![FirstComm]

CommPortal

Admin Guide

Updated Version 05.12.20

Contents

1.   Introduction

This guide describes the Business Admin CommPortal, an interface that allows the business group administrator to manage the features of their phone system via a website.

1.1.   About this Guide

The Business Admin CommPortal Guide assists business group administrators in understanding and managing the hosted phone system.

The things you can do via the administrator portal include:

·   Making changes to line names and details associated with user accounts
·   Creating Departments, Account Codes and Short Codes
·   Reset Voicemails, Unlock Accounts and Change Passwords
·   Call Analytics Reports and Music on Hold

1.2.   Portal Log In

To access the CommPortal, open any browser to https://my.uc-view.com/bg/ and enter your administrator credentials.

Number: Enter the ten-digit account number assigned to your own phone account (DID or direct inward dial number).

Password: Enter same as your CommPortal password.

CommPortal Web

Please log in below.

Number: [ ]

Password: ••••••••••

Login

If you have forgotten your password, please contact customer support.

If after entering your correct direct dial number and password access is denied, please email business care at businesscare@firstcomm.com or call **800.860.2934**

2.　Groups - Hunt Groups

Groups can be used to manage how calls are handled for a selection of callers. The group page allows you to view Hunt Groups and Call Pickup Groups.

- Hunt Groups will pass calls to the next available member.
- Call Pickup Groups allow lines to answer each other's calls.
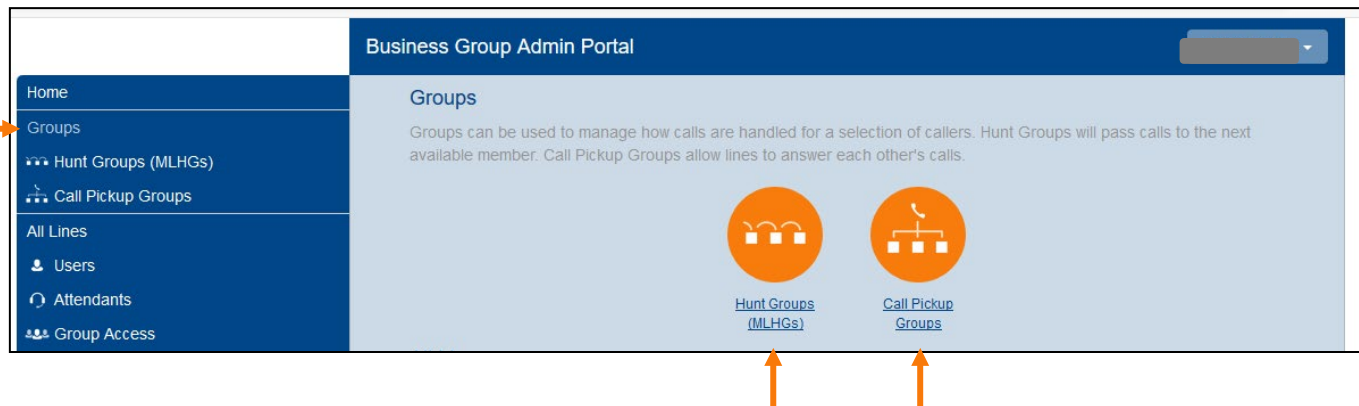
2.1　Standard Hunt Groups

A Hunt Group (MLHG or Multi-Line Hunt Group) is a set of lines within a Business Group (members), so that calls to the group are passed to a non-busy member of the Hunt Group, or may be added to a queue if all members are busy. Please contact us if you would like to set up a new Hunt Group.

The Hunt Group Page allows you to view your current Hunt Groups, how many members are in each Hunt Group, and the Service level.

If you would like to add a new Hunt Group please contact business care at **800-860-2934**.

When you click on the Hunt Group under Service Level it allows you to view any Hunt Group Pilots, Hunt Group Members, and the Settings.

2.1.1   Hunt Group Pilots

You can optionally assign one or more lines within the Business Group as Pilot Directory Numbers for the Hunt Group. These provide a contact number for the whole group that will always pick a free line, instead of being associated with a specific line within the Hunt Group. This could be useful, for example, if you are using a Multi-Line Hunt Group for a call center and wanted to provide one number for the public to call.

Additionally, calls that are dialed directly to a number within the Hunt Group can be forwarded to a non- busy line within the Hunt Group if the number they are calling is busy, or may be treated as busy if you prefer. Intercom calls are never hunted.

2.1.2   Hunt Group Members

This page allows you to Remove Selected Hunt Group Members, Change Positions and Add Lines or Single Lines.

You can also View Line Settings by clicking on Actions

- Position - A hunt algorithm selects non-busy lines to be passed incoming calls. The order of the lines and the algorithm to use can both be changed.

  View Line Settings- If you click on View Line Settings it allows you to view the Phone Status of your Hunt Groups, View Messages and Calls, and Go to Call Manager.
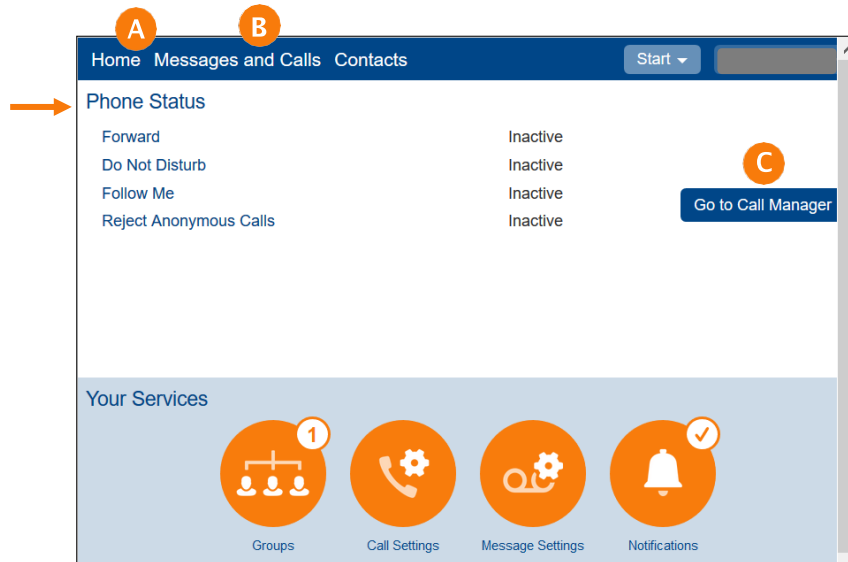

A. **Home** - The home page allows you to view the Phone Status and to see if Forward, Do Not Disturb, Follow Me, and Reject Anonymous Call are active or inactive.

B. **Messages and Calls** - the Messages and Calls page allows you to view Voicemails, Missed Calls, Received Calls, and Deleted Voicemails and Calls.
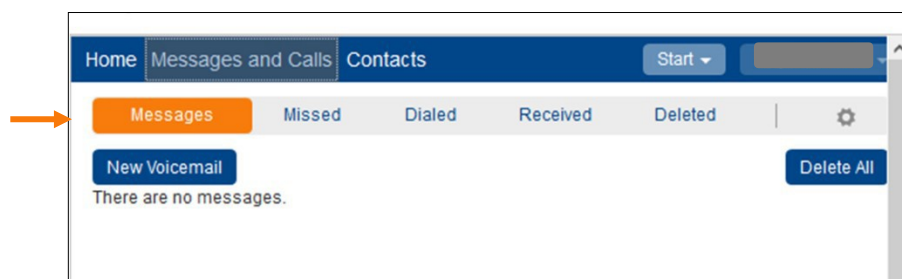
C. **Go to Call Manager**- When you click on Go to Call Manager it allows you to view the summary of configured services, view call forwarding, view follow me and view call screening.
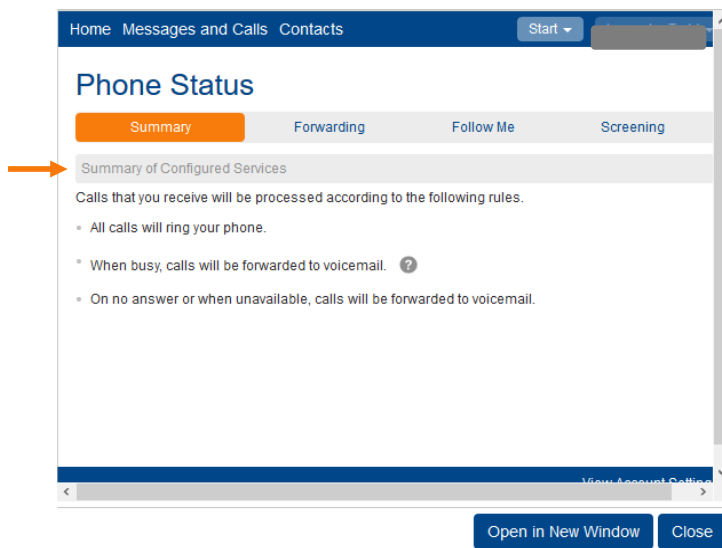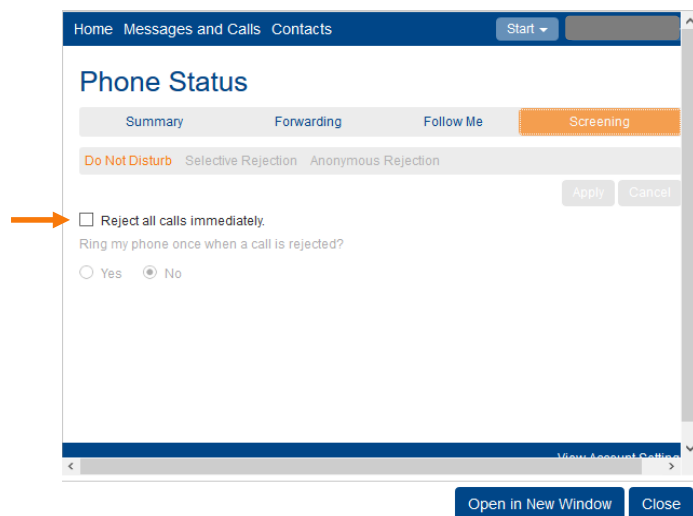

The summary page allows you to view the summary of configured services.
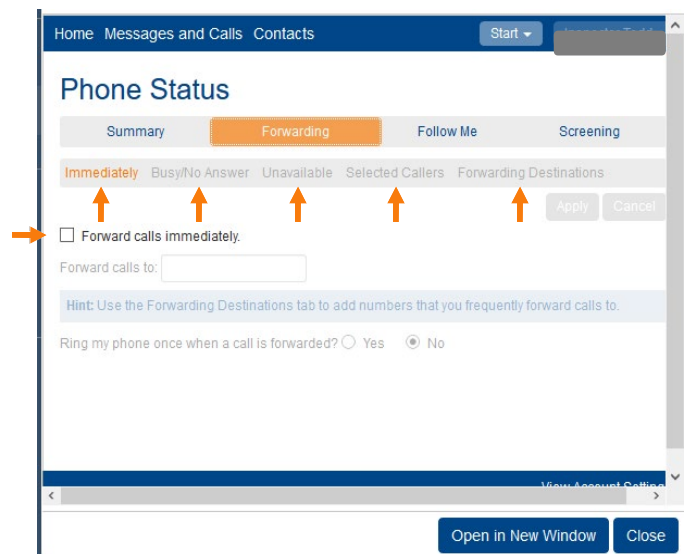
The forwarding page allows you to forward calls immediately, select Busy/No Answer, select Unavailable, view Selected Callers and view Forwarding Destinations.
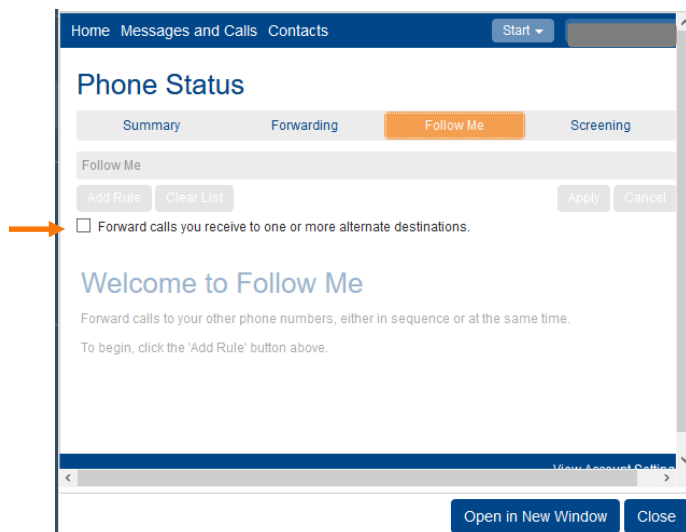
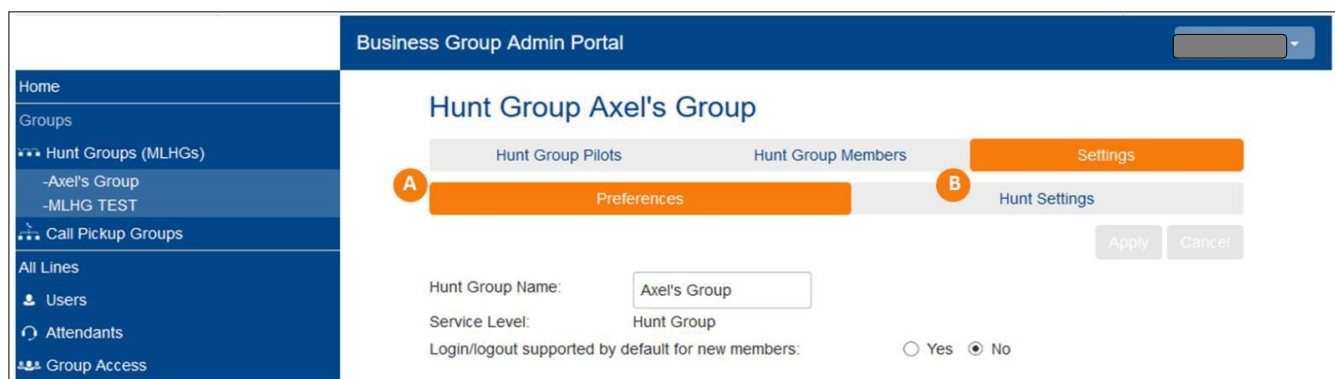
The Follow Me page allows you to forward calls you receive to one or more alternate destinations.

The screening page allows you to reject calls if they are from selected callers, choose selective rejection or anonymous rejection.

2.1.3   Settings

The settings page allows you to adjust preferences for each Hunt Group and allows you to adjust Hunt Settings.

A. **Preferences**- If you click on Preferences it allows you to edit the Hunt Group Name, view the Service Level, and give access to Login/logout.

B. **Hunt Settings** - The Hunt Settings page shows the settings for the Multi Line Hunt Group. Hunting is applied to all calls to pilot numbers. Hunting is optionally applied to direct-dialed calls to busy Hunt Group members.

Settings Include:
Call Distribution Algorithm. This can be one of:

- **Linear**: If a Pilot Number is called, hunting starts with the first member and continues through the list until a non-busy line is found. If a busy member is dialed directly and the *Hunt on Direct Dialed Calls* option is set to true, hunting starts with the member after the dialed number and continues to the end of the list until a non-busy line is found. It does not start again from the beginning of the list.

- **Circular:** If a Pilot Number is called, this is the same as Linear. If a busy member is called, this is the same as Linear except that once the end of the list is reached, hunting will continue from the beginning of the list until a non-busy line is found.

- **Uniform (round robin):** If a Pilot Number is called, hunting starts with the first number after the line that was selected by the previous hunt. When the end of the list is reached, hunting continues from the beginning of the list until it reaches the number it started with. If a busy member is dialed directly, and *Hunt on Direct Dialed Calls* is set to true, this is the same as Circular Hunting.

- **Uniform (longest idle):** If a Pilot Number is called, or a busy member is dialed directly and *Hunt on Direct Dialed Calls* is set to true, hunting starts with the member that has been idle for the longest. The idle time for a Line is calculated using the end time of any incoming or outgoing calls to or from the Line, not just those allocated by hunting. When a member disables the Do Not Disturb call service, its idle time is reset to zero.

  Maximum queue length. The maximum number of calls that can be queued at one time. If queuing is not supported or the queue is already full, the caller will receive the treatment specified by the Pilot or Direct Dial number that was called.

  Is line hunting applied to direct-dialed calls? Specifies whether external calls directly to a line within the Multi Line Hunt Group receive Line Hunting treatment if the line is busy.(Intercom calls, and external calls directly to a line with SIP Call Forking enabled, do not receive Line Hunting treatment regardless of the setting of this field.)

  Is the Pilot's information delivered as Caller ID? Specifies whether the Pilot that was called should be delivered as the caller ID. This can be used so that, for example, a helpdesk receiving calls could know whether the "Helpdesk" or "Accounts Inquiries" number had been called.

2.2   Enhanced Hunt Groups

To view the Summary of the phone status, make and change Rules, set a Weekly Schedule, and set Special days click on the phone number and click on Go to Call Manager.
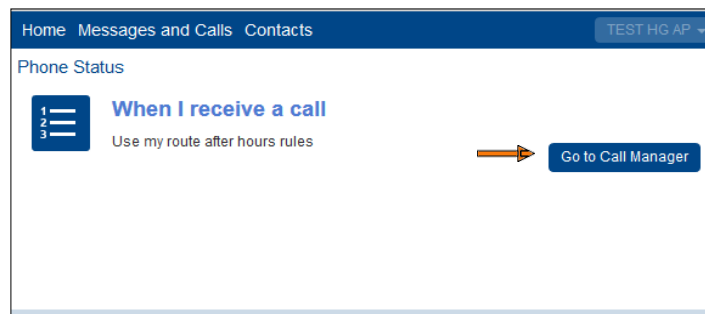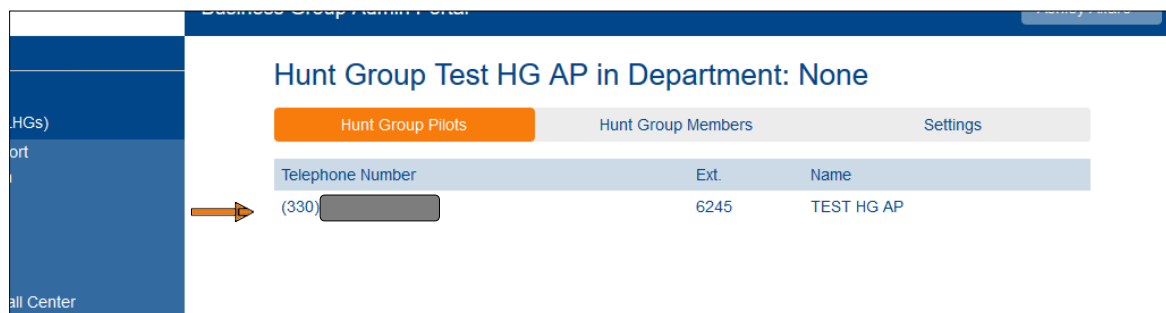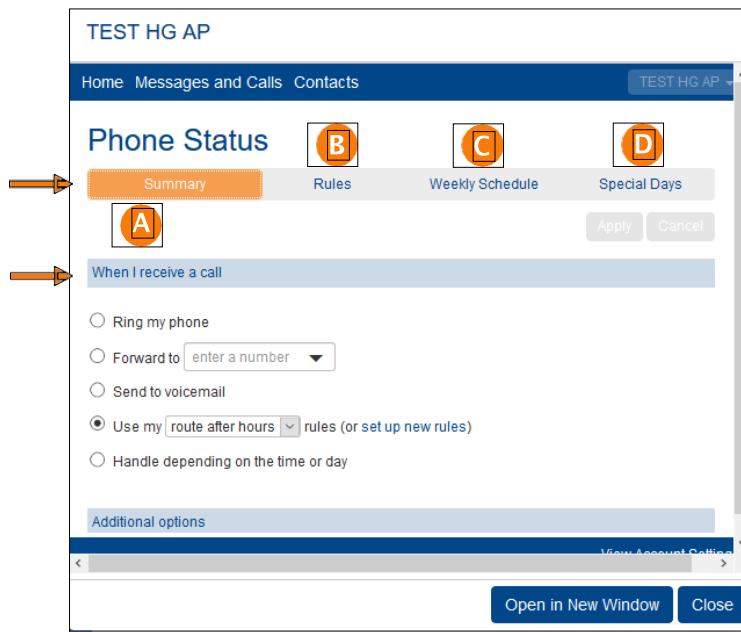
2.2.1   Summary

The Summary page allows you to ring your phone when a call is received, forward to another number, send to voicemail, use rules that have been created and handle a call depending on the time or day.

2.2.2   Rules

The Rules page gives you advanced options for handling incoming calls. You can add a new set of rules or choose which set of rules is active from the Summary tab.
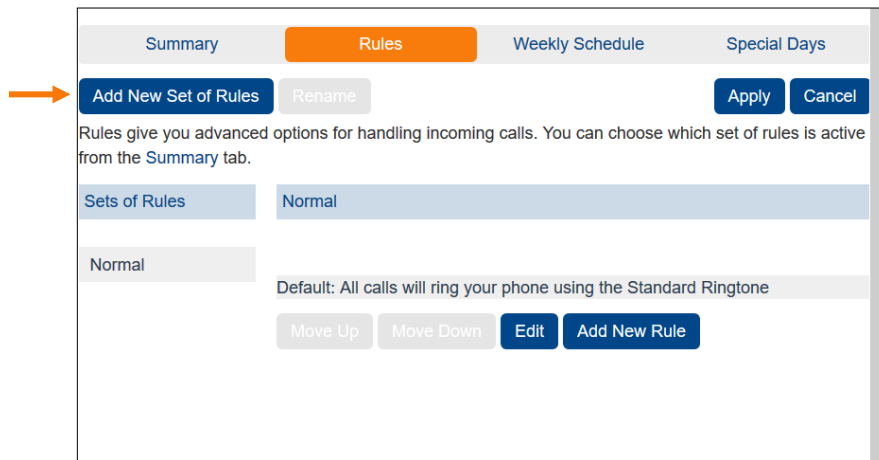
- To add a new rule click on Add New Set of Rules. Then the screen shown below will pop up and you will need to name your new rule and click OK.

- Once you have created a new name and click OK you will see then new name under the Set of Rules on the left side. To set the rules for the new name click on the name under Set of Rules and then click Add New Rule. You can also edit an existing rule by clicking Edit.
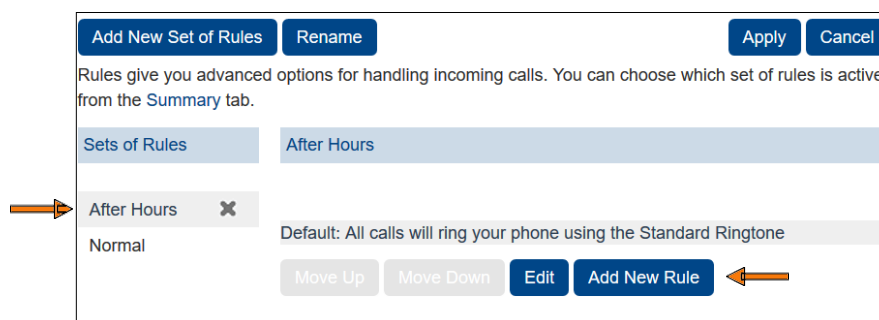
- Once you click on Add New Rule the screen below will pop up and you can create the rule. Click next to complete the rule.

- You must click on Finish to apply the settings to the new rule. You then have to click Apply in the top right corner to complete the new rule. Once you do this you will now be able to use this rule on the Summary Page.

2.2.3   Weekly Schedule

Using your weekly schedule, you can apply different rules at different times of day.

- You can click on Add New Period and add a new time frame. For example: After Hours, Lunch, or Office Hours.
- To set the time, drag your cursor over the allotted time frame. You only can have up to 3 Periods.
- Once you have completed the weekly schedule click Apply.

- Once you have set up your weekly schedule you can use the Summary tab to choose which rules apply during the periods you have defined.

2.2.4   Special Days

Special Days are exceptions to your normal weekly schedule. The SpecialDays tab allows you to add Public Holidays.

- For example, vacations or business trips are special days, when you may want to handle calls in a different way. You can use the Summary tab to choose a different rule which applies for the whole of these days.

- Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.

- When you click on 'Add Public Holidays', the screen shown below pops up. You then have the option to choose a specific country and it will automatically add the holidays to your calendar.

- You can use the Summary tab to choose a different rule which applies for the whole of these days.

3.   All Lines

The All Lines Page provides access to details of all lines in the business group. To view all the lines in your business group click on All Lines.

All Lines can be filtered by All Lines can be filtered by **User Lines**, **Attendants** and **Group Access Lines**. You can also manage the phones in your Business Group and assign them to lines from the **Phones** page.
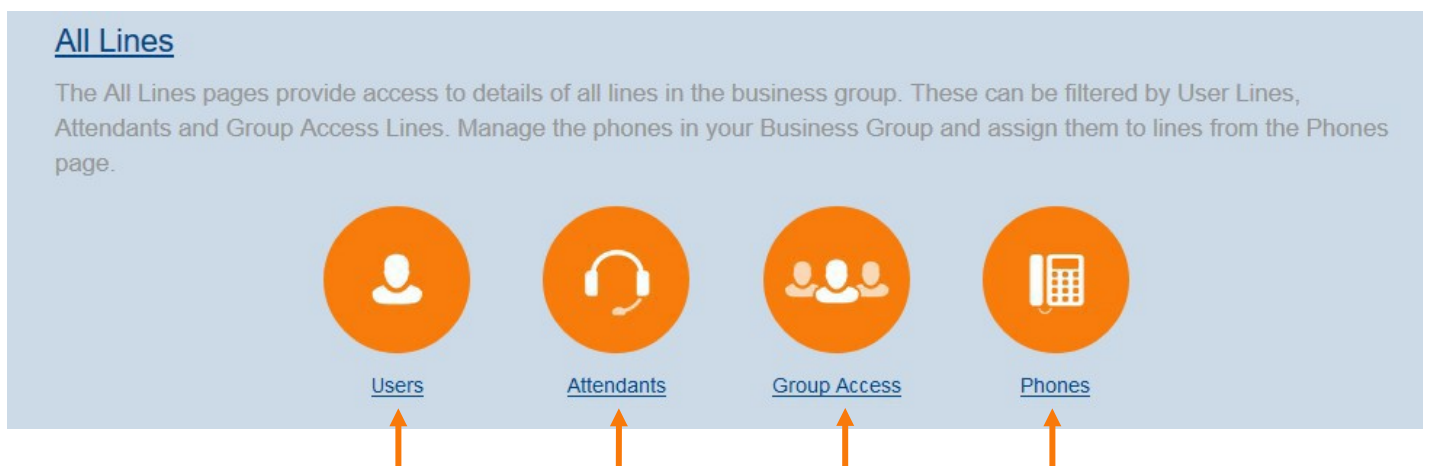
Once you are on the All Lines page you can search in the directory for Telephone Numbers, Extensions, Names or Departments and Download All Lines.

3.1   Users

The user page allows you to see each contact Telephone Number, Extension and Name. You can also use the search bar to explore Telephone Numbers, Extensions, Names or Departments.

If you click on actions, it allows you to View Individual Settings, Edit Personal Settings, Reset Lines and Unlock Accounts for each user.

3.1.1   View individual settings

When you click on individual settings it will allow you to view the user's details of the contact you selected. You will be able to see the contacts status for Forward, Do Not Disturb, and Follow Me. To manage the status click on Go to Call Manager.

You can also view/edit each of the users groups, call settings, message settings, and notifications.

Note: To find more information on Call manager and learn how to make changes to a user's call settings, message settings and notifications please visit our CommPortal User guide here:

3.1.2   Edit Personal Details

This is where you can edit the Name and Administration privileges of each contact.

3.1.3   Soft Reset

If a user has forgotten their password or cannot get into their account you can do a soft reset. To complete a soft reset do the following:

- First you will need to click on the user number from the user page.

- Next you will click on View Account Settings on the bottom right of the page.
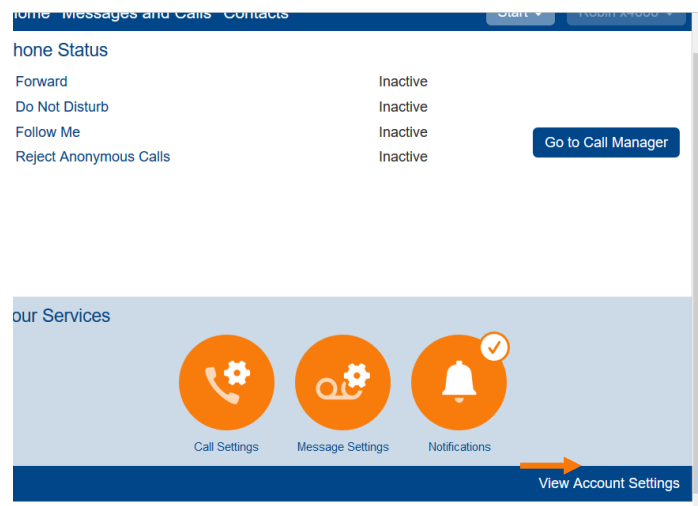
- You will then be able to change the user's password, change call services PIN, configure account email, or change voicemail PIN.
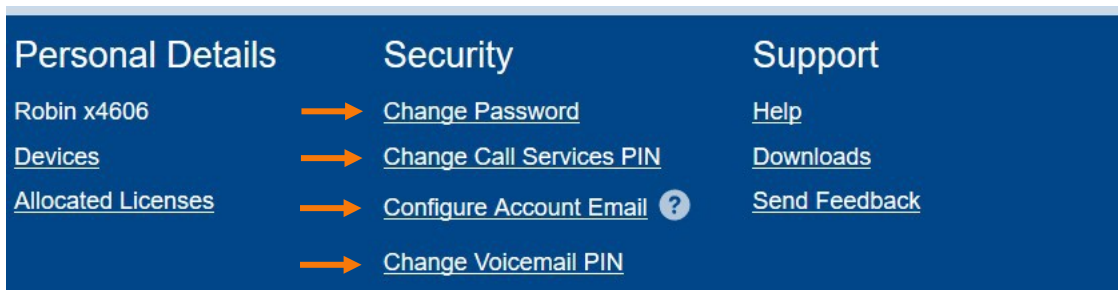
3.1.4   Hard Reset

Resetting a line will keep the phone number active but it wipes out all existing information such as saved messages and contacts. Please take extra care when performing this operation.

- When you click on Reset line a window will pop up and you will be asked for some new properties for the line:

- New account name: The server may reject some special characters and names that are too long or short.

After successfully resetting the account another popup will display the new user details, which may include the following:

o   Telephone Number
o   Account Name
o   Account Password
o   Voicemail PIN
o   Call Services PIN

New User Details

Telephone Number: (999) 999 1599
Account Name: new employee
Account Password: wC<+Sp9(#K<EW8`
Voicemail PIN: 93259591763807081674
Call Service PIN: 7104

OK
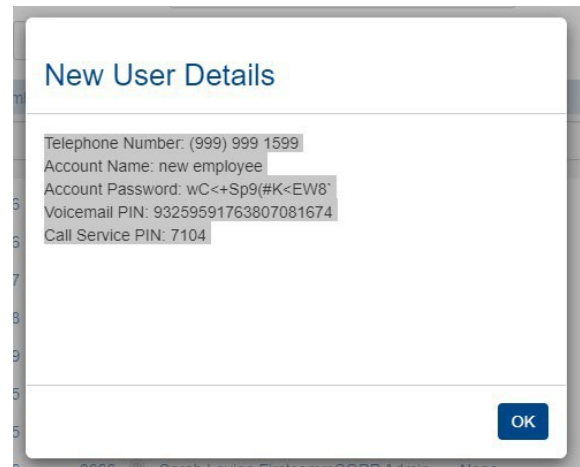
Note: These user details will be preselected and can be easily copied and pasted wherever required. The account name, password and PIN can be changed afterwards in the Settings page, via the "View individual settings" action.

3.1.5   Unlock Account:

This is where you can unlock accounts for each contact. If the account was not locked, nothing will happen.

3.2   Attendants

The Attendants page gives you an overview of all your attendants. You can use the search bar to explore Telephone Numbers, Extensions, Names or Departments.

If you click on actions it allows you to View Attendant Settings, Edit Personal Details, Reset Lines and Unlock Accounts for each attendant.

| Telephone Number	Ext.	Name	Department	
Search for...			in any field	View attendant settings
				Edit personal details
(330)_____	9895	FC Main Business Forward	None	Reset line
(630)_____		FC-Lab AA FirstcommCORP Admin	None	Unlock account

3.2.1   Easy Auto Attendant

If you click on View Attendant Settings it allows you to see the Line Status of your Attendants and Open Attendant Settings.

3.2.1.1   Line Status

The Line Status shows if the attendants line is currently on or off. You can easily switch it on or off by clicking the blue button.

3.2.1.2   Open Attendant Settings

When you click on Open Attendant Settings, you can view the Line Status Main Menu, make a Schedule, view Business Hours Menu, view Non-Business Hours Menu, and view Extensions.

- The **Main Menu** allows you to see if your Easy Attendant is on or off and you are able to switch to using a single menu.

- The **Schedule** tab allows you to define your business hours to play different menus to callers depending on the time of day.

- The **Business Hours Menu** tab allows you to assign functions to each key on the caller's phone and record an initial greeting. To change or listen to your recording click listen/change shown in green below.
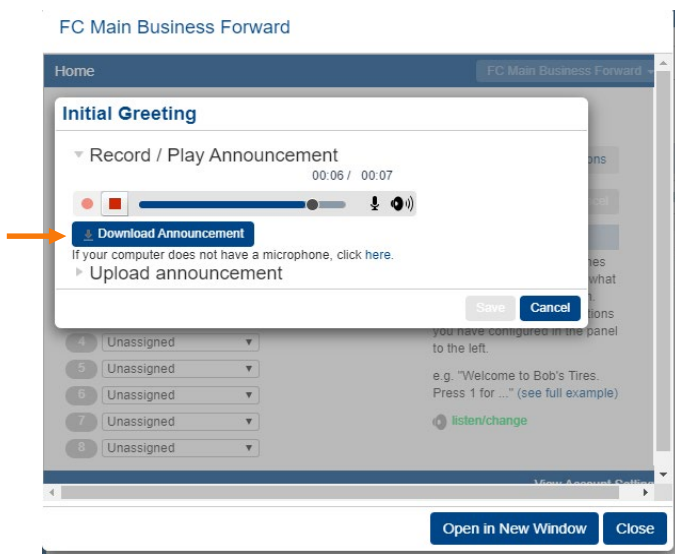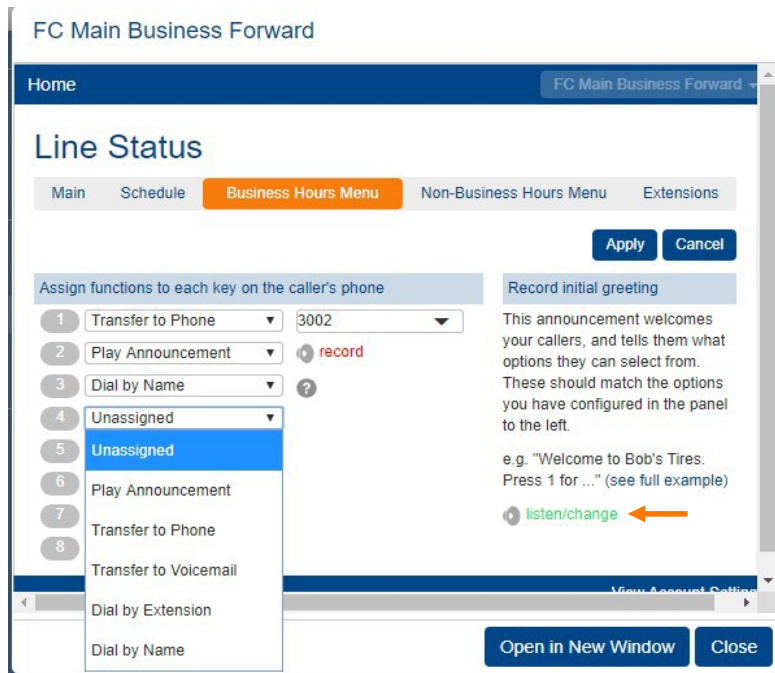
Once you click on listen/change the above window pops up. Here you can make a new recording by pressing ⬤ or stop the recording by pressing ⬛ Once you are happy with the recording you can press
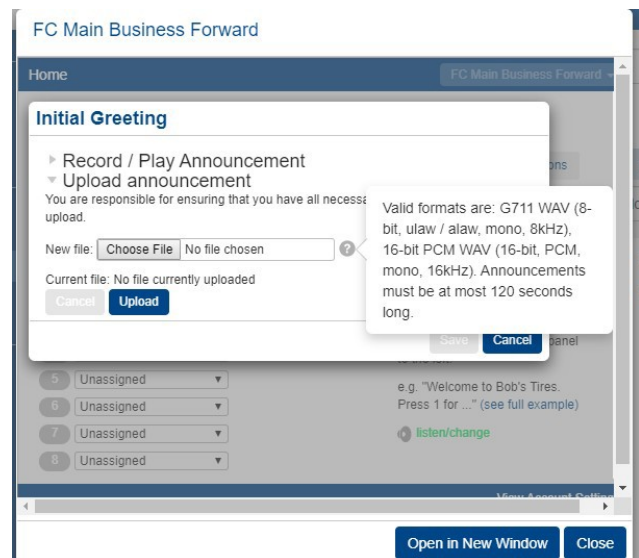
Once you have downloaded your recording and saved the file to your computer you can click Choose File to upload it. Once you have uploaded the file click save.

- The **Non-Business Hours Menu** tab allows you to assign functions to each key on the caller's phone and record an initial greeting for Non Business Hours. To change or listen to your recording follow the steps listed above under Business Hours Menu.

- The **Extensions** tab allows you view extensions, include all lines, exclude all lines, or dial by extension.

Note: New Business Group Extensions will be automatically included. Callers are allowed to dial by extension only after selecting "Dial by Extension" menu option.

3.2.2   Enhanced Auto Attendant

Enhanced Auto Attendant is an add on feature that provides an automatic call answering service and delivers an interactive menu to callers.
Note: This is an add-on feature. Not every Business Admin User has this feature.

3.2.2.1   View Enhanced Auto Attendant Settings

If you click on View Attendant Settings, it allows you to see the Line Status of your Enhanced Auto Attendant and Open Attendant Settings.

Note: Your Enhanced Auto Attendant should be labeled accordingly. To know if the attendant is Premium or not you will see which type of attendant it is under Line Status.

3.2.2.2   Enhanced Auto Attendant Line Status

The Line Status shows if the Enhanced Auto Attendant is currently on or off. You can easily switch it on or off by clicking the blue button.
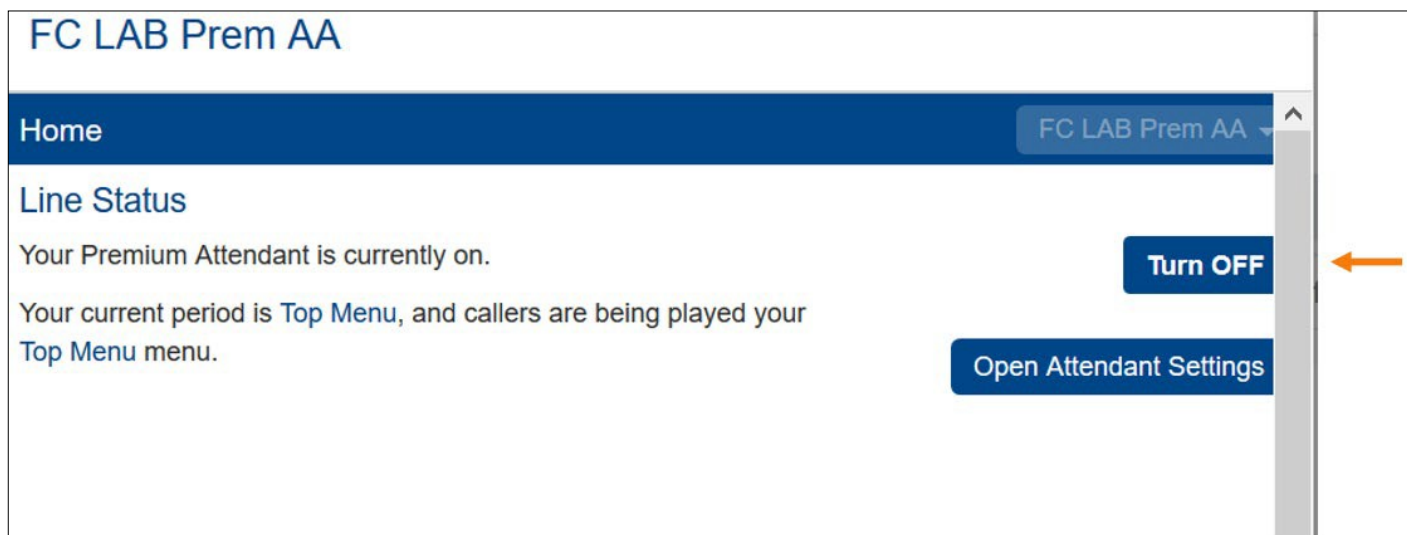
3.2.2.3   Open Enhanced Auto Attendant Settings

When you click on Open Attendant Settings, you can view the Enhanced Auto Attendants Main Menu, the Schedule, Sub Menus, Announcements, Extensions, and Advanced Features.
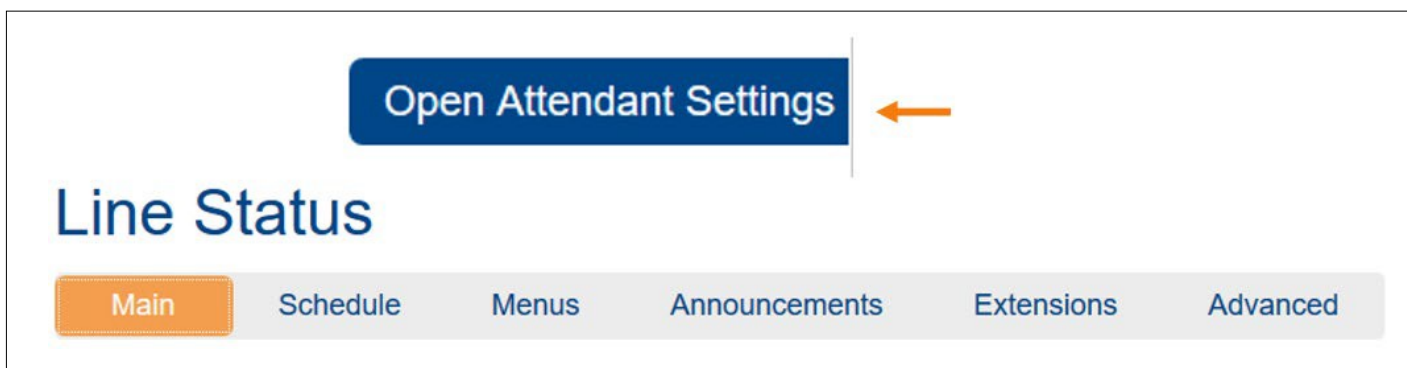
3.2.2.3.1   Main Menu

The **Main Menu** allows you to see the Activation Status of your Enhanced Auto Attendant and the Service Status. The Service Status shows you what menu your Enhanced Auto Attendants current period is in and which menu callers are being played to.

3.2.2.3.2   Schedule

The **Schedule** tab allows you to configure your weekly schedule and holidays, so that different menus can be played based on time and day. You have the option to Add New Period, Rename an existing one or Delete a period.

1. If you click on **Add New Period** a window will pop up and you will need to choose a name for the new period and click OK.
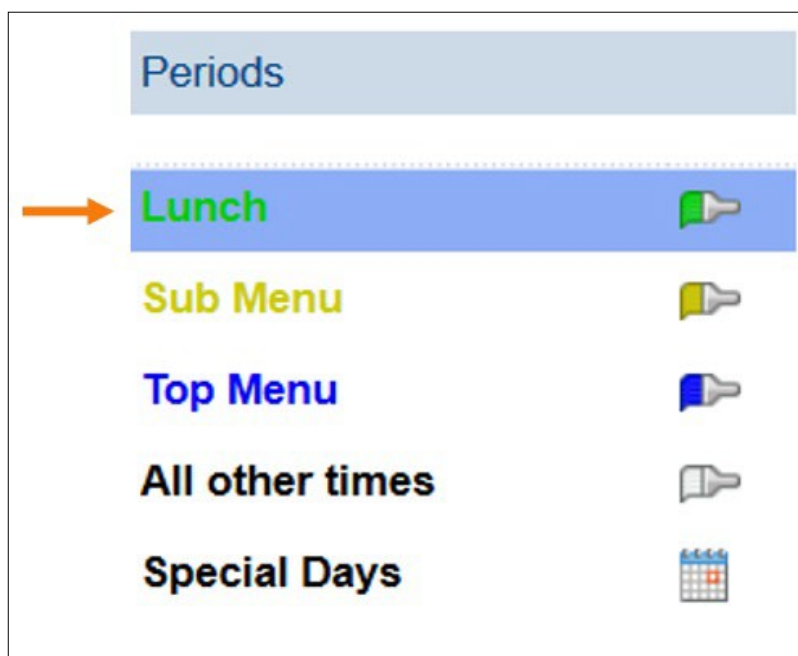

The new period name will be added to the Periods menu on the left side of your screen.

You will then need to choose which Menu you would like to connect to that period. To create a new menu click on the Menus tab.

Next you will need to click and drag your cursor over the allotted time you would like to schedule the new period.

Next, click Apply located in the top right corner to save these settings. Your new period is now configured to play a certain menu during a specific time.
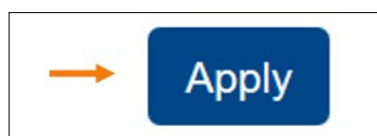
2. To **Rename** a period click on Rename, change the name and then click OK.

3. To **Delete** a period, click on the period you would like to delete, click the Delete button, and then confirm the delete by clicking OK.

4. To add a Menu to a Special Day click on Special days located in the Periods menu.
   Note: Special Days are exceptions to your normal weekly schedule. You can add public holidays, vacations or business trips under Special Days.

To choose a Special Day, click on a date on the calendar. You can also click and drag to change several days at once.

When you click on Add Public Holidays, the screen shown below pops up. This is where you have the option to choose which specific country and will automatically add the holidays to your calendar.

Select which public holidays to add to your Special Days.

01. US Public Holidays 2019

02. US Public Holidays 2020

03. English and Welsh Public Holidays 2019

04. English and Welsh Public Holidays 2020

05. Northern Irish Public Holidays 2019

06. Northern Irish Public Holidays 2020

07. Scottish Public Holidays 2019

08. Scottish Public Holidays 2020

09. Canadian Public Holidays 2019

10. Canadian Public Holidays 2020

OK   Cancel

Once you have selected a date, click on the drop down menu to select which menu you would like to configure to that specific date. Click Apply to save these settings.

During **this period**, use this menu: Top Menu

Menus

The **Menus** tab defines the menus that your callers will be offered, and the actions they can choose from. You can add a new menu, delete a menu, and search from existing menus.

Line Status

Main   Schedule   Menus   Announcements   Extensions   Advanced

1. To add a new menu click on **Add New Menu**.

Add New Menu   Delete

After you click on Add New Menu, you will now be able to configure a new menu. There are four different tabs to change the settings of your new menu or an existing menu. These tabs consist of General, Keys, Timeout and References.
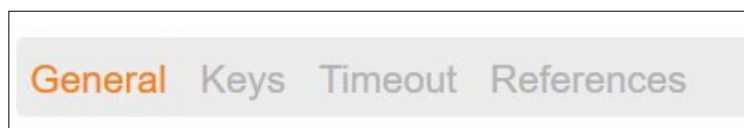
The **General** tab allows you to name your new menu, add a description and select the menu announcement. You can select a preexisting announcement or create a new one.

The **Keys** tab allows you to configure each key within the menu for your callers. For example, Key 1 (if configured) can transfer to a phone, voicemail, or other options. You can also leave the key set to default and it will not do anything for the caller.

The **Timeout** tab allows you to override timeout behavior by checking the box and then selecting the set timeout duration in seconds.

You also have the option to select which action to take after the timeout occurs by clicking on the drop-down menu.

The **References** tab shows you which period is referenced to the specific menu. You can reference a menu by going back into the schedule tab and assigning a period to the menu.

After you have completed configuring a new menu click **Apply** located in the top right corner to save the settings.

Once you have clicked Apply your new menu will be shown under Menus.
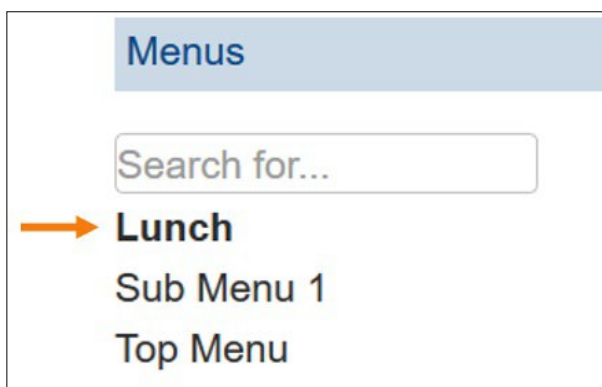
To **Delete** a menu click on the Delete button and confirm the Delete by clicking OK.

Note: If you are unable to delete the menu due to it being used by a period in schedule, go back and disconnect them in the schedule.
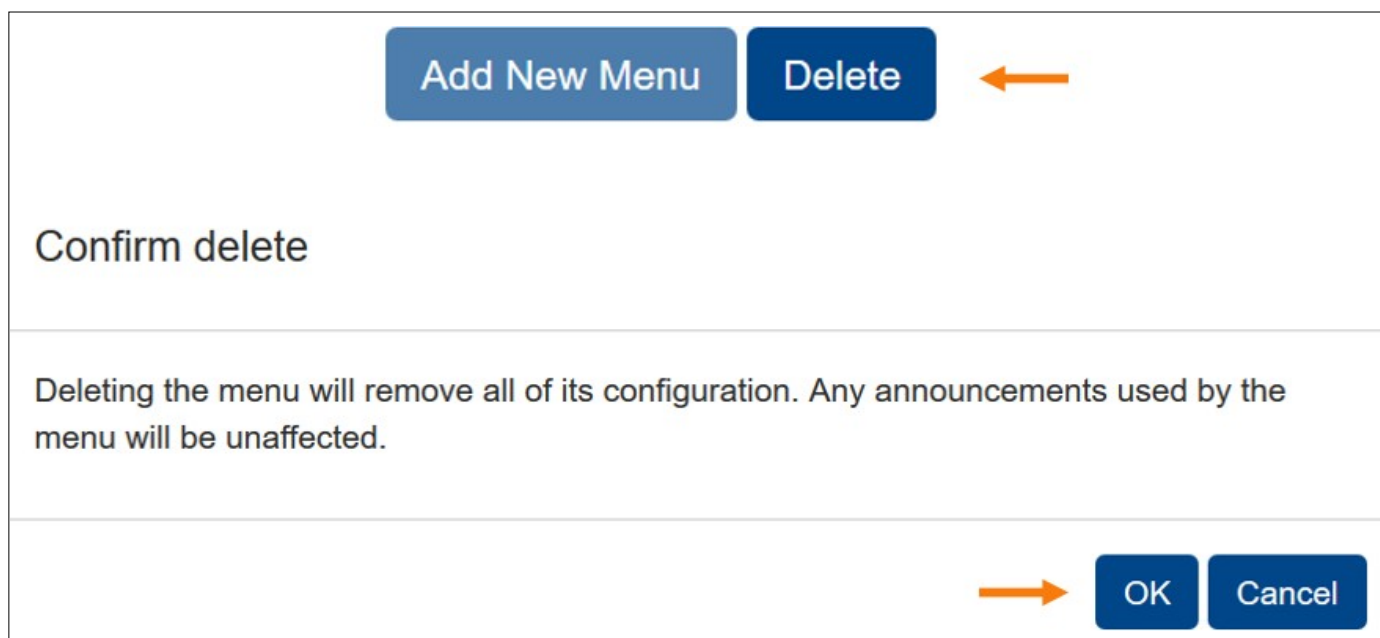
3.2.2.3.4   Announcements

The **Announcements** tab allows you to record the announcements your caller will hear. You can add a new announcement, delete an existing one or download recording report.
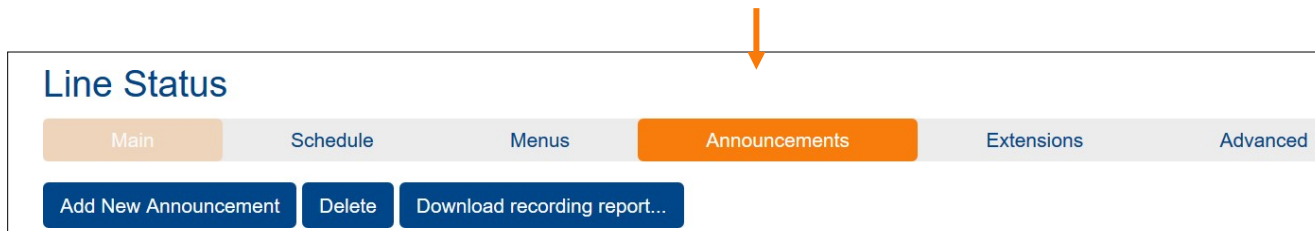
To add a new announcement, click on **Add New Announcement**.

A window will pop up to add an announcement. To record an announcement and use your computers microphone you will have to allow it.
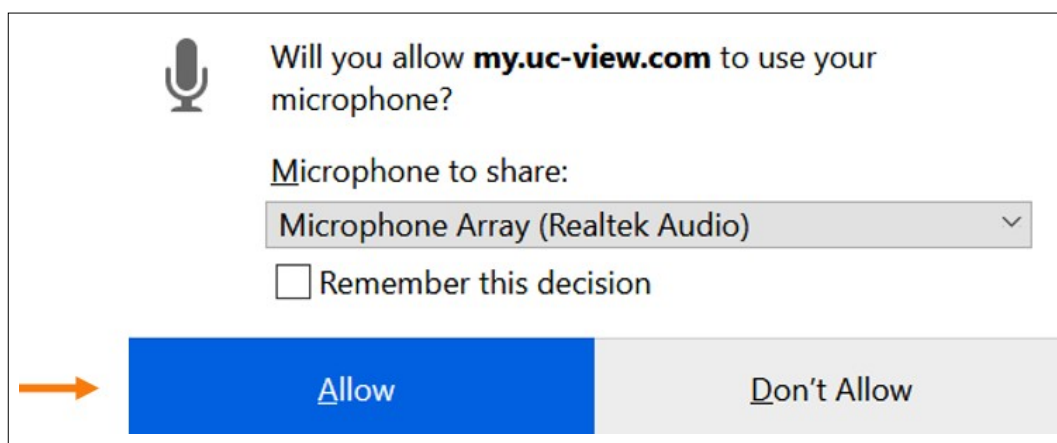
You then will be able to name your new announcement; add a description and select the action you would like to choose in the drop-down menu. The drop-down menu allows you to record a new announcement and play it, upload an already recorded announcement or record by phone.

To record a new announcement, select the action Record/Play Announcement and click the red record button. Once you have completed your recording hit the red square button to stop the recording.
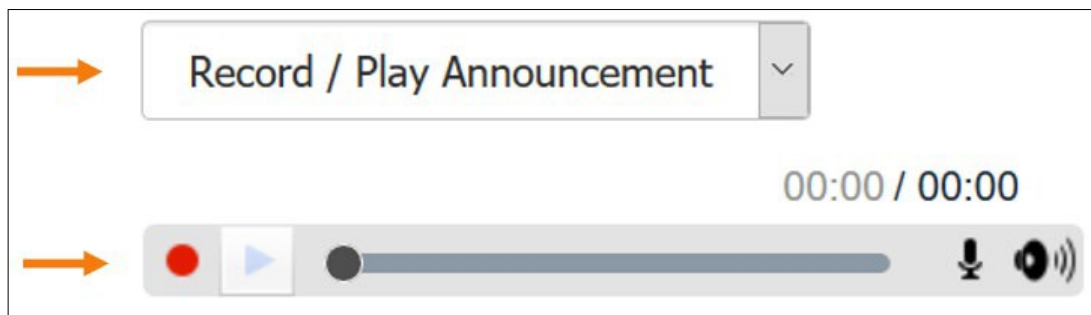
You can then press the blue triangle button to play the recording back.
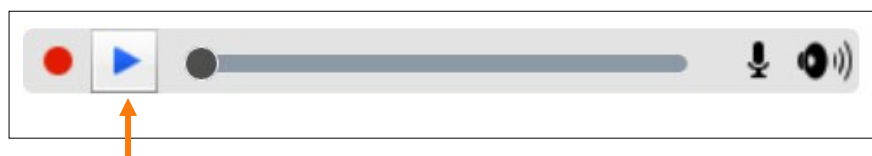
If you are satisfied with your announcement name, description and recording, click Add.

Once you click Add your new announcement will be displayed in the announcement menu.

To Delete an announcement, click the box next to the announcement you would like to remove and then click the Delete button located above the menu.

You can download a CSV format report with detail of all of your recordings by clicking the **Download recording report** button.

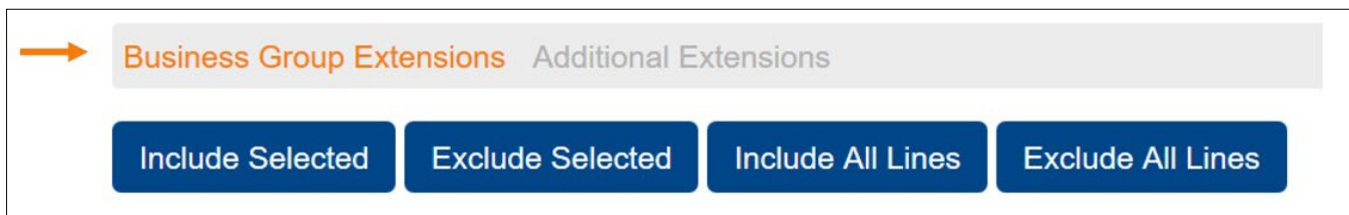### 3.2.2.3.5   Extensions

The Extensions tab allows you to manage the extensions your caller can transfer to. You can view and manage all of your Business Group Extensions or add Additional Extensions.
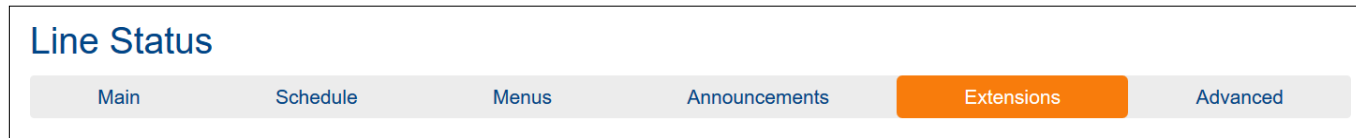
Under Business Group Extensions you have the option to include a Selected Extension, Exclude a Selected Extension, Include All Lines or Exclude All Lines.


1.   To include a selected extensions select the extension you would like to include by checking the box. Then hit Include Selected.

2.   To exclude an extension, select the extension you would like to exclude by checking the box. Then hit Exclude Selected.
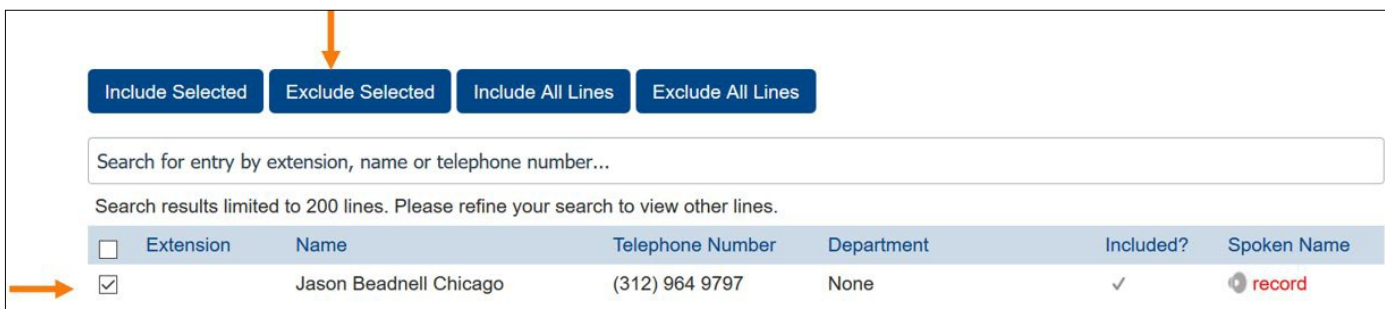
3.   If you would like to include all of your business group extensions hit the Include All Lines button. This action will affect all the lines in your Business Group.
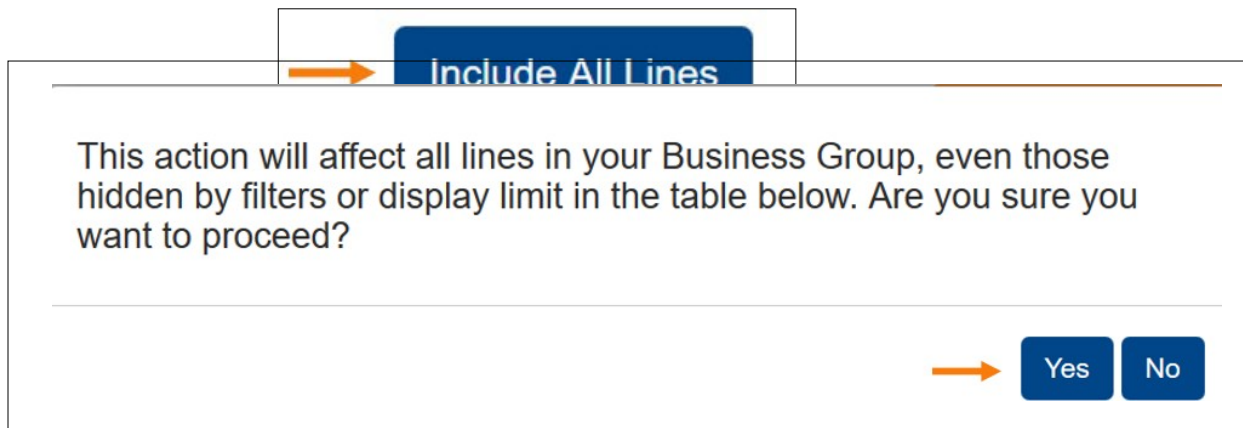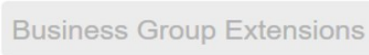

The below window will pop up and you will need to click the Yes button if you wish to proceed. If you select Yes all of your Business Group Extensions will now be included.

4.   If you would like to exclude all of your business group extensions hit the Exclude All Lines button. This action will affect all the lines in your Business Group.

The below window will pop up and you will need to click the Yes button if you wish to proceed. If you select Yes all of your Business Group Extensions will now be excluded.

Then click on Add Extensions. The below window will pop up and you will need to insert an Extension (between 1 and 7 digits), enter a First Name, enter a Last Name, and enter a Telephone Number. You also have the option to Record a Spoken Name or Upload a Spoken Name.

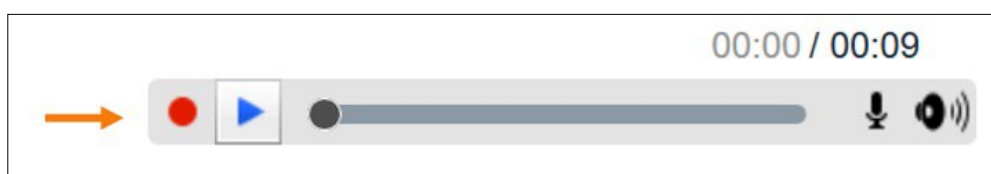If you would like to record a spoken name you will need to click on Record Spoken Name and allow your computers microphone to be used.
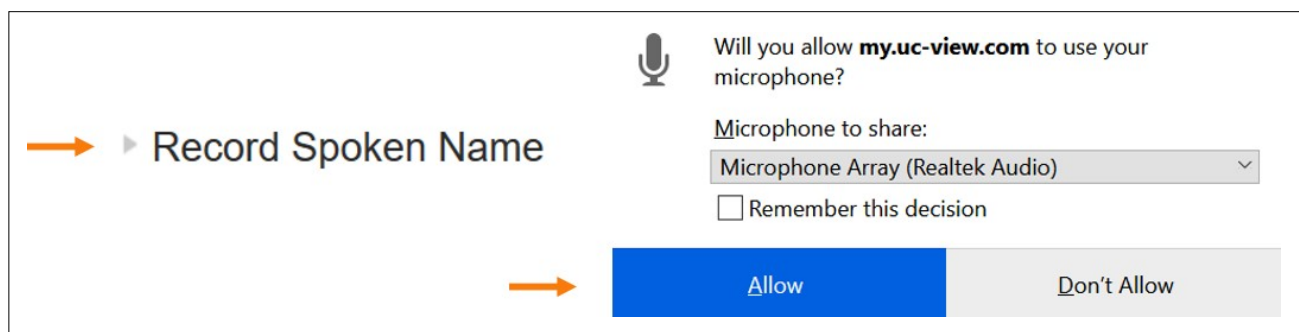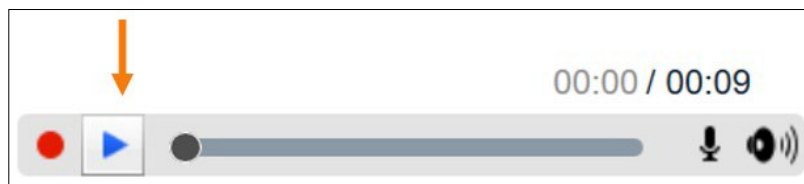
Once you allow your computers microphone to be used hit the red circle button to record the name. To stop recording hit the red square.
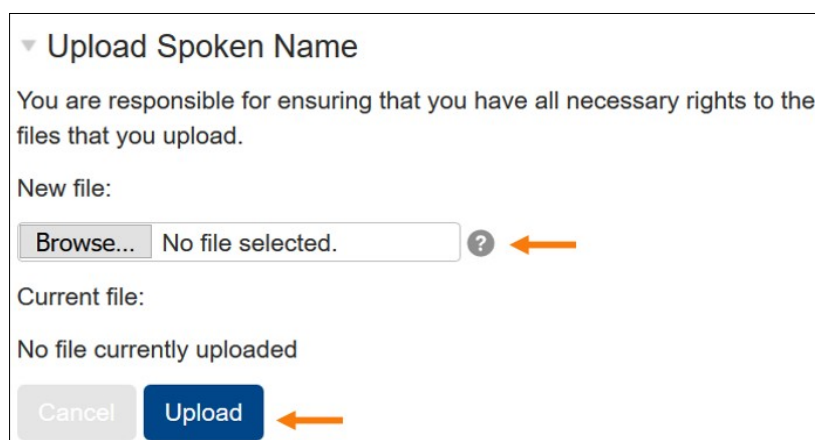

To listen to your recording press the blue triangle button.

If you are satisfied with your recording, click Add.

If you would like to upload a prerecorded name, click Upload Spoken Name. Then browse for the file and click upload.

Once you are satisfied with the spoken name and extension credentials click Add to add your new

extension.

Once you have added the new extension it will be shown in the Additional Extensions Menu.

To delete an extension from the Additional Extensions page select the extension you would like to remove by checking the box, then hit Delete Selected.

3.2.2.3.6   Advanced

The **Advanced** tab allows you to configure the advanced settings that apply across all of your menus. The advance tab allows you to edit Default Keys, Error handling, and change other settings.

1. The **Default keys** page allows you to configure default actions for each key that a caller can press.

Note: These actions will be available to callers in all menus unless you assign an alternative action to the key in the per menu configuration.

Once you are done configuring the default actions for each key click Apply located in the top right corner to save these settings.

The **Error handling** page allows you to edit the settings for Timeout, Unknown Input, Call Transfer and Invalid Extension across all of your menus.

After you have finished adjusting these settings click Apply located in the top right corner to save these settings.

The **Other settings** page allows you to select if you would like First and Last names, just First names, or just Last names to match against configured extensions based on when a caller dials the name of an extension or mailbox they wish to transfer to.

You can also insert the voicemail account where you would like the intercept mailbox action to direct your callers to.

Once you have adjusted these settings click Apply located in the top right corner to save these settings.

3.3   Phones

The phone page allows you to assign phones to lines using the table below or manage your phone profiles.

3.3.1   Device Manager

You can customize your phone's line key settings such as Speed Dials, Enhanced Call Monitoring "BLF", Enhanced Call Park "Orbits" and Intercom/PTT. Features are available based on your phone make and model.

To configure your phone click on "*manage your phone profiles*" link to manage your phone profiles for all phones in the Business Group.

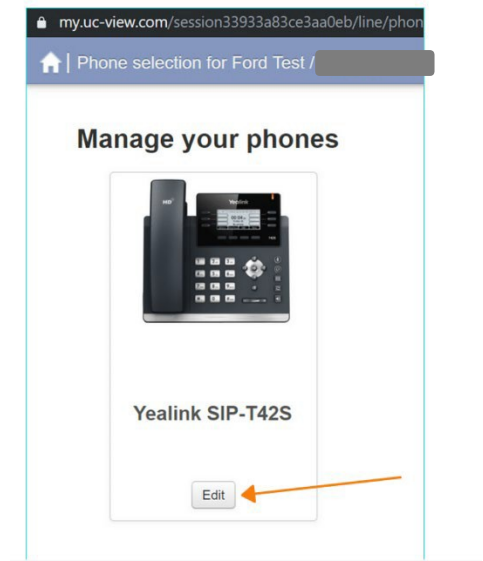To configure a phone for an individual user click on Actions then Configure Phone.

- A new window pops up as shown below. Click on 'Edit' to edit phone key settings.
(Note – Phone information may differ based on the phone you have).

- Once you click on Edit you can change the settings for your line keys as shown below (phone settings may appear differently based on the type of phone you have):

3.3.2   Speed Dial (Configure Phone Line Keys)

1.   To set setup speed dials on phone keys, choose the user, click on Actions, then click on configure phone.
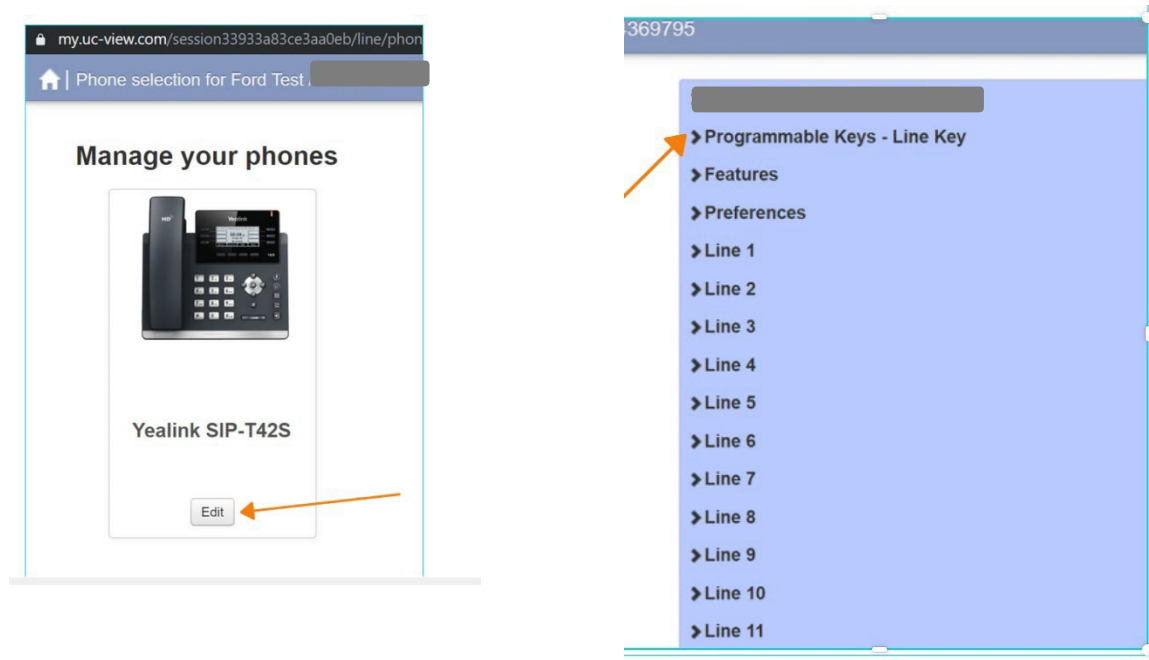
2. A new window pops up as shown below. Click on "Edit" to edit phone key settings and select "Programmable Keys- Soft Key". (Note- Phone information may differ based on the phone you have).

3. Choose the key you want to edit, select "Speed Dial" from the list of options as shown below:
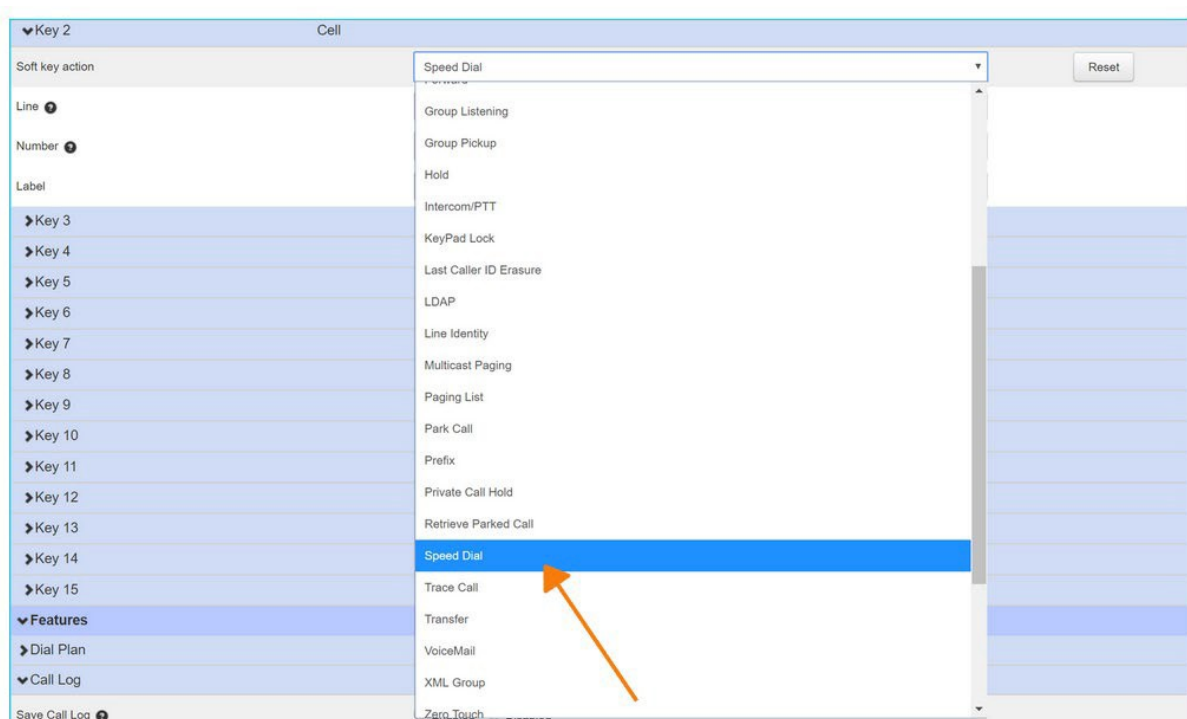
4. Add the phone number you want to be set as speed dial, assign a label to be displayed on phone and hit save changes.
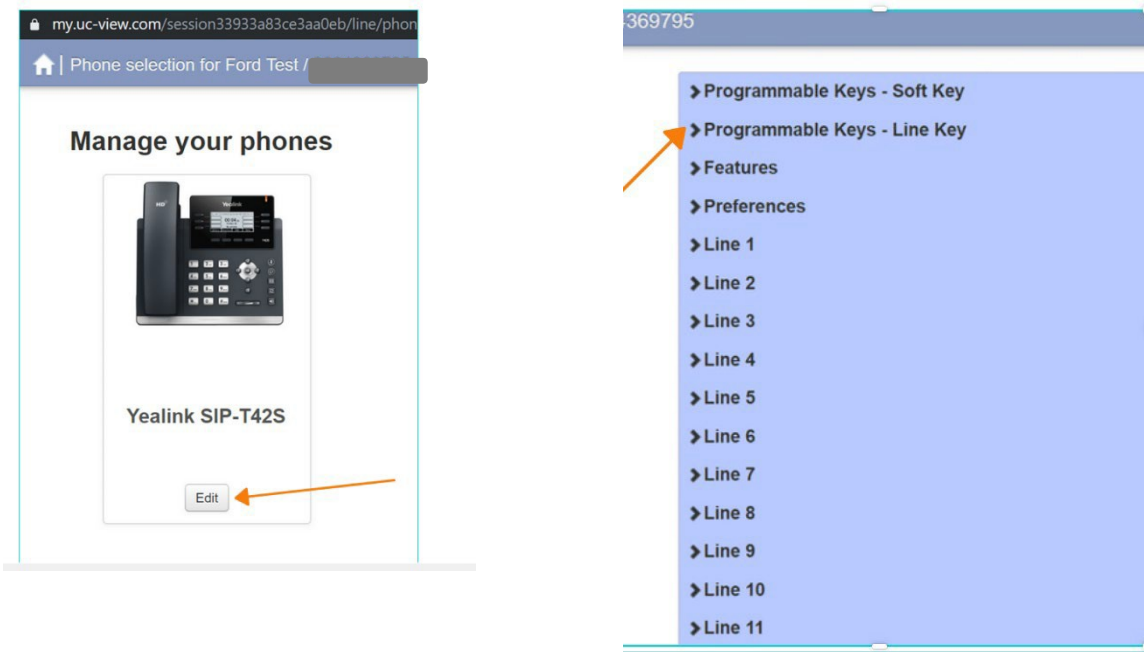

5. Configuration settings will be instantly updated the user's phone.

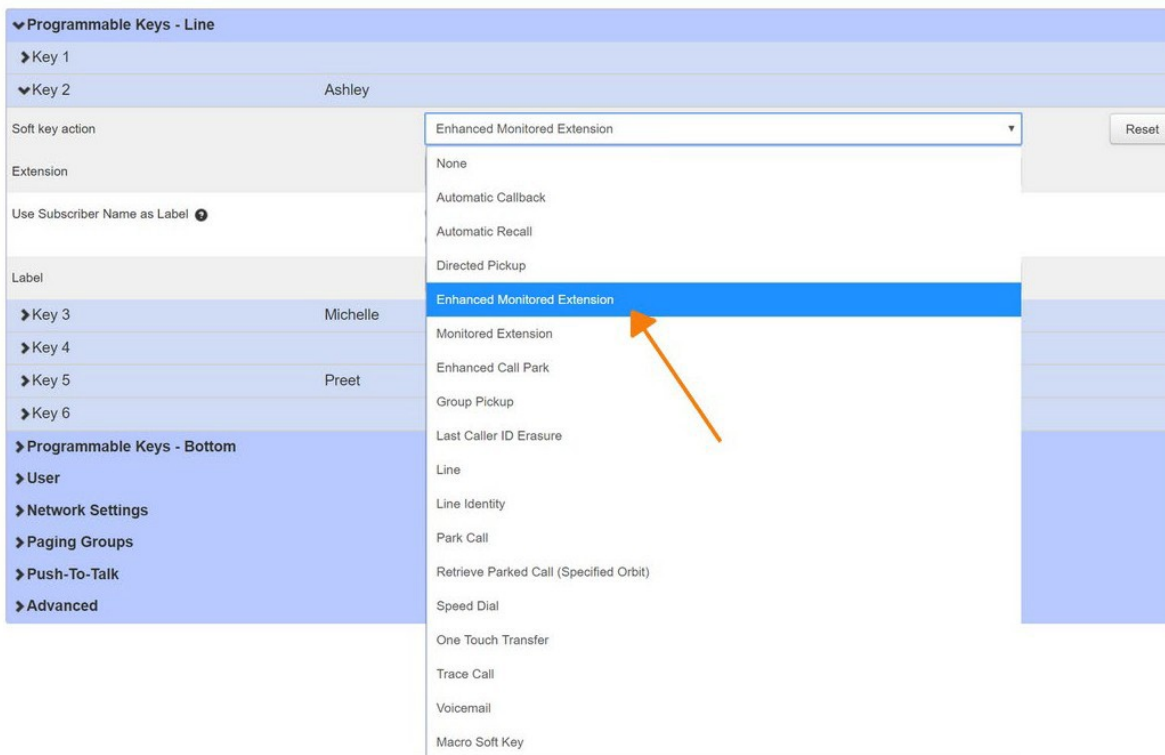### 3.3 3   Enhanced Monitored Extension (Busy Lamp Field BLF)

1. To setup monitored extensions on phone keys choose the user, click on Actions, then click on configure phone.

2. A new window pops up as shown below. Click on "Edit" to edit phone key settings and select "Programmable Keys- Soft Key" (Note- Phone information may differ based on the phone you have).

3. Select "Enhanced Monitored Extensions" from the list of options as shown below:

4. Add phone extension, choose label options and hit "Save changes"

5. Configuration settings will be instantly updated the user's phone.

3.3.4 Enhanced Call Park (Orbital Call Parking)

1. To setup Enhanced Call Park on phone keys choose the user, click on Actions, then click on configure phone.
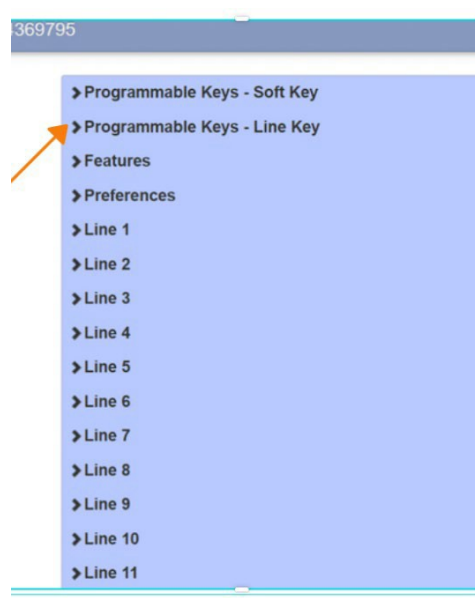
2. A new window pops up as shown below. Click on "Edit" to edit phone key settings and select "Programmable Keys- Line Key" (Note- Phone information may differ based on the phone you have).

3. Select "Enhanced Call Park" from the list of options as shown below:
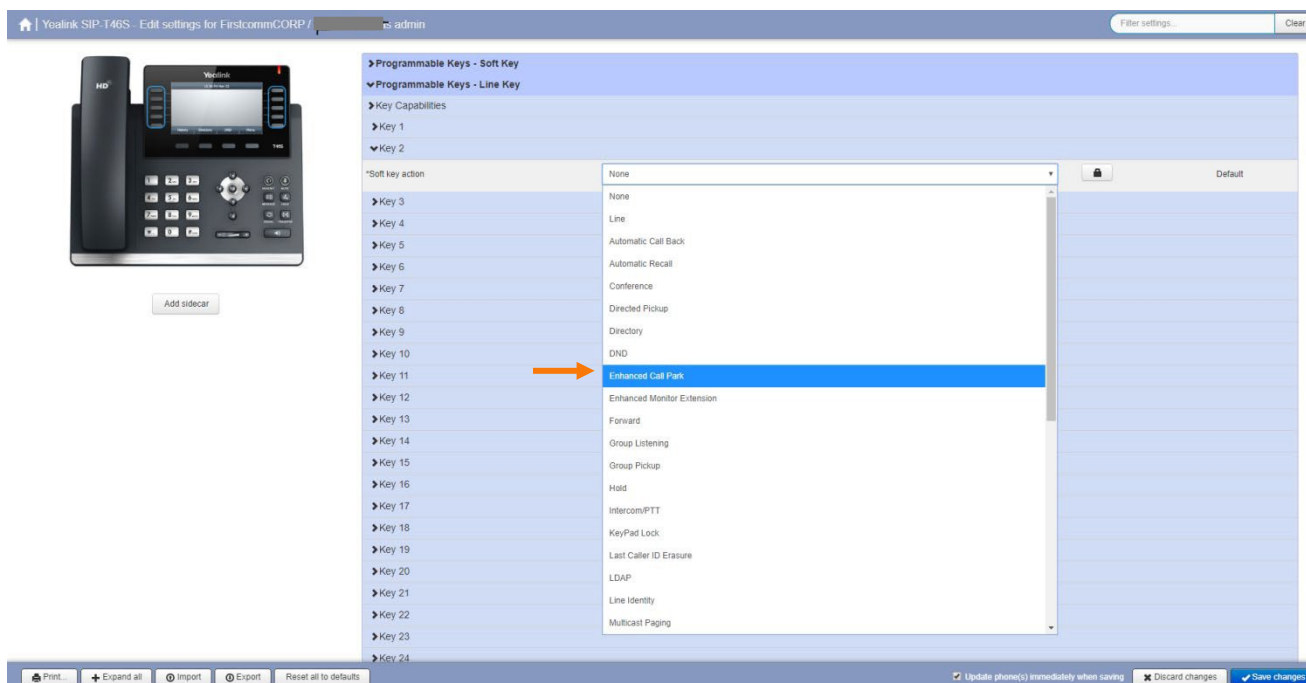
4. Add the park orbit, choose label options, and click "Save Changes"
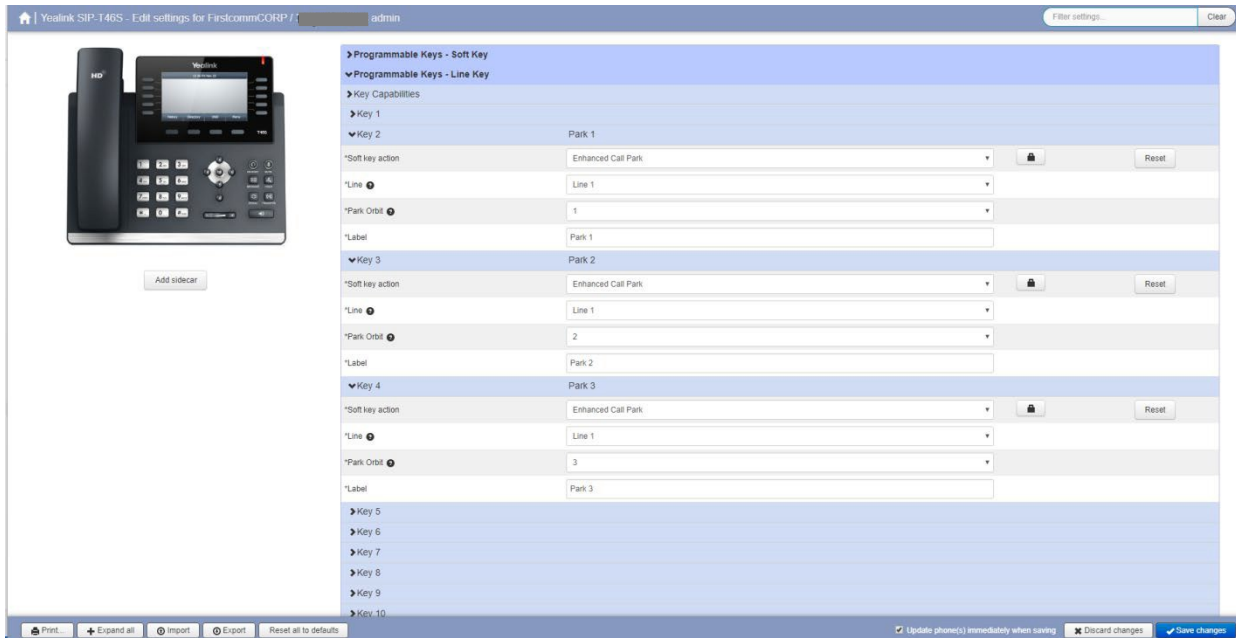

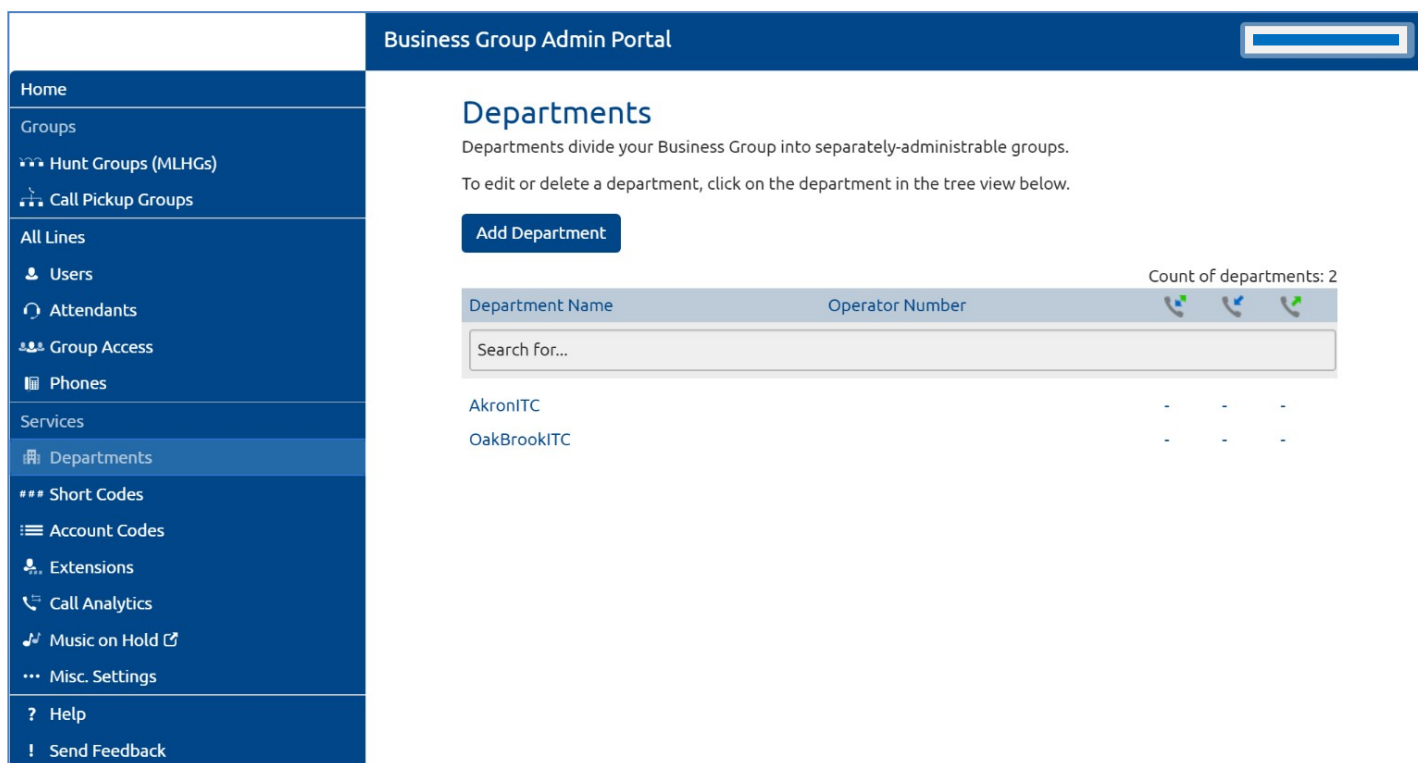5. Configuration settings will be instantly updated the user's phone.

4. Departments

Departments divide your Business group into separately-administrable groups. Business Group administrators can optionally be restricted so that they only have privileges to administer lines within a given Department (and its sub-departments). Departments may be divided into sub- departments.

Lines, Attendants, Groups, Phones or Short Codes can all be placed into a department (or in the top-level Business Group-wide department) and moved between departments in the pages relating to each of those items.

Department Configuration

Each row in the table shows the Department name and call limits.   ⊞ Departments
Department names are indented to show their hierarchy.

*When deleting a Department, ensure that the Department is empty of Lines, Phones, Call Pickup Groups, Short Codes and other Departments - Departments can't be deleted unless they are empty. Lines, Phones, Groups or Short Codes, can be deleted or moved into other Departments. Sub departments must be deleted.

To Add a Department:

1.   Click "Add Department".
2.   Enter the name for the new Department.
3.   Click "Add".

To modify an existing Department:

1.   Click department name you wish to modify.
2.   Modify the name or operator number (if any).
3.   Click "Apply".

5. Short Codes

Short codes are group-wide speed dials that may be used from any of your group's phones to access an internal or external phone number or access code.

To view the short codes in your group, click on the Short Codes link in the pane to the left of your administrator screen.

Short Codes may be either a single code or a range of codes. The telephone number or service access code that the Short Code maps to may be blank if not assigned yet. *Please note that short codes may not conflict with your current extensions, access codes, 911, or 411. They may include the # sign and be 1-7 characters in length.

To add a new short code, click on "Add":

1. Enter the Short Code number to be assigned.
2. Select if it Maps to "Telephone number" or "Service Access Code"
3. Enter the telephone number or service access code the Short Code should dial when accessed.
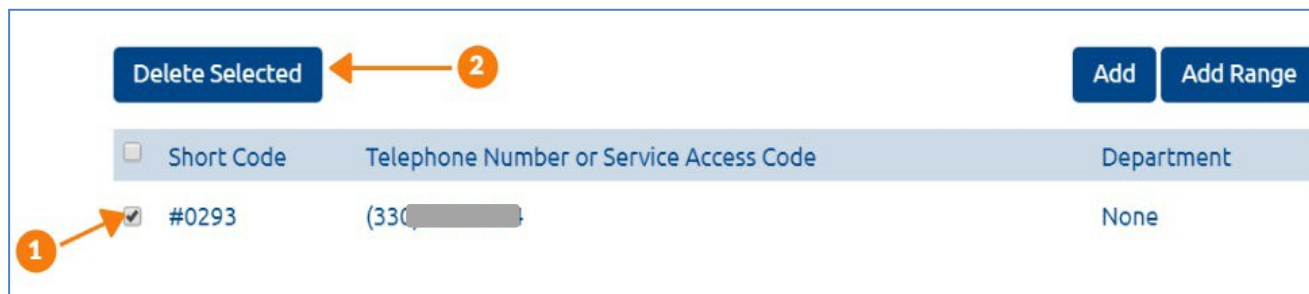4. Select "Department"
5. Click "Add"

To delete a short code:

1.   Select the code to remove using the check box to the left of the Short Code
2.   Click "Delete Selected"

To modify an existing short code:

1.   Click either the Short Code or telephone number for the code
2.   Modify the details in the popup window
3.   Click "Save"

6. Account Codes

Account Codes, when active, place limits on outbound dialing. Putting these into place may be done on the group or the individual level. To view the group Account Codes, click the Account Codes link in the pane to the left of your administrator screen. Changes in this view will be active for all phones in your group unless a particular exception has been placed on a user's line.

6.1   Modifying Call Types Requiring Account Codes

Use the check boxes to specify which types of calls will require Account Codes.

A box that is check marked will require an account code if this service is activated. Any changes you make should be followed by clicking the "Apply" button.

·   **International** – Whether account codes are required for calling international numbers.
·   **Local** – Whether account codes are required for local calls.
·   **Premium Rate** –Whether account codes are required for premium rate (1-900 number) calls.
·   **Regional** – Whether account codes are required for regional calls.
·   **National** – Whether account codes are required for long distance calls.
·   **Operator** – Whether account codes are required for operator calls.
·   **Directory** – Whether account codes are required for directory (411) calls.
·   **Carrier Dialed** – Whether account codes are required to make calls when dialing a carrier code (such as 1010000).
·   **Local Business Group** – Whether calls to other numbers within your business required account codes if they are local calls.
·   **Other Business Group** – Whether calls to other numbers within your business require account codes if they are not local calls.

6.2   Validated or Invalidated Account Codes

You can also choose whether you require your account codes to be validated or not. This service cannot be enabled or disabled at a global level. It is enabled or disabled per outbound call type by configuring which types of outbound calls you wish to log account codes for.

Validated:

If account codes are validated then you define a set of permitted account codes, and you must dial a code from this list whenever you place an outbound call (if it is a type you have specified you wish to log account codes for). If you dial an account code that does not match one of this list more than a configured number of times, then your account will be blocked, and will need to be unblocked before you can place any more calls that require account codes.

Not Validated:

If account codes are not validated, then you do not preconfigure a set of permitted account codes. When you place an outbound call (of a type you have specified you wish to log account codes for) you may dial any code of your choice.

You must configure the following information to use this service.

1. Call types requiring an account code. Select the checkboxes for the call types that you wish to log account codes for. If you select a call type, then whenever you place a call of this type you will be required to enter an account code. If you do not select a call type then you cannot log account codes when placing this type of call.
2. Account code length – set the default length of account codes
3. Use validated account codes.

Example: To set "0011" as a validated account code for all International calls on a group level please follow below steps:

1. Select ☑ "International" from list of call types requiring account code
2. Select ☑ "Use validated account codes"
3. Enter length of account code
4. Click "Edit List"
5. Add account code number e.g. in this case "0011"
6. Add description to define account code number e.g. in this case "International"
7. Click "Add" to add account code and description to the list
8. Hit "OK" to save
9. Click "Apply"

- To remove an account code, click on the icon ✖ to the right of the account code.
- To change the description of an account code, remove it then re-add it with the new description, click "Add", "OK" and hit "Apply".

6.3.   Blocking Access after Incorrect Account Codes

If you are using validated account codes, a user's phone line will be blocked after an incorrect account code is entered too many times in succession for security purposes.

To change the number of incorrect entries the user is allowed:

1. In the Account Codes section, enter the desired value in the" Max incorrect attempts before account is blocked" field.
2. Click Apply.

6.4.   Setting Individual Line Properties

To specify whether various settings can also be specified for each line in your business uniquely, perform one of the following:

1. To allow which types of calls require account codes to be changed for each line, check "Call types may be overridden per line".

2. To allow the length of the account codes to be changed for each line, check "Account code length may be overridden per line".
3. To allow individuals to view the account codes that you have defined for the whole business in their individual Portals, check "Lines may view business group account codes".
4. To set whether each line should be able to view, change, or both view and change their own account codes via their individual CommPortal, select the appropriate option form the dropdown list at the bottom of the Account Code Options section.
5. If you want to configure codes on a per line basis, you may do so my logging into the user's personal account via your administrator Portal.
6. Once you have made all of your changes, click the Apply button to save them.

7.   Extensions

Extension allows users to quickly dial another number within the Business Group, without having to dial the full telephone number.
Additionally, to call or transfer straight to voicemail, dial *55 followed by the extension.

To view the Extensions, click the Extensions link in the pane to the left of your administrator screen.
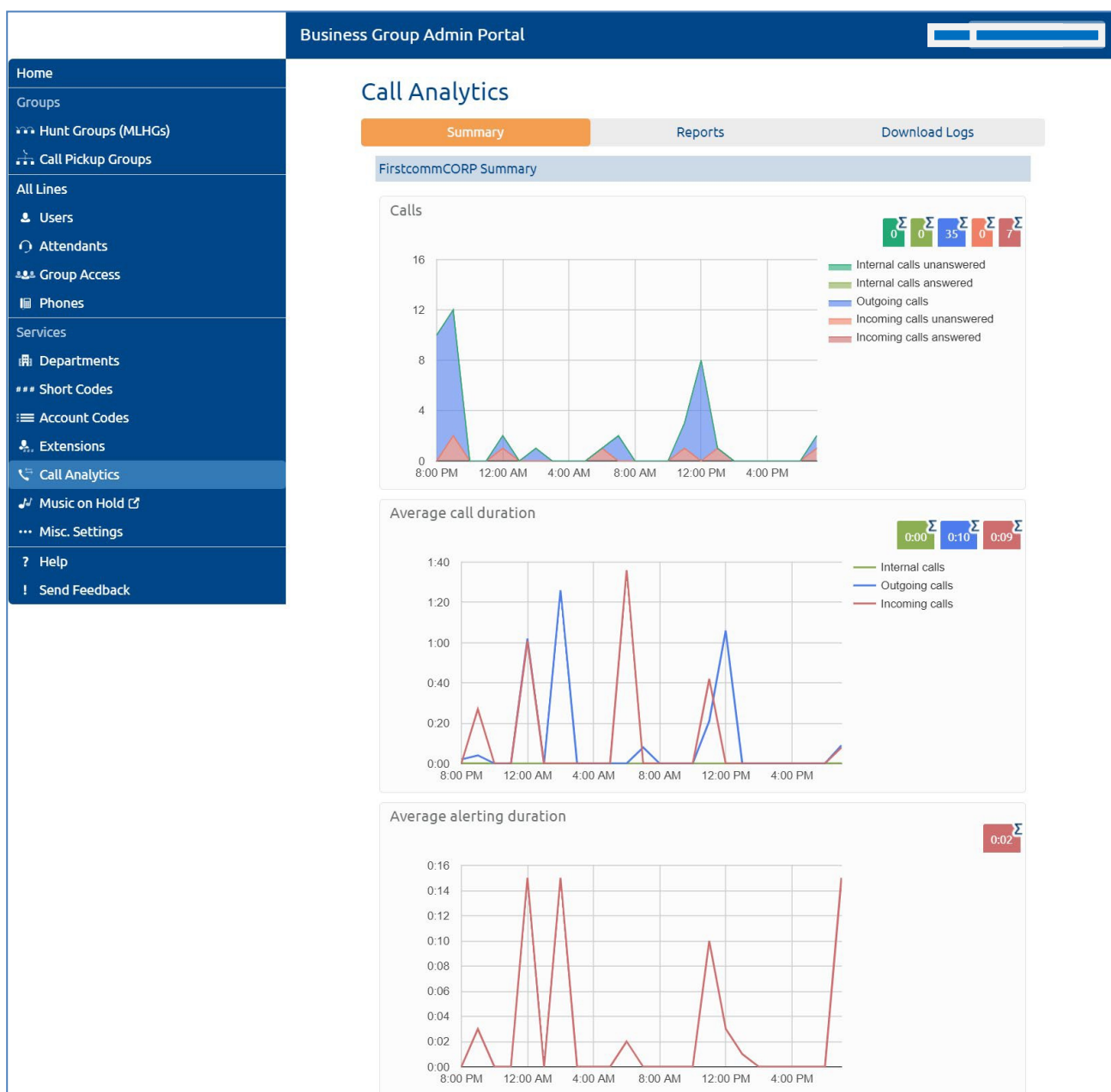
8.   Call Analytics

The Call Analytics page allows you to visualize call activity in your Business Group. Call activity data is provided in three ways: summary graphs, reports and call logs.

Summary:

This tab shows a few summary graphs with call activity for the past 24 hours. The summary graphs cover all the departments you administer.

<u>Reports:</u>

Reports provide a way to visualize call activity more easily than via Raw Call Logs. There are several different report types for analyzing call activity from different angles.

- To view and edit scheduled reports, click the Manage Reports button.

- To generate new reports, or just view a report in your browser, click the New Report button.

- To schedule reports daily or weekly, click on New Reports:

1. Select "Schedule" – Daily or Weekly.
2. Select "Start of the Day" and "End of the Day" time you want call analytics report.
3. Add "Report Title".
4. Select "Report Scope" – ACD or BG.
5. Select "Report type".
6. Select "Department" (if any).
7. Select "Account Code" if you want to pull report specifically for particular account code (if any).
8. Add email address of the recipient.
9. Click the "Update Report" button.
10. Hit "Save".

<u>Download Logs:</u>

- The Download Logs tab allows you to download a report of all calls made to or from lines in your Business Group or a particular department.
- Once you have downloaded the report, you can open it in a spreadsheet application such as Microsoft Excel. The report includes the following fields:
- Date and time that the call was made.
- Whether the call was between two lines in your Business Group, from an external line into your Business Group or from a line in your Business Group to an external line.
- The calling number, and its extension and department if applicable.
- The called number, and its extension and department if applicable.
- Whether the call was answered.
- The length of the call.
- How long the caller was waiting for the call to be answered.
- Any account and carrier codes that were dialed to make the call.
- Note that if you filter on department and your department was recently renamed, you will only see calls that were made since the renaming.

9.   Music On Hold

Music on hold is an audio file that is played while your callers are on hold, parked, or queued in a call center. To access this section, click the Music On Hold section in the left pane of the administrator portal.

Adding a Recording

To add your own recording:

1. Click on the Resources tab in the music on hold section then scroll to the bottom of the page.
2. Enter an ID for this recording in the ID text box. This ID must be between 10 and 99.
3. Enter a description for this recording in the Description text box.
4. Click on Browse and select the recording you wish to upload. You can upload recordings to the system in either WAV or MP3 format.
5. Click on Add.

Depending on the size of the recording you are uploading, this process may take a few minutes.

Modifying a Recording

To change the description of a recording:

1. Click on the Resources tab in the music on hold section then scroll to the recording you want to modify.
2. Click on the Edit button to the right of the recording.
3. Edit the description field.
4. Click Save.

To change the volume at which a recording will play:

1. Click on the Resources tab in the music on hold section then scroll to the recording you would like to modify.
2. Click on the Edit button to the right of the recording.
3. Select a new Gain value from the drop down list.
4. Select 0 to play the recording at its original volume.
5. Select +1, +2, or +3 to play the recording louder, with +3 being the loudest.
6. Select -1, -2, or -3 to play the recording quieter, with +3 being the quietest.
7. Click Save.

To remove a recording:

1. Click on the Resources tab in the music on hold section then scroll to the recording you would   like to modify.
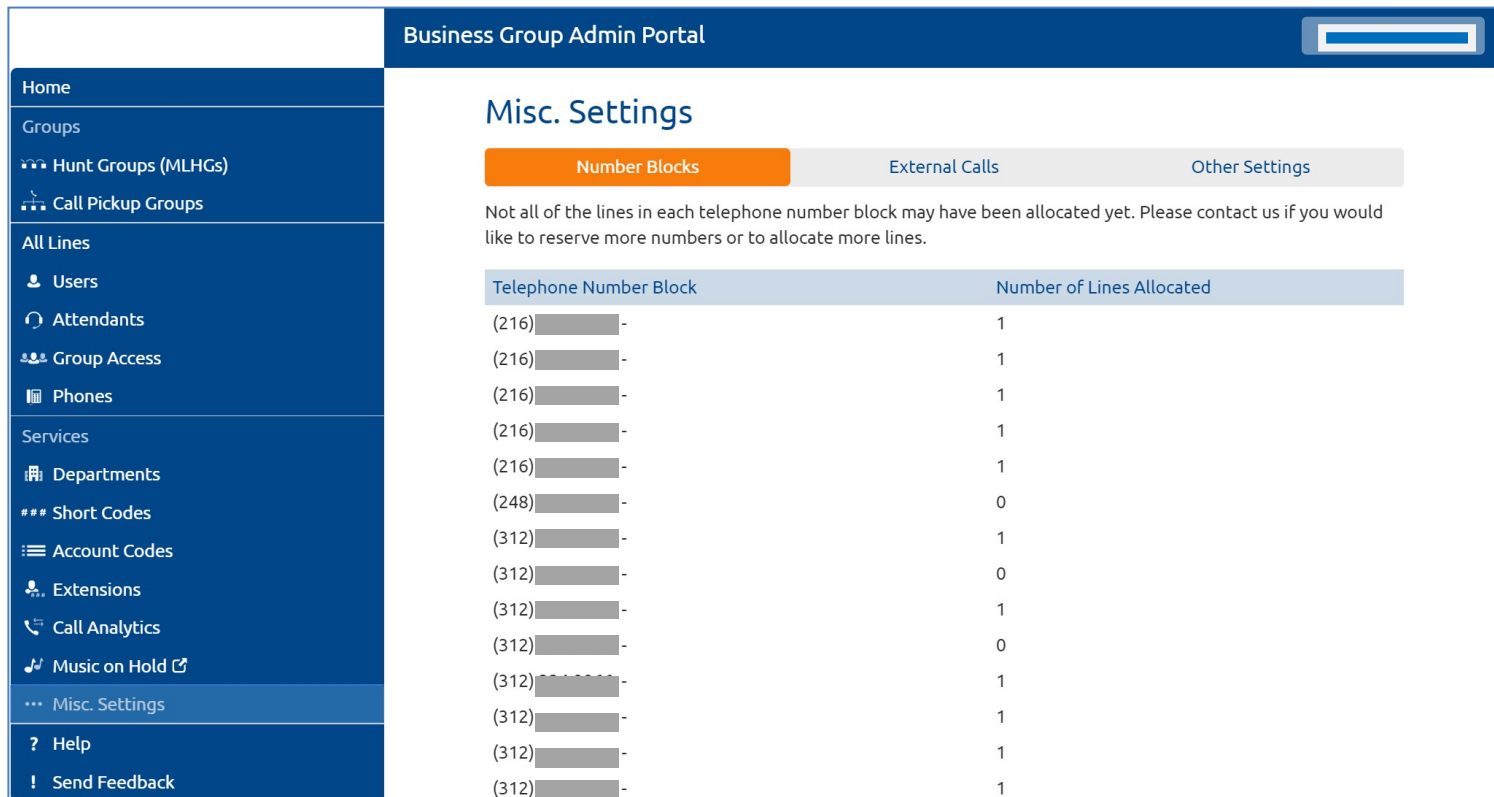2. Click Delete to the right of the recording you wish to delete.

Playing a Recording:

You can play a recording that you have uploaded by clicking the ID or Description link for that recording. Note that this will play the recording at its original volume- the Gain setting has no impact on playing a recording through this interface.

10.   Miscellaneous Settings

To view Miscellaneous Settings, click on the Misc. Settings link in pane to the left of your administrator screen.

Number Blocks:

A Number Block defines a range of directory numbers used for Business Group Lines in the Business Group.
Each Number Block in the table shows the range of directory numbers and the number of directory numbers to which Business Group Lines have been assigned.

External Calls:

Each call type can have the following limits. Note, external call limits apply to the total number of incoming and outgoing calls.

• Unlimited.
• Limited. In this case the maximum number of external calls is also shown.
• Not permitted.

Your default carriers for making calls are shown. Note, these may be overridden on per line and/or

per call.

Other Settings:

Restricted Subscriber Messaging prevents the forwarding of voicemail messages to subscribers outside of the business group. This applies to the whole business group.

MORE QUESTIONS?

If you have any additional questions about setting up voicemail call us at **800-860-2934** or email businesscare@firstcomm.com.

You can access all user guides here:

https://www.firstcomm.com/products/cloud-ip-pbx/user-guides/