



Business Cloud  
Communications

USER GUIDE | MAY 2022

**ciello**

# TABLE OF CONTENTS

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<b>Welcome .....</b>	<b>6</b>
Feature Plans .....	6
Star Codes Guide.....	7
Social & Public Services .....	8
E911 Emergency Services .....	9
Address Validation .....	9
911 for Remote Office Users.....	9
<b>Using Your IP Phone .....</b>	<b>10</b>
Placing Calls.....	10
Answering Calls .....	10
Holding Calls .....	10
Call Transfer .....	11
Attended Transfer .....	11
Blind Transfer.....	11
Transfer Call to Voicemail .....	11
Conference Calls .....	12
Use Call Conference on Polycom VVX.....	12
Use Call Conference on Yealink.....	12
Paging.....	12
Make an Announcement.....	12
<b>Calling Features .....</b>	<b>13</b>
Call Screening .....	13
All Other Callers .....	13
Anonymous Callers.....	14
Custom Callers .....	15
Call Trace .....	16
Do Not Disturb .....	16
Call Forwarding.....	17
Call Forwarding Star Codes.....	17

Remote Access Forwarding .....	18
Call Handling .....	19
Call Park .....	19
Call Pickup .....	20
Call Waiting .....	21
Caller ID .....	22
Do Not Disturb .....	23
Last Call Return .....	23
Voice mail Local Access .....	24
Access a Voice mail Box .....	24
Listen to Messages .....	24
Customize a Voice mail Box .....	25
<b>Voice Portal Guide Limited Users .....</b>	<b>26</b>
<b>Voice Portal .....</b>	<b>27</b>
Log In .....	27
User Info .....	28
Phone Numbers .....	29
Call Handling .....	29
Ring Phone .....	30
Forward All .....	30
Simultaneous Ring .....	31
Find Me/Follow Me .....	32
Schedules .....	33
Call Screening .....	37
Call Screening Categories .....	37
Call Screening Behaviors .....	38
Voice mail .....	39
Voice mail Box Greetings .....	39
Messages .....	40
Message Settings .....	41
<b>Voice Portal Guide Admin Users .....</b>	<b>43</b>
<b>Voice Portal .....</b>	<b>44</b>
Log In .....	44

<b>Users .....</b>	<b>45</b>
Calls .....	46
Call Details .....	46
Call Screening .....	47
Call Handling .....	49
Devices .....	56
Settings .....	57
User Information.....	57
Feature Plan & Voice Portal.....	58
Calling Plans.....	59
Voicemail .....	60
Voicemail Box Details.....	60
<b>Phone Numbers .....</b>	<b>62</b>
Customer Service Record.....	63
E911 Record.....	64
Phone Number Route Management.....	65
<b>Devices.....</b>	<b>66</b>
Device Info.....	67
Configuration Status.....	67
Swap Device .....	67
Bulk Line Configuration .....	68
Line Configuration.....	70
Call Park .....	71
Device Line.....	71
Paging Group .....	72
Presence/BLF.....	72
Shared Line.....	73
Speed Dial .....	75
Sidecar.....	76
Bulk Sidecar Setup .....	77
<b>Auto-Attendant.....</b>	<b>80</b>
Overview.....	80
Tools.....	81

Auto-Attendant Setup .....	82
Add an Auto-Attendant .....	82
Activate an Auto-Attendant .....	83
Assign a Phone Number .....	84
Edit an Auto-Attendant .....	85
Auto-Attendant Routes .....	86
Schedule .....	86
Menu .....	88
Message .....	90
Group .....	91
User Ring Strategy .....	93
User .....	94
Forward to .....	94
Directory .....	94
Hang Up .....	95
Reference .....	96
<b>Voicemail .....</b>	<b>97</b>
Voicemail Box Details .....	97
Voicemail Box Greetings .....	98
Messages .....	98
Message Settings .....	99
<b>Call History .....</b>	<b>101</b>
Filters .....	101
Details .....	102

# WELCOME

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

## Feature Plans

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

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

FEATURE	STANDARD	ADVANCED	PROFESSIONAL
Auto-Attendants - Call Groups - Call Queues	✓	✓	✓
Cloud PBX	✓	✓	✓
Call Park	✓	✓	✓
Extension Dialing	✓	✓	✓
Find Me/Follow Me	✓	✓	✓
Hold Music	✓	✓	✓
Presence	✓	✓	✓
Visual Voicemail	✓	✓	✓
Mobile & Desktop Softphone App		✓	✓
Team Messaging		✓	✓
Screen Sharing			✓
Video Conferencing			✓

# Star Codes Guide

This is a handy guide to the star codes available on your service. Dial these codes to activate and deactivate certain features on your account.

ACCOUNT CALL SCREENING		USER CALL FORWARDING	
*41	All Other Callers: Block	*00+Ext.	Send Call Directly to Voicemail
*42	All Other Callers: Allow	*72+	Call Forward: All (On/Off)
*45	Custom Caller: Block	*90+	Call Forward: Busy (On/Off)
*46	Custom Callers: Allow	*92+	Call Forward: No Answer (On/Off)
*47	Custom Callers: Block w/Message	*94+	Call Forward: Out of Service (On/Off)
*48	Anonymous Callers: Block	USER CALL SCREENING	
*49	Anonymous Callers: Allow	*58+	Custom Caller: Block w/Message
*50	Anonymous Callers: Block w/Message	*59+	Custom Caller: Allow
*51	Anonymous Callers: Disable Block w/Message	*60+	Custom Caller: Block
*57	Call Trace	*63+	Custom Caller: Forward
USER CALL HANDLING		*64	All Other Callers: Block
** + Ext.	Directed Call Pickup	*74	All Other Callers: Allow
*40	Pick Up Group	*77	Anonymous Callers: Block
*43	Call Waiting: Enable	*87	Anonymous Callers: Allow
*44	Call Waiting: Disable	*95	Anonymous Callers: Block w/Message
*70+	Call Waiting: Disable Next Call	*97	Anonymous Callers: Disable Block w/Message
*62	Call Park	*78	Do Not Disturb: Enable
*66+Slot	Call Park Retrieval	*79	Do Not Disturb: Disable
*65+	Caller ID: Enable Next Call	SOCIAL & PUBLIC SERVICES	
*67+	Caller ID: Block Next Call	211	Essential Community Services
*68	Caller ID: Manage (On/Off)	411	Directory Assistance
*69	Last Call Return	511	Traveler Information (US)
*98	Voicemail Management	611	Customer Service
		711	Telecommunications Relay Service
		811	Utility Location Services (US)
		911	Emergency Services

## STAR CODE +

To enable or disable the feature, dial the star code plus an extension, parking slot, voicemail PIN and/or phone number.

# Social & Public Services

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

CODE	FEATURE
211	<p><b>ESSENTIAL COMMUNITY SERVICES</b></p> <p>Access to community information and referral services, such as essential needs, crisis, and disaster assistance. Visit <a href="http://www.211.org">http://www.211.org</a> to learn about services in your area.</p>
411	<p><b>DIRECTORY ASSISTANCE</b></p> <p>Phone service used to look up a published telephone number and/or address listing.</p>
511	<p><b>TRAVELER INFORMATION (US)</b></p> <p>Local hotline for real-time information regarding traffic and road conditions. Not available in all states.</p>
611	<p><b>CUSTOMER SERVICE</b></p> <p>Dials Customer Service.</p>
711	<p><b>TELECOMMUNICATIONS RELAY SERVICE</b></p> <p>TRS uses operators to facilitate phone calls between people with hearing and speech disabilities and other individuals. A TRS call may be initiated by a person with or without a disability. Visit <a href="http://www.fcc.gov">www.fcc.gov</a> to learn more.</p>
811	<p><b>UTILITY LOCATION SERVICES (US)</b></p> <p>“Call Before You Dig” routes the caller to their local utility location services. Call a few days before beginning an excavation project to find out the location of underground utilities and reduce the risk of serious damage.</p>
911	<p><b>EMERGENCY SERVICES</b></p> <p>Calls to 911 (US or CAN) will be sent to the nearest Public Safety Answering Point (PSAP) based on the registered address. Both callback number and address are available to the PSAP on each call.</p>



# E911 Emergency Services

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

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

## Address Validation

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

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

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

## 911 for Remote Office Users

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

### **WARNING**

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

# USING YOUR IP PHONE

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

## Placing Calls

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

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

### DIAL 9

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

## Answering Calls

To answer a call, do one of the following:

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

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

## Holding Calls

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

# Call Transfer

## Attended Transfer

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

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

## Blind Transfer

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

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

### Yealink Phones

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

## Transfer Call to Voicemail

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

1. Place caller on hold. The caller will begin to hear hold music.
2. Dial the star code + the extension.
3. Press **[Dial] > [More] > [Join]**.
4. Hang up. The caller will be in the other user's voicemail box.

### Yealink Phones

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

# Conference Calls

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

## Use Call Conference on Polycom VVX

1. While on a call, press **[More]** then **[Confnc]**.
2. Enter the second number/extension to have on the call.
3. When the second party answers, press **[More]** then **[Confnc]**.

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

## Use Call Conference on Yealink

1. While on a call, press **[Conference]**.
2. Enter the second number/extension to have on the call.
3. When the second party answers, press **[Conference]**.

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

# Paging

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

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

- **STANDARD:** All devices except those on a call and with Do Not Disturb enabled.
- **PRIORITY:** All devices except those on a call.
- **EMERGENCY:** All devices regardless of status.

## Make an Announcement

1. Press the line key assigned to the paging group or dial the group's extension.
2. You are now connected to all users in the paging group. Make your announcement and then hang up.

# CALLING FEATURES

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## Call Screening

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

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

## All Other Callers

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

CODE	DESCRIPTION
*64	<p><b>BLOCK ALL OTHER CALLERS</b>  <b>All other callers (not otherwise specified in <a href="#">Call Handling</a> settings) will be blocked.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your selective call accept service has been activated."</li> </ol>
*74	<p><b>ALLOW ALL OTHER CALLERS</b>  <b>All other callers (not otherwise specified in <a href="#">Call Handling</a> settings) will be allowed.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your selective call accept service has been deactivated."</li> </ol>

## Anonymous Callers

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

CODE	DESCRIPTION
*77	<p><b>BLOCK ANONYMOUS CALLERS</b>  <b>Calls without caller ID will be blocked and the caller will hear a busy tone.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line."</li> </ol>
*87	<p><b>ALLOW ANONYMOUS CALLERS</b>  <b>Calls without caller ID will be allowed.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your anonymous call rejection service has been deactivated."</li> </ol>
*95	<p><b>BLOCK ANONYMOUS CALLERS WITH MESSAGE</b>  <b>Calls without caller ID will be blocked and the caller will hear a message.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line."</li> </ol>
*97	<p><b>UNBLOCK ANONYMOUS CALLERS WITH MESSAGE</b>  <b>Disables "Anonymous Callers: Block with Message." Anonymous calls will be allowed.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Your anonymous call rejection service has been deactivated."</li> </ol>

## Custom Callers

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

CODE	DESCRIPTION
*59	<p><b>ALLOW CUSTOM CALLERS</b></p> <p><b>Calls from the number specified will be blocked with a message. Use this feature if you've blocked all callers and want to allow a specific caller to contact you.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the 10-digit phone number, starting with 1, followed by #.</li> <li>4. You will hear, "Calls from [phone number] will be allowed."</li> </ol>
*60	<p><b>BLOCK CUSTOM CALLERS</b></p> <p><b>Calls from the number specified will be blocked. Blocked callers will hear a busy signal.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the 10-digit phone number, starting with a 1, followed by #.</li> <li>4. You will hear, "Calls from [phone number] will be blocked."</li> </ol>
*58	<p><b>BLOCK CUSTOM CALLERS WITH MESSAGE</b></p> <p><b>Calls from the number specified will be blocked with a message.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the 10-digit phone number, starting with 1, followed by #.</li> <li>4. You will hear, "Calls from [phone number] will be blocked."</li> </ol>
*63	<p><b>FORWARD CUSTOM CALLERS</b></p> <p><b>Calls from the number specified will be forwarded.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Enter the 10-digit phone number, starting with 1, followed by #.</li> <li>4. You will hear, "Calls from [phone number] will be forwarded."</li> </ol> <p>For forwarding to work, a <i>Forward To</i> number must be set up in the Voice Portal. If a number is not set, forwarded calls will fail over to the <i>All Other Callers</i> setting.</p>

## Call Trace

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

CODE	DESCRIPTION
<b>*57</b>	<b>CALL TRACE</b> <ol style="list-style-type: none"> <li>1. After ending the call, dial the star code.</li> <li>2. You will hear, "The previous call will be marked in your call history."</li> <li>3. A new line for the trace will be entered in the Call History.</li> </ol>

## Do Not Disturb

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

CODE	DESCRIPTION
<b>*78</b>	<b>ENABLE DO NOT DISTURB</b> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Do Not Disturb enabled."</li> <li>3. All calls will be sent to voicemail.</li> </ol>
<b>*79</b>	<b>DISABLE DO NOT DISTURB</b> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear, "Do Not Disturb disabled."</li> </ol>



# Call Forwarding

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

## Call Forwarding Star Codes

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

CODE	DESCRIPTION
*00	<p><b>FORWARD CALL TO VOICEMAIL</b></p> <p><b>Send a call directly to another user's voicemail box.</b></p> <ol style="list-style-type: none"> <li>1. Place the caller on hold. The caller will hear hold music.</li> <li>2. Dial the star code + the user's extension.</li> <li>3. Press Dial &gt; More &gt; Join.</li> <li>4. Hang up. The caller will be in the other user's voicemail box.</li> </ol>
*72	<p><b>CALL FORWARD: ALL (ON/OFF)</b></p> <p><b>Choose where to forward all calls to your line.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>- <b>ENABLE:</b> Press 1 to enter a forwarding number followed by #.</li> <li>- <b>DISABLE:</b> Press 2 to disable forwarding.</li> </ul> </li> </ol>
*90	<p><b>CALL FORWARD: BUSY (ON/OFF)</b></p> <p><b>Choose where to forward calls when you're on another call.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>- Press 1 to enter a forwarding number followed by #.</li> <li>- Press 2 to send calls to voicemail.</li> </ul> </li> </ol>

CODE	DESCRIPTION
*92	<p><b>CALL FORWARD: NO ANSWER (ON/OFF)</b></p> <p><b>Choose how calls will be handled when your line isn't answered.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>– Press 1 to enter a forwarding number followed by #.</li> <li>– Press 2 to send calls to voicemail.</li> </ul> </li> </ol>
*94	<p><b>CALL FORWARD: OUT OF SERVICE (ON/OFF)</b></p> <p><b>Choose how calls will be handled when your line is out of service or not registered.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your voicemail PIN followed by #.</li> <li>3. Choose an option: <ul style="list-style-type: none"> <li>– Press 1 to enter a forwarding number followed by #.</li> <li>– Press 2 to send calls to voicemail.</li> </ul> </li> </ol>

## Remote Access Forwarding

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

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

# Call Handling

## Call Park

Call Park, also known as Valet Call Park, combines the elements of transferring a call and placing it on hold. Rather than asking the caller to call back later or sending them to voicemail, the call can be transferred to a virtual parking spot where it will remain on hold until retrieved. To create parking spots on the account, contact Customer Support.

### USING YOUR IP PHONE

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

CODE	DESCRIPTION
<b>LINE</b>	<b>CALL PARK</b> <b>Places a call in a parking spot.</b> <ol style="list-style-type: none"> <li>1. While on a call, press the line key assigned to the parking spot.</li> <li>2. The call will be placed in that parking spot.</li> </ol>
<b>LINE</b>	<b>CALL PARK RETRIEVAL</b> <b>Retrieves a parked call from a parking spot.</b> <ol style="list-style-type: none"> <li>1. Press the line key on the phone for the parking spot the call is in.</li> <li>2. You will be connected to the caller.</li> </ol>

### USING STAR CODES

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

CODE	DESCRIPTION
<b>*62</b>	<b>CALL PARK</b> <b>Place a call in a parking spot.</b> <ol style="list-style-type: none"> <li>1. While on a call, press <b>[Transfer]</b> and dial the star code.</li> <li>2. The system indicates the parking spot the call has been placed in.</li> <li>3. Hang up.</li> </ol>

CODE	DESCRIPTION
*66	<p><b>CALL PARK RETRIEVAL</b> Retrieve a parked call from a parking spot.</p> <ol style="list-style-type: none"> <li>1. Dial the star code + the parking spot the call was placed in. <ul style="list-style-type: none"> <li>– For example: *6601</li> </ul> </li> <li>2. You are now connected to the parked caller.</li> </ol>

## Call Pickup

### DIRECTED CALL PICKUP

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

CODE	DESCRIPTION
**	<p><b>DIRECTED CALL PICKUP</b> Answer a call ringing at a specific extension.</p> <ol style="list-style-type: none"> <li>1. When you hear the call ringing, pick up your phone and dial ** followed by the extension the call is ringing to.</li> <li>2. You are now connected to the caller.</li> </ol>

### PICK UP GROUP

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

CODE	DESCRIPTION
*40	<p><b>PICK UP GROUP</b> Answer a ringing extension for another user in the same Pick Up Group.</p> <ol style="list-style-type: none"> <li>1. When you hear a call ringing on another group member's phone, pick up your phone and dial the Pick Up Group star code to answer it. <ul style="list-style-type: none"> <li>– If multiple calls are ringing, the call that has been ringing the longest will be answered.</li> <li>– If you belong to multiple groups, the longest ringing call in any of your groups will be answered.</li> </ul> </li> </ol>

## Call Waiting

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

### SWITCHING CALLS

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

1. When notified of a second incoming call, press the line button on your phone. Your first call will be placed on hold, and your second call will be active.
2. You can switch between the two calls by pressing the line button for the call you want to switch to.

### STAR CODES

CODE	DESCRIPTION
*43	<p><b>CALL WAITING: ENABLE</b>  <b>Enable Call Waiting for ALL of your calls.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear a message indicating the call waiting service has been activated.</li> </ol>
*44	<p><b>CALL WAITING: DISABLE</b>  <b>Disable Call Waiting for ALL of your calls.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. You will hear a message indicating the call waiting service has been deactivated.</li> </ol>
*70	<p><b>CALL WAITING: DISABLE NEXT CALL</b>  <b>Keep the next phone call you make from being interrupted. If call waiting is enabled on the line, this star code will disable call waiting on the current call only.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code + the phone number.</li> <li>2. Call Waiting is disabled for the current call, and any incoming call will follow the "busy" call behavior.</li> <li>3. After you hang up, Call Waiting will be active again.</li> </ol>

## Caller ID

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

- **OUTBOUND CALLER ID:** The caller ID number sent with outbound calls is set on each user. You can choose to send out the main company number, a specific user-assigned number, or not send out any caller ID.
- **INTERNAL CALLER ID:** When calling another user on your PBX, your caller ID is your name and extension.

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

## STAR CODES

Do you want to send your caller ID with every call? Or do you want to block it for every call but unblock it for the current call? Use the following star codes to manage your caller ID settings.

CODE	DESCRIPTION
*65	<p><b>CALLER ID: ENABLE NEXT CALL</b>  <b>If your caller ID is disabled (blocked) for all calls, this will enable it for this current call only. Future calls will not be affected.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code + the number for the party you're trying to reach.</li> <li>2. Caller ID will be displayed to the party on this call.</li> </ol>
*67	<p><b>CALLER ID: BLOCK NEXT CALL</b>  <b>If your caller ID is enabled for all calls, this will block it from being sent with this current call only. Future calls will not be affected.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code + the number for the party you're trying to reach.</li> <li>2. Caller ID will be displayed as "BLOCKED" to the party on this call.</li> </ol>
*68	<p><b>CALLER ID: MANAGE (ON/OFF)</b>  <b>Manage your caller ID setting for all calls.</b></p> <ol style="list-style-type: none"> <li>1. Dial the star code.</li> <li>2. Enter your 4-digit PIN followed by #.</li> <li>3. Follow the prompts to enable or disable caller ID.</li> </ol>

## Do Not Disturb

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

CODE	DESCRIPTION
*78	<b>ENABLE DO NOT DISTURB</b> <ol style="list-style-type: none"><li>1. Dial the star code.</li><li>2. You will hear, "Do Not Disturb enabled."</li></ol>
*79	<b>DISABLE DO NOT DISTURB</b> <ol style="list-style-type: none"><li>1. Dial the star code.</li><li>2. You will hear, "Do Not Disturb disabled."</li></ol>

## Last Call Return

CODE	DESCRIPTION
*69	<b>LAST CALL RETURN</b> <p>Dials the last caller ID number that rang the line. It does not redial the last <i>outbound</i> call.</p> <ol style="list-style-type: none"><li>1. Dial the star code.</li><li>2. Your phone will redial the last number that called you.</li></ol>

# Voicemail Local Access

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

## Access a Voicemail Box

### DIRECT ACCESS

1. From a line assigned to your voicemail box, dial the Voicemail Management star code. (\*333)
2. Enter your voicemail PIN and press #.

### REMOTE ACCESS

1. From a line *not* assigned to the voicemail box, dial your 10-digit phone number.
2. When the greeting plays, press #.
3. Enter your voicemail PIN and press #.

## Listen to Messages

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

- **PRESS 1:** Skip message and mark the message as "unread"
- **PRESS 2:** Save message and mark the message as "read"
- **PRESS 3:** Erase message
- **PRESS 9:** Repeat message
- **PRESS 0:** Exit menu

### VOICEMAIL PIN

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



# Customize a Voicemail Box

## PERSONAL OPTIONS

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

- **PRESS 1:** Change the PIN
- **PRESS 2:** Personalize your greeting
- **PRESS 3:** Record your personal name
- **PRESS 5:** Set up Call Forwarding
- **PRESS 6:** Set Up a Call Screening Forwarding Number
- **PRESS 9:** Repeat personal options
- **PRESS 0:** Exit menu

## CHANGE THE PIN

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

## CHANGE YOUR GREETINGS

1. Access your voicemail box and press 8 for personal options.
2. Press 2 to change your greetings.
  - Press 1 to change the default (basic) greeting.
  - Press 2 to change the "busy" greeting.
  - Press 3 to change the "no answer" greeting.
3. When you're done, hang up or press 0 to go back to the main menu.

# Voice Portal Guide Limited Users

# VOICE PORTAL

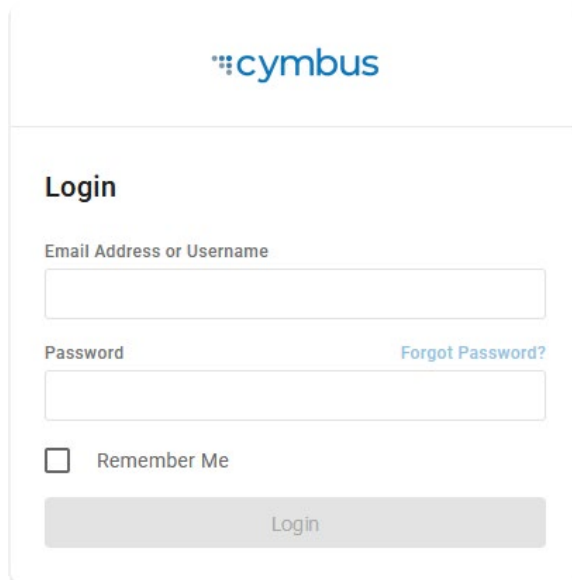
## Log In

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

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

If you haven't received it, contact Customer Support at 719-852-3538 (Option 0) or dial 611 from your Ciello phone to get your login information.

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



The screenshot shows the Cymbus login page. At the top center is the Cymbus logo. Below it is the heading "Login". There are two input fields: "Email Address or Username" and "Password". To the right of the password field is a link that says "Forgot Password?". Below the input fields is a checkbox labeled "Remember Me". At the bottom of the form is a grey button labeled "Login".

### FORGOT PASSWORD

If you can't log in, click *Forgot Password?* and an email will be sent to you with a link to reset it. Your new password must be 8–16 characters long and include uppercase and lowercase letters and at least one number. It cannot contain any part of your username.

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

# User Info

The User Info section shows your account name and number, your direct phone number(s), your E911 address, which phone number is being used as your outbound caller ID, and the device(s) assigned to you.

If any of this information is NOT correct, please contact Customer Service for assistance.

**User Info - Sarah Jane (s.jane)**

Account Name **Documentation Demo**

Account Number **Business Cloud Comm..**

Phone Numbers **None**

E911 Address **CP-8851 256 Somerset Ln, Santa Clara, UT 84765**  
[Edit E911 Address](#)

Outbound Caller ID **14356283774**

Devices **CP-8851 - Line 11  
CP-8851 - Line 2**

## EDIT E911 ADDRESS

In the event a 911 call is placed from your phone number, emergency services will be dispatched to the address listed here. If this is not the address of your physical location, please click the button and update it.

**User Info - Sarah Jane (s.jane)**

Account Name **Documentation Demo**

Account Number **Business Cloud Comm..**

Phone Numbers **1 (435) 628-3774**

E911 Address **CP-8851 256 Somerset Ln, Santa Clara, UT 84765**  
[Edit E911 Address](#)

Outbound Caller ID **14356283774**

Devices **CP-8851 - Line 11  
CP-8851 - Line 2**

1 (435) 628-3774

**Customer Service Record**

Address Preview 256 Somerset Ln  
Santa Clara, UT 84765  
Lat/Long 37.133200, -113.652800  
[View Lat/Long in Google Maps](#)

**E911 Record**

Same as CSR Record

Individual Company

Postal Code **84765**

Enter Address **256 Somerset Ln Santa Clara, UT 84765** x Q

Address Preview 256 Somerset Ln  
Santa Clara, UT 84765 **Manual Entry** v  
Lat/Long 37.133200, -113.652800

Provide Lat/Long

[View Lat/Long in Google Maps](#)

[Dismiss](#) [Save](#)

# Phone Numbers

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

**Phone Numbers**

Routed to User    1 (435) 628-2065  
                                  1 (435) 628-7082

# Call Handling

Call Handling determines how your incoming calls will be routed under different circumstances.

**Call Handling**

Scheduling    Manage Schedules    3 Schedules

Call Waiting   

Do Not Disturb     **Send incoming calls to voicemail**  
If you'd like callers to hear a busy tone, remove the voicemail box.

Ring Phone    Forward All    Sim Ring    Find Me

No Answer    Send to Voicemail    after 20 seconds

Busy    Send to Voicemail

Out of Service    Send to Voicemail

FEATURE	DESCRIPTION
<b>Scheduling</b>	Create or manage schedules that determine how incoming calls are routed during specific times. See <a href="#">Schedules</a> for more information.
<b>Call Waiting</b>	Check this box to enable Call Waiting, which will allow a second call to ring through while you are already on the phone. <ul style="list-style-type: none"> <li>Enabled: When you're on a call, you'll hear a tone to let you know a second caller is trying to reach you.</li> <li>Disabled: While you're on a call, incoming calls will hear a busy tone.</li> </ul>

FEATURE	DESCRIPTION
<b>Do Not Disturb</b>	<p>Check this box to enable Do Not Disturb.</p> <ul style="list-style-type: none"> <li><b>ENABLED:</b> Incoming calls are sent directly to your voicemail box.</li> <li><b>DISABLED:</b> Incoming calls follow your Call Handling settings.</li> </ul> <p>If DND is enabled but you don't have a voicemail box, callers will hear a busy tone. If you have a voicemail box but want callers to hear a busy tone, your voicemail box will need to be removed.</p>

## Ring Phone

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

FEATURE	DESCRIPTION
<b>No Answer</b>	The call is unanswered after a specified number of seconds.
<b>Busy</b>	The device is busy (already in use and Call Waiting is not enabled).
<b>Out of Service</b>	The device has lost power or is otherwise not registering as an active device.

## Forward All

Working on the go and need all the calls that come into your desk phone to get to you? Do all incoming calls need to be redirected elsewhere? Forward All does this by sending your callers to the phone number that you enter here. Once a *Forwarding Number* is entered, this feature can be enabled or disabled from the device by dialing star codes.

## Simultaneous Ring

Simultaneous Ring, or Sim Ring, will ring all numbers added to the list until the call is answered or times out. The first phone number to pick up will take the call.

You can add a limit to how long the call will ring, and after it's timed out have it sent to voicemail, forwarded to another number, or given a busy tone. If you like, you can also set the call to ring indefinitely.

FEATURE	DESCRIPTION
---------	-------------

<b>Phone Numbers</b>	Enter the phone number(s) that will ring. To add another number to the list, click [+Add Number].
----------------------	---

<b>No Answer</b>	<p>Choose what happens when the call is unanswered:</p> <ul style="list-style-type: none"> <li>• Busy Tone</li> <li>• Forward to (add a forwarding number)</li> <li>• Ring Forever</li> <li>• Send to Voicemail</li> </ul>
------------------	--

Also, enter the number of seconds the call will ring before the action is triggered. Calls that ring longer than 120 seconds may be disconnected by the carrier.

### VOICEMAIL

It is possible that voicemail for these other numbers could pick up the call before the timeout, if the user's timeout is shorter than what is set here.

## Find Me/Follow Me

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

Ring Phone Forward All Sim Ring **Find Me**

+ Add Destination

Devices # Ring Devices for 20 seconds

Phone Number # 1 (435) 628-2133 for 20 seconds

Phone Number # 1 (435) 628-1234 for 20 seconds

Timeout Action Send to Voicemail

Find Me Follow Me will ring each Destination sequentially. If the call isn't answered by any of the destinations, the call will be sent to the Timeout Action.

FEATURE	DESCRIPTION
<b>Destinations</b>	<p>Indicate if calls should route through  <b>Devices</b> or  <b>Phone Numbers</b> by clicking the respective icons.</p> <ul style="list-style-type: none"> <li>• Use the   arrows to reorder the destinations.</li> <li>• Click <b>[+ Add Destination]</b> to add more destination fields.</li> </ul>
<b>Devices</b>	<p>In the field provided, enter a timeout setting. Remember, calls that ring longer than 120 seconds may be disconnected by the carrier.</p>
<b>Phone Number</b>	<p>Enter the phone number calls should progress to and how long each number will ring.</p>
<b>Timeout Action</b>	<p>Choose what will happen to the call after all destinations have timed out:</p> <ul style="list-style-type: none"> <li>• Busy Tone</li> <li>• Send to Voicemail</li> </ul>

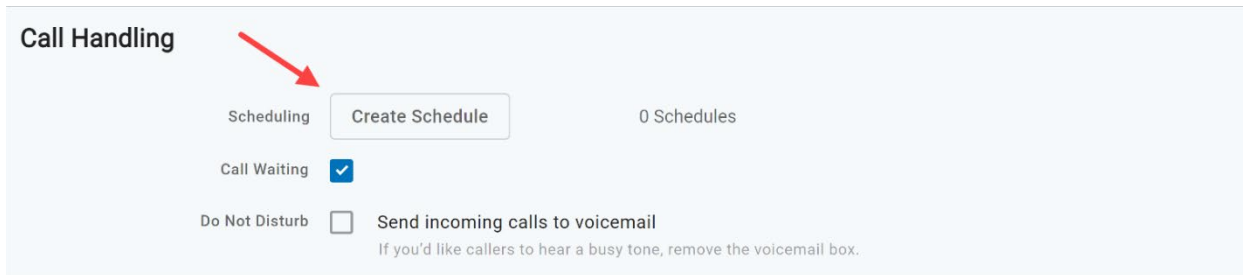


## Schedules

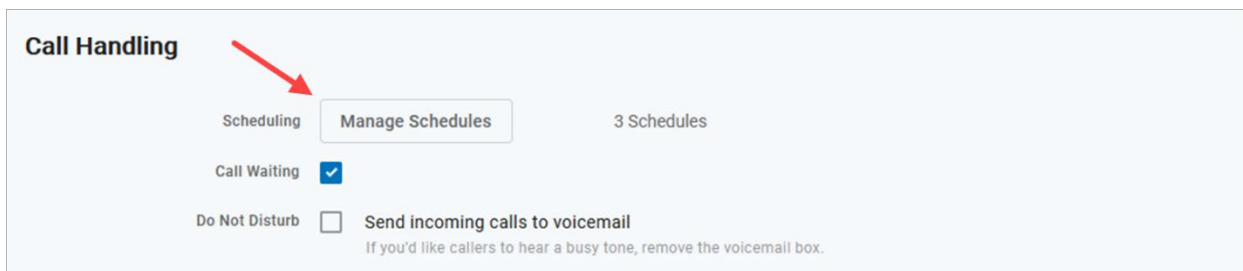
Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

Within the scheduler, the Call Handling options are: Ring Phone, Forward All, Sim Ring, and Find Me. The main Call Handling section will take effect *outside* of these hours.

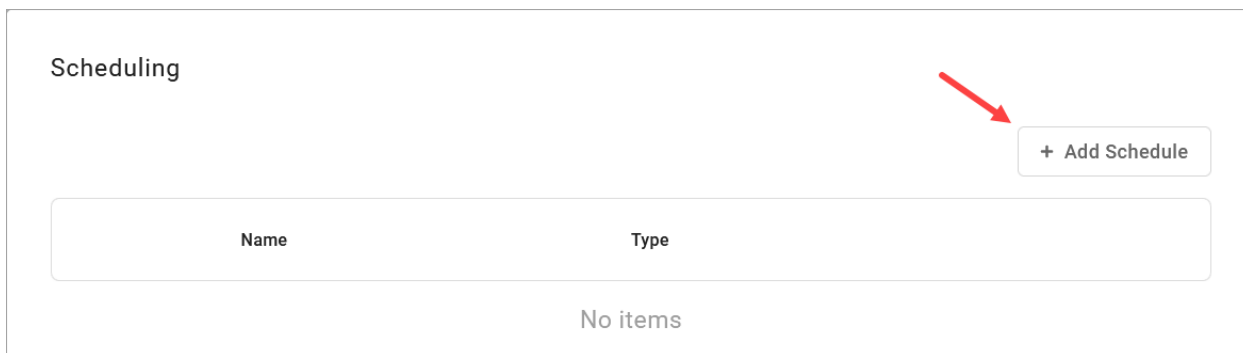
1. Within the Call Handling section, click **[Create Schedule]**.



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



2. In the Scheduling window, click **[+Add Schedule]**.



Custom

Schedule Name

**Custom** Weekly + Add a Day

Date

Start Time  End Time

- 3. **SCHEDULE NAME:** Give the schedule a name.
- 4. **TYPE:** Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).
  - On a Custom schedule, click **[+ Add a Day]** to add another section.

Custom

Schedule Name

**Custom** Weekly + Add a Day

Date  x

Start Time  End Time

---

Date  x

Start Time  End Time

- On a Weekly schedule, enter the start and end times for the days of the week you want this call handling to be in effect.

Weekly

Schedule Name

Custom
Weekly

Sun	Start Time	<input type="text"/>	End Time	<input type="text"/>
Mon	Start Time	<input type="text"/>	End Time	<input type="text"/>
Tue	Start Time	<input type="text"/>	End Time	<input type="text"/>
Wed	Start Time	<input type="text"/>	End Time	<input type="text"/>
Thu	Start Time	<input type="text"/>	End Time	<input type="text"/>
Fri	Start Time	<input type="text"/>	End Time	<input type="text"/>
Sat	Start Time	<input type="text"/>	End Time	<input type="text"/>

5. **CALL HANDLING.** Choose what will happen to calls *during* the schedule.

### Call Handling

Call Waiting

Do Not Disturb  Send incoming calls to voicemail  
If you'd like callers to hear a busy tone, remove the voicemail box.

Ring Phone
Forward All
Sim Ring
Find Me

No Answer  after  seconds

Busy

Out of Service

6. Click **[Confirm]** and then **[Save]**.

### Example of a Custom Schedule

In the custom schedule example below, calls received between 5:00 AM and 5:00 PM on November 15, 2019, will be forwarded to 1-208-582-1676. Any call outside of that specific time will follow the call handling set up in the main Call Handling section.

Thanksgiving Custom

Schedule Name

Custom  Weekly + Add a Day

Date

Start Time  End Time

---

#### Call Handling

Call Waiting

Do Not Disturb  **Send incoming calls to voicemail**  
If you'd like callers to hear a busy tone, remove the voicemail box.

Ring Phone  Forward All  Sim Ring  Find Me

Forwarding Number

---

# Call Screening

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

Choose how calls from anonymous numbers, toll-free numbers, and other callers—including Custom Callers (specific phone numbers)—will be handled. For each category, choose a screening behavior from the drop-down menu.

## Call Screening Categories

FEATURE	DESCRIPTION
<b>[+ Add Caller]</b>	Starts the process of setting up call screening behaviors for a specific phone number.
<b>Screening Forward Number</b>	Enter a destination phone number that will be used when This is the destination number used when a call screening category is set to <i>Forward</i> .
<b>Anonymous Caller</b>	Choose what happens to incoming calls that don't send caller ID.

FEATURE	DESCRIPTION
<b>Toll-Free Caller</b>	Choose what happens to incoming calls from a toll-free number.
<b>All Other Callers</b>	Choose what happens to all other incoming calls, unless otherwise defined by a custom rule.
<b>Custom Callers</b>	Click <b>[+Add Caller]</b> to define the screening behavior for a specific phone number. If there are more than two custom callers, click <b>...and X more</b> at the bottom to see them.

## Call Screening Behaviors

For each category, choose a screening behavior from the drop-down menu.

FEATURE	DESCRIPTION
<b>Allow</b>	Allow the caller to ring through.
<b>Allow with Priority Ring</b>	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
<b>Block</b>	Block the caller from ringing through. Callers will hear a busy signal.
<b>Block with Message</b>	Block the call with a message: <ul style="list-style-type: none"> <li>• <b>CUSTOM CALLERS:</b> <i>"The number you have dialed is not accepting calls at this time."</i></li> <li>• <b>TOLL-FREE CALLERS:</b> <i>"The number you have dialed is not accepting calls from toll-free numbers at this time."</i></li> <li>• <b>ANONYMOUS CALLERS:</b> <i>"The number you have dialed is not accepting calls from anonymous numbers."</i></li> </ul>
<b>Forward</b>	If you choose to forward calls from the caller, you must choose the number those calls are forwarded to in the <i>Screening Forward Number</i> field.
<b>Voicemail</b>	Caller will be sent to your voicemail box.

# Voicemail

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

Voicemail messages and greetings can also be managed by calling the voicemail box. See [Voicemail Local Access](#) for more information.

## Voicemail Box Greetings

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

**Voicemail Box Greetings** ⓘ

**Basic Greeting**

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

**Personal Name**

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

---

**Custom Greetings**

Any custom voicemail greeting upload here will override basic and personal name greetings.

**Busy Greeting**

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

**No Answer Greeting**

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

# Messages

Voicemail messages saved to the box are listed here.

Messages <span style="float: right;"></span>				
<input type="checkbox"/>	Date/Time ↓	Caller	Length	Status
<input type="checkbox"/>	Nov 4, 2020 11:02 AM	1 (304) 454-2217	16 seconds	New
<input type="checkbox"/>	Oct 14, 2020 10:23 AM	1 (877) 805-7744	17 seconds	New <span style="float: right;"> </span>
<input type="checkbox"/>	Sep 23, 2020 10:44 AM	1 (801) 318-1683	3 seconds	New
<input type="checkbox"/>	Sep 16, 2020 4:36 PM	1 (801) 633-4550	1 second	New
<input type="checkbox"/>	Aug 28, 2020 4:07 PM	1 (801) 691-5660	1 second	New
<input type="checkbox"/>	Aug 28, 2020 12:32 PM	1 (801) 214-5286	1 second	New

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

Field	Description
<b>Download</b>	Save a copy of the message to your computer as an MP3 file.
<b>Save</b>	Change the status of the message to <i>Saved</i> .
<b>Delete</b>	Delete this message from the box.

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

## MESSAGE WAITING INDICATOR

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



## Message Settings

**Message Settings**

Forward Voicemail to Email  Forward voicemail messages

Keep a copy in voicemail box

Enable Transcription  Enable Transcription of Messages

Enter email addresses, separated by commas

### FORWARD VOICEMAIL TO EMAIL

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

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

### ENABLE VOICEMAIL TRANSCRIPTION

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

**Message Settings**

Forward Voicemail to Email  Forward voicemail messages

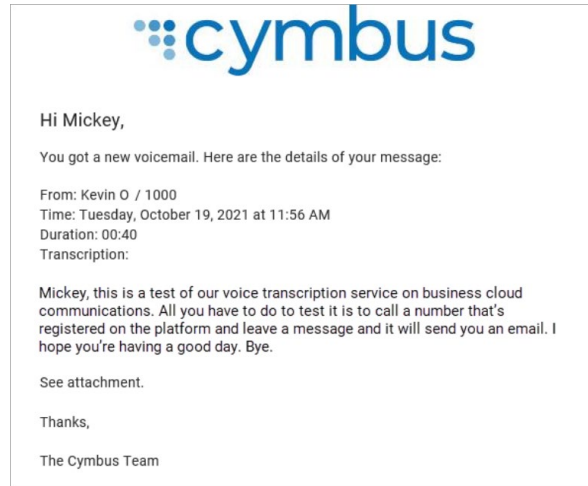
Keep a copy in voicemail box

**Enable Transcription  Enable Transcription of Messages**

s.jane@demo.com ✕

1. Check the box for **Enable Transcription**.
2. In the field below, enter one or more email addresses in the field below separated by commas (required).
3. Click **[Save]**.

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



## US ENGLISH

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

# Voice Portal Guide

## Admin Users

# VOICE PORTAL

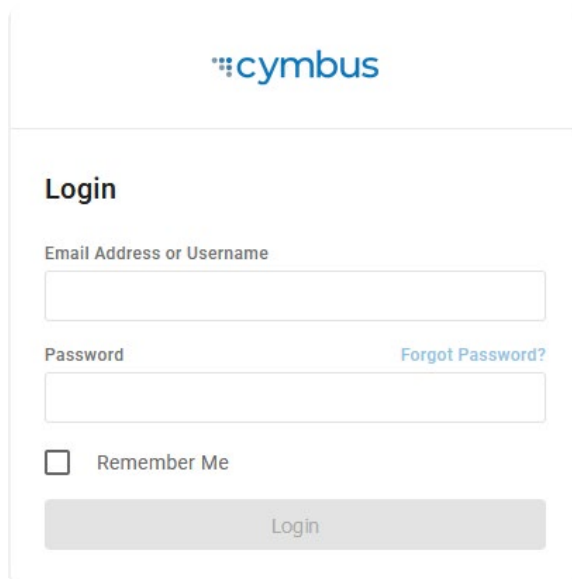
The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

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

## Log In

When your account was created, an email was sent to you containing your username, a link to create your password, and the portal URL. Keep that email safe so you can refer to it later. If you haven't received it, contact Customer Support at 719-852-3538 (Option 0) or dial 611 from your **Ciello** phone to get your login information.

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



The screenshot shows a web-based login form for Cymbus. At the top center is the Cymbus logo. Below the logo, the word "Login" is displayed in bold. There are two input fields: the first is labeled "Email Address or Username" and the second is labeled "Password". To the right of the password field is a link that says "Forgot Password?". Below the password field is a checkbox labeled "Remember Me". At the bottom of the form is a button labeled "Login".

## FORGOT PASSWORD

If you can't log in, click *Forgot Password?* and an email will be sent to you with a link to reset it. Your new password must be 8–16 characters long and include uppercase and lowercase letters and at least one number. It cannot contain any part of your username.

# USERS

All users on your account are listed here. To edit the settings for a specific user, hover over the user and click **Edit** on the right.

The screenshot shows the 'Users' management page. On the left is a sidebar with navigation options: Account, TeleCom Power & Cable (2468013579), Business Cloud, Users (selected), Phone Numbers, Devices, Auto-Attendant, Voicemail, and Call History. The main area is titled 'Users' and contains a search bar and a table of users. The table has columns for Name, Username, and Extension. The user 'Clara Oswald' is highlighted, and an 'Edit' button with a dropdown arrow is circled in red next to her name.

Name ↑	Username	Extension	
Amy Pond	amypond	2580	
Clara Oswald	claraoswald	3150	<b>Edit</b> ▾
Donna Noble	donnanoble	4150	
Mickey Smith	mickeysmith	2250	
Rose Tyler	rosetyler	1250	

For each user, there are four tabs that organize the user’s settings: Calls, Devices, Settings, and Voicemail.

The screenshot shows the settings tabs for a specific user, Sarah Jane (username: jane.s, extension: 2000). The tabs are 'Calls', 'Devices', 'Settings', and 'Voicemail'. The 'Voicemail' tab is selected and has a notification badge with the number '0'.

# Calls

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

## Call Details

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

Sarah Jane
s.jane
2000
^

**Calls**
Devices
Settings
Voicemail **0**

### Call Details

Assigned Phone Number **1 (801) 555-2102**

Extension Number

Caller ID Number

Caller ID Name **BLOCKED**

Caller ID Enabled

FEATURE	DESCRIPTION
<b>Assigned Phone Number</b>	The phone number routed to this user to contact them directly, if any. If a number has not yet been assigned, see <a href="#">Phone Number Route Management</a> for more information.
<b>Extension Number</b>	The dialable extension the user can be reached at on the account.
<b>Caller ID Number</b>	The phone number displayed on the phone of the person being called. Users can choose the main account number, their phone number, or choose <i>None</i> to not send out any caller ID at all. This field is required.
	It is important to choose a <b>number</b> here, even if you choose to disable caller ID (below). If this field is set to <i>None</i> , outbound calls—even to 911—will be sent out as <i>Anonymous</i> , and the carrier may reject the call.
<b>Caller ID Name</b>	The name associated with the phone number that will display on the phone of the person being called.

- If *Caller ID Number* is set to *None*, this will say ANONYMOUS.
- If *Caller ID Enabled* is unchecked, this will say BLOCKED.
- If *Caller ID Enabled* is checked, this will reflect the caller ID name of the phone number selected above.

**Caller ID Enabled**

Determines if the Caller ID Name will be shown or not on the phone of the person being called. This setting can also be managed by star code.

- **CHECKED:** Caller ID will be sent on all outbound calls.
- **UNCHECKED:** Caller ID will be sent as BLOCKED. Calls to 911 will still send out the phone number selected in the *Caller ID Number* field.

## Call Screening

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

Choose how calls from anonymous numbers, toll-free numbers, and other callers—including Custom Callers (specific phone numbers)—will be handled. For each category, choose a screening behavior from the drop-down menu.

**Call Screening** + Add Caller

Screening Forward Number:   
This is the destination Number used when Forward is selected as a Call Screening setting.

Anonymous Caller:

Toll-free Caller:

All Other Callers:

---

Custom Caller(s):

<input type="text" value="12125551234"/>	<input type="text" value="Allow with Priority Ring"/>	✕
	Priority Ring: <input type="text" value="Priority Ring 4"/>	
<input type="text" value="17175551234"/>	<input type="text" value="Forward"/>	✕
<input type="text" value="18015551234"/>	<input type="text" value="Voicemail"/>	✕

[hide extra callers](#)

## CALL SCREENING CATEGORIES

FEATURE	DESCRIPTION
<b>[+ Add Caller]</b>	Starts the process of setting up call screening behaviors for a specific phone number. The specific callers who are being screened and the associated screening behavior are listed under the <i>Custom Callers</i> field.
<b>Screening Forward Number</b>	Enter a destination phone number that will be used when This is the destination number used when a call screening category is set to <i>Forward</i> .
<b>Anonymous Caller</b>	Choose what happens to incoming calls that don't send caller ID.
<b>Toll-Free Caller</b>	Choose what happens to incoming calls from a toll-free number.
<b>All Other Callers</b>	Choose what happens to all other incoming calls, unless otherwise defined by a custom rule.
<b>Custom Callers</b>	Click <b>[+Add Caller]</b> to define the screening behavior for a specific phone number. If there are more than two custom callers, click <b>...and X more</b> at the bottom to see them.

## CALL SCREENING BEHAVIORS

For each category, choose a screening behavior from the drop-down menu.

FEATURE	DESCRIPTION
<b>Allow</b>	Allow the caller to ring through.
<b>Allow with Priority Ring</b>	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
<b>Block</b>	Block the caller from ringing through. Callers will hear a busy signal.
<b>Block with Message</b>	Block the call with a message: <ul style="list-style-type: none"> <li>• <b>CUSTOM CALLERS:</b> "The number you have dialed is not accepting calls at this time."</li> <li>• <b>TOLL-FREE CALLERS:</b> "The number you have dialed is not accepting calls from toll-free numbers at this time."</li> <li>• <b>ANONYMOUS CALLERS:</b> "The number you have dialed is not accepting calls from anonymous numbers."</li> </ul>
<b>Forward</b>	If you choose to forward calls from caller, you <b>must</b> choose the number those calls are forwarded to in the <i>Screening Forward Number</i> field.
<b>Voicemail</b>	Send the caller directly to voicemail.



## Call Handling

Call Handling determines how incoming calls are routed under various circumstances. In the first section, create or manage your Call Handling Schedules, Call Waiting, and Do Not Disturb settings. Just below that, select and configure a ring strategy.

### Call Handling

Scheduling Manage Schedule 1 Schedule

Call Waiting

Do Not Disturb  **Send incoming calls to voicemail**  
If you'd like callers to hear a busy tone, remove the voicemail box.

Ring Phone
Forward All
Sim Ring
Find Me

No Answer Send to Voicemail ▼ after 20 seconds

Busy Busy Tone ▼

Out of Service Forward to ▼ 1 (801) 555-1234

FEATURE	DESCRIPTION
<b>Scheduling</b>	<ul style="list-style-type: none"> <li>Create or assign a schedule which will determine how incoming calls will be routed based on the date/time the call comes in. See <a href="#">Schedules</a> for more information.</li> </ul>
<b>Call Waiting</b>	<p>Checking this box will allow a second call to ring through while you are already on the phone. While Call Waiting is enabled and on an active call, you will hear a tone that indicates a second caller is trying to reach you. If this feature is not enabled, incoming calls hear a busy tone while you're on an active call.</p> <p>If Call Waiting is enabled and the IP phone in question has multiple instances of the same line assigned to it, the first line will ring even if the line is on a call. If Call Waiting is disabled, the second device line will ring.</p>
<b>Do Not Disturb</b>	<p>Indicates if Do Not Disturb is enabled. While enabled, all incoming calls will be sent directly to voicemail.</p> <div style="background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p>If DND is enabled but you don't have a voicemail box, callers will hear a busy tone. If you have a voicemail box but want callers to hear a busy tone, the voicemail box will need to be removed.</p> </div>

## RING PHONE

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

Ring Phone
Forward All
Sim Ring
Find Me

No Answer

Send to Voicemail

after

20

seconds

Busy

Busy Tone

Out of Service

Forward to

1 (801) 555-1234

FEATURE	DESCRIPTION
<b>No Answer</b>	The call is unanswered after a specified number of seconds.
<b>Busy</b>	The device is busy (already in use and Call Waiting is not enabled).
<b>Out of Service</b>	The device lost power or is otherwise not registering as an active device.

## FORWARD ALL

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

Once a *Forwarding Number* is entered, this feature can be enabled or disabled from the device by dialing star codes.

Ring Phone
Forward All
Sim Ring
Find Me

Forwarding Number

1 (435) 628-2138

## SIMULTANEOUS RING

Simultaneous Ring, or Sim Ring, will ring all numbers added to the list until the call is answered or times out. The first phone number to pick up will take the call.

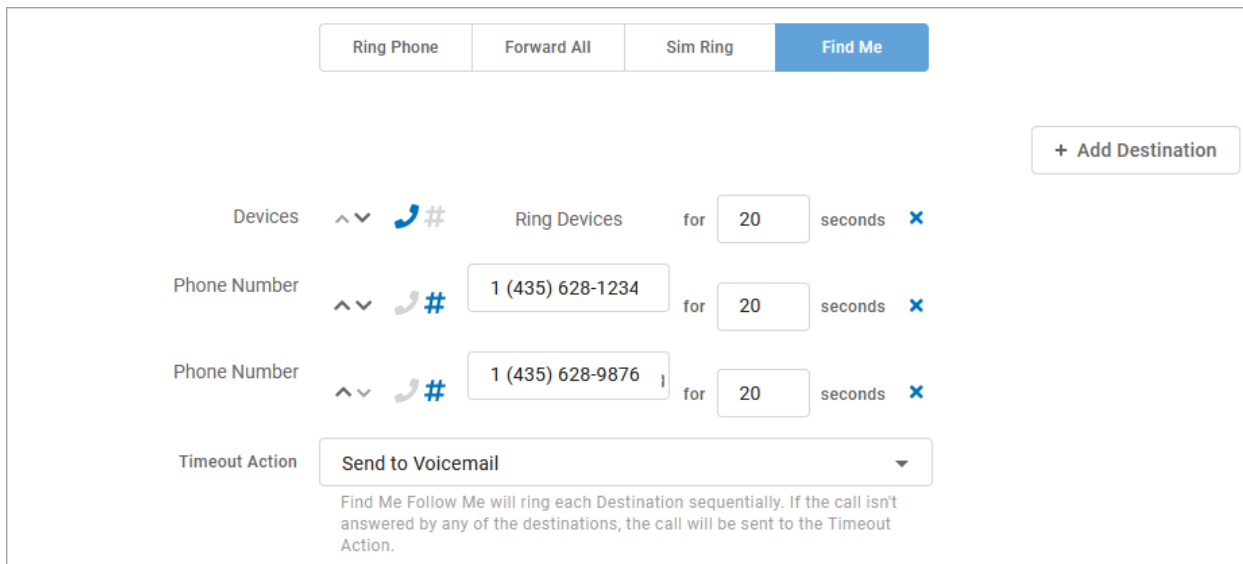
You can add a limit to how long the call will ring, and after it's timed out have it sent to voicemail, forwarded to another number, or given a busy tone. If you like, you can also set the call to ring indefinitely.




The screenshot shows a configuration panel for 'Sim Ring'. At the top, there are four tabs: 'Ring Phone', 'Forward All', 'Sim Ring' (which is active and highlighted in blue), and 'Find Me'. Below the tabs, there is a section for 'Phone Numbers'. It contains two input fields, each with a phone number: '1 (435) 628-2948' and '1 (435) 628-2138'. To the right of the first number is a '+ Add Number' button. To the right of the second number is a 'Remove Number' button. Below each number is a small text box explaining that simultaneous ring will ring all devices and the first to pick up takes the call. At the bottom of the panel, there is a 'No Answer' section with a dropdown menu set to 'Send to Voicemail', followed by 'after' and an input field with '20', and 'seconds'.

FEATURE	DESCRIPTION
<b>Phone Numbers</b>	Enter the phone number(s) that will ring. To add another number to the list, click [ <b>+Add Number</b> ].
<b>No Answer</b>	<p>Choose what happens when the call is unanswered:</p> <ul style="list-style-type: none"> <li>• Busy Tone</li> <li>• Forward to (add a forwarding number)</li> <li>• Ring Forever</li> <li>• Send to Voicemail</li> </ul> <p>Also, enter the number of seconds the call will ring before the action is triggered. Calls that ring longer than 120 seconds may be disconnected by the carrier.</p>

## FIND ME/FOLLOW ME

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



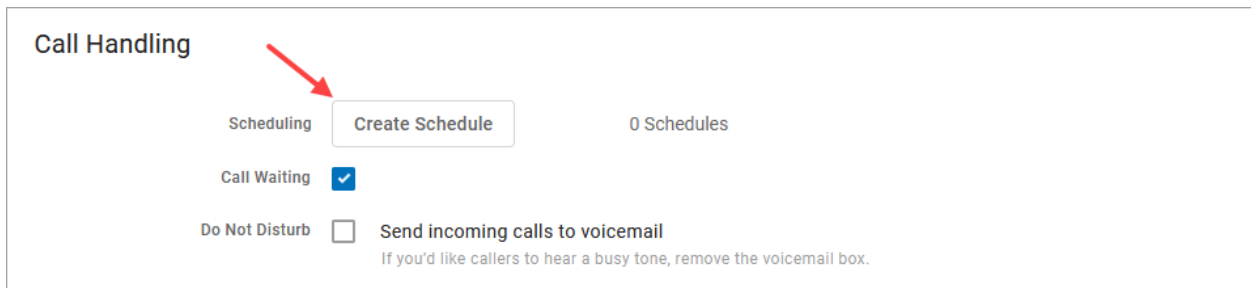
FEATURE	DESCRIPTION
<b>Destinations</b>	Indicate if calls should route through  <b>Devices</b> or <b># Phone Numbers</b> by clicking the respective icons. <ul style="list-style-type: none"> <li>• Use the   arrows to reorder the destinations.</li> <li>• Click <b>[+ Add Destination]</b> to add more destination fields.</li> </ul>
<b>Devices</b>	In the field provided, enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.
<b>Phone Number</b>	Enter the phone number calls should progress to and how long each number will ring.
<b>Timeout Action</b>	Choose what will happen to the call after all destinations have timed out: <ul style="list-style-type: none"> <li>• Busy Tone</li> <li>• Send to Voicemail</li> </ul>

## SCHEDULES

Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

Within the scheduler, the Call Handling options are Ring Phone, Forward All, Sim Ring, and Find Me. The main Call Handling section will take effect *outside* of these scheduled hours.

1. Within the Call Handling section, click **[Create Schedule]**.
  - If there are already schedules on the account, the button is **[Manage Schedules]**.



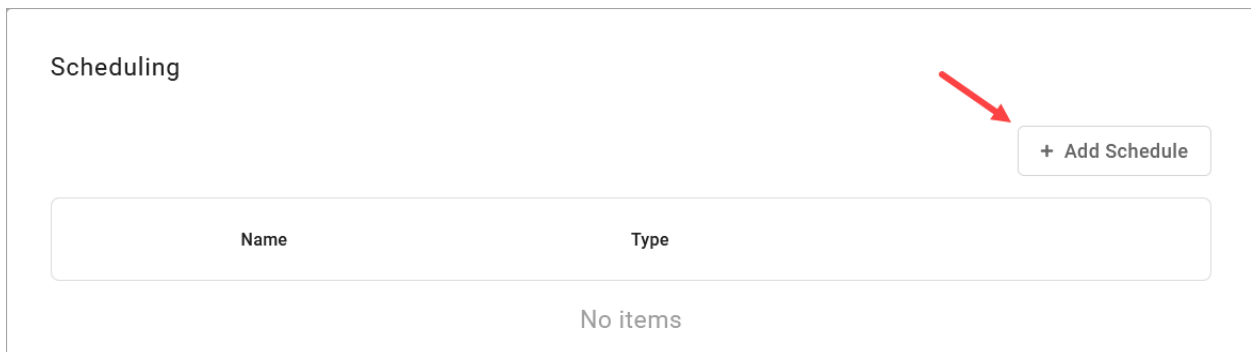
**Call Handling**

Scheduling **Create Schedule** 0 Schedules

Call Waiting

Do Not Disturb  Send incoming calls to voicemail  
If you'd like callers to hear a busy tone, remove the voicemail box.

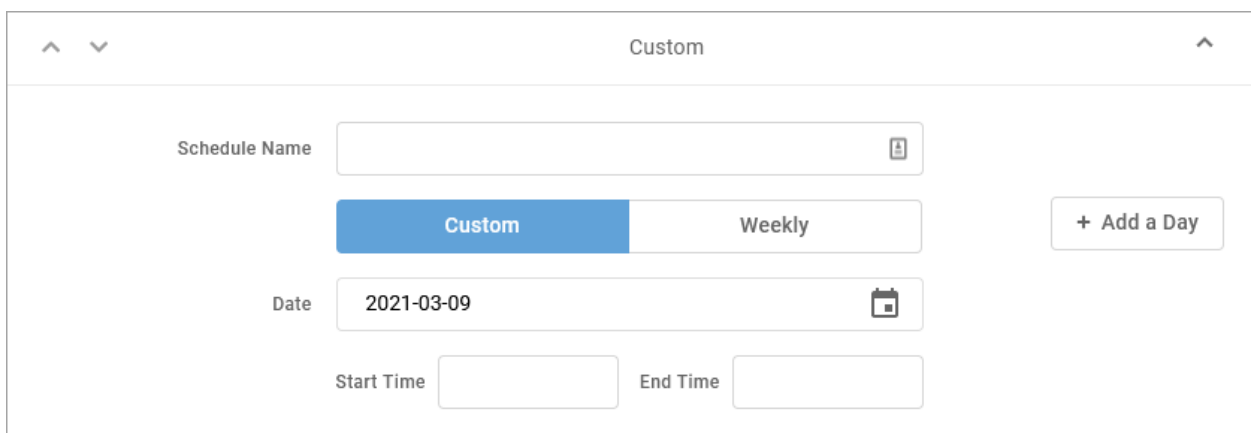
2. In the Scheduling window, click **[+Add Schedule]**.



**Scheduling**

**+ Add Schedule**

Name	Type
No items	



Custom

Schedule Name

**Custom** Weekly **+ Add a Day**

Date

Start Time  End Time

3. **SCHEDULE NAME:** Give the schedule a name.
4. **TYPE:** Choose whether this schedule is for specific dates (Custom) or recurring (Weekly).

- On a Custom schedule, fill in the dates and times the schedule will be in effect. If not using a 24-hour time, include AM or PM. Click [+ Add a Day] to add another section.

^ v Holidays Custom ^

Schedule Name

Custom  Weekly

Date

Start Time  End Time

---

Date

Start Time  End Time

- On a Weekly, recurring schedule, enter the start and end times for the days of the week you want this call handling to be in effect.

^ v Business Hours Weekly ^

Schedule Name

Custom  Weekly

Sun	Start Time	<input type="text"/>	End Time	<input type="text"/>
Mon	Start Time	<input type="text" value="08:00 AM"/>	End Time	<input type="text" value="05:00 PM"/>
Tue	Start Time	<input type="text" value="08:00 AM"/>	End Time	<input type="text" value="05:00 PM"/>
Wed	Start Time	<input type="text" value="08:00 AM"/>	End Time	<input type="text" value="05:00 PM"/>
Thu	Start Time	<input type="text" value="08:00 AM"/>	End Time	<input type="text" value="05:00 PM"/>
Fri	Start Time	<input type="text" value="08:00 AM"/>	End Time	<input type="text" value="05:00 PM"/>
Sat	Start Time	<input type="text"/>	End Time	<input type="text"/>

- CALL HANDLING:** Choose the call handling action that will occur *during* the specified times.

### Call Handling

Call Waiting

Do Not Disturb  **Send incoming calls to voicemail**  
If you'd like callers to hear a busy tone, remove the voicemail box.

No Answer  after  seconds

Busy

Out of Service

- Click **[Confirm]** and then **[Save]**.

### Custom Schedule Example

In the custom schedule example below, calls received between 5:00 AM and 5:00 PM on November 25, 2021, will be forwarded to 1-208-582-1676. Any call outside of that specific time will follow the call handling set up in the main Call Handling section.

Thanksgiving
Custom

---

Schedule Name

Date

Start Time  End Time

---

### Call Handling

Call Waiting

Do Not Disturb  **Send incoming calls to voicemail**  
If you'd like callers to hear a busy tone, remove the voicemail box.

Forwarding Number

# Devices

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

Sarah Jane
bcc.standard
2000
^

Calls
Devices
Settings
0 Voicemail

### Device Lines

Device Type	MAC Address	Line Number
Cisco 8851 (3PCC)	0010fa6e384a	1-10

### Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
CP-8851	bbbcccd242	2	Jack Harkness

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

- **DEVICE INFO:** View the MAC Address, Device Type, and Configuration Status. There you can also Swap the device for a new one or upload a Bulk Configuration file.
- **LINE CONFIGURATION:** On an IP phone, you can assign features to lines, including Call Park, Device Line, Paging Group, Presence/BLF, Shared Line, and Speed Dial.
- **SIDECAR:** Configure a sidecar (key expansion module) on the device.

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

## CYMBUS DEVICES

Only physical devices are listed in the Voice Portal. Users on Advanced or Professional plans are automatically assigned two Cymbus softphone devices that are not included here.



# Settings

The Settings tab displays the user's information and settings, including the outbound caller ID number for that user, the time zone used by the system, and the language used in the voicemail menu.

## User Information

Sarah Jane
s.jane
2424
^

Calls
Devices
Settings
Voicemail 0

### User Information

Name

Language

English

Time Zone

US/Mountain

FEATURE	DESCRIPTION
<b>Name</b>	The user's first and last name.
<b>Language</b>	<p>The language heard in the telephone user interface (TUI) audio prompts for star codes and the IVR. Select English or French.</p> <p>This is separate from the Language setting on the <a href="#">Voicemail tab</a>, which applies specifically to that voicemail box. Please remember to set both.</p>
<b>Time Zone</b>	The time zone displayed on the user's device and call records.

## Feature Plan & Voice Portal

**Feature Plan & Voice Portal**

Feature Plan **ADVANCED** i

Voice Portal Access

Email  ✓

Username **jane.s**

End-User Role **ADMIN** i

✉ Resend Welcome Email
🔑 Reset Password

Last Send: Feb 2nd 2021, 3:32 pm

FEATURE	DESCRIPTION
<b>Feature Plan</b>	<p>The user's current feature plan:</p> <ul style="list-style-type: none"> <li>• <b>STANDARD:</b> All basic voice features.</li> <li>• <b>ADVANCED:</b> All Standard features + the softphone app and Team Messaging.</li> <li>• <b>PROFESSIONAL:</b> All standard and advanced features + Video Conferencing and Screen Sharing.</li> </ul> <p>To change the plan, please contact Customer Support.</p>
<b>Voice Portal Access</b>	<p>This toggle allows you to enable or disable the user's access to the Voice Portal. It is automatically enabled for Advanced and Professional users, but it is disabled by default for Standard users.</p> <p>Flip it ON for those who need access and leave it OFF for those who don't.</p>
<b>Email</b>	<p>A valid email address is required for every user who has access to the Voice Portal. This is where their <i>Welcome</i> and <i>Forgot Password</i> emails are sent.</p>
<b>Username</b>	<p>Their username. It cannot be changed. The user can log in to the Voice Portal with this or their email address.</p>
<b>End-User Role</b>	<p>The level of access the user has in the Voice Portal.</p> <ul style="list-style-type: none"> <li>• <b>ADMIN:</b> Access to manage features for all account users.</li> <li>• <b>LIMITED:</b> Access to manage their own account features.</li> </ul> <p style="background-color: #ffe6e6; padding: 5px;">You cannot change your own End-User Role.</p>
<b>Resend Welcome Email</b>	<p>Resend the <i>Welcome</i> email with the Voice Portal URL, a link to create a password, and their softphone account information (if applicable).</p>
<b>Reset Password</b>	<p>Send the user an email with a link to reset their password.</p>

# Calling Plans

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

Expand a plan to see how many minutes have been used.


To add or modify the user's Calling Plan, including changes to permitted calling areas, please contact Customer Support.

### Calling Plans

Calling Plan	Total Minutes	Minutes Used	
Default	50000	3	^

Calling Plan **Default**

Minutes Used **3 / 50000**



Delete

# Voicemail

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

Please note, as an Account Manager or Admin user, you can download only your own voicemail messages from the Voice Portal.

## Voicemail Box Details

Sarah Jane
jane.s
2000
^

Calls
Devices
Settings
Voicemail 0

### Voicemail Box Details

Voicemail Box Name Sarah Jane

Owner **Sarah Jane**

Reset PIN
i

Language **English**

FEATURE	DESCRIPTION
<b>Voicemail Box Name</b>	<p>The name of the voicemail box assigned to this user. To change the user's box, click the drop-down menu and select one from the list.</p> <p>To change the name of the voicemail box, go to <a href="#">Account &gt; Voicemail</a> and search for the box.</p>
<b>Owner</b>	The name(s) of the user(s) this voicemail box is assigned to.
<b>Reset PIN</b>	If the user cannot remember their voicemail box PIN to sign in, click <b>Reset PIN</b> to reset it for them. The default PIN is 1234. The first time the user logs in to their voicemail box in with the default PIN, they will be asked to set a new one.

## VOICEMAIL MANAGEMENT

Voicemail boxes can be managed at the user level (here) or in the Voicemail section of the Voice Portal. The settings for Voicemail Box Greetings, Messages, and Message Settings are the same in both locations. See [Voicemail](#) for more information about these settings.

Sarah Jane jane.s 2000

Calls Devices Settings **Voicemail 0**

### Voicemail Box Details

Voicemail Box Name Sarah Jane

Owner Sarah Jane

[Reset PIN](#) ⓘ

Language English

---

### Voicemail Box Greetings ⓘ

Basic Greeting [Click Here](#) [Upload](#)  
Accepted files: WAVE, MP3, and OGG files under 10MB

Personal Name [Click Here](#) [Upload](#)  
Accepted files: WAVE, MP3, and OGG files under 10MB

---

Custom Greetings  
Any custom voicemail greeting upload here will override basic and personal name greetings.

Busy Greeting [Click Here](#) [Upload](#)  
Accepted files: WAVE, MP3, and OGG files under 10MB

No Answer Greeting [Click Here](#) [Upload](#)  
Accepted files: WAVE, MP3, and OGG files under 10MB

---

### Messages 🗑️

<input type="checkbox"/>	Date/Time ↓	Caller	Length	Status
No Voicemail Messages				

---

### Message Settings

Forward Voicemail to Email  Forward voicemail messages

Keep a copy in voicemail box

Enable Transcription  Enable Transcription of Messages

[Delete](#) [Cancel](#) [Save](#)

# PHONE NUMBERS

In Phone Numbers, you can see the phone numbers on the account and the destination to which they're routed. Click the **left** side of the phone number to view the Customer Service Record and edit the E911 Record.

If you don't see Phone Numbers in the menu, please contact Customer Support.

The screenshot shows the 'Phone Numbers' page in the Business Cloud interface. On the left is a navigation menu with options: Users, Phone Numbers (highlighted), Devices, Auto-Attendant, Voicemail, Call History, and Account History. The main content area is titled 'Phone Numbers' and includes a search bar, a filter dropdown set to 'All', and a table of phone numbers. A '+ Add Number' button is in the top right.

Phone Number	Type	Destination
1 (435) 625-0417	ELS	Hunt Groups - Main Office
1 (617) 326-8008	ELS	Hunt Groups - Main Office

This screenshot shows the configuration page for the phone number 1 (435) 625-0417. The left sidebar shows the 'Phone Numbers' list with the selected number highlighted in red. The main area is titled '1 (435) 625-0417' and contains sections for 'Customer Service Record' and 'E911 Record'. The 'E911 Record' section includes a 'Same as CSR Record' checkbox, radio buttons for 'Individual' and 'Company', a 'Postal Code' field (84713), an 'Enter Address' field (353 E Spring Dr, Beaver, UT 84713), and an 'Address Preview' section. A 'Manual Entry' dropdown is also present. At the bottom are 'Delete', 'Dismiss', and 'Save' buttons.

**Customer Service Record**

Address Preview 353 E Spring Dr  
Beaver, UT 84713  
Lat/Long 38.279000, -112.635900  
[View Lat/Long in Google Maps](#)

**E911 Record**

Same as CSR Record

Individual Company

Postal Code 84713

Enter Address 353 E Spring Dr Beaver, UT 84713

Address Preview 353 E Spring Dr  
Beaver, UT 84713  
Lat/Long 38.279000, -112.635900  
Manual Entry

Provide Lat/Long

[View Lat/Long in Google Maps](#)

Delete Dismiss Save

# Customer Service Record

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

1 (435) 628-2065

---

## Customer Service Record

Address Preview 789 N Town Rd  
Santa Clara, UT 84765  
Lat/Long 37.133200, -113.652800

[View Lat/Long in Google Maps](#)

## E911 Record

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

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

### E911 Record

Same as CSR Record

Individual
Company

Company Name

Postal Code

Enter Address

Address Preview 353 E Spring Dr  
Beaver, UT 84713 Manual Entry ▾

Lat/Long 38.279000, -112.635900

Provide Lat/Long

[View Lat/Long in Google Maps](#)

FEATURE	DESCRIPTION
<b>Name</b>	The name of the individual or company the phone number belongs to.
<b>Postal Code</b>	The postal code of the address.
<b>Enter Address</b>	The address associated with the phone number. Start typing an address and options will populate below. Select the correct address.
<b>Manual Entry</b>	Enter the address manually. These fields will automatically populate with the existing information and are optional unless otherwise indicated. If the address is for a multi-unit building, you can add the Unit Type and Unit Number here.
<b>Provide Lat/Long</b>	Check this box to view and/or modify the latitude and longitude, if necessary.



# Phone Number Route Management

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

To change a phone number's destination:

1. Go to the **Phone Numbers** page.
2. Locate the phone number you want to modify and click the right side to expand the settings.
3. Click the *Phone Number Rings To* drop-down menu and choose a new destination.
4. Click **[Save]**. The changes will be applied immediately.

## Phone Numbers

All ▾

Phone Number	Type	Destination
1 (801) 341-1600	ELS	VFAX - Receive Demo
1 (801) 999-6666	ELS	Auto-Attendant - New Auto-Attendant

Phone Number Rings To

Priority Ring

Assign Temp Number

Auto-Attendant - New Auto-Attendant ▾

None

Auto-Attendant - New AA

Auto-Attendant - Rural Electric Co-Op

User - Sarah Jane (s.jane)

User - Mickey Smith (m.smith)

VFAX - Receive Demo

Cancel
Save

## CUSTOMER SUPPORT

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

# DEVICES

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

The screenshot shows the 'Devices' section of the Business Cloud interface. On the left is a navigation menu with options: Documentation Demo, Business Cloud, Users, Devices (selected), Voicemail, and Call History. The main area has a search bar labeled 'Search devices' and a table of devices.

MAC Address ↑	Device Type	Owners	
0010fa6e384a	Cisco 8851 (3PCC)	Sarah Jane	Edit ↓
aabbceccff11	Polycom VVX 250	Clara Oswald	
bbbccddd242	Cisco 8851 (3PCC)	Jack Harkness	
bbeeffdaa22	Polycom VVX 250	David Smith	

To view and manage device settings:

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

## CYMBUS DEVICES

Only physical devices are listed in the Voice Portal. Users on Advanced or Professional plans are automatically assigned two Cymbus softphone devices that are not included here.

## Device Info

Here you can see the device's MAC Address, Device Type (make and model), and Configuration Status.

Polycom VVX 601	64167f5555a	1-16	^
-----------------	-------------	------	---

**Device Info**

MAC Address 64167f5555a

Device Type **Polycom VVX 601**

Configuration Status **Yes** ✓ [Details](#) ▼

Swap Device

[Bulk Line Configuration](#) ▼

## Configuration Status

The Configuration Status indicates if the device is provisioned and registering on the voice server. If yes, the device is online and available for use. If no, make sure the device is on and the MAC address is correct. If it isn't, please contact Customer Support to update it.

## Swap Device

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

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

1. Click **[Swap]**.
2. Enter the information for the new device in the fields provided.
  - **DEVICE TYPE:** Select the new device type. If the device you're trying to use isn't listed here, please contact Support.
  - **MAC ADDRESS:** Enter the device's MAC address.
  - **DEVICE NAME:** Optionally, enter a name for the device.

3. Double-check the list of Affected Device Lines to make sure you won't break anything. Once the switch is complete, you may need to set up these lines again.
4. Click **[Confirm]** to complete the switch.

**Swap Device - 888844442222**

**New Device**

Device Type:  ⓘ

MAC Address:

Device Name:

---

**Affected Device Lines**

Username	Device Name	Line
16173268008	Line 2	1

---

## Bulk Line Configuration

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

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

[Bulk Line Configuration](#) ^

Export Current Configuration

Import New Configuration

Device Lines

Expected header row of LINE\_NUMBER, LINE\_TYPE, REFERENCE, REFERENCE\_NAME

## IMPORT FILE FORMAT

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

Header Row Values	Field Values
<b>LINE_NUMBER</b>	The numeric line number on the device. The import does not accept line numbers that don't exist on the device.
<b>LINE_TYPE</b>	Enter one of the following values to assign a feature to that line: <ul style="list-style-type: none"> <li>• <b>Line</b>: Device line assigned to the owner of the IP phone.               <ul style="list-style-type: none"> <li>– Line 1 <u>must</u> be set to <i>Line</i>. It cannot be set to another type.</li> </ul> </li> <li>• <b>ReferencedUser</b>: Shared line with another user on the account.</li> <li>• <b>PresenceBlfUser</b>: Assignment of the device line to monitor the state of another user on the same account.</li> <li>• <b>SpeedDialUser</b>: Assignment of the device line to another user on the account as a speed dial.</li> <li>• <b>SpeedDialTn</b>: Assignment of the device line to an external number or star code.</li> <li>• <b>CallParkingSpot</b>: Assignment of the device line to a parking spot.</li> <li>• <b>SipPaging</b>: Assignment of the device line to a paging group.</li> <li>• <b>Blank</b>: Device Line is <i>Deactivated</i>.</li> </ul>
<b>REFERENCE</b>	The 3- to 6-digit extension of other users on the account (SpeedDialUser), or a speed dial phone number (SpeedDialTN).
<b>REFERENCE_NAME</b>	The user or object that owns the <i>Reference</i> . This field is listed on an export but is not required for an import.

## EXAMPLE IMPORT FILE

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

# Line Configuration

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

- [Call Park](#)
- [Paging Group](#)
- [Shared Line](#)
- [Device Line](#)
- [Presence/BLF](#)
- [Speed Dial](#)

Line Configuration		
Line Number ↑	Type	Assignment
1	Device Line	
2	Call Park	Parking Spot 1
3	Deactivated	Edit ▾
4	Paging Group	Back Office
5	Presence/BLF	David Smith
6	Shared Line	Clara Oswald
7	Speed Dial	*456

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

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

## CONTACT SUPPORT

For any other device changes, please contact Customer Support.

## Call Park

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

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

**Device Line Info**

Type Call Park ▼

Assignment Parking Spot 1 ▼

- **TYPE:** Call Park
- **ASSIGNMENT:** Choose a parking spot.

## Device Line

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

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

**Device Line Info**

Type Device Line ▼

911 Callback Number

[SIP Credentials](#) ▲

Fax Enabled  This line is connected to a fax machine  
Incoming faxes answered by the voicemail box are always allowed. Enabling fax here changes the device configuration to enable fax settings. These settings will negatively affect voice call quality.

### FAX ENABLED

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

## Paging Group

Paging Groups are used to make one-way announcements to one or more devices. By assigning users to a Paging Group, all of the users assigned to that group can be contacted at once via their device's speaker, just by pressing the paging group set up in the line configuration of the device.

To set up a Paging Group on the account, please contact Customer Support.

**Device Line Info**

Type

Assignment

- **TYPE:** Paging Group
- **ASSIGNMENT:** Select a group from the list

## Presence/BLF

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

**Device Line Info**

Type

Assignment

Presence States include Busy, Available and Ringing of 1 or more of their devices is on a call. Lines assigned to presence will also enable Speed Dialing between users.

- **TYPE:** Presence/BLF
- **ASSIGNMENT:** Select a user from the list



## Shared Line

A shared line allows this user to receive and place calls as another user from their own phone.

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

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

### Device Line Info

Type	Shared Line
Assignment	Clara Oswald

- **TYPE:** Shared Line
- **ASSIGNMENT:** Select a user

## EXAMPLE OF A SHARED LINE

The example below shows a shared line between David Smith and Clara Oswald.

In the first image, we see the user David Smith has set up a shared line with Clara Oswald on his Polycom VVX device.

The screenshot shows the user interface for David Smith (username: dsmith, extension: 1455). The 'Devices' tab is active. Under 'Device Lines', a Polycom VVX 250 device (MAC: bbeeffddaa22) is listed with line numbers 1-4. A 'Line Configuration' section shows two lines: Line 1 is a 'Device Line' and Line 2 is a 'Shared Line' assigned to Clara Oswald.

Device Type	MAC Address	Line Number
Polycom VVX 250	bbeeffddaa22	1-4

Line Number	Type	Assignment
1	Device Line	
2	Shared Line	Clara Oswald

In the second image, we see in Clara's Devices tab that the VVX 250 belonging to David Smith is shown in the Referenced Devices section.

The screenshot shows the user interface for Clara Oswald (username: bcc.pro.limited, extension: 4500). The 'Devices' tab is active. Under 'Device Lines', a Polycom VVX 250 device (MAC: aabbeccff11) is listed with line numbers 1-4. A 'Referenced Devices' section shows a device owned by David Smith (MAC: bbeeffddaa22) with line number 2.

Device Type	MAC Address	Line Number
Polycom VVX 250	aabbeccff11	1-4

Device Type	MAC Address	Line Number	Device Owner
VVX250	bbeeffddaa22	2	David Smith

## Speed Dial

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

### ASSIGNING A SPEED DIAL

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

**Device Line Info**

Type

Assignment

- **TYPE:** Speed Dial
- **ASSIGNMENT:** Choose a user from the list

### ASSIGNING A CUSTOM SPEED DIAL

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

2      Speed Dial      \*456      ^

**Device Line Info**

Type

Assignment

Speed Dial

Speed Dial Display Name

- **TYPE:** Speed Dial
- **ASSIGNMENT:** Custom Speed Dial
- **SPEED DIAL:** Enter a phone number or star code.
- **SPEED DIAL DISPLAY NAME:** Enter a name for the group that will be displayed on your phone for the line.

# Sidecar

Sidecars, also called Expansion Modules, can be provisioned on an IP phone for additional line keys and functionality. Expand an IP phone device and scroll down past the Line Configuration section to see the Sidecar option.

**Sidecar**

Sidecar Type

Number Of Sidecars

- **SIDECAR TYPE:** Select a sidecar type from the menu. This list will only display options that are compatible with the IP phone being managed.
- **NUMBER OF SIDECARS:** Select the number of sidecars being added to the IP phone.

**Sidecar**

Sidecar Type

Number Of Sidecars

[Bulk Sidecar Setup](#) ▾

Line Number	Type	Assignment
Sidecar 1 - Page 1 Line 1	Deactivated	
Sidecar 1 - Page 1 Line 2	Deactivated	
Sidecar 1 - Page 1 Line 3	Deactivated	
Sidecar 1 - Page 1 Line 4	Deactivated	
Sidecar 1 - Page 1 Line 5	Deactivated	
Sidecar 1 - Page 1 Line 6	Deactivated	
Sidecar 1 - Page 1 Line 7	Deactivated	

## Bulk Sidecar Setup

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

There are three bulk sidecar setup options:

- **ALPHABETICALLY:** Add all possible users in order by last name.
- **BY EXTENSION:** Add all possible users in order by their extension number.
- **CUSTOM:** Choose specific users as sidecar lines in a single operation.

Choose an option, then scroll down past the lines and click **Save** to implement it.

**Sidecar**

Sidecar Type

Number Of Sidecars

**Bulk Sidecar Setup** ^

Sidecar Line Setup

Line Number		
Sidecar 1 - Page 1 Line 1	Alphabetically	
Sidecar 1 - Page 1 Line 2	By Extension	
Sidecar 1 - Page 1 Line 3	Custom	

### IMPORTANT

Any bulk setup operation will overwrite the current sidecar configuration—it cannot be undone!

## ALPHABETICALLY

Users are assigned to lines in reverse alphabetical order.

**Sidecar**

Sidecar Type

Number Of Sidecars

[Bulk Sidecar Setup](#) ▾

Line Number	Type	Assignment
Sidecar 1 - Page 1 Line 1	Speed Dial	Mickey Smith
Sidecar 1 - Page 1 Line 2	Speed Dial	Clara Oswald
Sidecar 1 - Page 1 Line 3	Speed Dial	Jack Harkness
Sidecar 1 - Page 1 Line 4	Speed Dial	David Smith
Sidecar 1 - Page 1 Line 5	Speed Dial	John Doe

## BY EXTENSION

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

**Sidecar**

Sidecar Type

Number Of Sidecars

[Bulk Sidecar Setup](#) ▾

Line Number	Type	Assignment
Sidecar 1 - Page 1 Line 1	Speed Dial	David Smith
Sidecar 1 - Page 1 Line 2	Speed Dial	Mickey Smith
Sidecar 1 - Page 1 Line 3	Speed Dial	Jack Harkness
Sidecar 1 - Page 1 Line 4	Speed Dial	Clara Oswald
Sidecar 1 - Page 1 Line 5	Speed Dial	John Doe

## CUSTOM

Use the arrows to move Unassigned Users to the Assigned Users list.

### Sidecar

Sidecar Type

Number Of Sidecars

[Bulk Sidecar Setup ^](#)

Sidecar Line Setup

Bulk Sidecar Setup will overwrite the current Sidecar setup.

#### Unassigned Users

- David Smith
- Jack Harkness
- John Doe
- Mickey Smith

#### Assigned Users

- Scroll up the Unassigned Users list
- Add all users to the Assigned Users list
- Add the selected user to the Assigned Users list
- Removes selected user from the Assigned Users list
- Removes all users from the Assigned Users list
- Scroll down the Unassigned Users list

All users will be setup as Speed Dial Lines

# AUTO-ATTENDANT

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

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

## Overview

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

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

**Auto-Attendant** + Add Auto-Attendant

Search Auto-Attendant

**To edit an activated Auto-Attendant, you can do one of the following:**

- Duplicate it and make changes to the copy
- Remove any assigned phone numbers and deactivate it to allow editing

Name ↑	Assigned Phone Number	Modified Date	Status	
Emergency Support	1 (435) 628-2138	6/1/2021, 2:28:59 PM	Live	
Main Line	---	4/12/2021, 12:32:15 PM	Incomplete	
Main Office	1 (435) 628-3774	8/19/2021, 12:45:19 PM	Live	
Rural Electric Co-Op	---	8/20/2021, 8:45:35 AM	Ready to Activate	

















1-4 of 4 < >









FIELD	DESCRIPTION
<b>[+Add Auto-Attendant]</b>	Start creating a new auto-attendant. The builder will open in a new window, so you can look back at the auto-attendant list if you need to reference it.
<b>Name</b>	The name of the auto-attendant. If a name wasn't saved, it will be named "untitled auto-attendant" by default.
<b>Assigned Phone Number</b>	The phone number(s) directed to this auto-attendant. A phone number must be assigned before calls can be directed through the auto-attendant. If this is blank, contact Customer Support for assistance.
<b>Modified Date</b>	The last date the auto-attendant was modified: month, day, year, time.
<b>Status</b>	<ul style="list-style-type: none"> <li><b>INCOMPLETE:</b> There are open routes that need to be closed before the auto-attendant can be launched.</li> <li><b>READY TO ACTIVATE:</b> All routes are closed and it's ready to be launched (activated).</li> <li><b>ACTIVATED:</b> The route has been launched and it can now be assigned to a phone number.</li> <li><b>LIVE:</b> A phone number is assigned, and this auto-attendant is live.</li> </ul>

## Tools

Hover over an auto-attendant to see the tools on the right. The tools available are different for each status. For example, you cannot delete or edit an Activated or Live auto-attendant, so those options will be greyed out, but you will have the *View Only* option.

Main Line	---	4/12/2021, 12:32:15 PM	Incomplete	   
Rural Electric Co-Op	---	8/20/2021, 8:45:35 AM	Ready to Activate	   
Rural Electric Co-Op	---	8/20/2021, 8:45:35 AM	Activated, Assign T...	   
Emergency Support	1 (435) 628-2138	6/1/2021, 2:28:59 PM	Live	   



FIELD	DESCRIPTION
 <b>Delete</b>	Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.

FIELD	DESCRIPTION
 <b>Duplicate</b>	Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one.
 <b>Activate</b>	When the status is <i>Valid</i> , click the <b>Activate</b> icon to activate it so the attendant will be available as a destination in the Phone Number menu.
 <b>Deactivate</b>	Deactivate the auto-attendant. <i>Activated</i> status will be downgraded to <i>Valid</i> , and <i>Linked</i> status will be downgraded to <i>Activated</i> .
	The phone number must be unassigned before the auto-attendant can be edited. Please contact Customer Support for assistance.
 <b>Edit</b>	Make changes to an inactive auto-attendant in the builder. Changes are saved in real time, so Live and Activated auto-attendant cannot be edited.
 <b>View Only</b>	Open an active auto-attendant to see how it's set up without the risk of making changes to a live call flow. Auto-attendants cannot be modified in View Only mode.

## Auto-Attendant Setup

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

### Add an Auto-Attendant

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

## AUTO-ATTENDANT ROUTES SUMMARY

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

## Activate an Auto-Attendant

When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to "Ready to Activate."

At this point, you can  **Activate** it and then assign a phone number it.

**Auto-Attendant** + Add Auto-Attendant

Search Auto-Attendant

**i** To edit an activated Auto-Attendant, you can do one of the following:

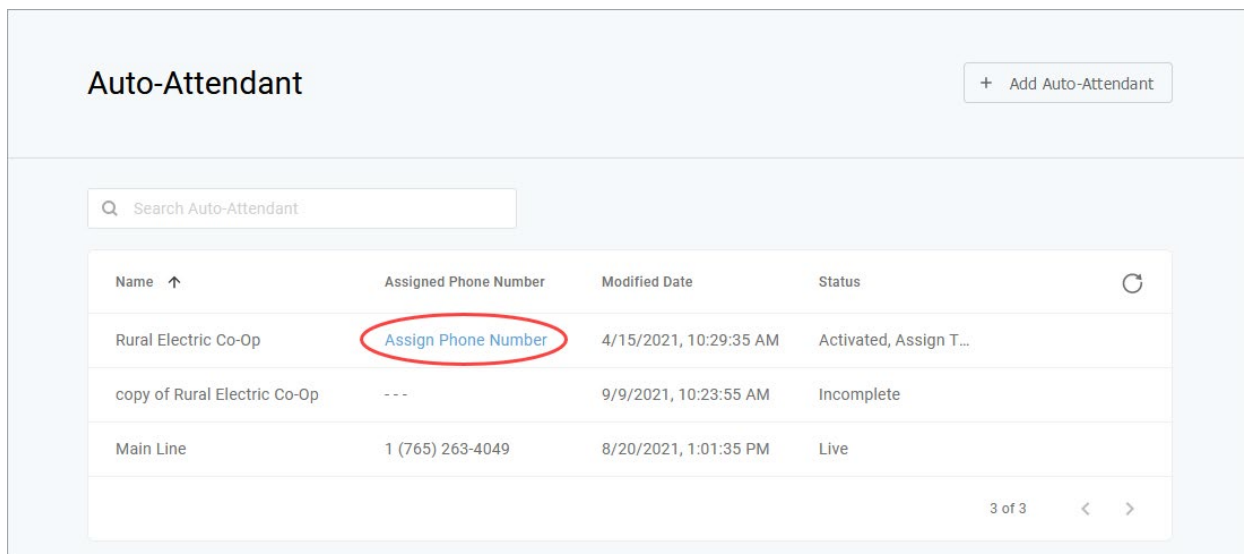
- Duplicate it and make changes to the copy
- Remove any assigned phone numbers and deactivate it to allow editing

Name ↑	Assigned Phone Number	Modified Date	Status	
Emergency Support	1 (435) 628-2138	6/1/2021, 2:28:59 PM	Live	
Main Line	---	4/12/2021, 12:32:15 PM	Incomplete	<b>Activate</b>
Rural Electric Co-Op	---	4/22/2021, 11:31:47 AM	Ready to Activate	

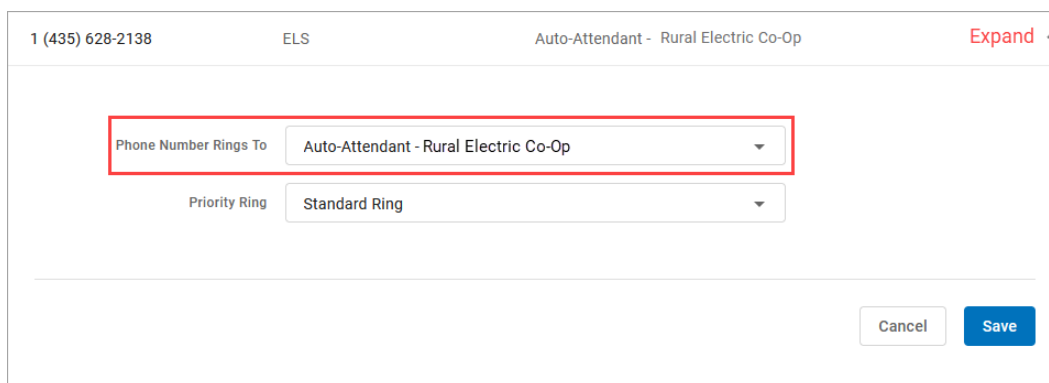
1-4 of 4 < >

## Assign a Phone Number

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




1. Click the *Assign Phone Number* link to go to the **Phone Numbers** page.
2. Locate the phone number you want to modify and click the right side to expand the settings.




3. Click the **Phone Number Rings To** drop-down menu and choose the auto-attendant as the new destination.
4. Click **[Save]**. Calls to that phone number will now be directed through the auto-attendant.





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

## Edit an Auto-Attendant

Once an auto-attendant has been  activated, whether or not a phone number has been assigned yet, it can no longer be edited. This is because the Auto-Attendant route builder saves changes in real time, and we don't want you to accidentally break an active call flow, even temporarily.




If you just want to see how the auto-attendant is set up, click  to open it in **View Only** mode. But if you do need to make changes, you have a few options:

### OPTION 1: DUPLICATE, EDIT, SWITCH

1. In the Voice Portal, go to the **Auto-Attendant** page. Locate the one you want to modify and click  **Duplicate**.
2. Click  **Edit** to open the builder and make any necessary changes.
3. Go back to the **Auto-Attendant** page, find the one you just modified, and click  **Activate**.
4. When you're ready for the new version to go live, go to the **Phone Numbers** page and locate the phone number assigned to the original auto-attendant. Click the destination on the right and change it to the new auto-attendant.
5. Calls to that phone number will now be directed through the new auto-attendant.
6. Go to the **Auto-Attendant** page, locate the original, and click  **Deactivate**.
7. Delete the old version or rename it so users don't confuse them.

### OPTION 2: DEACTIVATE, EDIT, REACTIVATE


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

1. In the Voice Portal, go to the **Phone Numbers** page and locate the phone number assigned to the auto-attendant you want to modify.
2. Click the phone number destination on the right and change it to "None" or another viable option (like a temporary auto-attendant).
3. Go to the Auto-Attendant page and locate the one you want to modify. On the right, click  **Deactivate**.
4. Now click  **Edit** to open the builder and make any necessary changes.
5. When you're done, go back to the **Auto-Attendant** page, locate the auto-attendant you just modified, and click  **Activate**.
6. Click the *Assign Phone Number* link to go to the **Phone Numbers** page.

7. Locate the phone number you want to assign, then click the destination on the right and change it back to the auto-attendant.
8. Calls to that phone number will now be directed through the auto-attendant.

## Auto-Attendant Routes

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

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

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

### INFO

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

## Schedule

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

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

1. **SCHEDULE NAME:** Enter a name for this schedule (20-character max).
2. **TIME ZONE:** Select which time zone should be applied.
3. **RULE NAME:** Enter a name for this rule.
4. **WEEKLY/CUSTOM:** Choose a rule type: Weekly (recurring) or Custom (one-time).
  - **DAY/DATE:** For a Weekly rule, select the days of the week that this rule applies to. For a Custom rule, choose one or more dates (but not a range).
  - **TIME:** Enter the start and end times. You can type it in or click the **clock** icon on the right to use the drop-down menu (Chrome only).
    - For a Weekly rule, you can split the rule into different times during the day. Click **+ Add Time Range** and then enter the other time.
  - **SAVE:** When you're done, click the checkmark in the top right.

- If needed, click **[+ Add Rule]** to add another rule to this schedule.
- When you're done adding rules to the schedule, click **[Save]**.

**Weekdays**  
Weekly (Mo - Fr)

Rule name  
Weekdays

Weekly Custom

Mo Tu We Th Fr Sa Su

08 : 00 : 00 AM ✕ 12 : 30 : 00 PM ✕

01 : 00 : 00 PM ✕ 05 : 30 : 00 PM ✕

[+ Add Time Range](#)

**Holidays**  
Custom (12/24/2021) +1

Rule name  
Holidays

Weekly Custom

Date & Time  
12/24/2021 ✕




08 : 00 : 00 AM ✕ 05 : 30 : 00 PM ✕



Date & Time  
12/25/2021 ✕

08 : 00 : 00 AM ✕ 05 : 30 : 00 PM ✕

[+ Add Custom Date](#)

## DELETE A RULE

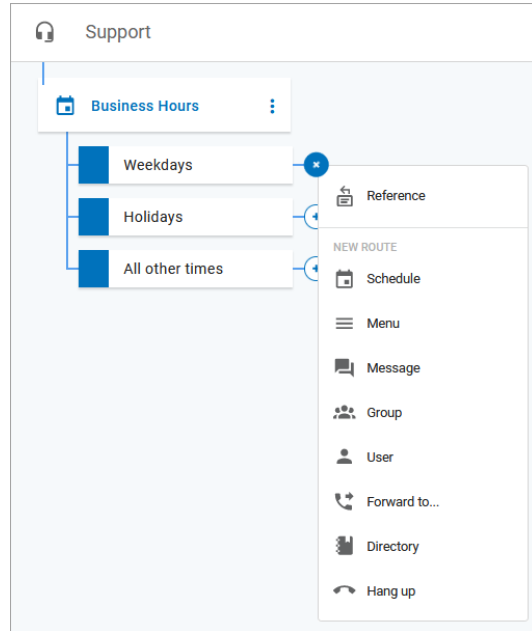
To delete a rule, click the  **trash** icon. The rule will be crossed out, but if you change your mind, it can still be  **restored** or  **edited** until the schedule is saved. Once you save the schedule, though, any deleted rules will be deleted permanently.

= Weekly (Mo - Fr)  

## SAVE

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

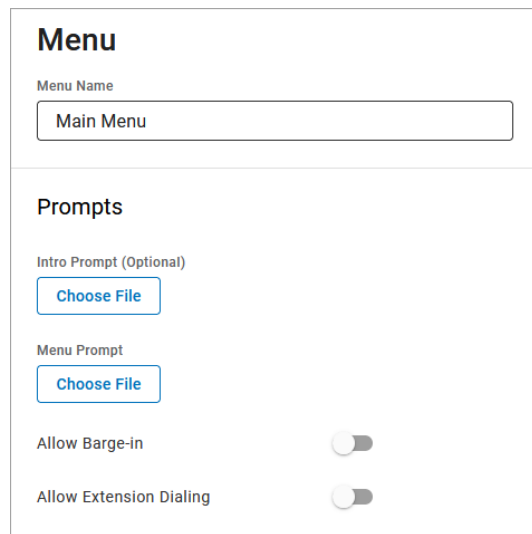
By default, an "All other times" route will be added to determine where calls are routed during times that aren't specified by a rule.



## Menu

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

Enter a name for this menu and then upload your prompts.



FIELD	DESCRIPTION
<b>Intro Prompt</b>	The recorded audio that a caller will hear upon entering the menu. A WAV file must be uploaded before the menu can be saved.
<b>Menu Prompt</b>	The recorded audio that a caller will hear after the introduction prompt has completed. A WAV file must be uploaded before the menu can be saved. WAV files must be less than 5 MB and in an 8-bit mono U-Law file format.  Example: "Thank you for calling Acme Corp. Press 1 for Sales, 2 for Support, or 3 for Billing."



**Allow Barge-In**

Allow callers to interrupt the Intro prompt by dialing an option (DTMF input) before they hear it.

**Allow Extension Dialing**

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

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

## MENU OPTIONS

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

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

The screenshot shows a 'Menu Options' configuration panel. It contains three rows, each representing a menu option. Each row has a circular icon with a number and its corresponding letters (e.g., '2 ABC'), a text input field for the option name (e.g., 'Sales'), and a trash icon. Below the list is a blue button labeled '+ Add Option' with a downward-pointing arrow.

## FAILURE ROUTING

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

The screenshot shows a 'Failure Routing' configuration panel. It has three main sections: 'Menu Timeout (Seconds)' with a dropdown menu set to '30'; 'Max Invalid Selections' with a dropdown menu set to '3'; and 'Invalid Prompt' with a 'Choose File' button.

FIELD	DESCRIPTION
<b>Menu Timeout</b>	The number of seconds delay before directing the call into the failure route.

**Max Invalid Selections** The number of invalid DTMF (touchtone) selections that will be allowed prior to directing the call into the failure route.

**Invalid Prompt** Upload a recorded audio file (WAV or WAVE) that a caller will hear after dialing an invalid DMTF option (required). Files must be less than 5 MB and in 8-bit mono U-Law format.  
 Example verbiage: "The number you entered was invalid. Please try again."

When you're done configuring the menu, click **[Save]**. The menu will be added to the auto-attendant builder canvas.

## Message

The caller will hear a pre-recorded message.

**Message**

Message Name

Please leave a message

Message

Choose File

Please upload a .wav file (under 5 MB).

FIELD	DESCRIPTION
<b>Message Name</b>	Enter a name for this message.
<b>Message</b>	Upload a recorded audio file (WAV or WAVE under 5 MB) that will play when the caller reaches this point in the route.

## Group

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

### Group

Group Name

Allow Call Queuing

Max # of Calls

Queue size is required.

Max Time (Minutes)

Max Time is required.

Ring Timeout (Seconds)

Timeout value is required.

FIELD	DESCRIPTION
<b>Group Name</b>	Enter a name to identify this group.
<b>Allow Call Queuing</b>	Allows calls to enter a queue.
<b>Max # of Calls</b>	Enter the number of calls that can be in the queue at one time (1–50).
<b>Max Time (Minutes)</b>	Enter the number of minutes that a call is allowed be in the queue (limit 360). Once the max time is reached, the call is sent to the failure route.
<b>Ring Timeout (Seconds)</b>	Enter the number of seconds a call will ring a user (sequential) or group (simultaneous) before it is pushed back to the front of the queue (limit 120). Keep this setting low to ensure calls are answered quickly.

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

## CALL QUEUEING

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

The screenshot displays the configuration interface for a call group. On the left is a navigation menu with options: Reference, NEW ROUTE, Schedule, Menu, Message, Group (highlighted), User, Forward to..., Directory, and Hang up. The main panel is titled 'Group' and contains the following settings:

- Group Name:** Waiting Room
- Allow Call Queuing:** A toggle switch that is turned on (highlighted with a red box).
- Max # of Calls:** 10
- Max Time (Minutes):** 30
- Ring Timeout (Seconds):** 20
- User Ring Strategy:**
  - Simultaneous: Ring all users at the same time
  - Sequential: Ring users in order
- Users:** A list containing 'Sarah Jane' with a dropdown arrow and a close button (X).
- + Add User:** A button to add more users to the group.

1. In the Auto-Attendant, add a **Group** route.
2. Slide the toggle for **Allow Call Queueing**. This will enable the ability to have incoming calls placed in a "waiting room" where hold music will play while they wait for the next available representative.
  - Because hold music is set at the account level, not at the queue level, custom music cannot be set for each individual queue.
3. Enter the following information:
  - **Max # of Calls.** How many people can wait on hold at a time.
  - **Max Time.** How long can each call be on hold before the failure routing takes effect.
  - **Ring Timeout.** The number of seconds a call will ring a user (sequential) or all users (simultaneous) in this group before it is pushed back to the front of the queue (limit 120). Keep this setting low to ensure calls are answered quickly.

4. Next, choose a ring strategy:
  - **Simultaneous:** Ring all users at the same time.
  - **Sequential:** Ring users in order. The amount of time it routes to each user added to the group until the max time parameter has been met which will then route the call to the next route.
5. Finally, add individuals to the group.
6. When you're done, click **[Save]**.

## User Ring Strategy

Choose if calls will ring to all users at once or in order.

### User Ring Strategy

Simultaneous: Ring all users at the same time

Sequential: Ring users in order

Users

=  ✕

Valid user must be selected.

[+ Add User](#)

---

Ring Timeout (Seconds)

Timeout value is required.

### User Ring Strategy

Simultaneous: Ring all users at the same time

Sequential: Ring users in order

Users	Timeout (Sec)
= <input type="text" value="Bob Ross"/>	<input type="text" value="15"/> <span style="float: right;">✕</span>
= <input type="text" value="Alice Cooper"/>	<input type="text" value="15"/> <span style="float: right;">✕</span>

Total Ring Time: 0 min 30 sec

[+ Add User](#)

FIELD	DESCRIPTION
<b>Simultaneous</b>	Rings all devices in the group at the same time. The first user to answer gets the call.
<b>Sequential</b>	Rings one device in the group at a time in a specified order until the call is answered. For a sequential strategy, enter each user and the number of seconds the call will ring for that user before going on to the next.
<b>Users</b>	Add a user to the group.
<b>Ring Timeout</b>	The number of seconds the call will attempt to route to this group. After the timeout, calls will route to the next specified route.

## User

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

**User**

Bob Ross

Send calls directly to user's voicemail

## Forward to...

Forward to Phone Number routes calls to an on- or off-net phone number. Select the country code from the drop-down menu on the left, then enter the phone number in the field to the right.

**Forward to Phone Number**

Forward Number

+30

## Directory

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

### DIAL BY...

Choose if callers can dial the user by their last name or first name.

**Directory**

Dial by...

Last Name

First Name

### CUSTOM AUDIO

Optionally, upload custom audio prompts to provide callers with customized guidance. WAV files must be less than 5 MB. If a custom file is not used, the caller will hear the default prompts.

**Custom Audio**

Intro Prompt (Optional)

Please upload a .wav file (under 5 MB).

Invalid Selection (Optional)

Please upload a .wav file (under 5 MB).

## FAILURE ROUTING

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

**Failure Routing**

Note: if the (\*) key is pressed the caller will be guided through the Failure Route.

Timeout (Seconds)

Timeout value is required.

Max Invalid Selections

Max invalid selections is required.

FIELD	DESCRIPTION
<b>Timeout (seconds)</b>	Enter the number of seconds the call can be in the directory. (1-999)
<b>Max Invalid Selections</b>	Enter the number of invalid selections the caller can try before the call is redirected to the failure route. (1-10)

## Hang Up

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

**Hang\_up**

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

# Reference

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

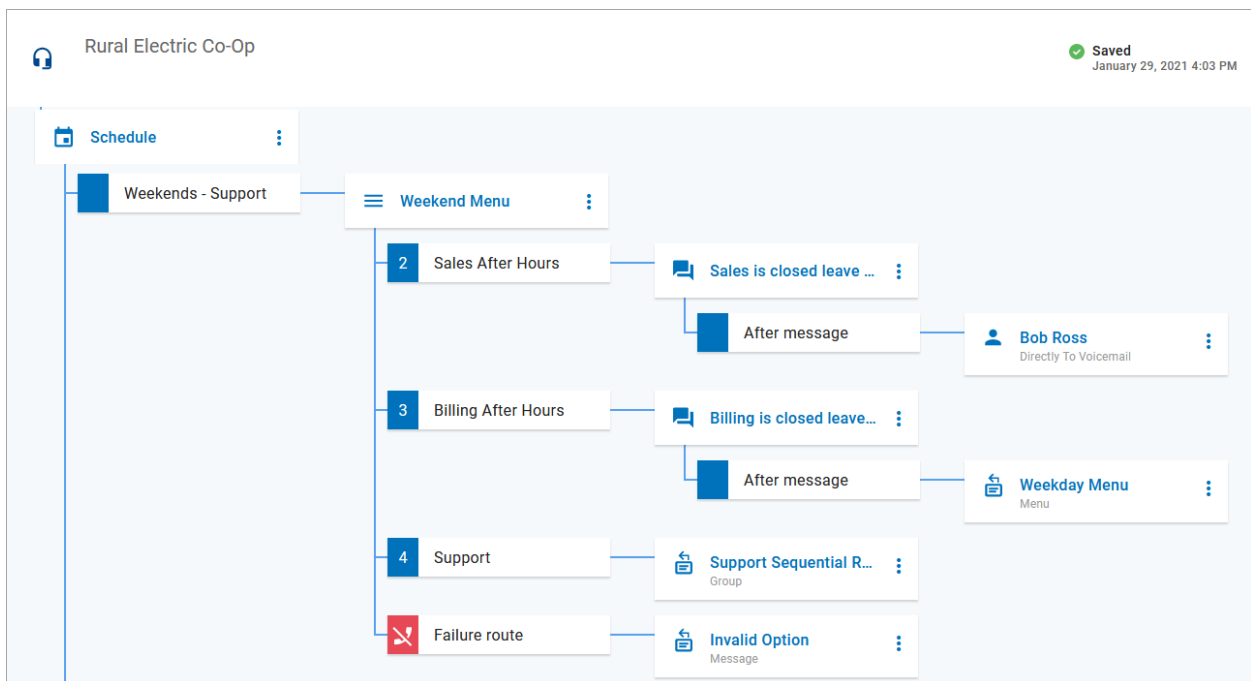
Choose which Group, Menu, Message, Schedule, or User a caller will be redirected to once they reach this point in the route, then click **[Save]**.

### Reference

A reference is a copy of route and all the actions that come after. When a change is made within a branch...

GROUP
Support Sequential Ring
MENU
Weekday Menu ✓
Weekend Menu
MESSAGE
Billing is closed leave a msg
Invalid Option
No one is home, leave a msg
Sales is closed leave a msg
SCHEDULE
Schedule
USER
Alice Cooper
Bob Ross
Bob Ross

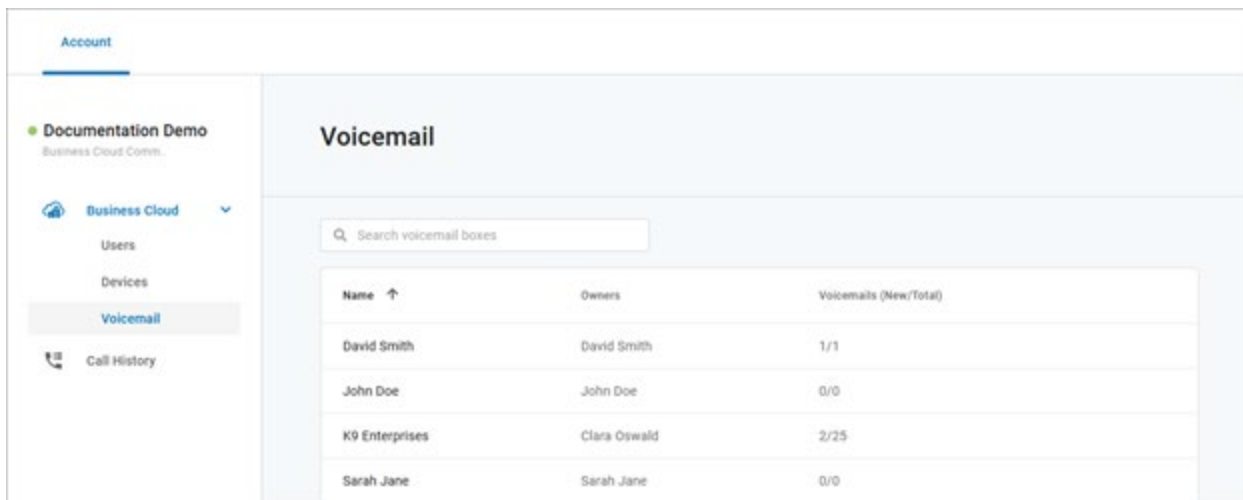
## EXAMPLE OF A COMPLETED ROUTE





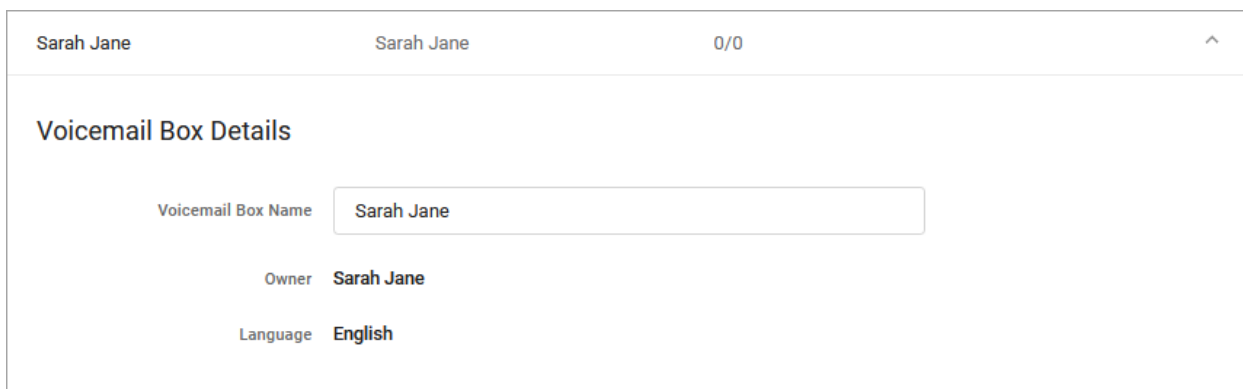
# VOICEMAIL

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



## Voicemail Box Details

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



# Voicemail Box Greetings

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

**Voicemail Box Greetings** i

**Basic Greeting** Click Here Upload

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

**Personal Name** Click Here Upload

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

---

**Custom Greetings**

Any custom voicemail greeting upload here will override basic and personal name greetings.

**Busy Greeting** Click Here Upload

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

**No Answer Greeting** Click Here Upload

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

# Messages



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

Please note, messages cannot be downloaded from the Voice Portal.

**Messages** 🗑️

<input type="checkbox"/>	Date/Time ↓	Caller	Length	Status	
<input type="checkbox"/>	May 28, 2021 5:15 PM	1 (801) 534-4672	3 seconds	New	✉️ 🗑️
<input type="checkbox"/>	Jan 20, 2016 10:40 AM	2001	2 minutes, 59 seconds	New	
<input type="checkbox"/>	Jan 20, 2016 10:36 AM	2001	2 seconds	New	

1-3 of 3 ⏪ ⏩

Field	Description
 <b>Save</b>	Change the status of the message to <i>Saved</i> .
 <b>Delete</b>	Delete this message from the box.

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

## MESSAGE WAITING INDICATOR

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


# Message Settings

### Message Settings

Forward Voicemail to Email  Forward voicemail messages

Keep a copy in voicemail box

Enable Transcription  Enable Transcription of Messages



## FORWARD VOICEMAIL TO EMAIL

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

1. Check **Forward Voicemail to Email**.
2. Optionally, check **Keep a copy in voicemail box**.
  - When checked, the message waiting indicator (MWI) on the user's device will stay on until they've listened to or deleted the message from their voicemail box.
3. Enter one or more email addresses, each separated by a comma.
4. At the bottom of the section, click **[Save]**.

## ENABLE VOICEMAIL TRANSCRIPTION

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

**Message Settings**

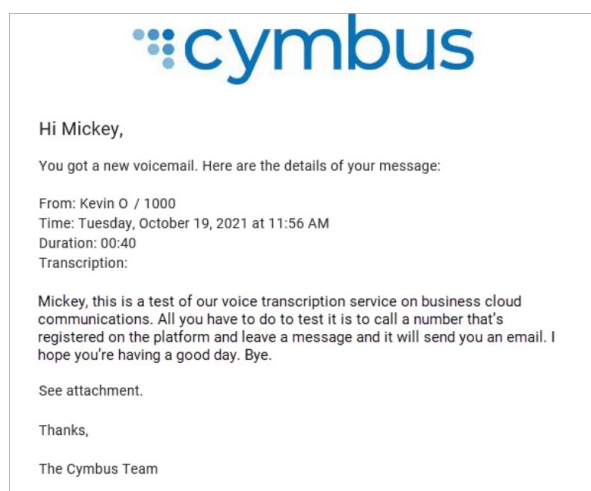
Forward Voicemail to Email  Forward voicemail messages

Keep a copy in voicemail box

**Enable Transcription**  **Enable Transcription of Messages**

5. Check the box for **Enable Transcription**.
6. In the field below, enter one or more email addresses in the field below separated by commas (required).
7. Click **[Save]**.

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



## US ENGLISH

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

# CALL HISTORY

Call History holds the records of all calls made and received on the account. Calls are presented in chronological order with the most recent call at the top. At the top right of the table, the current record list can be downloaded as a CSV file.

**Account**

Documentation Demo  
987876546

Business Cloud

Call History

### Call History

Dates Type Call Flags Reset Filters

Date ↓	From	To	MOS	CSV
3/10/2021 1:42 PM MST 0 seconds	1 (385) 555-5823 PROVO-OREM, UT	1 (801) 555-6455 PROVO-OREM, UT	0	
3/10/2021 1:42 PM MST 6 seconds	1 (860) 555-3253 HARTFORD-EAST HARTFORD-MIDDLET...PROVO-OREM, UT	1 (801) 555-6434 PROVO-OREM, UT	0	Details
3/10/2021 1:41 PM MST 0 seconds	→ 1 (385) 555-5823 PROVO-OREM, UT	1 (617) 555-9551 BOSTON-CAMBRIDGE-NEWTON, MA-NH	0	
3/10/2021 1:41 PM MST 6 seconds	1 (385) 555-5823 PROVO-OREM, UT	1 (801) 555-6441 PROVO-OREM, UT	0	

## Filters

Call records can be filtered by Date, Type, and/or Call Flags. These filters allow you to identify patterns in the calls, such as how many calls are being sent to voicemail, what calls are being missed, etc.

Click the filter buttons to set your criteria. If necessary, click **[Reset Filter]** to remove any parameters and display ALL calls again. Once your parameters are set, the matching call records are displayed below.

**Dates**

March 2021 April 2021

S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6					1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29	30	

mm/dd/yyyy — mm/dd/yyyy

Reset Save

**Type**

Inbound

Outbound

Save

**Call Flags** Reset Filters

SELECT ALL

Answered

Busy

Forwarded

Missed

Sent to VM

Save

# Details

For more information about a call, hover over a record and click **Details** on the right.

3/10/2021 1:42 PM MST 6 seconds	1 (860) 555-3253 HARTFORD-EAST HARTFORD-MIDDL...PROVO-OREM, UT	1 (801) 555-6434	0	<b>Details</b> ▾
------------------------------------	---	------------------	---	------------------

3/10/2021 1:42 PM MST 6 seconds	1 (860) 555-3253 HARTFORD-EAST HARTFORD-MIDDL...PROVO-OREM, UT	1 (801) 555-6434	0	^
------------------------------------	---	------------------	---	---

Block 1 (860) 269-3253

## Time and Length

Start Time **03/10/2021 1:42:36 PM MST**  
Connected Time **03/10/2021 1:42:36 PM MST**  
End Time **03/10/2021 1:42:42 PM MST**  
Billed Length **0 seconds**  
Actual Length **6 seconds**

## Cost

Cost **\$0**  
In Calling Plan **Yes**  
Rate Per Minute **\$0**

## Origination

Number **1 (860) 555-3253**  
Location **HARTFORD-EAST HARTFORD-MIDDLETOWN, CT**  
Category **Off Network**

## Termination

Number **1 (801) 555-6434**  
Location **PROVO-OREM, UT**  
Category **On Network**

[Technical Details](#) ▾

FIELD	DESCRIPTION
<p><b>Block</b></p>	<p>If necessary, you can block the inbound caller. Click <b>[Block]</b> to add the inbound caller to the user's or account's blocked caller list (in Call Handling).</p> <div data-bbox="685 359 1258 577" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Select Screening Location</p> <p style="text-align: center;">Location <span style="border: 1px solid #ccc; padding: 2px;">User - Phone 01 (860-555-3253) ▼</span></p> <p style="text-align: right;"> <span style="border: 1px solid #ccc; padding: 2px 10px;">Dismiss</span> <span style="background-color: #0070c0; color: white; padding: 2px 10px; margin-left: 10px;">Confirm</span> </p> </div>
<p><b>Time and Length</b></p>	<p>Start time, connected date and time, end date and time, billed length, and actual length.</p>
<p><b>Cost</b></p>	<p>The total cost, whether it was included in the calling plan, and the rate per minute.</p>
<p><b>Origination</b></p>	<p>The originating number, location, and category (On or Off Network).</p>
<p><b>Termination</b></p>	<p>The terminating number, location, and category (On or Off Network).</p>
<p><b>Technical Details</b></p>	<p>View all the technical details of the call. This can be helpful to Customer Support when troubleshooting call issues</p>



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