

# Hosted Unified Communications

## Customer Administration Portal Guide 2023

Customer Administration Portal

V 1.0 - Jan 2023

## Table of Contents

<b>Overview</b> .....	<b>4</b>
Preferred Browsers .....	4
Logging In to the Portal.....	4
Access Levels .....	4
<b>CAP Layout</b> .....	<b>5</b>
<b>Tools</b> .....	<b>5</b>
Contact Us.....	5
Settings .....	6
Logout .....	6
<b>Location Section</b> .....	<b>7</b>
<b>Choose Location</b> .....	<b>7</b>
Manage Phone System Tab .....	7
Unassigned Devices Tab .....	9
Music on Hold Tab.....	9
Call Park Tab.....	10
On-Net Calling Name Tab .....	10
Secure Voice Tab.....	10
<b>Manage Settings Window</b> .....	<b>11</b>
Incoming Calls Tab .....	11
Outgoing Calls Tab .....	13
Messaging Tab .....	13
Call Control Tab .....	15
Anywhere Phone Number Window .....	16
PTT Select User Window .....	17
E911 Service Tab.....	17
Time Zone Tab .....	17
<b>Enterprise Services Section</b> .....	<b>18</b>
<b>Announcement Repository</b> .....	<b>18</b>
Location Announcements Tab .....	18
User Announcements Tab .....	19
Service Announcements .....	19
<b>Auto Attendant</b> .....	<b>20</b>
Expanded Menu .....	20
Menus .....	22
Menu Actions .....	22
Advanced Auto Attendant .....	23
Ordering Additional Auto Attendants .....	23
<b>Hunt Groups</b> .....	<b>24</b>
Hunt Group Menu .....	24
Scheduled Call Routing .....	26

<b>Virtual / Toll Free Numbers</b> .....	<b>27</b>
<b>Hosted Fax</b> .....	<b>28</b>
My Hosted Fax Tab .....	28
Send Fax Window .....	29
Personal Hosted Fax Settings Window .....	30
Group Hosted Fax Settings Window .....	30
Download Configuration Tab .....	31
<b>Call Recording</b> .....	<b>32</b>
My Recorded Calls Tab / Supervised Recordings Tab .....	32
Configuration Tab .....	33
Call Recording Configuration Window - Configuration Tab .....	33
Call Recording Configuration Window - Supervised Call Recording Tab .....	34
Download Configuration Tab .....	34
<b>Storage</b> .....	<b>36</b>
Usage Per Account .....	36
Average Usage .....	36
Overages .....	36
<b>Conference Bridge</b> .....	<b>37</b>
<b>Virtual Extensions / Mailbox</b> .....	<b>38</b>
Virtual Extension Window .....	38
Standalone Mailbox Settings Window .....	39
<b>Schedules</b> .....	<b>40</b>
Schedule Window .....	41
Event Window .....	42
<b>Receptionist</b> .....	<b>43</b>
Configure Monitored Contacts Window .....	43
<b>Key System Emulation</b> .....	<b>44</b>
Park Group Window .....	44
<b>Administration Section</b> .....	<b>45</b>
<b>Administration and Access</b> .....	<b>45</b>
Administration and Access Widget .....	45
<b>User Settings Window</b> .....	<b>46</b>
<b>Corporate Directory</b> .....	<b>47</b>
Corporate Directory Widget .....	47
<b>Reporting Section</b> .....	<b>48</b>
<b>Call Logs</b> .....	<b>48</b>
Call Log Widget .....	48
<b>Appendix A: Basic Enterprise Set-Up</b> .....	<b>49</b>
Set Up Admin Login .....	49
Create All Users .....	49
Assign Users to Seats .....	49
Customize Extensions .....	49
Build Schedules .....	49
Set Up Hunt Groups .....	49
Set Up Auto Attendants .....	49
Point Virtual Numbers .....	49

## Overview

The Customer Administration Portal (CAP) is a web-based utility used by users, administrators, and implementation personnel to configure, manage, and report on activity for the Unified Communications as a Service (UCaaS) phone system provided by Clearwave Fiber.

This guide will explain the sections<sup>1</sup>, tabs, and widgets in the utility.

## Preferred Browsers

This client operates by using HTML5 and Javascript. Google Chrome and Mozilla Firefox interpret the coding accurately, while Microsoft Explorer and Apple Safari can have some interpretation issues, and Edge can be temperamental. If possible, utilize Chrome or Firefox for full functionality.

## Logging In to the Portal

When you reach the login screen<sup>2</sup>, you will enter your username and password.

While users are assigned in the Customer Admin Portal under Administration > Administration and Access, they will need to create their own login credentials with the Resend Welcome Mail button.



## Access Levels

There are three levels of access to the Customer Administration Portal. After the Enterprise has been provisioned a Super Admin access is available. When users are created, they are assigned either Admin or End-User access, and Super Admin is removed.

**Super Admin:** Default access from Atlas that allows you to log in and do basic configuration tasks, but specific functions such as creating new Hunt Groups and changing extensions will not function.

**Admin:** Full access to all customizability in the Customer Admin Portal.

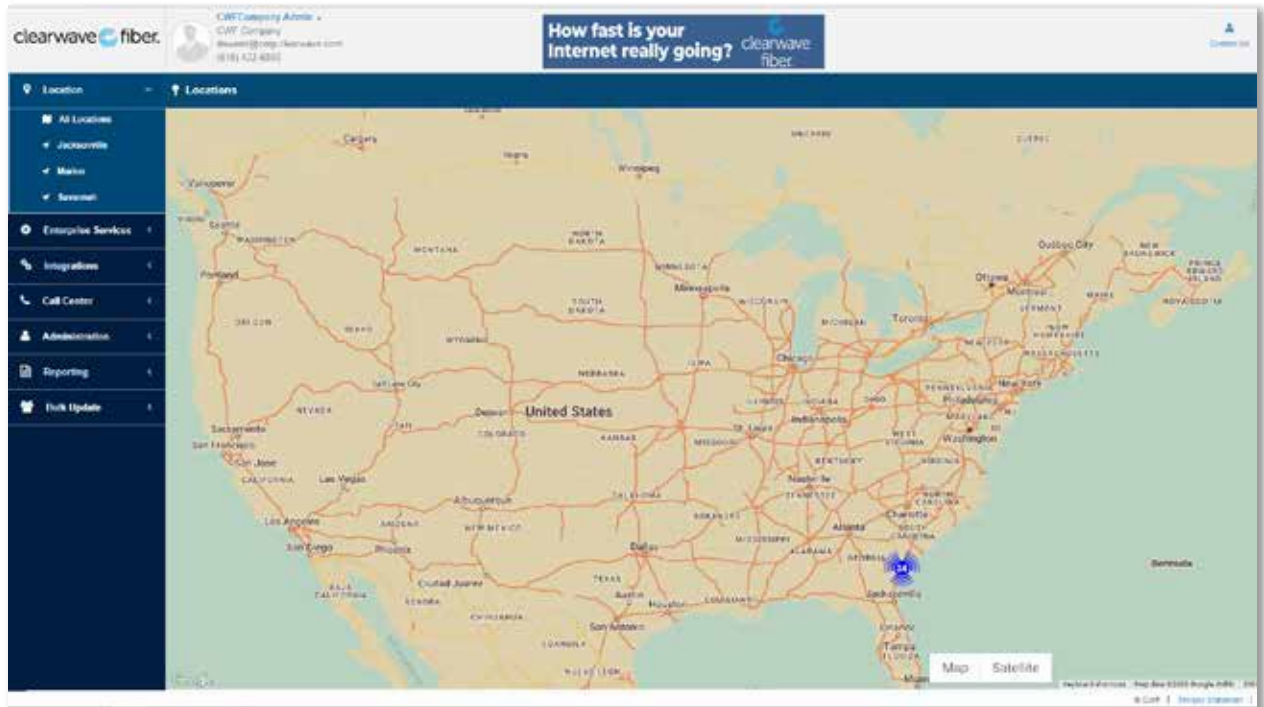
**End-User:** Access to the services that have been assigned to the specific user.

Certain products (such as Call Recording and Hosted Fax) will allow End-User access to them as needed and assigned, and as such they may have access levels for these features more on par with an admin.

<sup>1</sup>This guide will not fully cover SIP Trunking, as it is such a highly customized solution.

<sup>2</sup>You can also log into a customer's Customer Admin Portal by emulating a user on that system through the Customer Tab in the Atlas Portal.

## CAP Layout



Once you log in, you will see a Customer Admin Portal with several distinct regions.

**User** The information about the user currently using the portal is here. The user in this example is an admin, thus, all the navigation sections are visible.

**Tools** A few handy tools are in this area, including a defined Contact Us link, the Buy Services link, Company Settings, and the Logout icon.

**Navigation** On the left side is the main section navigation. Each of these sections can contain many more subsections and are covered fully in subsequent pages.

**Widget** The main section of the client is consumed by the selected widget.

## Tools

Like the other portions of the top of the client, these tools will remain available regardless of the widget being used.

## Contact Us



The contact us section permits a Customer Admin Portal user a variety of methods to contact Clearwave Fiber.

## Settings

The company settings dialog window will let an Admin change the Company Name, address, and time zone for the entire enterprise<sup>3</sup>.

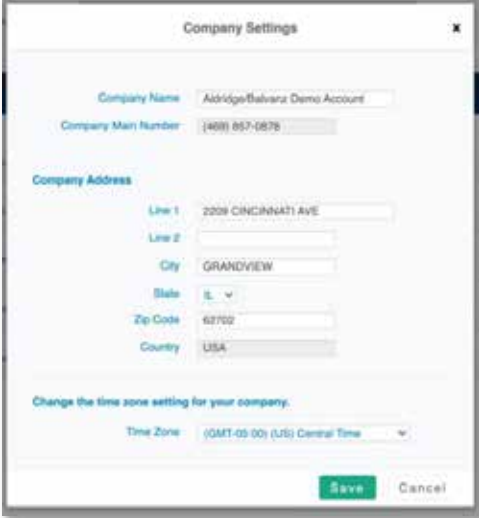
If the address is changed, it will need to be validated with the E911 system, which will occur automatically. You will be asked to confirm the location, but if you do not see a valid E911 address to select, you should follow the instructions on the Confirm Location window to get the E911 database updated.

When the address is entered, it will be examined by the E911 database, to validate that the address is written correctly (“Ave” instead of “Avenue”) and that it is accessible to the Public Safety Answering Points so emergency services can be dispatched appropriately.

To submit an E911 service location change request, you may call Clearwave Fiber at 912-428-8674.

## Logout

The logout button will open the logout dialog window, to ask you to confirm your intention to log out of the Customer Administration Portal.



---

<sup>3</sup> Each location can have its own address and time zone, independent from the company main details.

## Location Section

The default section when you log into the Customer Administration Portal, Locations is where you will choose locations and eventually manage seats.

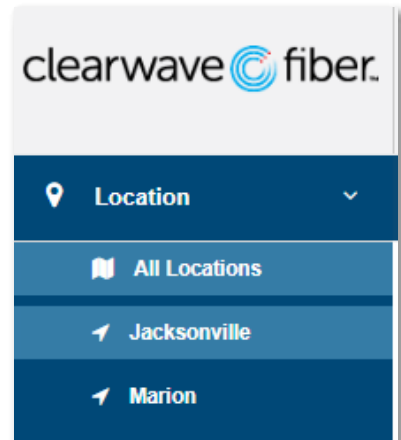
### Choose Location

When you press the Location section, it will expand to show you all the locations in the enterprise. In our example to the right, this enterprise has two locations, Jacksonville and Marion.

If you do not want to select a specific location, there is another option for All Locations that will pull the info from the entirety of the enterprise.

Alternatively, you can use the buttons on the map widget to select your desired location. You can use the + and - keys on the map to zoom in and out or use the scroll wheel on your mouse.

Lastly, you can drag Pegman onto the map to go into street view.



Once a location (or All Locations) has been selected, you will see a series of tabs in the widget. The top ribbon will change depending on the tab that has been selected.

Extension	Phone	User Name	Service Plan	Service Status	Device Type	Location	Connected Device	Action
1001	(813) 441-2100	Jessie Soble	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1002	(813) 441-2100	Jessie Test 1	Preferred	Active	Yamaha PHSX Bundle w/PS MAC 01:30:30:00:00:00	Seawson		
1003	(813) 441-2100	Jessie Test 2	Preferred	Active	Yamaha PHSX Bundle P/E MAC 01:30:30:00:00:00	Seawson		
1004	(813) 441-2100	Hansone Sultanman	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1005	(813) 441-2100	Wendy Clark	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1006	(813) 441-2100	Jessie Test	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1007	(813) 441-2100	Jessie Test 1	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1008	(813) 441-2100	Jessie Test 1	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1009	(813) 441-2100	Jessie Test 1	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1010	(813) 441-2100	Jessie Test 1	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		
1015	(813) 441-2100	Jessie Test 1	Preferred	Active	Yamaha PHSX Bundle MAC 01:30:30:00:00:00	Seawson		

### Manage Phone System Tab

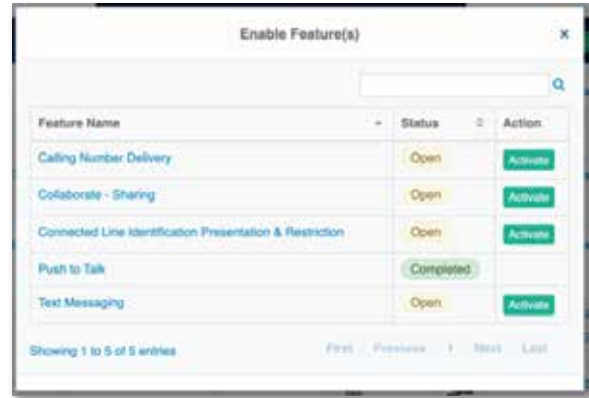
**Enterprise Extensions Info Button:** This button reminds you about the extensions rule for this enterprise. This will almost always let you know that “Extensions are unique within the Enterprise”.

**Download E911 Report:** This button will allow you to input an email address to send a report about all the E911 addresses assigned to the enterprise.

**Download CSV Button:** This button will allow you to download a Comma Separated Values (CSV) file with the information in the widget. You should be able to open these files in any spreadsheet for best usability, or a text editor to see the data itself.

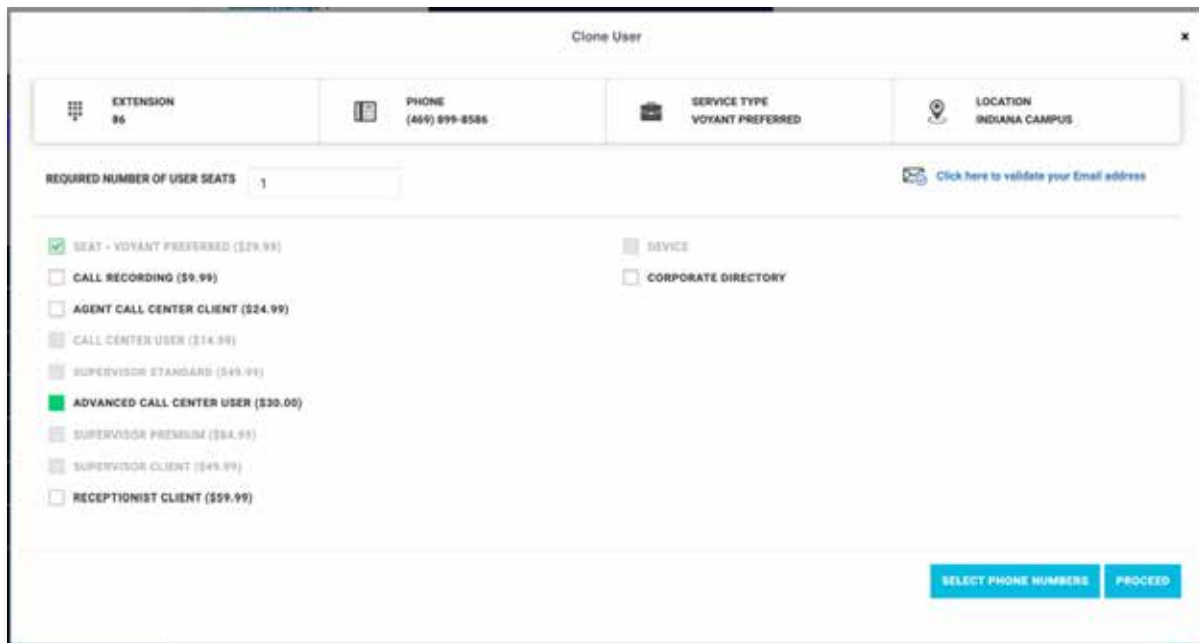
**Features Button:** Special enterprise level features can be activated from here. When new features are uploaded, they may need to be enabled on enterprises that had been in existence before those features were standardized, or if they are optional.

- Calling Number Delivery
- Collaborate - Sharing
- Connected Line ID...
- Push to Talk
- Text Messaging



**Clone User Button:** If activated from within Atlas, the clone user button will enable a CAP Admin to order up to 1000 seats and features, as clones of a selected line in the widget. It will seek to duplicate the associated features of the selected line and will give options to add new ones.

When this order has been put in place, an email will be sent to the service provider, and a follow-up contact may be in order in case other features are required.



**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.



## *Extension*

The extension of the seat is listed here. An Admin can change the extension easily merely by clicking on the current listing and inputting another one.

## *Phone*

The ten-digit direct inward dialing number of the seat. This must be changed in Atlas.

## *User Name*

The name of the user assigned to the seat.

## *Service Plan*

The seat type is shown here. It can be upgraded or downgraded in Atlas.

## *Service Status*

If the seat is provisioned properly, it will show Active.

## *Device Type*

Details about the associated device can be found here. You can click on the device name to open device details, and access activation, hoteling, and swap options.

## *Location*

This will appear if you are viewing All Locations and will name the location where the seat is found.

## *Connected Device*

Details about device registration is found here.

## *Action*

The Edit icon here will open the Manage Settings Window to edit seat details, and the Reassign button will reassign the seat to a new user.

## **Unassigned Devices Tab**

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

## *Device Status*

The active status of the device is listed here.

## *Device*

The manufacturer and model of the device.

## *Device Type*

The device's MAC address.

## *Location*

If you are viewing All Locations, this field will tell you which location the device is ready for.

## *Action*

You can use the link here to assign the device by selecting the location and seat to assign.

## **Music on Hold Tab**

**Refresh, Help Buttons:** These standard buttons will let you refresh the data, or open a context-sensitive in-line help file.

### **Turn on to have Music on Hold play during these actions**

**Music during Call Hold:** This will play the hold music track when the call is on hold.

**Music during Call Park:** This will play the hold music track when the call is parked.

**Music during Call Transfer Recall:** This will play the track when a transfer is recalled.

### **Music on Hold Message**

Use the switch here to toggle between the default audio track and a custom one.

## Call Park Tab

**Refresh Button:** This standard button will let you refresh the data in the table.

### Settings for Call Park Widget

**Alternate Recall User:** Use the drop-down menu to select a seat in that location to send parked calls that have not been retrieved by the recall timer timeframe.

**Recall To:** This drop-down will define the recall pattern.

### Settings for All Parked Calls Widget

**Ring Pattern for Recalled Calls:** This drop-down will select a ring pattern for parked calls that have been recalled.

**Recall Timer:** This field can edit the length of time before a call park recall.

**Alert Alternate Recall User Wait Time:** This defines the time for an alternate recall user.

## On-Net Calling Name Tab

**Refresh Button:** This standard button will let you refresh the data in the table.

### Update On-Net Calling Line Group Name

**On-Net Calling Line Group Name:** You can select the default on-net group name or customize it by selecting Custom.

**Enter On-Net Calling Line Group Name:** Enter the custom on-net name here.

## Secure Voice Tab

**Search, Refresh Buttons:** These standard buttons will let you input a field to search the data in the widget or refresh the data.

*Service Name*

The name of the service will be listed here.

*Label Name*

The label for the specific service, which is set with the Edit action.

*Assigned*

The user to which the integration has been assigned is here.

*Extension/ Phone number*

The seat's extension and phone number that have had Secure Voice assigned.

*Location*

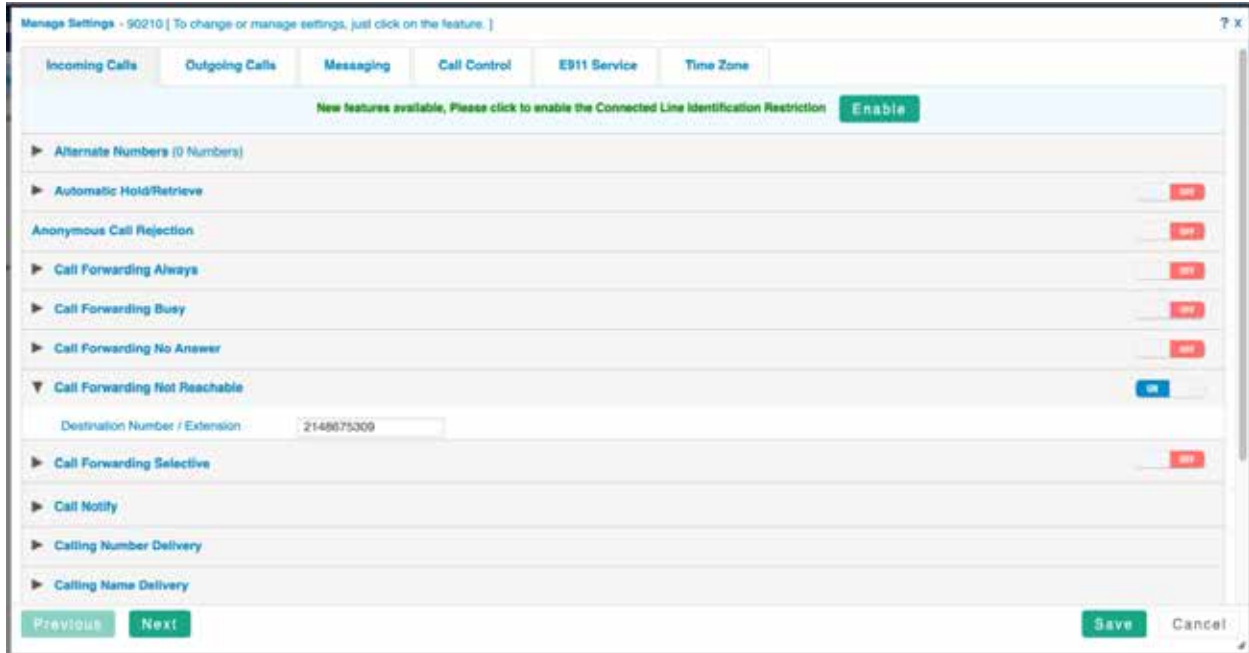
The location of the seat that has been integrated.

*Action*

Use the Edit button to assign the Secure Voice license to a user and seat, as well as enter a specific label for the service.

## Manage Settings Window

**Help Buttons:** This button will open a context-sensitive in-line help file. Changes made here are implemented within seconds.



### Incoming Calls Tab

This tab is used primarily for Call Forwarding settings, but there are other features pertaining to incoming calls as well.

#### Alternate Numbers Section

Toggle this service on to set up to 10 alternate numbers to ring to this seat. Use the table to add new ones and set distinctive ring tones if desired.

#### Automatic Hold/Retrieve Section

Toggle this feature on and set the number of seconds the call will remain on hold before being automatically presented to the device.

#### Anonymous Call Rejection

Enable this toggle to automatically reject any incoming calls without Caller ID data.

#### Call Forwarding Always Section

Toggle this feature ON then define the extension or number to transfer all incoming calls. You can also click the box to cause the device to “chirp” to alert you a call has been forwarded in this manner.

#### Call Forwarding Busy Section

Toggle this feature ON then define the extension or number to transfer busy calls.

#### Call Forwarding No Answer Section

Toggle this feature ON then define the extension or number to transfer all incoming calls. You can also set the number of rings before the call is considered not answered and transferred this way.

### **Call Forwarding Not Reachable Section**

Toggle this feature ON then define the extension or number to transfer calls when no endpoint can be detected from the cloud service.

### **Call Forwarding Selective Section**

Toggle this feature ON then define the extension or number to transfer calls that fit the rules in the table. You can also click the box to cause the device to “chirp” to alert you a call has been forwarded in this method.

### **Call Notify Section**

Toggle this feature ON then activate the email address associated to the user assigned to this seat. You can set rules for the notification.

### **Calling Number Delivery Section**

Activate and deactivate the delivery of caller ID numbers for external and internal numbers.

### **Calling Name Delivery Section**

Activate and deactivate the delivery of caller ID name for external and internal numbers.

### **Do Not Disturb**

Enable this toggle to automatically send all inbound calls to the busy treatment. You can also click the box to cause the device to “chirp” to alert you a call has been forwarded in this method.

### **Selecting Call Acceptance and Rejection Section**

Define white list incoming calls to always come through, and black list numbers that are always rejected based on the schedules set below.

### **Sequential Ring Section**

Enable this feature to offer the call through a sequence of other locations on the list, with rules set below.

**Use Base Location First:** Turn this on to attempt to ring the seat-associated device first.

**Number of rings for Base Location:** Select the number of rings the base location will have before the sequential routing is activated.

**Continue the search process if the base location is busy:** When this is OFF, the sequential ring will not progress if the base location is on a call.

**Enable caller to skip process (Assumes forwarding or messaging is enabled):** When enabled, the caller can press a key to escape directly to the voice portal.

#### *Phone Number*

Enter the phone number or extension for the sequence.

#### *Number of Rings*

Set the number of Rings before moving to the next number in the sequence (or to no-answer voicemail if no others are listed).

#### *Answer Confirmation Required*

When ON, each other ring location will be prompted for a response before a call is accepted.

## **Simultaneous Ring Section**

Enable this feature to offer the call simultaneously<sup>4</sup> to other locations on the list, with rules set below.

**Don't ring simultaneous numbers if on a call / Always ring simultaneous numbers:** Select to permit or reject sequential calls if the main line is presently on a call.

## **Outgoing Calls Tab**

This tab sets parameters useful for outbound calling, such as personal and speed dial lists.

**Line ID Blocking:** When this toggle is ON, outbound calls are sent without CNAM data, so it will appear as Blocked, Private, or Anonymous (depending on the receiving carrier).

## **Calling Line ID Section**

**Current Calling Line ID:** This shows the number that is currently being sent out.

**Calling Line ID:** Select the device's number or alternatives (defines by Virtual Numbers that have been associated to group services).

**On-Net Calling Name:** Select the name that will be sent out to other seats and users within the enterprise.

## **Personal List Section**

Use the table here to add names and number to the personal directory for the seat, visible in the directory of the devices and soft clients.

## **Speed Dial 100 Section**

Use the table here to add two digit speed code, number, and name that can be dialed with #xx.

## **Messaging Tab**

This tab handles the voice portal associated with the seat.

## **Voice Portal Section**

**Auto-login to Voice Portal when calling from my phone:** Turn this on to bypass the password requirement to reach your voice portal when calling from this phone (or a defined alias).

**Voicemail Pass Code:** Enter a temporary passcode for this service. Once it is used to access the voice portal, the system will require the user to change it.

**Recorded Name:** You can upload a new audio file for the name. This can also be done from within the voice portal.

## **Aliases Section**

Use the table to add aliases - numbers that will be recognized as the desk phone when calling the number and routed directly to the voice portal.

---

<sup>4</sup>While the calls will be presented at the same time, some networks may have small but noticeable delays in passing the call through.

### **Voicemail Distribution Lists Section**

Voicemail distribution lists can be set up to forward voicemail messages to others within the network.

**Description:** Use this field to name the distribution list below.

**Add Phone Numbers:** Build your distribution list here.

### **Greeting Section**

This section manages the audio files used for greetings. These can also be set from the voice portal itself.

**Busy Greeting:** The greeting presented to the caller when calls are routed to the voice portal on busy conditions.

**No Answer Greeting Number of Rings:** Choose the number of rings before a call is considered unanswered and routed to the voice portal.

**No Answer Greeting:** Turn to Extended Away to enable or disable message receipt and upload a custom audio file for extended away conditions.

**Default Greeting:** The greeting presented to the caller when calls are routed to the voice portal when it is not answered.

### **Unified Messaging Section**

This section manages special unified messaging conditions, such as voicemail to email.

**Use unified message or Forward it to email:** When it is set for Forward it to email, the voice portal will not save calls, instead it will send the calls as a .wav file to the email address of the user associated to the seat.

**User Phone Message Waiting Indicator:** When turned OFF, the device associated to the seat will not offer a message waiting indicator.

**Forward a copy of this email to:** Input a valid email address in the free-form field and enable with the toggle to send a copy of the voicemail in email form to the address.

**Notify by Email:** Input a valid email address in the free-form field and enable with the toggle to send a notification of a voicemail to the email address.

**Transfer on '0' to this phone number:** Input a valid extension or phone number and enable with the toggle to permit transfer to this number if the caller presses 0 any time during the greeting.

### **Voicemail Management Section**

The main toggle, when switched OFF, will disable all access to the voice portal from incoming calls.

**Send all calls to voicemail:** Turn the ON to send every incoming call to voicemail without even offering it to the endpoint.

**Send busy calls to voicemail:** Turn ON to set the default busy behavior to the busy greeting of the voice portal. This can be overridden in the Incoming Calls tab.

**Send unanswered call to voicemail:** Turn ON to set the default no answer behavior to the no answer greeting of the voice portal. This can be overridden in the Incoming Calls tab.

## Call Control Tab

This tab covers some special features for the seat.

### Call Transfer Section

**Call Transfer Recall:** When ON, transfers that ring more times than the Rings before Call setting (below), it will ring back to this extension.

**Rings Before Call:** Select how many rings before recall.

**Busy Camp On:** When ON, the transferred call will wait for a busy party up to the number of seconds defined before following the Call Forward Busy rules for the party.

**Use Diversion Inhibitor for xx Transfers:** When ON, the specific type of transfer cannot be forwarded to voicemail by the receiving extension. This is most useful in combination with the Call Transfer Recall (above).

**Call Waiting:** If this is OFF, the seat will follow the busy calls rules if there is even one active call.

**Music on Hold:** If this is ON, the seat will follow the Music on Hold rules of the location. When OFF, any calls placed on hold (or parked) will hear dead air.

### Anywhere Section

Anywhere allows employees to make and receive calls from any device, at any location, with only one phone number, one dial plan, one voice mailbox, and a unified set of features.

**Alert all appearances for Click-to-Dial calls:** When ON, this will notify all the locations (below) when click-to-dials calls are presented.

**Alert all appearances for Group Paging calls:** When ON, this will notify all the locations (below) when a group the seat is in is paged.

**Add Location:** Press this button to open the Anywhere Phone Number window.

#### *Status*

Use the toggle here to quickly enable and disable the specific location.

#### *Phone Number*

The phone number of the Anywhere location.

#### *Description*

The Description field from the location, as defined by whoever set it up or edited it last.

#### *Action*

Use the icons here to open the Anywhere Phone Number window to edit the location or delete it entirely.

### Push to Talk Section

Once the Push to Talk (PTT) feature has been activated, you can use this section to edit the list of seats this one can connect to using the feature.

**Auto-Answer:** Turn this ON to receive incoming PTT conversations without a prompt.

**Outgoing Connection Type:** Use the drop-down to choose between One-Way and Two-Way connections.

**Access List:** This drop-down enables the list below to be a white list (allow only these) or a black list (allow all but these).

**Add User:** This button will open the Select PTT User window.

*Name*

The first and last name of the user associate to the seat.

*Phone Number*

The telephone number of the seat.

*Extension*

The extension of the seat.

*Action*

The icon here will delete the connection.

## **Call Center Settings Section**

This section is used to change the outgoing DNIS for this agent (only used for those with the Premium Call Centers with DNIS routing enabled).

**Make Outgoing Calls as CallCenter:** Turn the feature ON here.

**Outgoing Call DNIS List:** Select the DNIS from the drop-down here.

## **Shared Line Appearance / Busy Lamp Field Section**

This section sets up line appearances on the device activated for the seat.

**Enable Call Park notification:** When this toggle is ON, it will show on the display screen calls parked on this seat.

**Add Shared Line Appearance:** Use this button to open a line below, then use the drop-down to find an appropriate SLA from the list. This is limited to other seats in the same location.

**Add Busy Lamp Field:** Use this button to open a line below, then use the drop-down to find an appropriate BLF from the list.

## **Anywhere Phone Number Window**

Use this window to add new Anywhere locations.

### **Phone Number settings**

**Phone Number:** Enter the 10-digit phone number of the device (i.e., your mobile phone, your home phone, etc.).

**Description:** Enter a short description for this number/location.

**Enable this Location:** Turn this ON to enable Anywhere to the specific location.

### **Advanced Options**

**Outbound Alternate Phone Number/SIP URL:** By entering a 10-digit phone number in this field, your calling line ID will show this number.

**Enable Diversion Inhibitor:** Turning this ON will present this number/location from forwarding the incoming call (to voicemail, for instance).

**Require Answer Confirmation:** When ON, you will be prompted for a response before a call is transferred to your Anywhere device. This selection is useful if you wish to screen which calls you accept and which you want to go to voicemail.



## PTT Select User Window

Use this window to create or edit available users for Push to Talk services.

**Location:** Use the drop down to select the location of the user you wish to add.

**Search:** This field can be used to narrow down the users within the location selected.

*Name*

The first and last name fields of the user.

*Extension*

The extension for the user's seat.

*Phone Number*

The direct inward dialing number of the seat.

*Action*

Check here to add the user to the list.

## E911 Service Tab

This tab is used to update the E911 information for the seat. Every seat will have the E911 address for the location to which the seat is associated when the order is provisioned.

### Service Address Section

**Traveling outside of the U.S. E911 service will not be available:** Toggle this on to disable E911 services for this seat.

**Address:** Enter the fields for the physical location that a device associated to this seat will be located. When you Save it will validate the address for E911 compatibility.

### Email Notification Section

Enter email addresses that will be notified if this seat calls 911. You can use the + key to add a new field so multiple addresses can be notified.

## Time Zone Tab

This tab shows the current Time Zone setting for the seat, and grants you the option to change it,

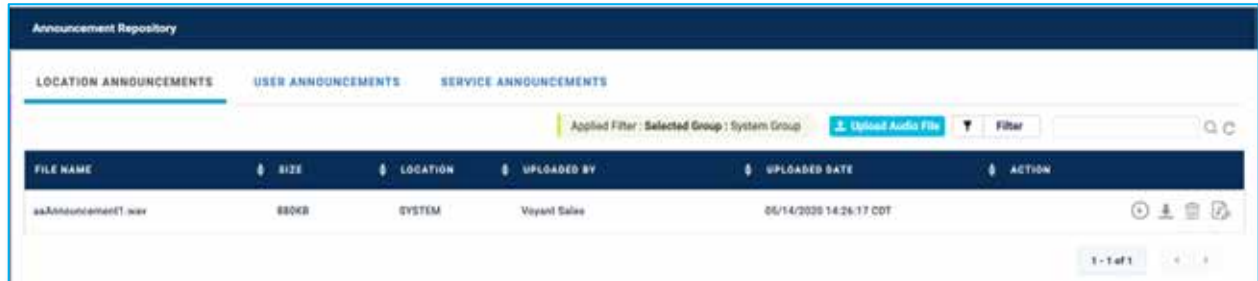
**Time Zone:** Use the drop-down menu to select the time zone for this seat. There is a difference between US and Canada time zones, so be sure to select the appropriate national set for the time zone.

## Enterprise Services Section

Enterprise services has the widgets to build, edit, and manage many of the call flow features in the enterprise.

### Announcement Repository

The announcement repository is a global location to place audio files that are used in various services, such as music on hold, call center greetings, or auto attendant announcements.



**Filter Notification:** The filters that have been applied to the data set below are listed in yellow on the ribbon.

**Upload Audio File Button:** Use this button to upload an appropriate audio file with the correct specifications.

**Filter, Search, Refresh Buttons:** These standard buttons will let you input a field to search the data in the widget, refine filter parameters, or refresh the data.

### Location Announcements Tab

This tab contains the announcements that are tied to specific locations. One location is SYSTEM, which is the global location, usable by all others.

*File Name*

The assigned filename of the announcement.

*Size*

The file size of the announcement.

*Location*

The location where the announcement has been assigned, or SYSTEM if it is set for global use.

*Uploaded By*

The user who uploaded or last replaced the file.

*Uploaded Date*

The date the file was uploaded.

*Action*

These buttons allow you to play, download, delete, or edit the file.

### User Announcements Tab

This tab contains the announcements that are tied to specific users.

*File Name*

The assigned filename of the announcement.

*Size*

The file size of the announcement.

*User*

The seat where the announcement has been assigned.

*Uploaded By*

The user who uploaded or last replaced the file.

*Uploaded Date*

The date the file was uploaded.

*Action*

These buttons allow you to play, download, delete, or edit the file.

### Service Announcements

This tab contains the announcements that are tied to specific services.

*File Name*

The assigned filename of the announcement.

*Size*

The file size of the announcement.

*Service Type*

The type of service this announcement has been uploaded for, such as Auto Attendant.

*Service Name*

The name of the specific service.

*Uploaded By*

The user who uploaded or last replaced the file.

*Uploaded Date*

The date the file was uploaded.

*Action*

These buttons allow you to play, download, delete, or edit the file.

## Auto Attendant

The auto attendant is a call distribution feature that gives the caller options and control of where their call is directed.



**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

### Name

The name of the specific auto attendant, defined within settings of the expanded menu.

### Extension

The extension associated to the specific auto attendant.

### Type

This will differentiate between Basic and Advanced auto attendants.

### Location

The location where the auto attendant has been assigned, this will often be SYSTEM, indicating a globally accessible service.

### Virtual/Toll Free Number

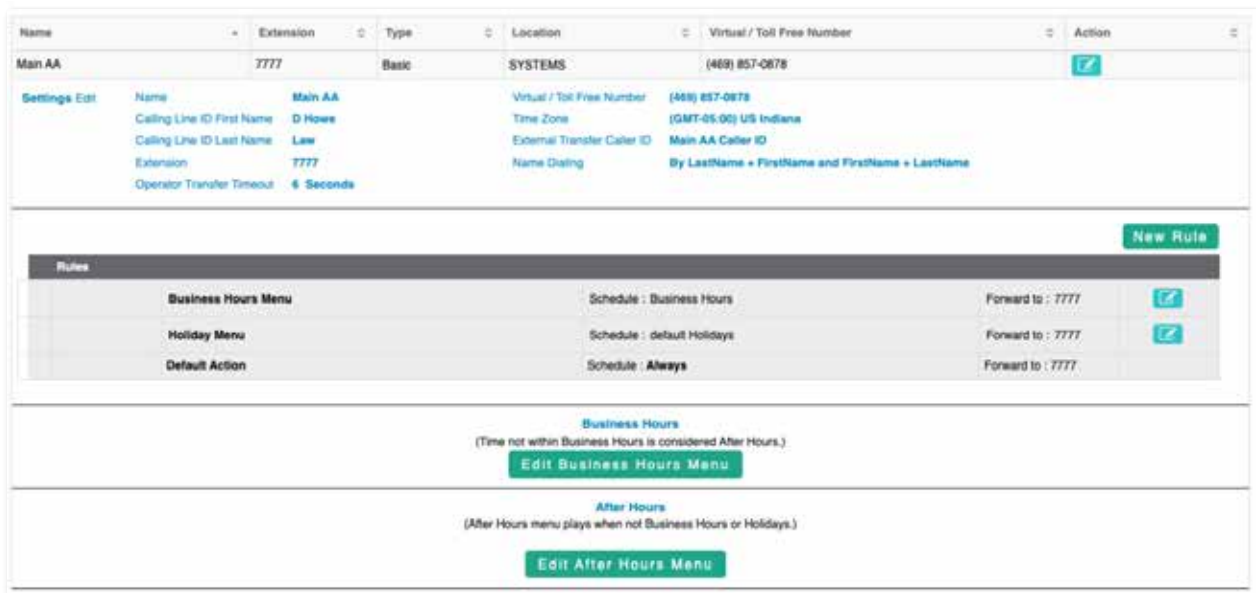
If direct numbers have been assigned to this auto attendant, they will be listed here.

### Action

The icon here will open the expand the selection so you can edit the details.

## Expanded Menu

When you press the button in the action section, you will see additional information.



## Settings

Press the Edit link next to Settings to enable editing of the settings themselves.

**Enabled:** This will enable the auto attendant to function when ON. When OFF, calling the extension will reach nothing.

**Name:** You can rename the auto attendant here.

**Calling Line ID First/Last Name:** Define the CNAM information here.

**Extension:** By default, the first Auto Attendant will be 7777, but it can be changed to any valid and available extension.

**Operator Transfer Timeout:** This will set the amount of time before the call is transferred to the first Transfer to Operator on the list.

**Virtual / Toll Free Number:** If you have assigned any virtual numbers, they will display here.

**Time Zone:** Select the time zone to be used by scheduled call routing here. You can find more information about schedules in that section.

**External Transfer Caller ID:** For calls transferred through, this will determine whether the inbound CLID, or the CLID of the Auto Attendant itself will be displayed.

**Name Dialing:** Select which fields are searched if the Name Dialing function is selected by the caller.

## Rules

You set up rules for diverting calls to the different menus in the center section. By default, the Business Hours menu will be played every time a call is routed to this auto attendant - shown as "Every Day All Day" in the Schedule category.

The logical path used to decide which menu to play is as follows:

```
IF [time = Holidays] THEN "Play After Hours Menu"  
ELSE IF [time = Business Hours] THEN "Play Business Hours Menu"  
ELSE "Play After Hours Menu"
```

**New Rule button:** Use this to create a new rule. By default, there are rules for Business Hours Menu and Holiday Menu. The advanced auto attendant also has an After Hours Menu option.

### *Menu*

The name of the menu forward is listed here. For basic auto attendants, any time interval that is not within the Business Hours Menu schedule plus any interval within the Holiday Menu will be directed to the After Hours Menu. Holiday Menus will have precedence over the Business Hours Menu.

### *Schedule*

The schedule used for the menu can be selected from the drop-down menu here. "Every Day All Day" means every time interval on the calendar.

### *Forwards to:*

By default, the extension of the auto attendant itself is listed here, meaning it will be directed to the menu within this auto attendant. Changing this can direct the call elsewhere.

### *Action*

Use this button to enable editing of the rule, and then save and cancel buttons once editing has begun.

## Menus

The menus are where the logic of the auto attendant comes into play.

### Audio File

You can use the Browse button to upload a compatible .wav file to be used as the voice prompt for the auto attendant. The Play button will play it for you within the Customer Admin Portal.

### Extension Dialing

Toggling this ON will enable the caller to dial an extension at any point during the voice prompt or with in 10 seconds after.

### Dial

This defines the button press, which includes the numbers 0-9, and the keys # and \*.

### Action

The action drop-down lets you select what will happen when the associated button is pressed.

## Menu Actions

**Disabled:** No action will be taken when this key is pressed.

**Transfer with Prompt:** Transfer to the listed extension or number after vocalizing a prompt.

**Transfer without Prompt:** Transfer to the listed extension or number.

**Extension Dialing:** This launches an IVR where the caller can input the extension number they wish to reach.

**Transfer to Mailbox:** This will launch an IVR where the caller is prompted to input the mailbox number (extension) they wish to reach.

**Transfer to Specific Mailbox:** This allows you to control which voicemail box the call is transferred to.


**Name Dialing:** Another IVR that allows the caller to input three letters of the name.

**Play Announcement:** This will play another compatible .wav file, then return to the main menu.

**Repeat Menu:** Plays the top level recording again, and restarts the operator transfer timer.

**Transfer to Operator:** This is like Transfer with Prompt, but it will automatically trigger if the caller cannot or will not interact before the Operator Countdown timer has elapsed.

**Exit:** Disconnects the call.



Dial	Action	Phone Number / Extn
0	Disabled	
1	Repeat Menu	
2	Disabled	
3	Transfer To Specific Mail	Will - Dallas - (618) 300-6
4	Disabled	
5	Disabled	
6	Transfer To Operator	Jayne - Main Office - (214)
7	Disabled	
8	Disabled	
9	Disabled	

### **Advanced Auto Attendant**

The Advanced Auto Attendant product offers a few upgraded features to the basic model.

The logical path used to decide which menu to play in and advanced auto attendant is as follows:

```
IF [time = Holidays] THEN "Play Holiday Menu"  
ELSE IF [time = Business Hours] THEN "Play Business Hours Menu"  
ELSE "Play After Hours Menu"
```

**Menus:** The advanced auto attendant has separate menus for after hours and holidays.

**Sub-menus:** Within the menus, advanced auto attendants can have up to two levels of sub-menus. You will see the actions Transfer to Submenu and Return to Previous Menu to navigate through these levels. Each submenu acts like its own auto attendant, with its own audio file and actions separate from the parent menu.

### **Ordering Additional Auto Attendants**

Each Enterprise comes with one basic auto attendant for free. Adding more of them requires ordering service from Clearwave Fiber, as they will enable a monthly recurring charge.

## Hunt Groups

Hunt Groups are a type of Call Distribution that uses an algorithm to hunt through a list of potential agents to find one who is available to take the call. One may think of them as very basic call centers. Hunt groups can be created to your heart's content, the only restriction is that you will eventually run out of extensions.



**Add Hunt Group button:** This will open the Hunt Group window, allowing you to add a new group.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

### *Name*

The name of the hunt group, defined within the hunt group window.

### *Extension*

The extension associated to the specific hunt group.

### *Type*

This will differentiate between Basic and Advanced auto attendants.

### *Virtual/Toll Free Number*

If direct numbers have been assigned to this hunt group, they will be listed here.

### *Action*

The icons here will open the hunt group window for editing or deletion of the hunt group.

## Hunt Group Menu

When a hunt group is edited, or when it is created, the Hunt Group Window opens.

**Hunt Group Name:** You can name the hunt group something appropriate to make it easier to find later.

**Caller ID First/Last Name:** Place the name of the hunt group here if you plan to use it for outbound dialing with a virtual number.

**Extension:** You can customize the extension for internal dialing here.

**Time Zone:** Select the time zone from the drop-down menu. This is important for schedule-based routing.

**Virtual Toll-Free Number:** You can assign an available virtual number here or use the Virtual/Toll Free Number widget to assign it.

**Allow Call Waiting on Phones:** Activate this to allow those in the hunt group a chance to answer the calls even if they are currently engaged on another line.

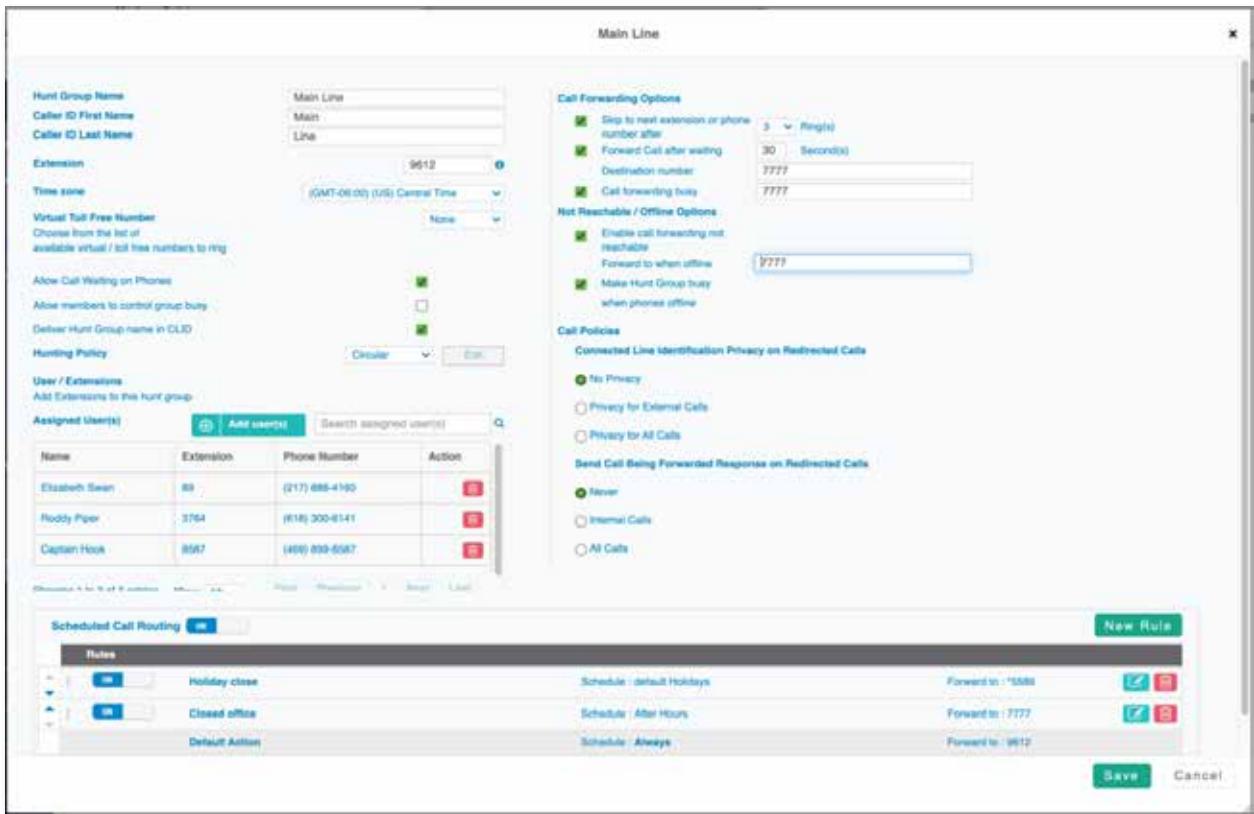
**Deliver Hunt Group name in CLID:** Activate this to prepend the Caller ID on the agent's phone with the hunt group name which is very useful for those who are on multiple hunt groups.



**Hunting Policy:** Select the algorithm's hunting policy from the drop-down menu.

- **Circular:** The algorithm will hunt through the list of available users in order, from top to bottom, resuming after the agent who took the call on each subsequent presentation.
- **Regular:** The algorithm will hunt through the list, top to bottom, always beginning at the top position if available.
- **Simultaneous:** This policy will ring all available phones in the list of available users.
- **Weighted Call Distribution:** This will let you assign a weight to every member of the group.
- **Uniform:** The algorithm reviews which member has been idle from the hunt group for the longest, presenting calls in longest idle order.

**User/Extensions:** Add users to the list with the edit button, or search from members in the list with the search magnifying glass icon. If you plan to use Circular or Regular hunting, make sure you add them in the desired order.



**Main Line**

Hunt Group Name  
 Caller ID First Name  
 Caller ID Last Name  
 Extension: 9612  
 Time zone: (GMT-06:00) (US) Central Time  
 Virtual Toll Free Number: None  
 Allow Call Waiting on Phones:   
 Allow members to control group busy:   
 Deliver Hunt Group name in CLID:   
 Hunting Policy: Circular

**Call Forwarding Options**

Stop to next extension or phone number after (3 Rings)  
 Forward Call after waiting (30 Seconds)  
 Destination number: 7777  
 Call forwarding busy: 7777

**Not Reachable / Offline Options**

Enable call forwarding not reachable  
 Forward to when offline: 7777  
 Make Hunt Group busy when phones offline

**Call Policies**

**Connected Line Identification Privacy on Redirected Calls**

No Privacy  
 Privacy for External Calls  
 Privacy for All Calls

**Send Call Being Forwarded Response on Redirected Calls**

Never  
 Internal Calls  
 All Calls

**Scheduled Call Routing**

Rules	Extension	Phone Number	Action
Holiday close		Schedule: default Holidays	Forward to: 7588
Closed office		Schedule: After Hours	Forward to: 7777
Default Action		Schedule: Always	Forward to: 9612

Save Cancel

**Call Forwarding Options:** Lets you set up how many rings between moving to the next assigned and available user, and where to route in case no one picks up after a given time. You can transfer to any extension or external ten-digit number.

**Not Reachable/Offline Option:** Set up business continuity and disaster recovery forwarding here.

## Scheduled Call Routing

The scheduled call routing section will appear after the hunt group has been built and saved. You can apply schedules to route calls coming to the hunt group's extension to become routed elsewhere given certain time intervals.

**Scheduled Call Routing:** This switch will enable the call routing rules to go into effect. At least one rule must be in place to enable this function.

**New Rule:** This button will add a new line for an additional rule. There is no practical limit to the number of rules that can be applied, and each one will occur in logical order from top to bottom. Only those rules that have been turned on will be checked.

### *Logical Order*

When more than one rule exists, you can sort them with the up and down arrows on the left side of the Rules widget.

### *ON/OFF Toggle*

Enable and disable specific rules with this switch.

### *Name*

A text field allows you to name the rule for clarity.

### *Schedule*

Select the schedule from the drop-down menu here.

### *Forward to*

Enter the extension, direct to voicemail code, or ten-digit external number here to set the rule to transfer to this location.

### *Action*

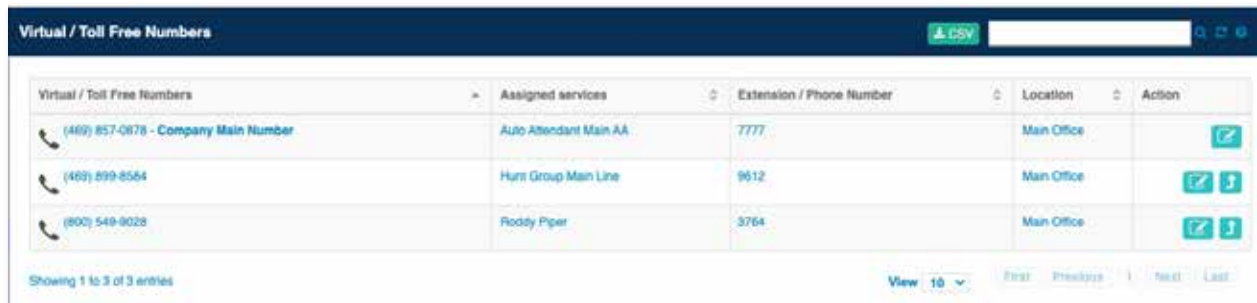
Accept or cancel the changes while editing. When in default mode, open the edit fields or delete the rule.






## Virtual / Toll Free Numbers

Virtual Numbers are direct inward dialing numbers that are not tied to a particular seat. There are two types, both of which are set up the same way.

**Company Main Number:** Every PBX has a Company Main Number, which can be edited to point to any group extension (such as a hunt group, and auto attendant, or a call center). Press the Edit button on the right side of the listing to assign it from the drop-down menu.

**Virtual Number:** A true Virtual Number incurs a recurring monthly charge but can be pointed toward any extension (even a seat) in the PBX. Press the Edit button on the right side of the listing to assign it from the drop-down menu.



Virtual / Toll Free Numbers	Assigned services	Extension / Phone Number	Location	Action
(469) 857-0878 - Company Main Number	Auto Attendant Main AA	7777	Main Office	
(469) 899-8564	Hunt Group Main Line	9612	Main Office	 
(800) 549-9028	Roddy Piper	3764	Main Office	 

Showing 1 to 3 of 3 entries

View 10 | First | Previous | Next | Last

**Download as CSV button:** This will let you download the data in this widget.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

### *Virtual / Toll Free Number*

The ten-digit or toll-free number is listed here. One is marked as Company Main Number.

### *Assigned Services*

The service or seat the number points to is listed here.

### *Extension / Phone Number*

The extension of the service or seat.

### *Location*

The location of the service or seat.

### *Action*

Use these buttons to edit the number routing or unassign outright.

## Hosted Fax

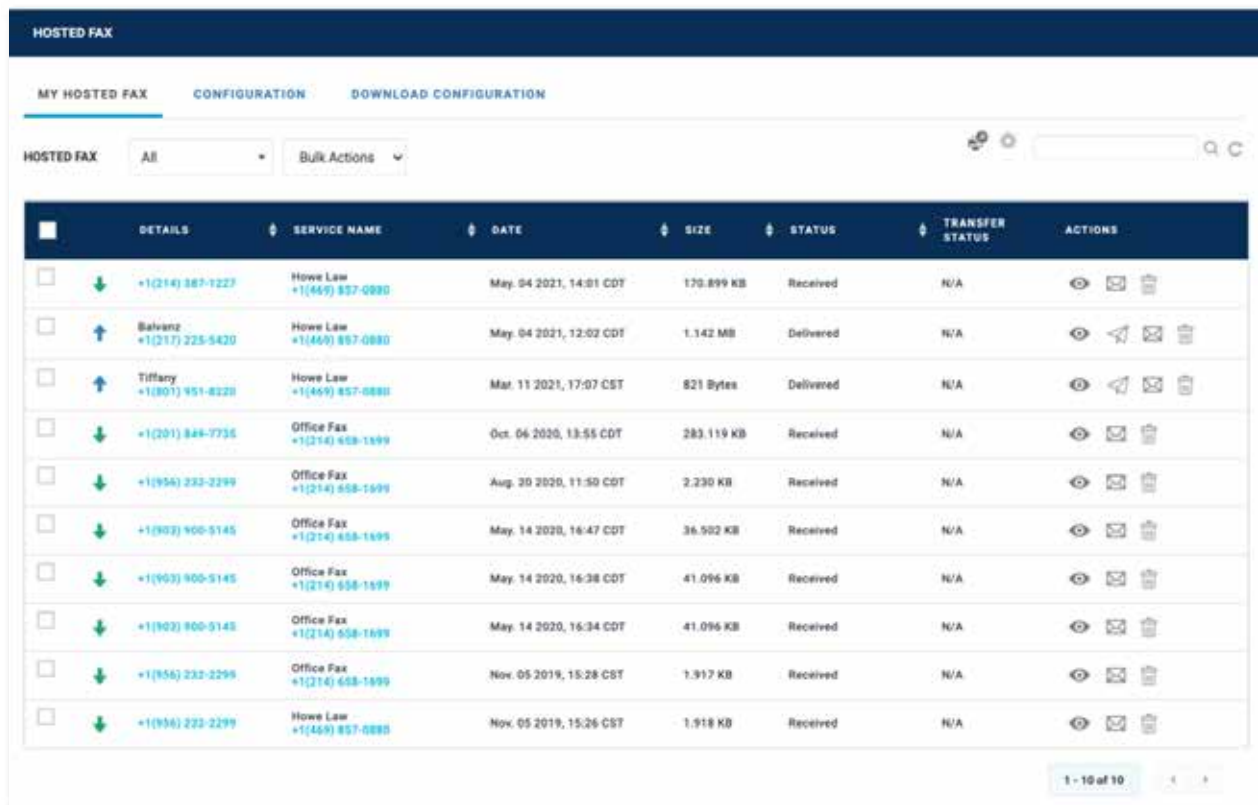
Hosted Fax provides the convenience of a private fax machine right in your browser or email client.

Hosted Fax is available in two variations depending on how many users within your company are needed:

- Personal Hosted Fax - assigned to one user and can be used like a personal fax machine.
- Shared Hosted Fax - assigned to multiple users and can be used like a company fax machine.

## My Hosted Fax Tab

This tab deals with the records of faxes sent by the current Customer Admin Portal user, or if they are an administrator or part of a Shared Hosted Fax product, those communications as well.



HOSTED FAX							
MY HOSTED FAX		CONFIGURATION	DOWNLOAD CONFIGURATION				
HOSTED FAX	All	Bulk Actions					
	DETAILS	SERVICE NAME	DATE	SIZE	STATUS	TRANSFER STATUS	ACTIONS
<input type="checkbox"/>	↓ +1(214) 387-1227	Howe Law +1(469) 857-0880	May. 04 2021, 14:01 CDT	170.899 KB	Received	N/A	
<input type="checkbox"/>	↑ Balvanz +1(217) 225-5420	Howe Law +1(469) 857-0880	May. 04 2021, 12:02 CDT	1.142 MB	Delivered	N/A	
<input type="checkbox"/>	↑ Tiffany +1(801) 951-8228	Howe Law +1(469) 857-0880	Mar. 11 2021, 17:07 CST	821 Bytes	Delivered	N/A	
<input type="checkbox"/>	↓ +1(201) 848-7735	Office Fax +1(214) 658-1999	Oct. 06 2020, 13:55 CDT	283.119 KB	Received	N/A	
<input type="checkbox"/>	↓ +1(954) 232-2299	Office Fax +1(214) 658-1999	Aug. 30 2020, 11:50 CDT	2.230 KB	Received	N/A	
<input type="checkbox"/>	↓ +1(902) 900-5145	Office Fax +1(214) 658-1999	May. 14 2020, 16:47 CDT	36.502 KB	Received	N/A	
<input type="checkbox"/>	↓ +1(903) 900-5145	Office Fax +1(214) 658-1999	May. 14 2020, 16:38 CDT	41.096 KB	Received	N/A	
<input type="checkbox"/>	↓ +1(902) 900-5145	Office Fax +1(214) 658-1999	May. 14 2020, 16:34 CDT	41.096 KB	Received	N/A	
<input type="checkbox"/>	↓ +1(856) 232-2299	Office Fax +1(214) 658-1999	Nov. 05 2019, 15:28 CST	1.917 KB	Received	N/A	
<input type="checkbox"/>	↓ +1(956) 232-2299	Howe Law +1(469) 857-0880	Nov. 05 2019, 15:26 CST	1.918 KB	Received	N/A	

**Fax Sort:** Use the drop-down to easily select the accounts you are looking for.

**Bulk Actions:** Use this drop-down to Download (selected), Delete, Delete All, or Download All.

**Send Fax:** This icon will open the Send Fax window.

**Settings:** Once a specific fax product has been selected with the Fax Sort, you can press this icon to open the Settings window.

**Filter:** This will allow you to narrow down the types of faxes presented, useful when you have hundreds of them in the cloud.

**Refresh:** Press this to refresh the data presented.

*Selection*

This box is used to select individual or multiple faxes for bulk actions.

*Details*

The other number for the fax, as well as an icon representing inbound or outbound fax.

*Service Name*

The details about the seat that handled the fax.

*Date*

The date and time of the fax.

*Size*

The size of the recorded file.

*Status*

The result of the fax transmission is listed here.

*Transfer Status*

The current state of the transmission is shown here.

*Actions*

View, email, resend, or delete the specific fax.

**Send Fax Window**

Faxes can be sent directly from the Customer Administration Portal with this window.

**Sender Name:** The current Customer Admin Portal user will populate here.

**Sender Fax Number:** If there are multiple fax products available to the user, they can be selected from this drop-down menu.

**Recipient(s) Detail:** Enter the name and fax number of your desired recipient then press the Add button to add an additional line for another recipient.

**Subject:** Enter the fax header here.

**Fax Type:** Select between Attachment, and you can attach up to 20MB of files, or Text Input where you can use the free-form field to input your message.

You can attach up to 20MB of PDF or JPEG files. As you add them, they will appear in the list below.

When ready, press the Send Fax button at the bottom.

It is possible for a user to send a fax from an email, provided the FROM email address is associated with a fax product, either personal or hosted fax.

### Personal Hosted Fax Settings Window

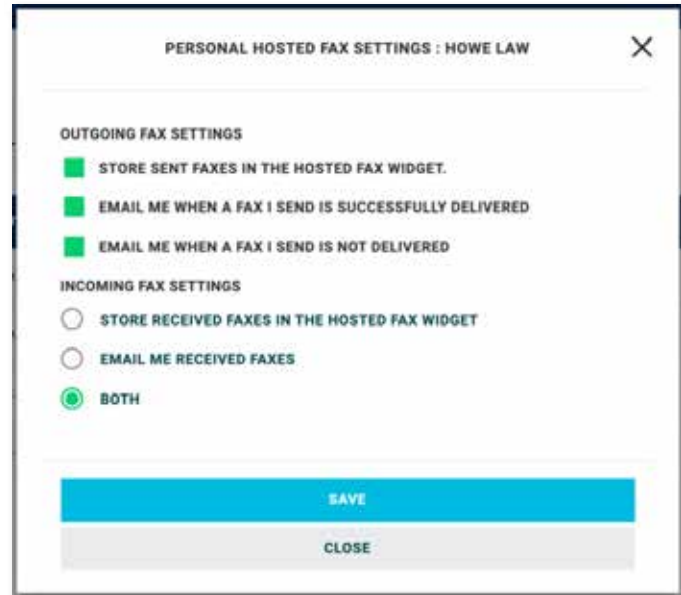
This window has settings for the personal hosted fax service. Only the user to whom the service has been assigned will be able to access this menu.

**Store Sent Faxes in the Hosted Fax Widget:** Click this to be able to access the sent faxes in the Customer Admin Portal.

**Email Me When a Fax I Send is Successfully Delivered:** When this is on, you will receive an email notification upon successful delivery.

**Email Me When a Fax I Send is Not Delivered:** Turn this on to receive a notification when a fax failed.

**Incoming Fax Settings:** Select whether to use just the Customer Admin Portal to view received faxes, have them emailed to you, or both.



### Group Hosted Fax Settings Window

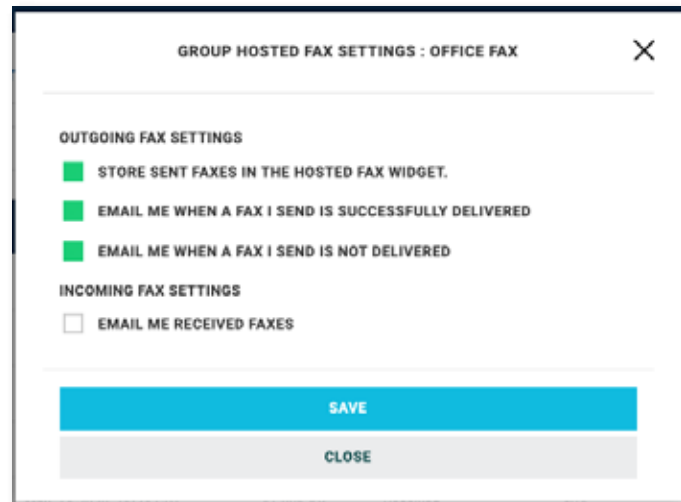
This window has settings for a shared hosted fax service.

**Store Sent Faxes in the Hosted Fax Widget:** Click this to be able to access the sent faxes in the Customer Admin Portal.

**Email Me When a Fax I Send is Successfully Delivered:** When this is on, you will receive an email notification upon successful delivery of a fax you sent.

**Email Me When a Fax I Send is Not Delivered:** Turn this on to receive a notification when a fax that you attempted failed.

**Email Me Received Faxes:** The received faxes will automatically be stored in the Customer Administration, you can select this box to also receive faxes via email.



## Download Configuration Tab

The last tab in the widget is used to configure personal storage via an FTP Server or S3 Bucket. This helps you manage storage without relying solely on Clearwave Fiber's cloud storage and the storage section.

### Sync

By default, this is off. To enable the data download, it must be turned ON with this switch. This then enables the options below.

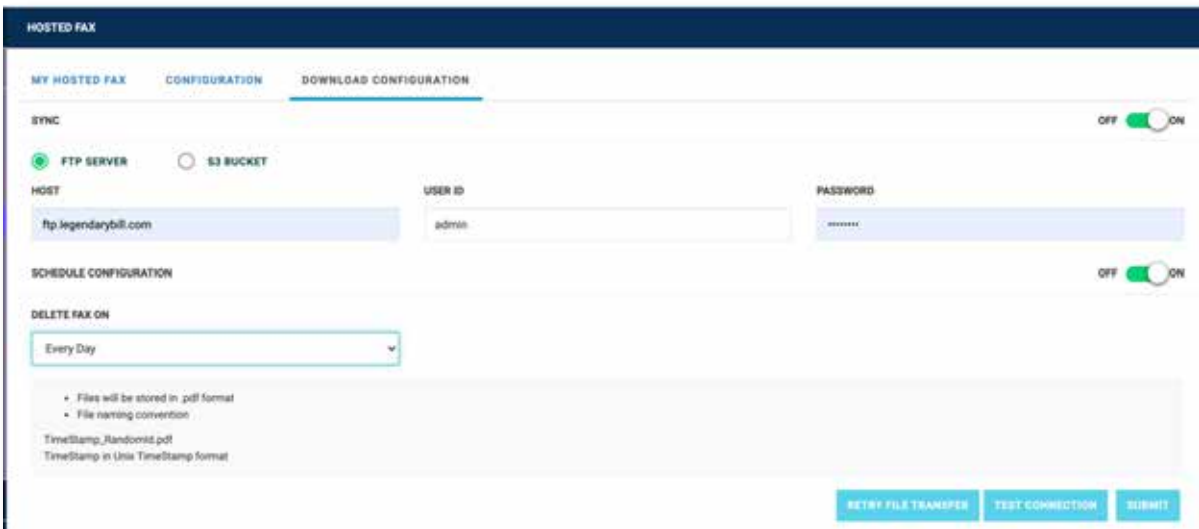
**FTP Server / S3 Bucket:** Use this to select the type of download you will use.

### FTP Server Settings

**Host:** Enter the host address for the FTP server.

**User ID:** Enter the login user for the server.

**Password:** Enter the FTP server password.



### S3 Bucket Settings

**Access Key:** Enter the access key for the S3 Bucket server.

**Bucket Name:** Enter the parameter for your bucket.

**Secret Access Key ID:** The security key for your bucket goes here.

**Region:** Choose your S3 region from the drop-down menu here.

### Schedule Configuration

Turn this on to schedule the time when the data is deleted from the Clearwave Fiber cloud.

**Delete Fax On:** Use the drop-down to select the interval for deletion.

### Download Details

At the bottom of the widget is the file format and naming convention for the data that will be sent to the S3 or FTP.

**Retry File Transfer:** This button will attempt to resend, useful for validating the data transfer.

**Test Connection:** You can use this to test the connection, receiving a result very quickly.

**Submit:** Use this button to save the settings you have entered above.

## Call Recording

Call Recording allows calls to be recorded automatically or on demand and provides easy access to stored files in the web-based Customer Administration Portal. Recorded calls can be either supervised or not. If not supervised, you are the only one who has access to your recordings. If supervised, one or more other users within your company have access to the recordings.



### My Recorded Calls Tab / Supervised Recordings Tab

These tabs will show your personal recordings or supervised call recordings that include you as the recorded party or the supervisor.

**Recording Sort:** Use the drop-down to easily select the accounts you are looking for.

**Bulk Actions:** Use this drop-down to Download (selected), Delete All, or Download All.

**Filter:** This will allow you to narrow down the types of recordings presented, useful when you have hundreds of recordings in the cloud.

**Refresh:** Press this to refresh the data presented.

#### *Selection*

This box is used to select individual or multiple recordings for bulk actions.

#### *Details*

The incoming number for the call.

#### *User*

The details about the seat that received the call.

#### *Date*

The date of the beginning of the call.

#### *Duration*

The length of the recording.

#### *Size*

The size of the recorded file.

#### *Comments*

Comments left about the call can be accessed here.

#### *Rating*

A rating can be assigned for the call.

#### *Transfer Status*

If the call was transferred, the details are here.

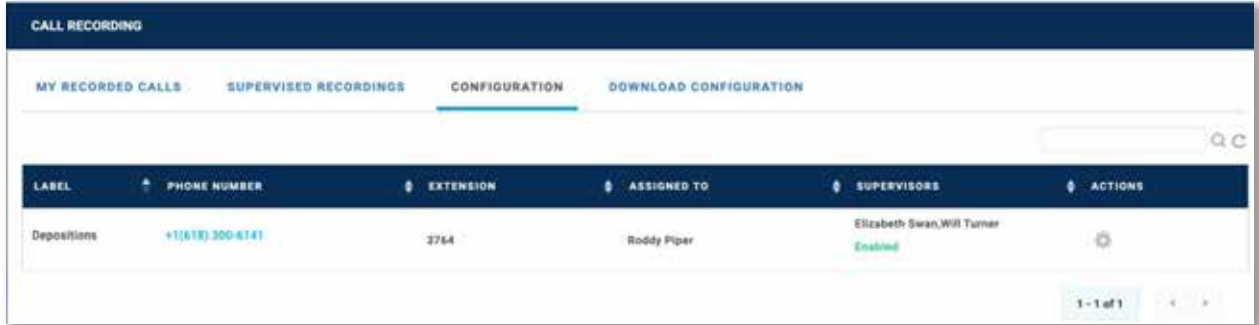
#### *Action*

Play, Download, Email, or Delete the individual recording.



## Configuration Tab

This tab will show all call recording services on the enterprise, providing details about the assignment and allowing you to edit them.



**Search, Refresh Buttons:** These standard buttons will let you input a field to search the data in the widget or refresh the data.

### Label

The label assigned to this specific service.

*Phone Number/Extension/Assigned To*  
Details about which seat and which user the service is currently monitoring.

### Supervisors

If the service is set to Supervised, the users assigned to support this service are listed here.

### Actions

Press the gear icon to open the Call Recording Configuration window.

## Call Recording Configuration Window - Configuration Tab

This window lets you define parameters of the call recording product.

**Call Recording Label:** You can input a helpful label for this specific recording application.

**Assign to User:** Select the seat this product is assigned to from this drop-down. This can be changed and saved at any time.

**Call Recording Mode:** Select which calls to record.

- **Never:** No calls into this phone number will be recorded.
- **Record All Calls:** Every call into or out of this phone number will be recording.
- **Selective Record Calls:** This can be done when dialing a call or in the middle of the call. To record the call when dialing a number - dial \*44 followed by the DID and pick up the receiver or select the speaker button. You can also input the \*44 code while an active call is on hold or initiate the call recording process with a button on a soft client.



**Call Recording Notification:** This can be used to play a recorded message at the start of the call or play a tone every 60 seconds during the recording. This can help satisfy your obligation for second party notification.

## Call Recording Configuration Window – Supervised Call Recording Tab

This window lets you define parameters of the supervised call recording setting.

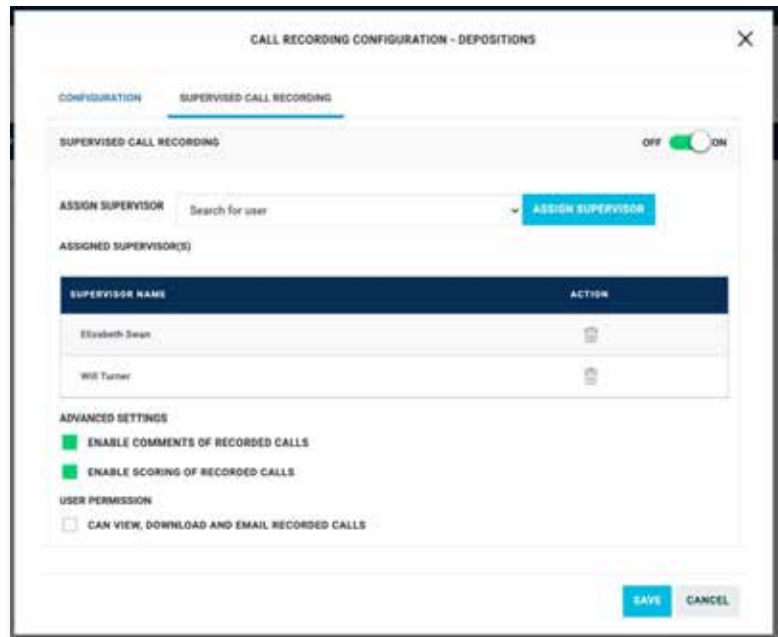
**Supervised Call Recording:** Turn this on to enable Supervised Call Recording mode.

**Assign Supervisor:** Use the drop-down menu to select End-Users to enable supervisory privileges for this service. Admin users in the Customer Admin Portal automatically can see, rate, comment, and take actions for all supervised recordings.

**Assigned Supervisor(s):** Admin users can see the assigned End-Users with supervisor privileges and delete them if desired. Admin users will not appear here, even though they have the right privileges due to their access level.

**Advanced Settings:** You can choose to allow comments and/or scoring of the supervised recordings.

**User Permission:** Supervised recordings automatically restrict the assigned user from deleting their recordings, but you can use this button to enable their ability to view, download, and email those recordings.



## Download Configuration Tab

The last tab in the widget is used to configure personal storage via an FTP Server or S3 Bucket. This helps you manage storage without relying solely on Clearwave Fiber's cloud storage.

### Sync

By default, this is off. To enable the data download, it must be turned ON with this switch. This then enables the options below.

**FTP Server / S3 Bucket:** Use this to select the type of download you will use.

### FTP Server Settings

**Host:** Enter the host address for the FTP server.

**User ID:** Enter the login user for the server.

**Password:** Enter the FTP server password.

### S3 Bucket Settings

**Access Key:** Enter the access key for the S3 Bucket server.

**Bucket Name:** Enter the parameter for your bucket.

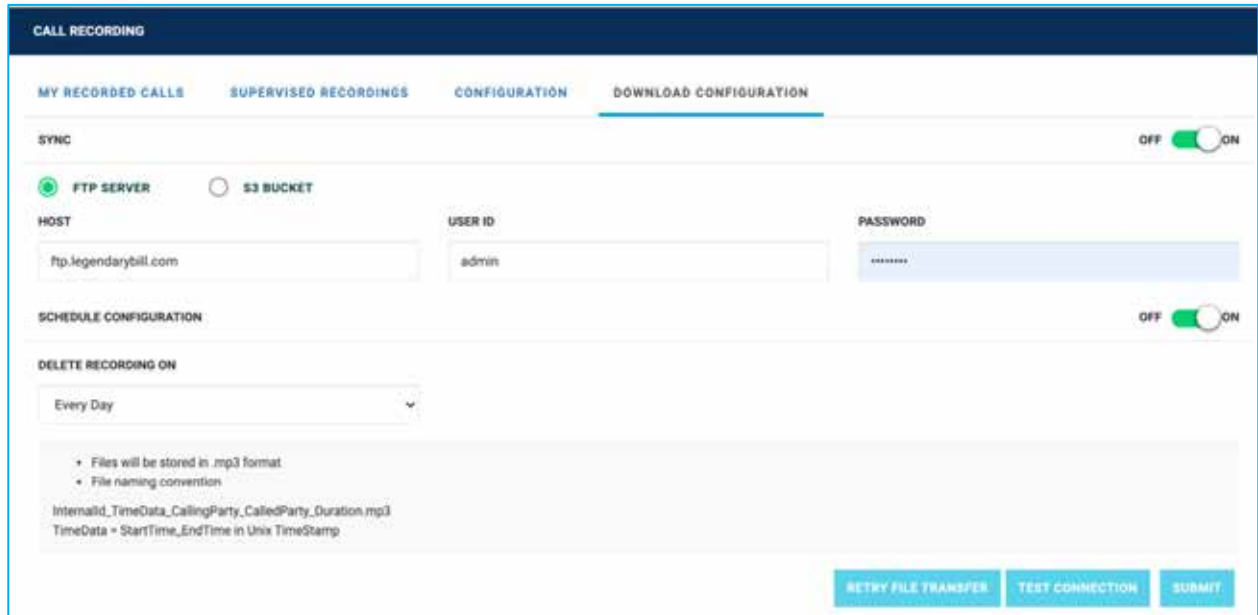
**Secret Access Key ID:** The security key for your bucket goes here.

**Region:** Choose your S3 region from the drop-down menu here.

### Schedule Configuration

Turn this on to schedule the time when the data is deleted from the Clearwave Fiber cloud.

**Delete Fax On:** Use the drop-down to select the interval for deletion.



**CALL RECORDING**

MY RECORDED CALLS   SUPERVISED RECORDINGS   CONFIGURATION   **DOWNLOAD CONFIGURATION**

SYNC OFF  ON

**FTP SERVER**    S3 BUCKET

HOST: ftp.legendarybill.com   USER ID: admin   PASSWORD: \*\*\*\*\*

SCHEDULE CONFIGURATION OFF  ON

DELETE RECORDING ON: Every Day

- Files will be stored in .mp3 format
- File naming convention

InternalId\_TimeData\_CallingParty\_CalledParty\_Duration.mp3  
TimeData = StartTime\_EndTime in Unix TimeStamp

### Download Details

At the bottom of the widget is the file format and naming convention for the data that will be sent to the S3 or FTP.

**Retry File Transfer:** This button will attempt to resend, useful for validating the data transfer.

**Test Connection:** You can use this to test the connection, receiving a result very quickly.

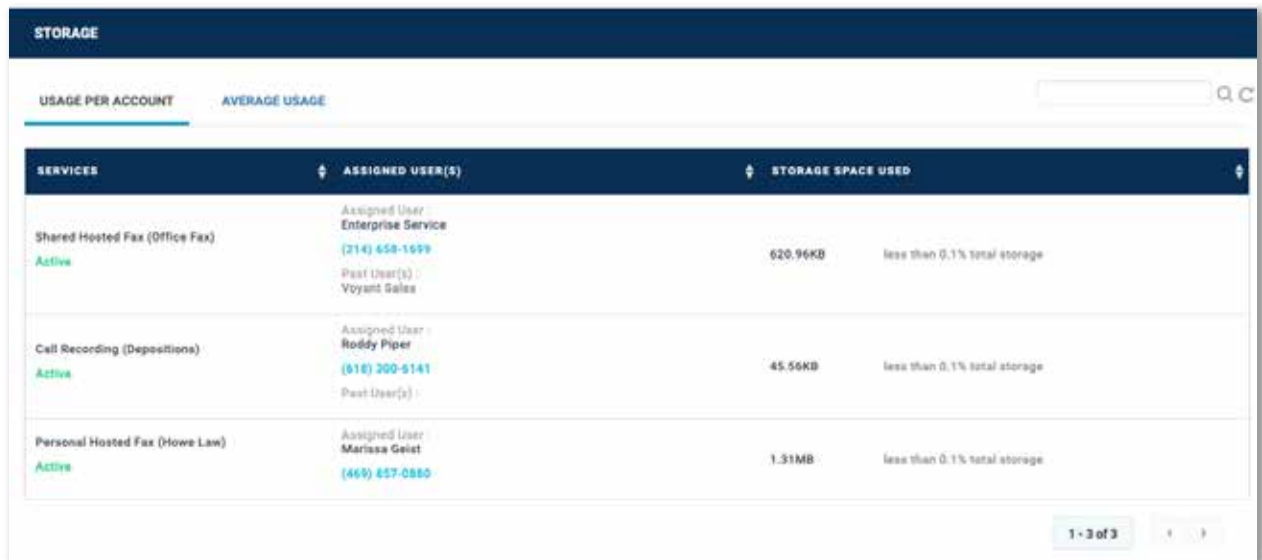
**Submit:** Use this button to save the settings you have entered above.

## Storage

The Enterprise Storage is used by Hosted Fax and Call Recording products to manage the cloud storage allotted to each enterprise. Every product that uses storage will grant 1GB of storage space. This is a bulk storage, so the 1GB of storage per product is not reserved for that product, specifically.

Each product allows you to manage the storage of their services, so you can delete or download as you see fit on a case-by-case basis.

As the storage space fills up, the Admins are alerted at certain intervals that the storage limit is being reached.



The screenshot shows a 'STORAGE' dashboard with two tabs: 'USAGE PER ACCOUNT' (selected) and 'AVERAGE USAGE'. Below the tabs is a table with columns for 'SERVICES', 'ASSIGNED USER(S)', and 'STORAGE SPACE USED'. The table lists three services: Shared Hosted Fax (Office Fax), Call Recording (Depositions), and Personal Hosted Fax (Howe Law). Each service is marked as 'Active' and shows its assigned user(s) and the storage space used, along with a percentage of total storage.

SERVICES	ASSIGNED USER(S)	STORAGE SPACE USED
Shared Hosted Fax (Office Fax) <i>Active</i>	Assigned User : Enterprise Service (214) 458-1699 Past User(s) : Voyant Sales	620.96KB less than 0.1% total storage
Call Recording (Depositions) <i>Active</i>	Assigned User : Roddy Piper (818) 200-5141 Past User(s) :	45.56KB less than 0.1% total storage
Personal Hosted Fax (Howe Law) <i>Active</i>	Assigned User Marissa Geist (469) 657-0880	1.31MB less than 0.1% total storage

### Usage Per Account

This tab breaks down usage by service.

#### Services

The service itself is listed here.

#### Assigned User(s)

Assigned users, both current and past, who have contributed to the storage space usage.

### Storage Space Used

This lists the space used as well as. Percentage of the overall available enterprise storage capacity.

### Average Usage

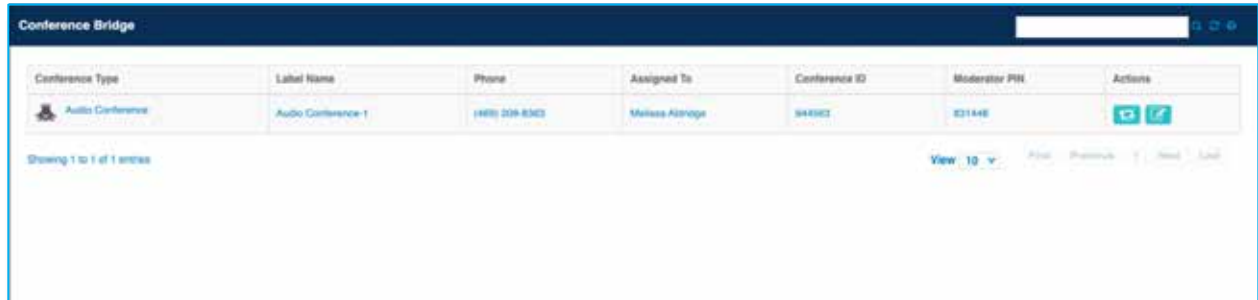
This widget shows a graph over time of the available storage and how it fills up. You can use the Download button to obtain a copy of this data.



### Overages

If you exceed the storage limit, the products will continue to work and none of your past items will be deleted, but you will be charged data overage if you do not manage your stored items.

## Conference Bridge

Conference bridges<sup>5</sup> are monitored here. This widget will list the details and credentials about all the conference bridge products (audio conference and personal conference) in the enterprise.



Conference Type	Label Name	Phone	Assigned To	Conference ID	Moderator PIN	Actions
Audio Conference	Audio Conference 1	(408) 208-8362	Melissa Altraga	948982	82144E	 

Showing 1 to 1 of 1 entries

View 10 | First | Previous | Next | Last

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

### *Conference Type*

The type of conference product is listed here.

### *Label Type*

The name, as assigned in actions, is shown here.

### *Phone*

The phone number for the bridge will be found here. This number may not be unique but found on multiple products.

### *Assigned To*

The user this has been assigned to as set in the Actions section, is here.

### *Conference ID*

The unique Conference ID is listed here. This is the code the participants use.

### *Moderator PIN*

The PIN entered after the moderator calls the number to “open” the bridge.

### *Actions*

You can reassign the user it is Assigned To or edit the Label Name with these buttons.

---

<sup>5</sup>The Conference Bridge service is capable of handling up to 15 participants (moderators and participants).

## Virtual Extensions / Mailbox

A virtual extension differs from a virtual number in that it represents an assigned extension that points external to the PBX, while the latter is an inbound number. Likewise, a standalone mailbox is a voicemail box that is disconnected from a seat.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.



Services	Assigned services	Extension	Action
Standalone Mailbox	Auto Attendant: Main AA	7777	[Edit] [Reassign] [Unassign]
Virtual Extension	MaintenanceGuy (214) 867-5309	999	[Edit]

Showing 1 to 2 of 2 entries

View 10 | First | Previous | Next | Last

### Services

This will help you differentiate between Virtual Extensions and Standalone Mailboxes.

### Assigned Services

Standalone Mailboxes are associated with services, and the ones assigned will be here.

### Extension

The extension of the service.

### Action

Buttons are here to edit, reassign, or unassign the services.

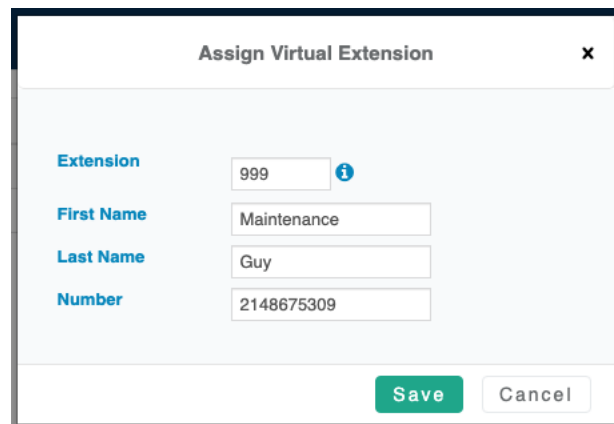
## Virtual Extension Window

When the edit action is selected for a Virtual Extension, this window will open.

**Extension:** The extension that will be dialed in-network to call the number listed below.

**First / Last Name:** The name associated to this extension, which will appear in the corporate directory.

**Number:** The external number for the call from the extension to be forwarded to.



**Assign Virtual Extension** ✕

---

**Extension**  i

**First Name**

**Last Name**

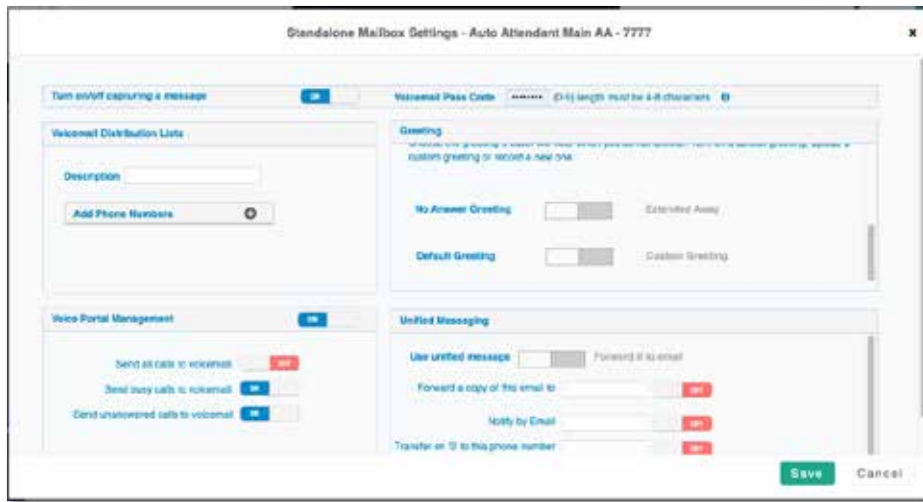
**Number**

## Standalone Mailbox Settings Window

The voicemail settings for the standalone box are set here. They can be changed at any time, and the changes will go into effect seconds after the Save button has been pressed.

**Turn on/off capturing a message:** When on, this mailbox will accept messages, when off, it does not give the caller a chance to leave a message.

**Voicemail Pass Code:** Configure the voicemail passcode here.



### Voicemail Distribution Lists

Use this section to name and assign a voicemail distribution list.

### Greeting

Use this section to upload or assign greetings to the voice portal for given situations. You can use the default greeting or use your own, which can be uploaded or assigned from those in the announcement repository.

**Busy Greeting:** This plays when a call is diverted to this voicemail due to the line being busy or the call being rejected.

**No Answer Greeting:** This plays when the call rings through to the voicemail or is ignored. If switched to Extended Away, the option to not record incoming messages becomes available.

### Voice Portal Management

Use this section to enable or disable the voice portal itself, then to choose which types of calls are sent to the voice portal.

### Unified Messaging

This section will set up voicemail to email.

**Use unified message / Forward it to email:** When switched to Forward it to email, the voicemails will no longer be kept on the cloud, instead sent as a wav file to the email address indicated.

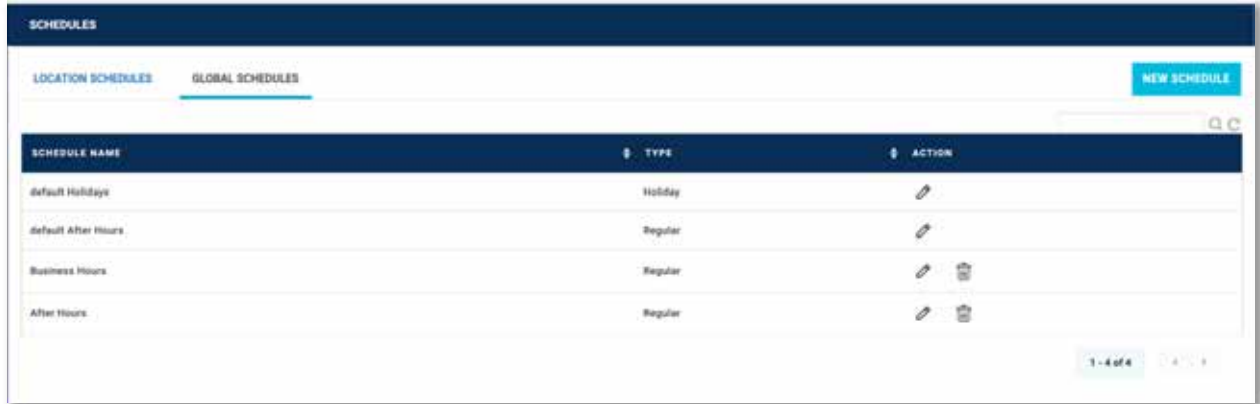
**Forward a copy of this email to:** Enter an email address to send a wav file copy of the voicemail.

**Notify by email:** Enter an email address here to send an email message indicating a voicemail message is available.

**Transfer on '0' to this phone number:** Enable this to send a call where the caller presses the 0 key any time during the greeting to the number indicated.

## Schedules

Schedule based call routing is a tool used by Hunt Groups, Auto Attendants, and Call Center Queues to flow the calls to another extension or action during certain scheduled times, such as after hours or holidays.



The screenshot shows a web interface titled 'SCHEDULES'. It has two tabs: 'LOCATION SCHEDULES' and 'GLOBAL SCHEDULES', with 'GLOBAL SCHEDULES' selected. A 'NEW SCHEDULE' button is in the top right. Below the tabs is a search bar and a refresh icon. The main area contains a table with the following data:

SCHEDULE NAME	TYPE	ACTION
default Holidays	Holiday	
default After Hours	Regular	
Business Hours	Regular	
After Hours	Regular	

At the bottom right of the table, there is a pagination indicator '1-4 of 4' and a refresh icon.

### Location vs. Global Schedules

Schedules built as Global Schedules can be accessed by any service, regardless of location. This is generally the best tab to use to build schedules and is the place to find the default schedules.

**New Schedule Button:** You may have any number of schedules but they each must have a unique name. Click this button to create a new schedule, which will open the Schedule window.

**Search, Refresh Buttons:** These standard buttons will let you input a field to search the data in the widget or refresh the data.

*Schedule Name* The unique name of the schedule.

*Type* Holiday or Regular. This differentiation is important to Auto Attendant scheduled call routing.

*Action* You can edit the schedules or delete them. The default schedules can be renamed or edited, but they cannot be deleted. Editing the schedule opens the Schedule window.

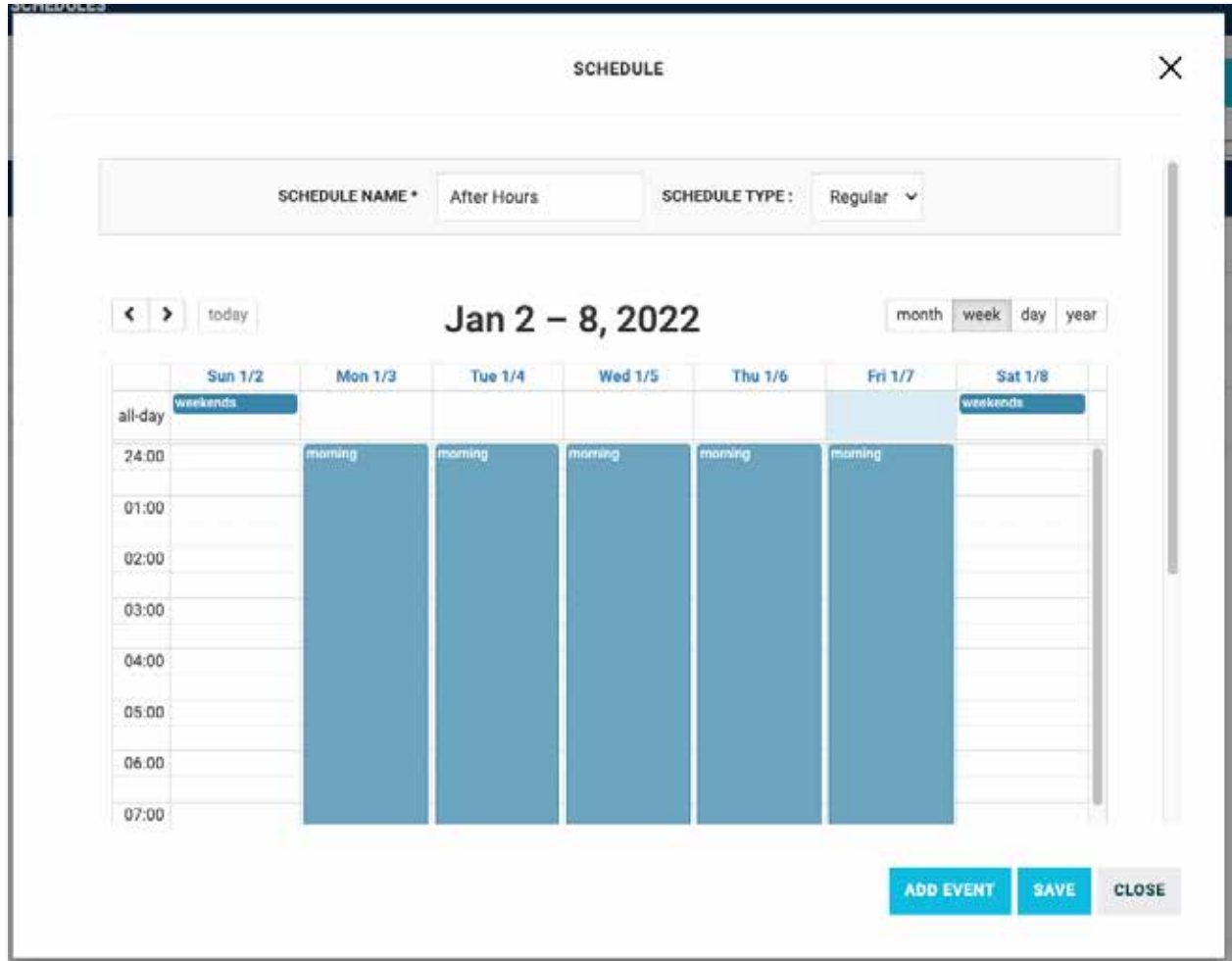


## Schedule Window

**Schedule Name:** This field can be altered to better identify the nature of the schedule.

**Schedule Type:** The drop-down here will toggle between Regular and Holiday schedules. This is only important when a schedule is applied to an Auto Attendant, but it will tag the schedule on the main view.

**Selection Options:** Use the date selectors to look forward and backward on the schedule and view the events that have been created. You can alternate between monthly, weekly, daily, and annual views. Events will be shown as blocks of color on the calendar.



**Add Event button:** This will open the Event window to create a new instance for the schedule. You can also double-click an existing event on the calendar view to edit that event.

**Save button:** Use this to save the schedule. A message confirming the changes will appear on the menu when successful. Changes to schedules that have been applied to services will update in real time.

**Close button:** Use this to exit this window without saving changes.

## Event Window

This window is used to create and edit schedule events.

**Description:** This is the name of the event. Within each schedule, all the events must be uniquely named.

**Repeat Event toggle:** If disabled, this event will occur once. When enabled, you will see the repeat menu.

**Interval radio button:** Select Daily, Weekly, Monthly, or Yearly as an interval for repetition. Once this has been selected, you will have options to adjust which timeframes within that interval.

**End Date radio button:** Select if this event will repeat indefinitely or will terminate at some point, which is useful for seasonal hours.

**Full Day:** Choose this if you would like the even to last all day, when it is deselected, you will open the begin and end time selector. This is listed in 24-hour time<sup>6</sup>.

**Cancel button:** If you are not happy with the choices you have made, you can leave this menu without saving.

**Save button:** When you are satisfied with the event, press Save.

<sup>6</sup>It is generally best to confine the scheduled event to a single day. For example, if you're closed before 9am, you would set an event from 00:00 to 09:00 (as shown on the screenshot example).

## Receptionist

The receptionist client is an add-on feature that provides a web-based portal to manage incoming calls, drag and drop transfers, barge into calls, and other functions that a front desk person in a high-volume enterprise might appreciate. This widget allows an Admin to edit the monitored users, reassign receptionist extensions, and uncouple licenses.



**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

*User* The name of the user who has been assigned the license is shown here. It can be reassigned with the Actions.

*Phone Number* This shows the phone number of the receptionist.

*Extension* This shows the extensions number of the receptionist.

*Action* You can configure the monitored contacts, reassign the license, or dissociate the license with these buttons.

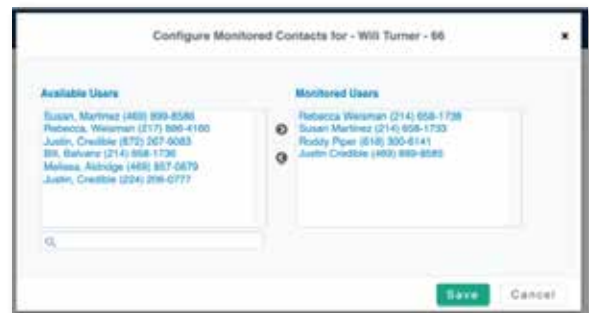
## Configure Monitored Contacts Window

An Admin can use this window to change the users who appear in the Favorites tab<sup>7</sup> in the receptionist client.

**Available Users:** This section shows the seat numbers that have yet to be assigned. This will pull information across the entire enterprise, not just the location where the receptionist is assigned.

**Monitored Users:** This section displays those who are monitored.

Use the arrow buttons between these sections to move selected seats from one side to the other.



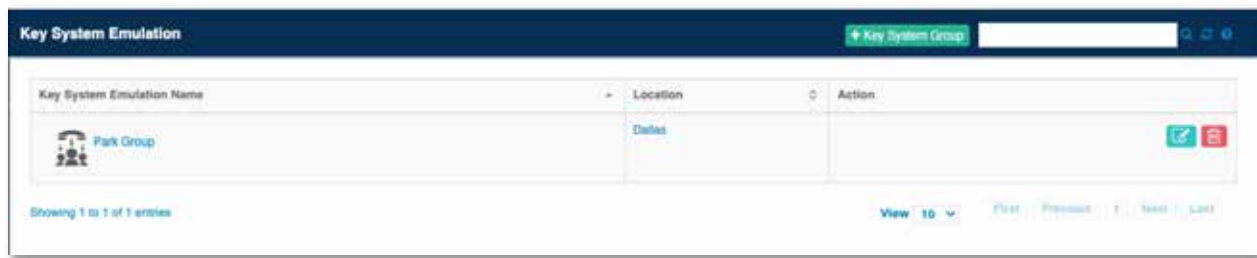
<sup>7</sup>The Receptionist client will be able to transfer calls to any number in the enterprise, regardless of if it is monitored or not. Monitored contacts are used for the most common extensions that may receive transfers and enable the hook status and presence visible from the Favorites tab of the client.

## Key System Emulation

Key Phone Systems were introduced in the 1960s to provide flexible solutions for widely varying telephone service requirements in businesses and enterprises. Some establishments still operate these systems, and when they choose to upgrade, customers may still desire some of the functionality of those systems.

The major feature is the ability to place a call on hold on one location, typically announced with a winking square line key, and then pick up that held call at another location by pressing the blinking line key when the handset is off hook. This methodology made use of the path routing endemic with mid-20<sup>th</sup> century phone technology. Unfortunately, the SIP technology used in hosted phone systems is designed to deliver the calls to a single location, where it is managed.

Key system emulation provides a way to simulate this behavior, within a location, by using the call park function, which is only available for seats that have full line capabilities (which means Primer seats are not eligible).



**Add Key System Group button:** Use this to open the Park Group window to create a new group.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

*Key System Emulation Name* The name of the groups you have created. By default, a group is named Park Group, but you will want to name it something more specific.

*Location* Key Groups only function within a location and this lists the location where the group exists.

*Action* Use these buttons to edit or delete the group.

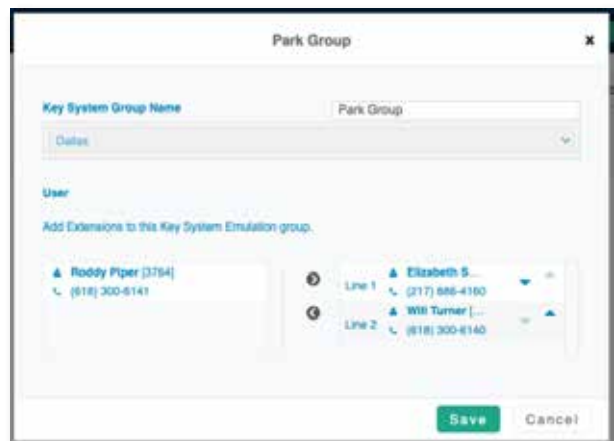
## Park Group Window

This window is enabled when you create a new group or edit an existing one.

**Key System Group Name:** Define the name of the group here.

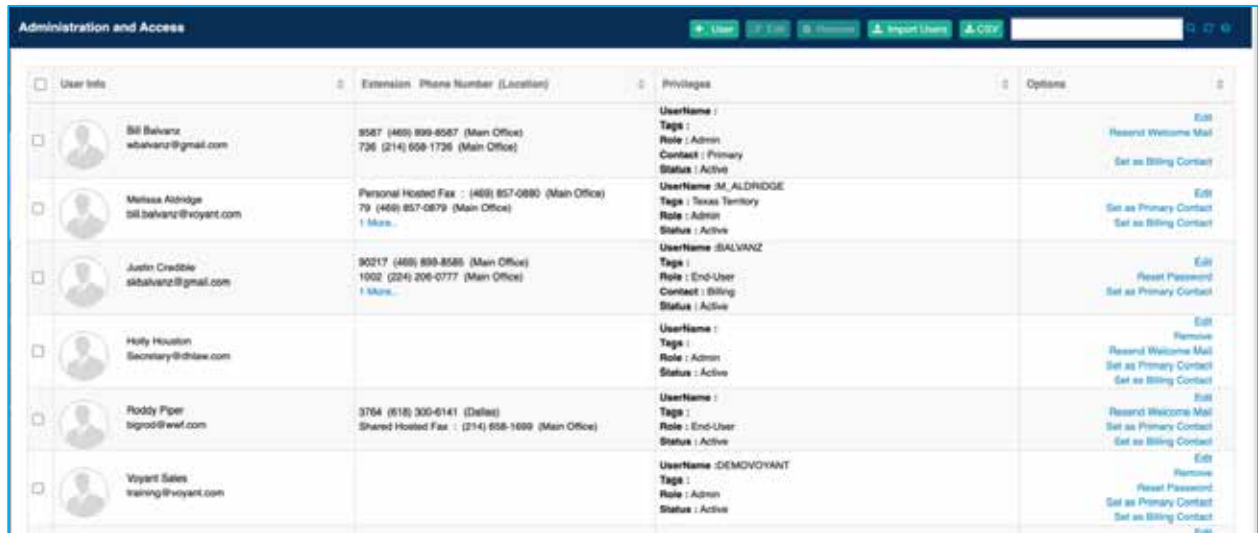
**Location Drop-Down:** Select the location within your PBX to place this group.

**User Selection:** Use the list generated and the right and left arrow keys to place users in the group.



## Administration Section

This section is used to manage the users. Users are then assigned to the seats in the Locations section.



User Info	Extension Phone Number (Location)	Privileges	Options
<input type="checkbox"/> Bill Balvanz wbalvanz@gmail.com	8587 (469) 899-8587 (Main Office) 736 (214) 658-1736 (Main Office)	UserName : Tags : Role : Admin Contact : Primary Status : Active	Edit Reset Welcome Mail Set as Billing Contact
<input type="checkbox"/> Melissa Aldridge billbalvanz@voynat.com	Personal Hosted Fax : (469) 857-0890 (Main Office) 79 (469) 857-0879 (Main Office) 1 More...	UserName : M_ALDRIDGE Tags : Texas Territory Role : Admin Status : Active	Edit Set as Primary Contact Set as Billing Contact
<input type="checkbox"/> Justin Credible jbalvanz@gmail.com	30217 (469) 899-8588 (Main Office) 1002 (224) 206-0777 (Main Office) 1 More...	UserName : JBALVANZ Tags : Role : End-User Contact : Billing Status : Active	Edit Reset Password Set as Primary Contact
<input type="checkbox"/> Holly Houston Secretary@chlaw.com		UserName : Tags : Role : Admin Status : Active	Edit Remove Reset Welcome Mail Set as Primary Contact Set as Billing Contact
<input type="checkbox"/> Roddy Floor rfloor@wef.com	3704 (818) 300-6141 (Dallas) Shared Hosted Fax : (214) 658-1699 (Main Office)	UserName : Tags : Role : End-User Status : Active	Edit Reset Welcome Mail Set as Primary Contact Set as Billing Contact
<input type="checkbox"/> Wyatt Sales wsales@voynat.com		UserName : DEMOVYANT Tags : Role : Admin Status : Active	Edit Remove Reset Password Set as Primary Contact Set as Billing Contact

### Administration and Access

**Add User Button:** This button will open the Add User window. This is very similar to the Edit and manage user settings window.

**Edit Button:** This opens the Edit and manage user settings window. This is where you can manipulate user data.

**Remove Button:** This will remove a selected user. This is not an option if the user is assigned to any seats.

**Import Users Button:** This will allow you to upload a CSV file with user information.

**Download CSV Button:** This button will allow you to download a Comma Separated Values (CSV) file with the information in the widget. You should be able to open these files in any spreadsheet for best usability, or a text editor to see the data itself.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

### Administration and Access Widget

#### User Info

The first name, last name, and email address of the user is here.

#### Extension Phone Number (Location)

All extensions that have this user assigned to them will be listed here. If there are more than one or two you may have to hit the More link in this cell to see more.

#### Privileges

Details about the user, such as the CAP UserName, any Tags, the user's Role, Contact status, and use Status are listed here.

#### Options

This list of links contains the actions that can be taken for this user.

## User Settings Window

The window to create or manage user settings can be reached in a variety of ways. The following fields are available in this window.

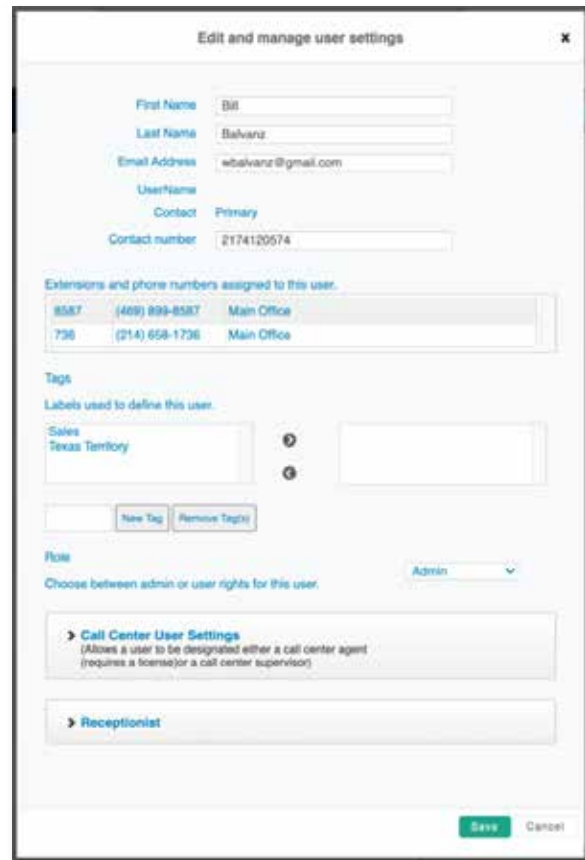
**First Name (required):** Text field for the first name of this user.

**Last Name (required):** Text field for the last named of the user.

**Email Address (required):** Many services use email as a method to send notices and features. This field is required, but it will not validate the email address other than by format (words@words.words).

**UserName:** If the user has made a Customer Admin Portal login by following the steps in the Welcome Mail, their username is visible here. Their password will never be visible.

**Contact number:** This is a field to put an off-net contact number for the user, such as a mobile phone.



**Extensions and phone numbers assigned to this user:** The list of seats to which the user has been assigned are found here.

**Tags:** These are metadata tags that can be assigned to help differentiate users in the Customer Administration Portal. They have no bearing on the function of the phone system.

**Role:** The drop-down allows you to select between End-User and Admin. More details about what each can access is available in the Access Levels section.

The following settings will not be functional until the user has been assigned to a seat, because these services are tied to the phone number of the seat itself.

**Call Center User Settings:** This sub-menu will let you assign licenses to any of the extensions this user is assigned to.

**Receptionist:** This sub-menu allows you to assign the receptionist privileges to seats associated with this user.

## Corporate Directory

**Contact Sync Button:** If you have made changes to the corporate directory or usernames, you can force the directories to sync with this button. Syncing all the endpoints may take an hour or more. If you do not perform this action, it may take a few days to fully update.

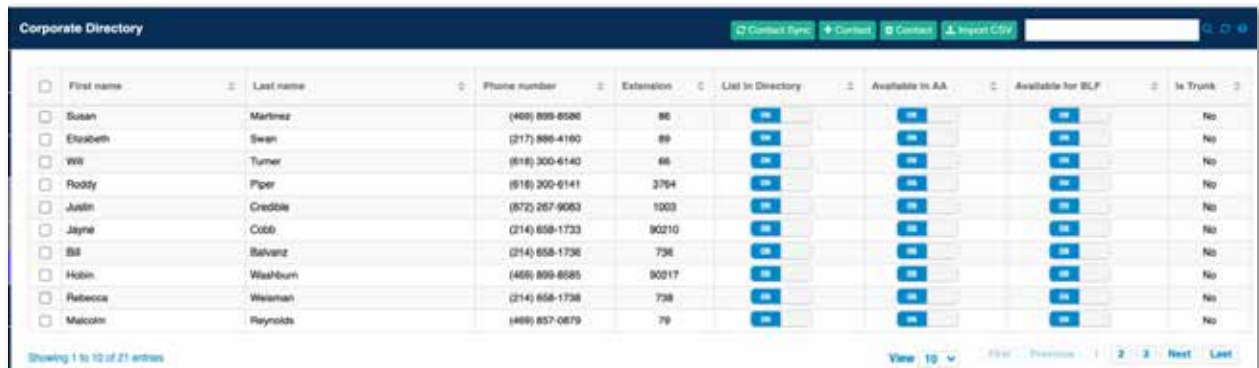
**Add Contact Button:** You can add off-net contacts to the enterprise directory. Once added, they will appear in the directories of every endpoint in the enterprise after the directory has been synced.

**Remove Contact Button:** You can remove selected off-net contacts with this button.

**Import CSV Button:** With this button, you can upload a CSV file with a list of off-net contacts to add to the corporate directory.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

## Corporate Directory Widget



<input type="checkbox"/>	First name	Last name	Phone number	Extension	List in Directory	Available in AA	Available for BLF	In Trunk
<input type="checkbox"/>	Susan	Martinez	(408) 899-6086	86	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Elizabeth	Swan	(217) 899-4160	89	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Will	Turner	(818) 300-6140	66	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Roddy	Piper	(918) 300-6141	3764	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Justin	Credible	(872) 267-9063	1003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Jayne	Cobb	(214) 658-1733	90210	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Bill	Balvanz	(214) 658-1736	736	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Hobin	Washburn	(408) 899-6085	90217	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Rebecca	Weisman	(214) 658-1736	736	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
<input type="checkbox"/>	Malcolm	Reynolds	(408) 857-0679	79	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No

### First Name

The first name field for the contact.

### Last Name

The last name field for the contact.

### Phone Number

The ten-digit phone number for the contact.

### Extension

Contacts that are part of the enterprise will have an extension.

### List in Directory Toggle

When ON, this will appear in the corporate directory. When OFF, it will not (although extension dialing will still work).

### Available in AA Toggle

When ON, this contact can be accessed via name dialing through the Auto Attendant.

### Available for BLF Toggle

When ON, this contact can be added to Busy Lamp Fields.

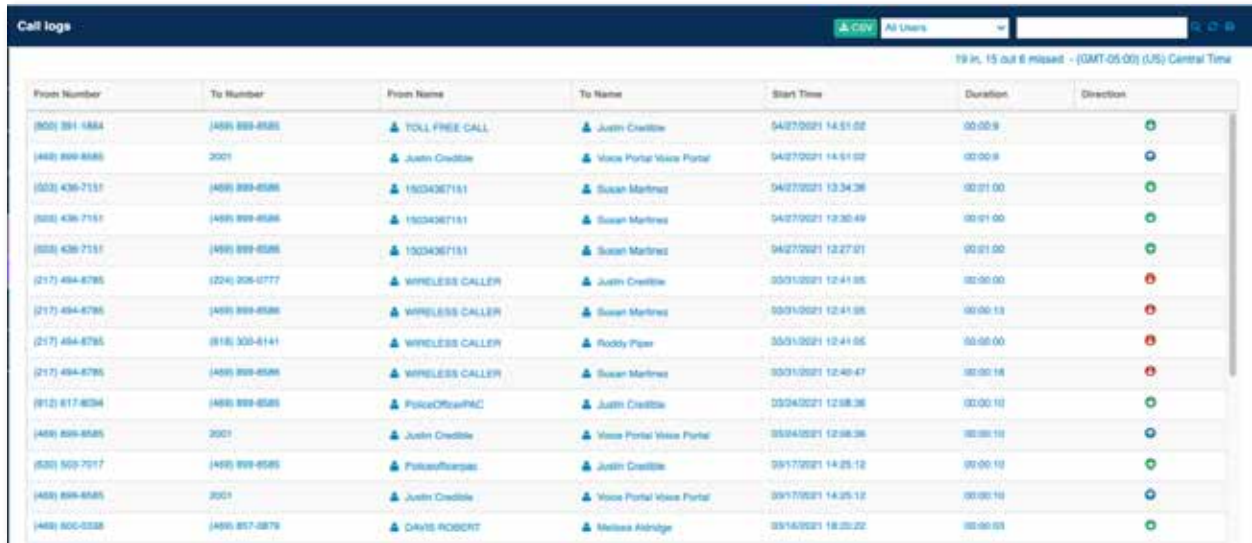
### Is Trunk

If this contact is part of a trunk group, it will be shown here.

## Reporting Section

The reporting section will empower an Admin to review call detail records for the enterprise.

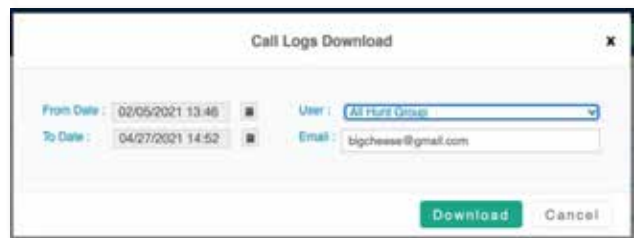
Call records will show to name and number, from name and number, time, duration, and direction. Specific details, such as how long a specific call was on hold or which party disconnected, are not gathered by this subsystem.



From Number	To Number	From Name	To Name	Start Time	Duration	Direction
(800) 881-1884	(488) 888-8888	TOLL FREE CALL	Justin Credible	04/27/2021 14:51:02	00:00:9	Inbound
(488) 888-8888	3001	Justin Credible	Voice Portal Voice Portal	04/27/2021 14:51:02	00:00:8	Outbound
(000) 436-7151	(488) 888-8888	15004367151	Susan Marfnez	04/27/2021 13:34:38	00:01:00	Inbound
(000) 436-7151	(488) 888-8888	15004367151	Susan Marfnez	04/27/2021 13:30:49	00:01:00	Inbound
(000) 436-7151	(488) 888-8888	15004367151	Susan Marfnez	04/27/2021 12:27:01	00:01:00	Inbound
(217) 484-8795	(224) 906-0777	WIRELESS CALLER	Justin Credible	03/01/2021 12:41:05	00:00:00	Outbound
(217) 484-8795	(488) 888-8888	WIRELESS CALLER	Susan Marfnez	03/01/2021 12:41:05	00:00:13	Outbound
(217) 484-8795	(818) 303-4141	WIRELESS CALLER	Roddy Piper	03/01/2021 12:41:05	00:00:00	Outbound
(217) 484-8795	(488) 888-8888	WIRELESS CALLER	Susan Marfnez	03/01/2021 12:40:47	00:00:18	Outbound
(912) 817-8534	(488) 888-8888	PoliceOfficerPAC	Justin Credible	03/04/2021 12:58:36	00:00:10	Inbound
(488) 888-8888	3001	Justin Credible	Voice Portal Voice Portal	03/04/2021 12:58:36	00:00:10	Outbound
(503) 502-7017	(488) 888-8888	PoliceOfficerpac	Justin Credible	03/17/2021 14:25:12	00:00:10	Inbound
(488) 888-8888	3001	Justin Credible	Voice Portal Voice Portal	03/17/2021 14:25:12	00:00:10	Outbound
(488) 800-0338	(488) 817-0878	DAVIS ROBERT	Melissa Abridge	03/16/2021 18:25:22	00:00:03	Inbound

### Call Logs

**Download CSV Button:** This button will allow you to download a Comma Separated Values (CSV) file with the information in the widget. You should be able to open these files in any spreadsheet for best usability, or a text editor to see the data itself.



**Filter Dropdown:** You can select specific users and services with this drop-down menu.

**Search, Refresh, Help Buttons:** These standard buttons will let you input a field to search the data in the widget, refresh the data, or open a context-sensitive in-line help file.

### Call Log Widget

#### From Number

The phone number that placed the call.

#### To Number

The phone number that received the call.

#### From Name

The CLID name of the caller.

#### To Name

The CLID name of the recipient.

#### Start Time

The time the call began.

#### Duration

The length of the call, rounded to the second.

#### Direction

Inbound (green), outbound (blue), and inbound redirected (red).



## Appendix A: Basic Enterprise Set-Up

The following steps represent the most efficient way to customize an enterprise to a usable product. This will configure a PBX ready to place and receive calls and handle the basics of a phone system. This leaves out a great deal of optional steps in lieu of providing a path to make a functional phone system with as few steps as possible.

**Note:** These processes begin after the order has been submitted for order processing in Atlas and has passed at least the Provision Service step in the Service Delivery workflow.

### Set Up Admin Login

If you do not have a true Admin with a login, your only option from the Customer Tab for the enterprise is Super Admin. You must have Admin access to make all the necessary changes. So, you should first build a new user with admin access. You can create an Admin in the Administration Section to complete this task.

### Create All Users

Once you have Admin access, you can create all the users the enterprise will use. This can be done in a variety of ways, and they are covered in the Administration Section. It is possible to have created users during the order entry process in Atlas, making this step a lot simpler.

### Assign Users to Seats

The users are created, but Administration and Access will not allow you to assign users to seats. You can do this in the Location Section. It is possible to have created users and assigned them to seats during the order entry process in Atlas, making this step a lot simpler.

### Customize Extensions

Now that the users have been associated with their seats, you can customize their extensions, also in the Location Section. A Super Admin will not be able to change these extensions, thus this is the first of many parameters a Super Admin cannot alter.

### Build Schedules

Before you go on to use any services with schedule-based call routing, you need to have the schedules in place. Use the Schedules Section to create, at minimum, an office hours schedule, an after-hours schedule, and a holiday schedule.

### Set Up Hunt Groups

Set up any hunt groups the call flow requires in the Hunt Group Section.

### Set Up Auto Attendants

Now you can fully set up auto attendants in the Auto Attendant Section. Be sure to customize any recordings and place these in the Announcement Repository before you fully implement the auto attendant menus.

### Point Virtual Numbers

Finally use the Virtual/Toll Free Numbers Section to point the Company Main Number and any other virtual numbers to the desired extensions.