- In the Participants field, enter the number of conference ports you wish to reserve. Each party that will be dialing into the conference requires a port. If multiple parties will be sharing a speakerphone in a conference room, only a single port is required for the conference room.
- To schedule a recurring meeting:
  - Enable the Recurring checkbox
  - Select the appropriate Recurrence Type by selecting one of the radio buttons and configure the Recurrence Parameters using the drop-down menus
  - Select the appropriate Recurrence End Date using the radio buttons and drop-down menus
- Click Check Availability
- If ports are available for the desired date(s) and time, click Save. Otherwise, click Back & Try Other Date/Time.
- Write down the Moderator ID, Guest ID and the Dial Access Number provided by the system

To **Modify an Existing Reservation**:

- Click the Conferencing tab
- Click the Meet-Me tab
- Navigate to the desired conference reservation
- Click the Edit function icon
- Change the relevant reservation information.
- Click Save

To **Cancel an Existing Reservation**:

- Click the Conferencing tab
- Click the Meet-Me tab
- Navigate to the desired conference reservation
- Click the Delete button for the relevant reservation. For a recurring reservation, click the Delete button to delete a single instance of the meeting. Click the Delete All Related Recurring Conferences to delete all instances of the meeting.

Joining a Meet-Me Conference

- Dial the Meet-Me Conferencing Bridge by dialing 522 or the Conference Bridge Access Number specified by your Service Provider.
- To enter as the moderator, enter the Moderator ID followed by the # key
- To enter as a guest, enter the Guest ID followed by the # key.
- Note: If you attempt to join the conference more than 5 minutes before the scheduled start time, you will be asked to try again later.

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Logging Into the Web Portal

- Open your web browser application.
- In the address field, enter the web portal address specified by your service provider
- Click Go
- In the Phone Number field, enter your complete telephone number. If your phone is configured as an extension-only phone (i.e., you have no DID number), enter your company's complete main telephone number followed by "x" and your extension number.
- In the Password field, enter your password.
- If your PC is secure and you are the only user, you can bypass the login process in the future by checking the Remember Me checkbox.
- Click OK

Logging Out of the Web Portal

- If you have not enabled Remember Me, you can log out of the Web Portal by clicking the Logout button or by simply closing the browser window.
- If you have enabled Remember Me and want the system to remember you the next time you access the web portal, simply close the browser window.
- If you have enabled Remember Me and want the system to forget your credentials and require the next person to log in, click the Logout button.

Configuring the Web Portal

The first time you access your web portal, you'll want to configure it for optimal use. You need only configure the web portal once, but can change the configuration at any time.

- Click the Options tab
- Click the Profile tab
- Using the Home Page drop-down, select which tab should be your default home page.
- In the Rows per Page field, enter the number of rows of information you'd like visible within each data table page (e.g., directories, call logs, voicemail etc.).
- Enable the Click to Call checkbox to allow click-to-dial functionality.
- Enable the Launch VA at Startup checkbox if you would like the Voice Assistant to open automatically when you log into the web portal.
- In the CA Address 1 and CA Address 2 fields, enter the IP Addresses specified by your service provider.
- Click Submit

Directories

The web portal provides two different contact directories. The Personal Directory enables you to manage and use your own private directory of contacts. The Corporate Directory is managed by your service provider or by your enterprise administrator. It displays all the employees of your organization.

Creating a Personal Contact

- Click the Directory tab
- Click the Personal tab
- Click Add
- Enter the relevant contact information
- Click Save

Navigating Contacts

Contacts are listed in tables. Tables may span multiple pages depending upon the number of contacts and the number of rows per table configured in your profile.

To **Sort Contacts**:

- Click on any of the underlined field headings (e.g., Last Name, First Name, Title, Phone Numbers) to sort the contacts by that field. An arrow icon will indicate which field is being used for sort and indicates the sort direction (e.g., ascending or descending). To change the sort direction, click the heading again.

To **Browse Contacts**:

- Click First to skip to the first page of the table
- Click Next to skip to the next page
- Click Previous to skip to the previous page
- Click Last to skip to the last page
- Enter a page number into the Page field and press the Enter key on your keyboard to skip to a specific page.

To **Search Contacts**:

- Using the Search By drop-down menu, select the field on which to index the search
- Enter the first few letters or numbers of the search criteria
- Click Go. The search function will open the page on which the first match appears.

Deleting a Personal Contact

- Click the Directory tab
- Click the Personal tab
- Navigate to the desired contact
- Enable the Select checkbox next to the desired contact
- Click Delete

Modifying a Personal Contact

- Click the Directory tab
- Click the Personal tab
- Navigate to the desired contact
- Click the Edit function icon for the contact
- Change the relevant contact information
- Click Save

Click-to-Dial a Contact

You can click-to-dial any telephone number associated with a personal or corporate contact.

- Click the Directory tab
- Navigate to the desired contact
- Click the appropriate telephone number (e.g., office, home, fax, cell etc.). Depending upon your phone, your phone will either go off-hook and dial the number or your phone will ring.
- Unless configured otherwise, Click-to-Dial establishes calls between the phone associated with your web portal account and the desired contact. To use Click-to-Dial from a remote location (e.g., your home phone or cell phone), see Remote Phone.
- In order to use this capability, you must have enabled the click-to-dial checkbox during login.
- Note: You may be prevented from dialing certain numbers due to toll-restrictions/call-restrictions.

Conferencing in a Contact

You can create a conference call by adding one or more parties to an existing call.

- Click the Directory tab
- Navigate to the desired contact
- Click the Conference In function icon

Voicemail

Managing Messages

- Click the Voice Mail tab
- Click either the Inbox tab or the Saved tab depending upon which messages you wish to hear.
- Navigate to the desired message.
- To hear the message through the speaker on your multi-media PC, click the Play to Speaker function icon. Using the playback controls on the Voicemail Player, you can Play, Pause/Resume, Stop, Skip Back, Skip Ahead, Rewind, and Fast Forward playback. You can also Save the Message to a file on your PC for archiving or future retrieval.
- To hear the message through your telephone, click the Play to Phone function icon. You can control playback of the message using the standard message controls. Refer to the Voicemail Quick Reference Card for further information.

- To delete a message, enable the select checkbox for the relevant message and click Delete.
- To move messages from your Inbox into your Saved Messages folder, enable the select checkbox for the relevant message and click Move to Saved.
- To forward a message within the voicemail system:
  - Click the Forward function icon
  - To add one or more distribution groups to the destination list, click Add Distribution Groups. Select one or more Distribution Groups and click Save.
  - To add one or more individual extensions to the destination list, click Add Extensions. Select one or more extensions and click Save.
  - Click Forward
- To forward a message as an attachment to an email:
  - Click the Forward to Email function icon
  - In the Email Address field, enter the recipient's email address.
  - Click Forward

Configuring Voicemail Paging Notification

Voicemail Paging Notifications can notify you when you receive certain types of voicemail messages.

To **Configure Voicemail Paging**:

- Click the Voice Mail tab
- Click the Paging tab
- Using the Notification For drop-down, select whether you want to be notified for Urgent Messages Only, All Messages or No Messages.
- Using the Pager Type drop-down, select whether you want to be notified using a numeric pager, an email or a voice call
- Configure the Notification Parameters for the appropriate Pager Type:
  - For a numeric pager, enter the pager number and the numeric code to be sent to the pager.
  - For a voice call, enter the phone number where you wish to be notified.
  - For an email, enter the email address and the text for the email message body.
- Click Save
- Note: The Email Pager Type can also be used with many alphanumeric pagers and with many cellular providers' Short Messaging Service (SMS) text messages.

Managing Voicemail Distribution Groups

Distribution Groups are used when you want to send messages to a group of users. There are two types of Distribution Groups:

- **Personal Distribution Groups** are managed by the end user and are available only to that user. A user may have a maximum of 20 Personal Distribution Groups (i.e., groups 80-99).
- **Corporate Distribution Groups** are managed by the System Administrator and can be used by anyone within the company. A company may have a maximum of 70 Corporate Distribution Groups.

To **Create a New Personal Group**:

- Click the Voice Mail tab
- Click the Dist. Groups tab
- Click Add
- Click Change Distribution Group Name
- In the Distribution Group Name field, enter a descriptive name for the group.
- Click Save
- Click Add Members
- Enable the Select checkbox associated with each person you'd like to add to the group
- Click Save

To **Edit an Existing Personal Group**:

- Click the Voice Mail tab
- Click the Dist. Groups tab
- Click the Edit function icon associated with the group you wish to modify. Note that you can only modify personal distribution groups.
- To Change the Distribution Group Name, click Change Distribution Group Name, enter the new name and click Save.
- To Add New Members to the Group, click Add Members, enable the Select checkbox associated with each of the new people you'd like to add and click Save.
- To Delete Members from the Group, enable the Select checkbox next to the distribution group members that you'd like to remove and click Delete

To **Delete an Existing Personal Group**:

- Click the Voice Mail tab
- Click the Dist. Groups tab
- Enable the Select checkbox next to the group(s) you wish to remove.
- Click Delete

Changing Your Voicemail Password

- Click the Voice Mail tab
- Click the Password tab
- In the Current Password field, enter your current password.
- In the New Password field, enter your new password.
- In the Confirm Password field, enter your new password again.

- Click Submit

Configuring Email Forwarding

Email Forwarding automatically sends copies of every new voicemail message to a pre-specified email address.

To **Enable Email Forwarding**:

- Click the Voice Mail tab
- Click the Options tab
- Check the Email Forwarding checkbox.
- In the Email Address field, enter the email address where messages should be archived.
- Click Submit

Configuring Voicemail Playback Order

- Click the Voice Mail tab
- Click the Options tab
- Check the Listen Newest Messages First checkbox to hear newer messages before older messages.
- Check the Priority Messages First checkbox to hear urgent messages before lower priority messages.
- Check the Unheard Messages First checkbox to hear new messages before messages that you have already heard.
- Click Submit

Call Management

Accessing Call Logs

Call Logs provide a historical record of recent inbound, outbound and missed calls.

- Click the Call Management tab
- Click the Logs tab

Navigating Call Log Entries

Call Logs are listed in tables. Tables may span multiple pages depending upon the number of log entries and the number of rows per table configured in your profile.

To **Sort Call Log Entries**:

- Click on any of the underlined field headings (e.g., Direction, Phone Number, Name, Date/Time, or Length) to sort the log entries by that field. An arrow icon will indicate which field is being used for sort. An arrow icon indicates the sort direction (e.g., ascending or descending). To change the sort direction, click the heading again.

To **Browse Call Log Entries**:

- Click First to skip to the first page of the table
- Click Next to skip to the next page
- Click Previous to skip to the previous page
- Click Last to skip to the last page
- Enter a page number into the Page field and press the Enter key on your keyboard to skip to a specific page.

Exporting Call Log Entries

You can export your call logs into a “Comma Separated Value (CSV)” file format that can be used by many spreadsheet applications.

To **Export Call Log Entries**:

- Click the Call Management tab
- Click the Logs tab
- Click Export to CSV File
- In the File Download dialog, click Save, select a destination folder, enter a filename and click Save.

Find Me

Find-Me enables your callers to locate you at a pre-defined group of numbers when you are away from your phone. Find-Me is a Ring No Answer condition that occurs when you fail to answer an inbound call at your business telephone. You can define one or more Find-Me profiles for use by different callers or at different times of day.

To **Define a Find Me Profile**:

- Click the Call Management tab
- Click the Find-Me tab
- Click Add
- Click Options

- In the Find-Me List Name field, enter a descriptive name for the Find-Me profile.
- Select either Sequential or Ring All as the Find-Me Strategy. Sequential means that each destination will be tried in order. Ring All means that all of the destinations will ring simultaneously until one of the destinations answers.
- Enable the Caller ID checkbox to show the original caller’s Caller ID information at each Find-Me destination as opposed to showing the Caller ID information for your business phone.
- Click Save
- Add One or More Find-Me Locations to the profile
  - Click Add
  - In the Name field, enter a descriptive name for the destination (e.g., Home, Cell etc.)
  - In the Phone Number field, enter the telephone number for the destination.
  - Using the No Answer Timeout drop-down menu, set the number of seconds that the system will ring the destination. This is often used to limit the call attempt at a location to prevent an alternate voicemail system from answering the call.
  - Using the Menu Timeout drop-down menu, set the number of seconds that the system will wait for the user to respond to the menu system after the call is answered. The menu response is used to avoid completing the call when the phone is answered by a voicemail system or answering machine.
  - Click Save
- If you selected Sequential as the Find-Me strategy, adjust the order of the destinations using the up/down arrow function icons.
- Note: After defining one or more Find-Me profiles, you must activate Find-Me by assigning Find-Me as either a Default Call Treatment or as a Call Screening Treatment. See Call Treatments for further information.

Call Treatments

Call Treatments allow you to specify how inbound calls are treated. You can define a default call treatment that handles all inbound calls. You can also define custom call treatments for specific callers to handle these calls in a different manner than the default. For example, you might configure your default treatment to route calls normally during the day and to use Find-Me in the evening. Calls from your most important customers however, will be forwarded to your cell phone for personal handling at any time of day.

To **Define the Default Call Treatment**:

- Click the Call Management tab
- Click the Call Treatment tab
- Click the Edit functions icon associated with the Default Forwarding entry.
- You can configure either a Basic Default Treatment which handles all calls the same regardless of the day-of-week or time-of-day or an Advanced Default Treatment which can handle calls differently based upon day-of-week and/or time-of-day.
- To configure a Basic Default Treatment:
  - Select a default call treatment using the Default Action drop-down menu: Disabled will ring your phone normally and route unanswered calls to your voicemail; Find-Me will ring your phone normally and route unanswered calls according to a Find-Me profile; Forward to Number will unconditionally forward all calls to an alternate extension or number; Forward When Busy / No Answer will ring your phone normally and will forward unanswered calls to a specified extension or number.
  - Click Save
- To configure an Advanced Default Treatment:
  - Click Advanced
  - You can define special call treatments for up to three different time periods using Time of Day Action 1, Time of Day Action 2 and Time of Day Action 3.
  - For each, select the Call Treatment Action from the drop-down menu and specify the days-of-week and times-of day that the action should be followed.
  - Using the Default Action drop-down menu, select an action for calls received during any periods of time that aren't covered by Action 1, Action 2 or Action 3.
  - Click Save

To **Define a Custom Call Screening Treatment**:

- Click the Call Management tab

- Click the Call Treatment tab
- Click Add
- In the Name field, enter a name for the call screening treatment.
- In the Incoming Number field, enter the telephone number for the caller from which calls should be screened.
- If desired, configure up to three different actions for calls received from the caller at different times. Do this by selecting the Time of Day Action used during the period and defining the day-of-week/time-of-day period the action is active.
- Using the Default Action drop-down menu, select an action for calls received from the caller during any periods of time that aren't covered by Action 1, Action 2 or Action 3.
- Click Save

Configuring your Out of Service Forwarding Number

In the event that your phone loses connectivity or power, your inbound calls are automatically routed to your voicemail. You can define an alternative Out of Service destination to have your calls forwarded in the event of an outage.

- Click the Call Management tab
- Click the Call Treatment tab
- Click Options
- In the OOS Forwarding Number field, enter an alternate extension or number where calls should be routed in the event of a loss of power or connectivity. Be sure to include the Outside Access Digit for external numbers.

Configuring Call Treatment Delay

The Call Treatment Delay determines how long your phone will ring before a No Answer condition is determined. By adjusting this value, you can change how long your phone will ring before calls are forwarded to voicemail or an alternate Ring No Answer condition is followed.

- Click the Call Management tab
- Click the Call Treatment tab
- Click Options
- Using the Call Treatment Delay drop-down menu, select the number of seconds before a Ring No Answer condition is determined.

Speed Dials

Depending upon the type of phone you have, you may be able to configure the speed dial buttons of your phone using the Web Portal.

To **Create a New Speed Dial Button**:

- Click the Call Management tab
- Click the Speed Dials tab

- Click Set Speed Dial Button
- Your phone will go off-hook. Follow the voice prompts to define the new speed dial button.

To **Modify an Existing Speed Dial Button**:

- Click the Call Management tab
- Click the Speed Dials tab
- Click the Edit functions icon associated with the Speed Dial Button you wish to modify.
- In the Name field, enter new descriptive text for the button (e.g., Dial Jason).
- In the Number field, enter the new telephone number for the button. For external numbers, be sure to include the Outside Access Digit before the area code or number.

To **Delete an Existing Speed Dial Button**:

- Click the Call Management tab
- Click the Speed Dials tab
- Click the Delete functions icon associated with the Speed Dial Button you wish to delete.

Options

Configure Remote Phone

The Remote Phone feature provides the capability to set up a remote phone to act as if it were the IP phone. When Remote Phone is active, click-to-dial rings the remote phone before dialing the desired party. Inbound calls simultaneously ring the business phone and the remote phone.

- Click the Options tab
- Click the Remote tab
- Enable the Remote User checkbox
- If desired, enable the Auto Enable When Phone OOS to have the system automatically enable the Remote Phone feature whenever your phone goes out of service due to a loss of connectivity or a loss of power.
- Enable the Enable Remote Caller ID to have the system display the original caller's Caller ID information on your remote phone instead of displaying the Caller ID of your own business phone.
- In the Remote Phone Number field, enter the telephone number for your remote phone. Be sure to include the Outside Access Digit for external numbers.
- Click Save

Reassigning Your Telephone Number and Profile to a New Phone

You can instantly reassign your telephone number and account to any other phone of the same type.

- Click the Options tab
- Click the Reassign tab

- Enter the MAC Address for the new phone
- Click Save

Changing Your Phone Password

- Click the Options tab
- Click the Password tab
- In the Current Password field, enter your current password.
- In the New Password field, enter your new password.
- In the Confirm Password field, enter your new password again.
- Click Submit

Installing the TAPI Module

The TAPI module enables you to use click-to-dial from within many TAPI-compliant personal information managers such as Microsoft Outlook.
To download and install the TAPI module:

- Click the Options tab
- Click the PC Integration tab
- Click Install TAPI Service Provider
- Note: Once installed, you will need to configure the module with the appropriate IP Address, telephone number and password. Contact your service provider for further information.

Voice Assistant

The Voice Assistant provides real-time call control capabilities using the web interface for point-and-click ease of use. Note that the Voice Assistant requires your web browser application to support ActiveX controls.

Launching the Voice Assistant

In order to use the Voice Assistant, you must have configured your Web Portal with the IP Address(es) specified by your service provider. If you haven't already done so, refer to the Configuring the Web Portal section of this Quick Reference Card.

To **Launch Voice Assistant Automatically**:

- Configure the Web Portal to "Launch VA at Startup". This will open the Voice Assistant whenever you log into your Web Portal. For more information, refer to the Configuring the Web Portal section of this Quick Reference Card.
- Log into your Web Portal

To **Launch Voice Assistant Manually**:

- Click the Call Control button which is available on any of the main tabs of the Web Portal.

Managing Incoming Calls

The Web Portal will provide a screen-pop to identify incoming calls and allow you to determine how incoming calls are handled.

Managing an Incoming Call:

- Click **Answer the Call** to answer the call. With an IP Phone, your phone will go off-hook in speakerphone mode and you will be connected to the calling party.
- Click **Answer & Control the Call** to answer the call and launch the Voice Assistant to manage the call. With an IP Phone, your phone will go off-hook in speakerphone mode and you will be connected to the calling party. With the Voice Assistant, you can manage the active call.
- Click **Send to Voice Mail** to forward the incoming call to your voicemail account.
- Click **Ignore the Call** to close the screen-pop window and prevent the caller from reaching your voicemail account. The caller will hear ring-tone until they hang up.
- Click **Hold the Call** to answer the call and place them on hold. The caller will hear "Please hold. Your call will be answered shortly" followed by music. To resume the held call, retrieve the held call using the standard procedure for held calls on your phone or press the Resume This Call button on the Voice Assistant.
- Click **Call Later** to send the caller to your voicemail account and add the caller to your Call Later List. Configure the reminder by entering the caller's name, telephone number and the number of minutes in which you wish to be reminded and click OK. When using this option, the caller will hear your Do Not Disturb voicemail greeting when they are forwarded to voicemail.
- Click **Redirect the Call** to forward the caller to one of the destinations on your Call Forward List. Note: You must pre-configure your Call Forward List in order to use this capability. See Configuring Your Call Forward List.

Managing an Active Call

Using the Voice Assistant you can manage active calls. When you have multiple active calls, select the call to manage from the list of active calls before choosing one of the following actions:

- Click **Hold the Call** to place the current call on hold. To retrieve the call, click Resume this Call. While on hold, the held party will hear music.
- Click **End this Call** to disconnect the call.

- Click **Transfer the Call** to transfer the call to another party. Enter the extension/phone number into the entry field or select a number from the drop-down menu.
  - To **Transfer with Consultation**:
    - Click OK to dial the 3rd-party and consult.
    - To complete the transfer, click Complete Transfer.
  - To **Transfer without Consultation**,
    - Check the Immediate Transfer checkbox
    - Click OK
- Click **Start a Conference** to create a conference call by adding a party to the current call.
  - To **Add the Party with Consultation**:
    - Enter the extension/phone number into the entry field or select a number from the drop-down menu.
    - Click OK. The party will be dialed so that you can consult with them.
    - Click Complete Conference to connect the party with the active call.
  - To **Add the Party without Consultation**:
    - Enter the extension/phone number into the entry field or select a number from the drop-down menu.
    - Enable the Immediate Conference checkbox.
    - Click OK. The party will be dialed and added to the conference when they answer.
  - To **Add Additional Participants**:
    - Click Add to the Conference
    - Repeat the appropriate process to add the party with consultation or without consultation.
  - To **Drop a Participant**:
    - Select the Conference Call
    - Click Show Conference List
    - Select a Participant
    - Click Remove. The selected party will be dropped from the conference call.
  - To **Leave the Conference**:
    - Select the Conference Call
    - Click Leave the Conference. You will be disconnected from the conference, but the other participants will be able to continue speaking.
- Click **Park the Call** to park the call for retrieval from any extension. The system will transfer the call to a park extension and announce the park extension to you. To retrieve the call, dial the park extension from any phone.

- Click **Make a New Call** to place the current call on hold and start a new call.

Using Pickup

- To answer someone else's ringing phone, click Pickup a Ringing Call.
- To answer a specific extension, enter the extension number and click OK.
- To answer the extension that has been ringing the longest, click Group Pickup.
- NOTE: You can only pickup calls from extensions that are within your pre-defined Call Pickup Group.

Retrieving Voicemail

- Click Listen to Voicemail. Your phone will either ring or go off-hook to connect you to the voicemail system.

Do Not Disturb

- Click Turn On Do Not Disturb to enable Do Not Disturb or Turn Off Do Not Disturb to disable it.

Call Forwarding

- Click Forward To to configure Call Forwarding.
- Enter the desired extensions/phone numbers for each of the Call Forwarding types (i.e., Always, Busy, No Answer, Out of Service).
- Click OK

Managing the Call Later List

- Select Call Later List from the Options menu
- To **Add a Call Later Entry**:
  - Click Add
  - Enter the person's Name and Telephone Number.
  - Select when you'd like to call the person back by selecting the # of minutes.
  - Click OK
- To **Edit a Call Later Entry**:
  - Select the entry from the Call Later List
  - Click Edit
  - Modify the desired information
  - Click OK
- To **Delete a Call Later Entry**:
  - Select the entry from the Call Later List
  - Click Delete
  - Confirm the deletion by clicking Yes.

Managing the Forward List

The Forward List contains all the destinations that are available in the drop-down menu for Call Redirection.

- Select Forward List from the Options menu
- To **Add a Forward Destination**:
  - Click Add
  - Enter the Name and Telephone Number for the forward destination.

  - Click OK
- To **Edit a Forward Destination**:
  - Select the entry from the Forward List
  - Click Edit
  - Modify the desired information
  - Click OK
- To **Delete a Forward Destination**:
  - Select the entry from the Forward List
  - Click Delete
  - Confirm the deletion by clicking Yes.