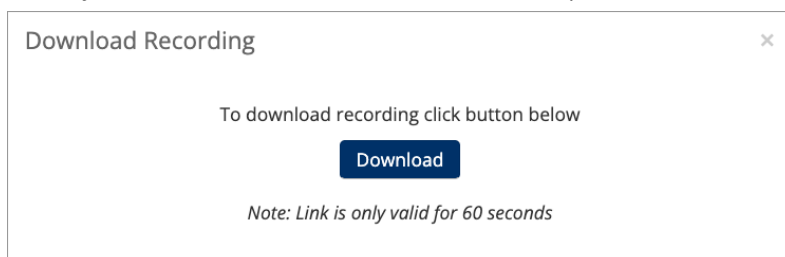
Favorite Recording

In some cases, you may need to save a recording to refer to it later. This can be accomplished by favoriting (or "starring") the recording. Favorite as many recordings as you'd like.

1. Locate the recording you want to favorite and click the **Star** icon on the right. The icon will change color to indicate the recording has been saved successfully.
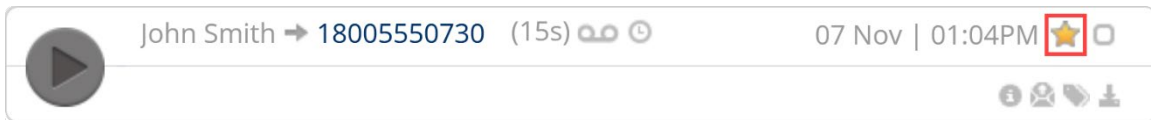
2. Once you've added the recording to your favorites, it can be accessed by clicking the **Show Starred** tab in the filter bar.
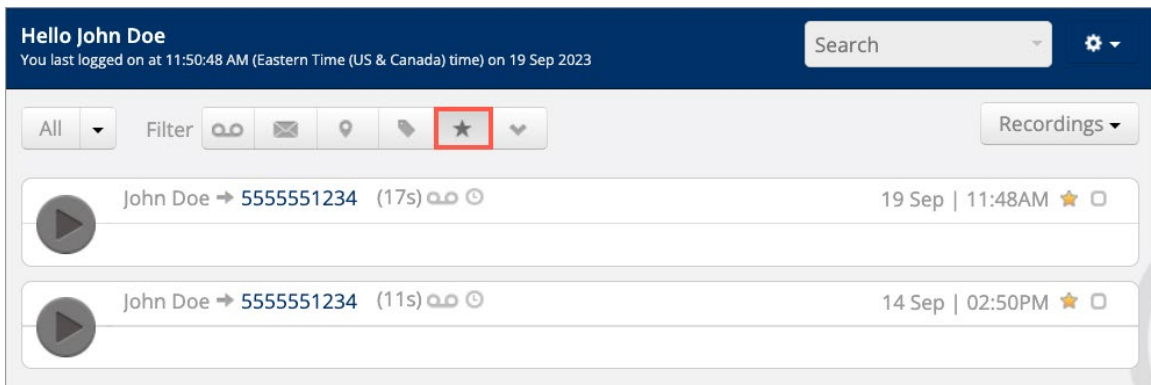
Dubber Administrators

Dubber Administrators are users who have additional privileges to update certain account settings and manage the recordings of other users within the Dubber Portal. At least one Administrator was assigned when Call Recording was enabled on the account.

Dubber Administrator users are available only on Dubber Recording, Dubber Unified, and Dubber Insights products.

> IMPORTANT
>
> Proceed with caution. This integration is designed to sync your voice services to Dubber, but not the other way around. **Do not modify** any account or user settings in Dubber outside of what is described below. Your changes will not sync.

Search for Recordings

After logging in to the [Dubber Portal](), Dubber Administrators are directed to the Call Recording page which contains the recordings of all users in the account. Recordings are listed newest to oldest.

Search by User

To search for recordings from a specific user, enter the user's name in the search bar located in the top-right corner of the page or click the [v] **Restrict to dub.point** tab from the filter bar and select the user from the menu.
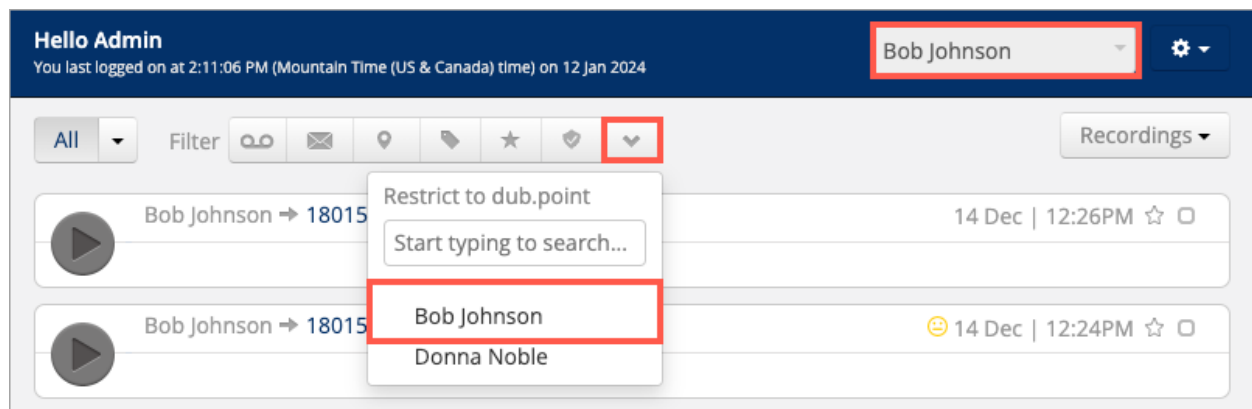
Search by Team

To search for recordings by team, click [All ▾] **All** on the left of the filter bar and select a team from the menu. Teams are listed below My Recordings.
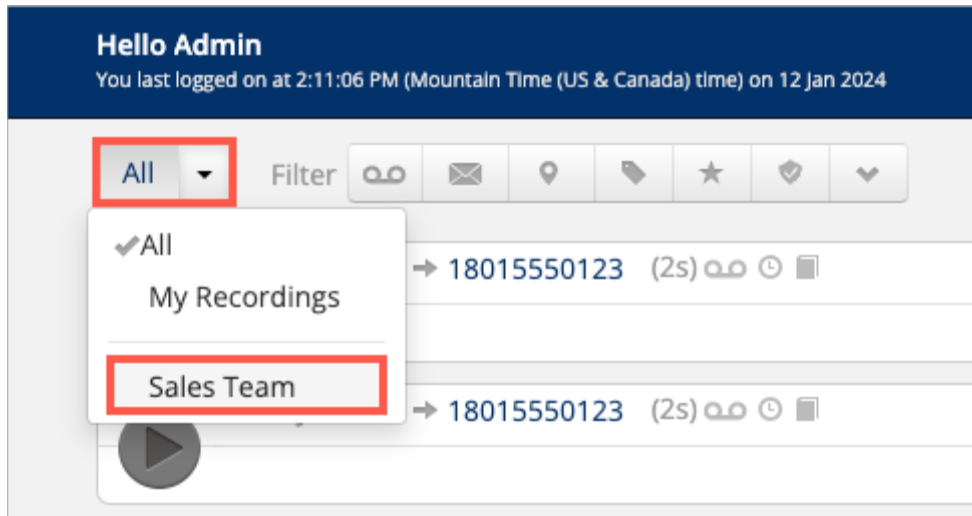
For more information, refer to Search Your Recordings in the Dubber Support Center.

Delete Recording

Dubber automatically deletes recordings from the platform based on the retention period defined by your call recording product. Although not typically recommended, Dubber Administrators can permanently delete recordings via the Dubber Portal.

Once a recording is deleted, it cannot be recovered.

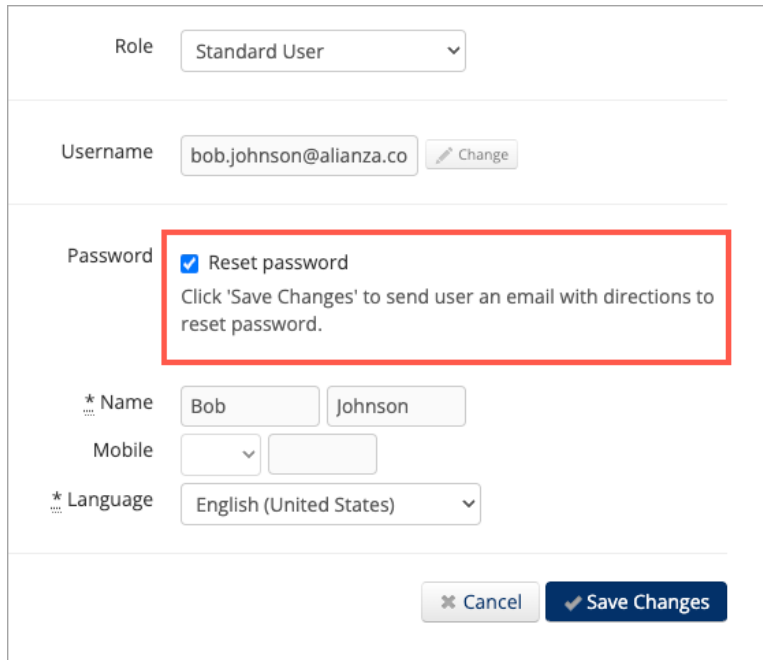1. To delete a recording, hover over the recording and click 🗑 **Delete**.
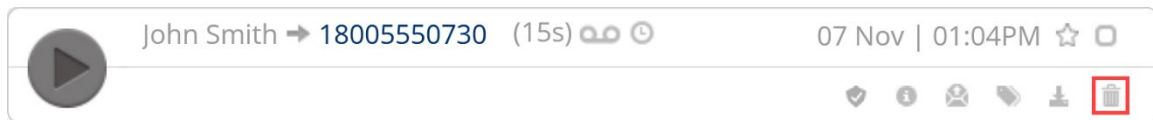
2. A confirmation modal appears, asking if you want to delete the recording. Click **[Confirm Delete]** to remove the recording from the account.
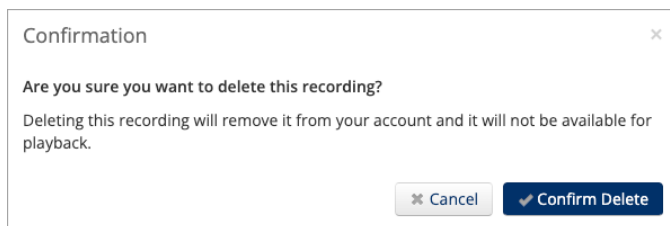
User Management

Because data updated in Dubber is not synced with your voice services, it's important that you **do not** add, edit, or delete users in the Dubber Portal. Nearly all user management functions should be handled in your voice services account instead.

However, if a user forgets their Dubber password and is unable to reset it on their own, you can reset it for them via the **People** tab in the account settings. For more information, refer to [Reset User Password](#) in the [Dubber Support Center](#).
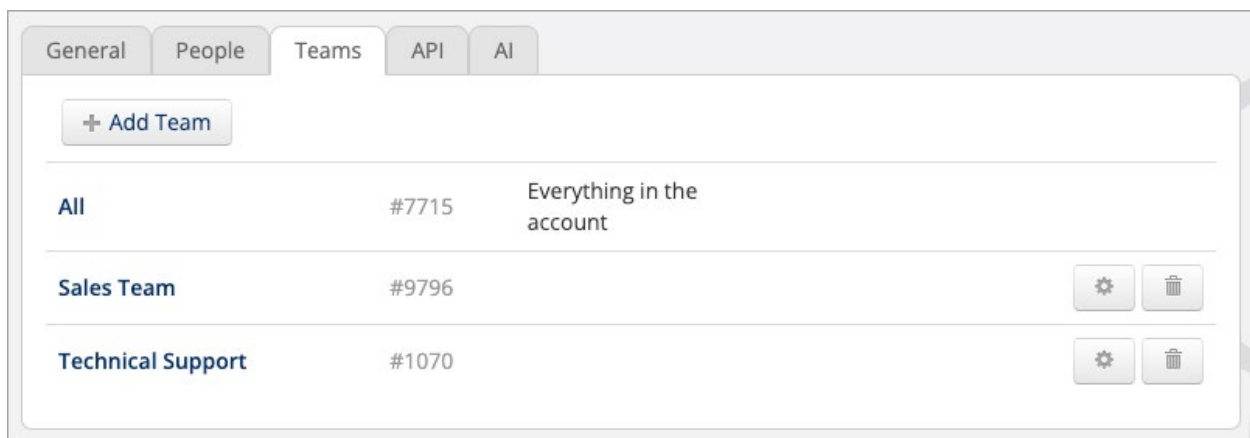
Create or Manage a Team

In Dubber, you can organize existing users into groups, otherwise known as Teams. Teams are an effective way to manage how users can access call recordings. Teams are composed of Contributors — users who can contribute their own recordings, and Listeners — users who can listen to the recordings of other team members.
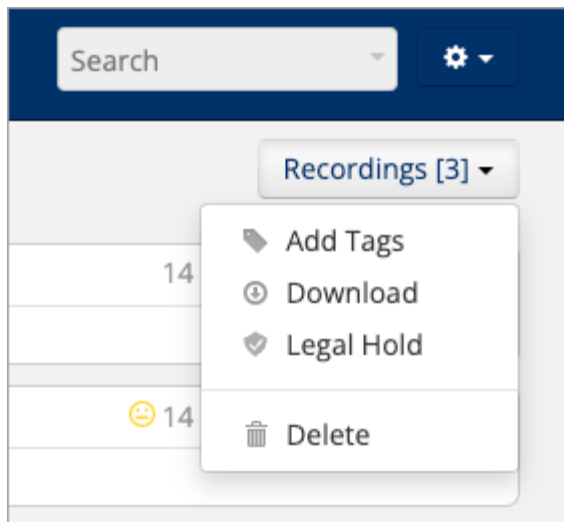

For more information, refer to [Teams](#) in the [Dubber Support Center](#).

Bulk Actions

Although Standard Users can tag multiple recordings at a time, Dubber Administrators can also ⊕ **Download**, apply a ✓ **Legal Hold**, or even 🗑 **Delete** recordings in bulk.

To complete a bulk action, select the applicable recordings from the Call Recording page, then choose an option from the **Recordings** menu.

For more information, refer to Multi Download and Multi Delete in the Dubber Support Center.

sctelcom