



# Business Cloud Communications

USER GUIDE | JANUARY 2023

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# WELCOME

SRT Business Cloud Communications (BCC), powered by Cymbus, 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

*41	All Other Callers: Block
*42	All Other Callers: Allow
*45	Custom Caller: Block
*46	Custom Callers: Allow
*47	Custom Callers: Block w/Message
*48	Anonymous Callers: Block
*49	Anonymous Callers: Allow
*50	Anonymous Callers: Block w/Message
*51	Anonymous Callers: Disable Block w/Message
*57	Call Trace

## USER CALL HANDLING

** + Ext.	Directed Call Pickup
*40	Pick Up Group
*43	Call Waiting: Enable
*44	Call Waiting: Disable
*70+	Call Waiting: Disable Next Call
*62	Call Park
*66+Slot	Call Park Retrieval
*65+	Caller ID: Enable Next Call
*67+	Caller ID: Block Next Call
*68	Caller ID: Manage (On/Off)
*69	Last Call Return
*99	Voicemail Management

### STAR CODE +

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

## USER CALL FORWARDING

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

## USER CALL SCREENING

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

## SOCIAL & PUBLIC SERVICES

211	Essential Community Services
411	Directory Assistance
511	Traveler Information (US)
611	Customer Service
711	Telecommunications Relay Service
811	Utility Location Services (US)
811	Canadian Health Services (CAN)
911	Emergency Services

# 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>FIRSTLINK HOTLINE</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>TROUBLE/REPAIRS</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 Access Points (PSAPs). The PSAP, in turn, uses that address to direct the emergency response units to your location.

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

## Address Validation

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

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

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

## 911 for Remote Office Users

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

### **WARNING**

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

# USING YOUR IP PHONE

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

## Placing Calls

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

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

### DIAL 9

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

## Answering Calls

To answer a call, do one of the following:

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

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

## Holding Calls

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

# Call Transfer

## Attended Transfer

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

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

## Blind Transfer

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

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

## 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.

# Conference Calls

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

## Use Call Conference

1. While on a call, press the conference/invite softkey.
2. Enter the second number/extension to have on the call.
3. The conference will be established as soon as the dialed number answers the call.
4. During the conference, the host can add other conference members by pressing on the invite softkey.

The conference will be terminated for all parties if the conference initiator hangs up or presses the end call softkey.

## 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></p> <p>All other callers (not otherwise specified in <a href="#">Call Handling</a> settings) will be blocked.</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></p> <p>All other callers (not otherwise specified in <a href="#">Call Handling</a> settings) will be allowed.</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></p> <p>Calls without caller ID will be blocked and the caller will hear a busy tone.</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></p> <p>Calls without caller ID will be allowed.</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></p> <p>Calls without caller ID will be blocked and the caller will hear a message.</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></p> <p>Disables “Anonymous Callers: Block with Message.” Anonymous calls will be allowed.</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>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.</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>Calls from the number specified will be blocked. Blocked callers will hear a busy signal.</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>Calls from the number specified will be blocked with a message.</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>Calls from the number specified will be forwarded.</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 Forward To number must be set up in the Voice Portal. If a number is not set, forwarded calls will fail over to the All Other Callers setting.</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
*57	<p><b>CALL TRACE</b></p> <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
*78	<p><b>ENABLE DO NOT DISTURB</b></p> <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>
*79	<p><b>DISABLE DO NOT DISTURB</b></p> <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>Send a call directly to another user's voicemail box.</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>Choose where to forward all calls to your line.</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>Choose where to forward calls when you're on another call.</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>Choose how calls will be handled when your line isn't answered.</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>Choose how calls will be handled when your line is out of service or not registered.</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 the SRT Business Center at 701.852.8888.

### 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>	<p><b>CALL PARK</b> Places a call in a parking spot.</p> <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>	<p><b>CALL PARK RETRIEVAL</b> Retrieves a parked call from a parking spot.</p> <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>	<p><b>CALL PARK</b> Place a call in a parking spot.</p> <ol style="list-style-type: none"> <li>1. While on a call, press [Transfer] 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></p> <p>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></p> <p>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 the SRT Business Center at 701.852.8888.

CODE	DESCRIPTION
*40	<p><b>PICK UP GROUP</b></p> <p>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> Enable Call Waiting for ALL of your calls.</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> Disable Call Waiting for ALL of your calls.</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> 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.</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 the SRT Business Center at 701.852.8888 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></p> <p>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.</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></p> <p>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.</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></p> <p>Manage your caller ID setting for all calls.</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 outbound 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.
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

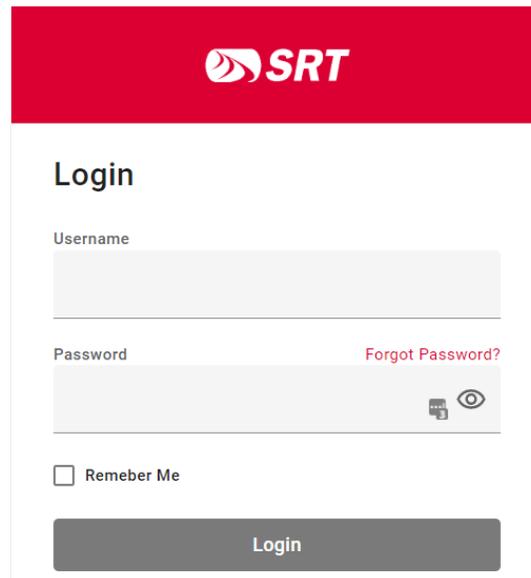
## Log In

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 1 (701) 839-2121 or dial 611 from your SRT phone to get your login information.

1. Go to <https://srt.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 SRT Voice Portal login interface. At the top is a red banner with the SRT logo. Below this is a white login form with the following elements:

- Header:** SRT logo in a red banner.
- Title:** "Login" in bold black text.
- Username Field:** A text input field labeled "Username".
- Password Field:** A text input field labeled "Password" with a "Forgot Password?" link in red text to its right. There is also a small icon for password visibility (an eye).
- Remember Me:** A checkbox labeled "Remember Me".
- Login Button:** A dark grey button with the text "Login" in white.

### 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 the SRT Business Center at 701.852.8888 for assistance.

**User Info - John Smith (andressrt)**

Account Name **Joes Plumbing**

Account Number **test 12345**

Phone Numbers **None**

E911 Address **1 (801) 998-9989**  
**3615 N Broadway, Minot, ND 58703**

[✎ Edit E911 Address](#)

Outbound Caller ID **18019989989**

Devices **VVX450 - Line 1**  
**VVX450 - 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, Sant**

[✎ 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

Enter Address

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

[Manual Entry](#)

Provide Lat/Long

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



FEATURE	DESCRIPTION
	<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
No Answer	The call is unanswered after a specified number of seconds.
Busy	The device is busy (already in use and Call Waiting is not enabled).
Out of Service	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.

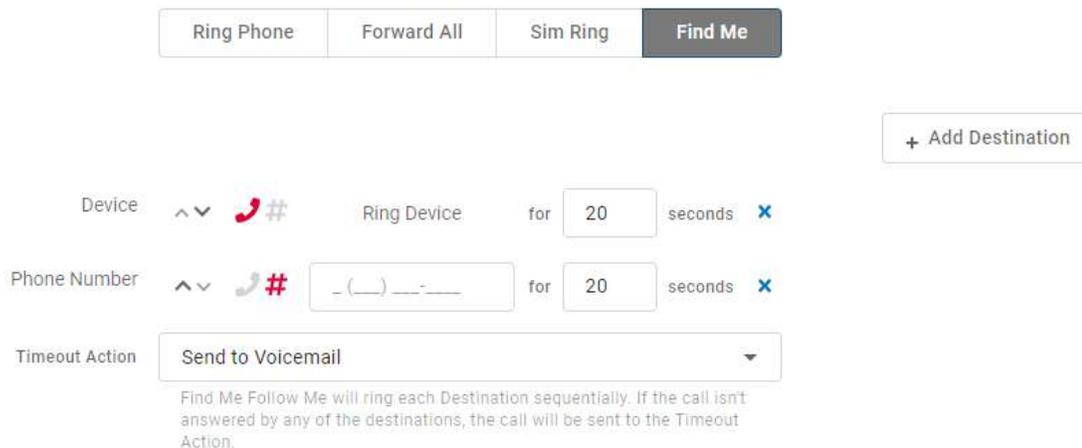
FEATURE	DESCRIPTION
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [+Add Number].
No Answer	<p>Choose what happens when the call is unanswered:</p> <ul style="list-style-type: none"> <li>• Busy Tone</li> <li>• Forward to (add a forwarding number)</li> <li>• Ring Forever                             <ul style="list-style-type: none"> <li>– Send to Voicemail</li> </ul> </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>

**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.



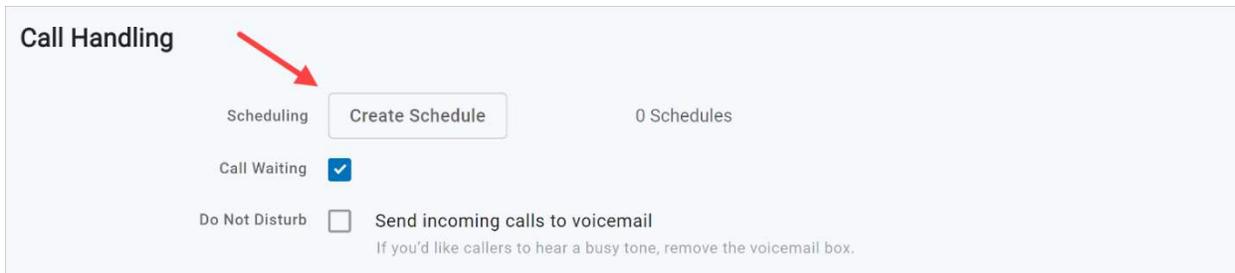
FEATURE	DESCRIPTION
Destinations	Indicate if calls should route through  Devices or  Phone Numbers by clicking the respective icons. <ul style="list-style-type: none"> <li>• Use the   arrows to reorder the destinations.</li> <li>• Click [+ Add Destination] to add more destination fields.</li> </ul>
Devices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

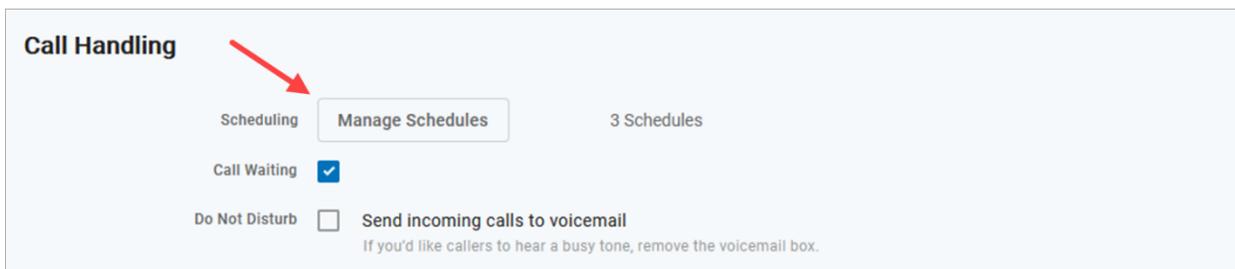
Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

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 hours.

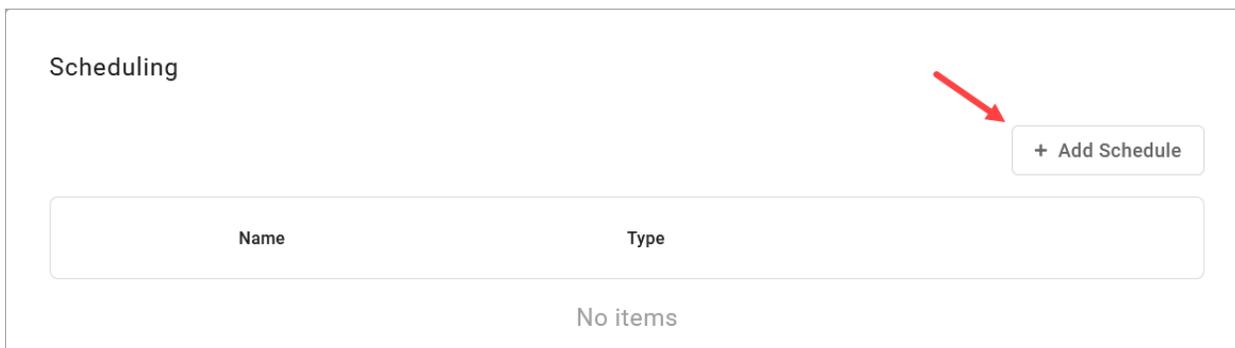
1. Within the Call Handling section, click [Create Schedule].



- 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

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

Date

Start Time  End Time

---

Date

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

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

Scheduling  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.

Phone Numbers    
Simultaneous Ring will ring all devices on this User and all numbers added to the list. The first Phone Number to pick up will take the call.

No Answer  after  seconds

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 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.

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

No Answer  after  seconds

Busy

Out of Service

# 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
[+ Add Caller]	Starts the process of setting up call screening behaviors for a specific phone number.
Screening Forward Number	Enter a destination phone number that will be used when This is the destination number used when a call screening category is set to Forward.
Anonymous Caller	Choose what happens to incoming calls that don't send caller ID.
Toll-Free Caller	Choose what happens to incoming calls from a toll-free number.
All Other Callers	Choose what happens to all other incoming calls, unless otherwise defined by a custom rule.

FEATURE	DESCRIPTION
Custom Callers	Click [+Add Caller] to define the screening behavior for a specific phone number. If there are more than two custom callers, click ...and X more at the bottom to see them.

## Call Screening Behaviors

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

FEATURE	DESCRIPTION
Allow	Allow the caller to ring through.
Allow with Priority Ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
Block	Block the caller from ringing through. Callers will hear a busy signal.
Block with Message	Block the call with a message: <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>
Forward	If you choose to forward calls from the caller, you must choose the number those calls are forwarded to in the Screening Forward Number field.
Voicemail	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 				
<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   
<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
 Download	Save a copy of the message to your computer as an MP3 file.
 Save	Change the status of the message to Saved.
 Delete	Delete this message from the box.

To delete all 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

### 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

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](mailto: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:

Hi Mickey,

You got a new voicemail. Here are the details of your message:

From: Kevin O / 1000  
Time: Tuesday, October 19, 2021 at 11:56 AM  
Duration: 00:40  
Transcription:

Mickey, this is a test of our voice transcription service on business cloud communications. All you have to do to test it is to call a number that's registered on the platform and leave a message and it will send you an email. I hope you're having a good day. Bye.

See attachment.

Thanks,

## 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 1 (701) 839-2121 or dial 611 from your SRT phone to get your login information.

1. Go to <https://srt.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].

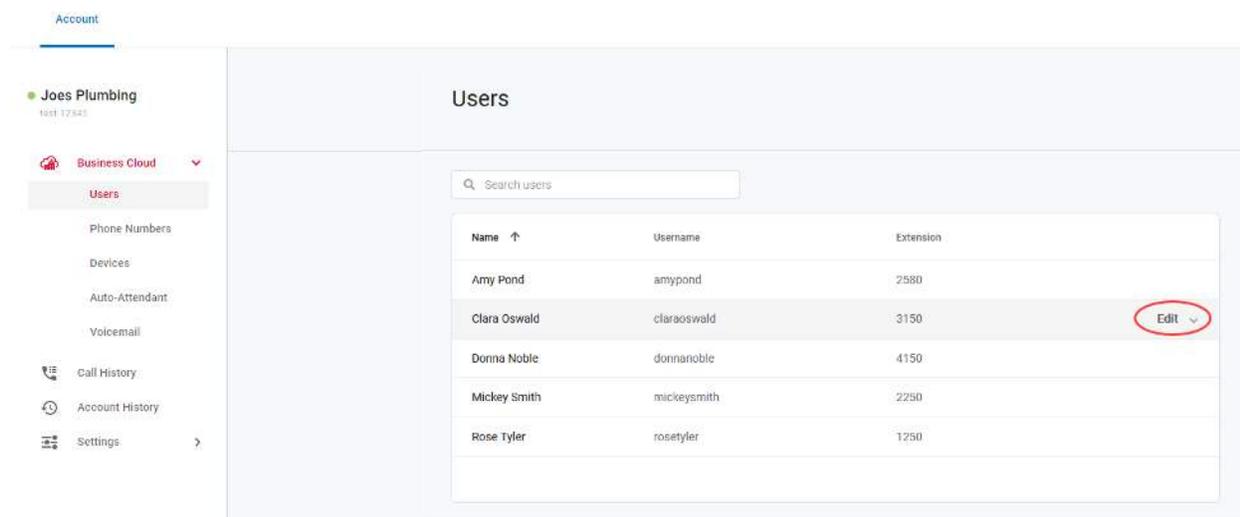
The screenshot shows the SRT Voice Portal login interface. At the top is a red banner with the SRT logo. Below this is a white login box. The box is titled 'Login'. It contains a 'Username' input field, a 'Password' input field with a 'Forgot Password?' link to its right, a 'Remember Me' checkbox, and a dark grey 'Login' button at the bottom.

### FORGOT PASSWORD

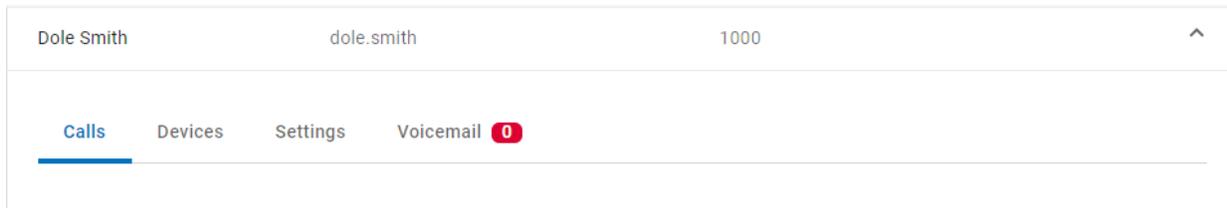
If you can't log in, click [Forgot Password?](#) and an email will be sent to you with a link to reset it. Your new password must be 8–16 characters long and include uppercase and lowercase letters and at least one number. It cannot contain any part of your username.

## 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.



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



# Calls

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

## Call Details

All phone numbers pointing to this user are listed here. Incoming calls to these numbers will follow the user’s Call Handling and Call Screening options as defined below. To add or remove a phone number, please contact the SRT Business Center at 701.852.8888.

Dole Smith
dole.smith
1000
^

**Calls**
Devices
Settings
Voicemail 0

### Call Details

Assigned Phone Number **1 (801) 998-9899**

Extension Number 1000

Caller ID Number 1 (801) 998-9899 ▼

Caller ID Name **Joels Plumbing**

Caller ID Enabled

FEATURE	DESCRIPTION
Assigned Phone Number	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.
Extension Number	The dialable extension the user can be reached at on the account.
Caller ID Number	The phone number displayed on the phone of the person being called. Users can choose the main account number, their phone number, or choose None to not send out any caller ID at all. This field is required.

It is important to choose a number here, even if you choose to disable caller ID (below). If this field is set to None, outbound calls—even to 911—will be sent out as Anonymous, and the carrier may reject the call.

Caller ID Name	<p>The name associated with the phone number that will display on the phone of the person being called.</p> <ul style="list-style-type: none"> <li>• If Caller ID Number is set to None, this will say ANONYMOUS.</li> <li>• If Caller ID Enabled is unchecked, this will say BLOCKED.</li> <li>• If Caller ID Enabled is checked, this will reflect the caller ID name of the phone number selected above.</li> </ul>
Caller ID Enabled	<p>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.</p> <ul style="list-style-type: none"> <li>• <b>CHECKED:</b> Caller ID will be sent on all outbound calls.</li> <li>• <b>UNCHECKED:</b> Caller ID will be sent as BLOCKED. Calls to 911 will still send out the phone number selected in the Caller ID Number field.</li> </ul>

## 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 Block with Message ▼

Toll-free Caller Block ▼

All Other Callers Allow ▼

---

Custom Caller(s)

12125551234

Allow with Priority Ring

✕

Priority Ring Priority Ring 4 ▼

17175551234

Forward

✕

18015551234

Voicemail

✕

[hide extra callers](#)

## CALL SCREENING CATEGORIES

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

## CALL SCREENING BEHAVIORS

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

FEATURE	DESCRIPTION
Allow	Allow the caller to ring through.
Allow with Priority Ring	Allow the caller to ring through with a priority ringtone. Choose from 7 other ring patterns.
Block	Block the caller from ringing through. Callers will hear a busy signal.
Block with Message	Block the call with a message: <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>
Forward	If you choose to forward calls from caller, you must choose the number those calls are forwarded to in the Screening Forward Number field.
Voicemail	Send the caller directly to voicemail.

# Call Handling

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

### 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.

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
Scheduling	<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>
Call Waiting	<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>
Do Not Disturb	<p>Indicates if Do Not Disturb is enabled. While enabled, all incoming calls will be sent directly to voicemail.</p> <div style="background-color: #f5f5f5; padding: 5px; border: 1px solid #ccc; 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.

FEATURE	DESCRIPTION
No Answer	The call is unanswered after a specified number of seconds.
Busy	The device is busy (already in use and Call Waiting is not enabled).
Out of Service	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.

## 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
Phone Numbers	Enter the phone number(s) that will ring. To add another number to the list, click [+Add Number].
No Answer	<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.

Ring Phone
Forward All
Sim Ring
Find Me

+ Add Destination

Device ^ v 📞 # Ring Device for  seconds ✕

Phone Number ^ v 📞 #  for  seconds ✕

Timeout Action Send to Voicemail v

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.

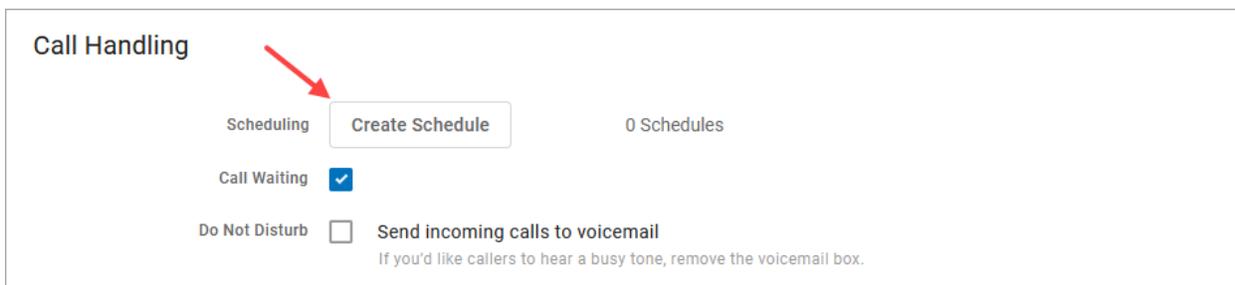
FEATURE	DESCRIPTION
Destinations	Indicate if calls should route through <span style="color: blue; font-size: 1.2em;">📞</span> Devices or <span style="color: blue; font-size: 1.2em;">#</span> Phone Numbers by clicking the respective icons. <ul style="list-style-type: none"> <li>Use the <span style="font-size: 0.8em;">^ v</span> arrows to reorder the destinations.</li> <li>Click [+ Add Destination] to add more destination fields.</li> </ul>
Devices	In the field provided, enter a timeout setting. Calls that ring longer than 120 seconds may be disconnected by the carrier.
Phone Number	Enter the phone number calls should progress to and how long each number will ring.
Timeout Action	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

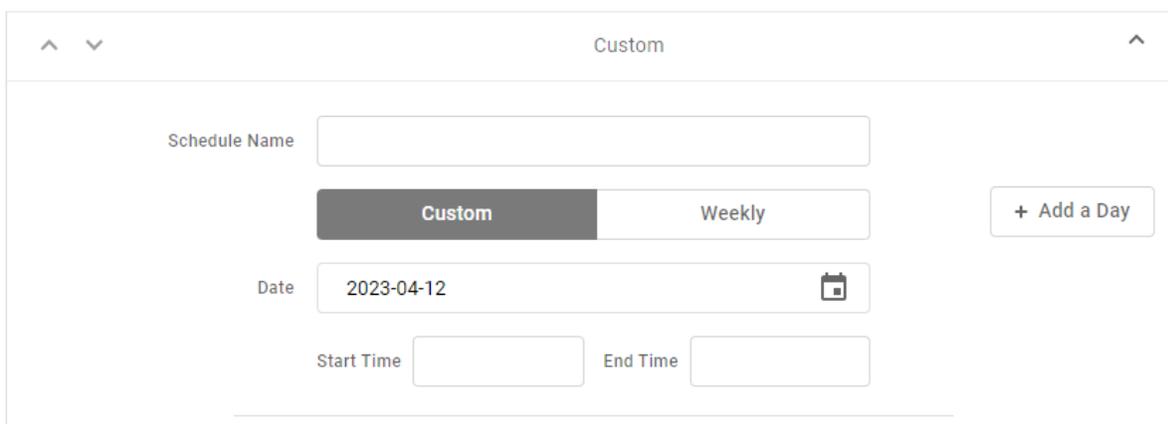
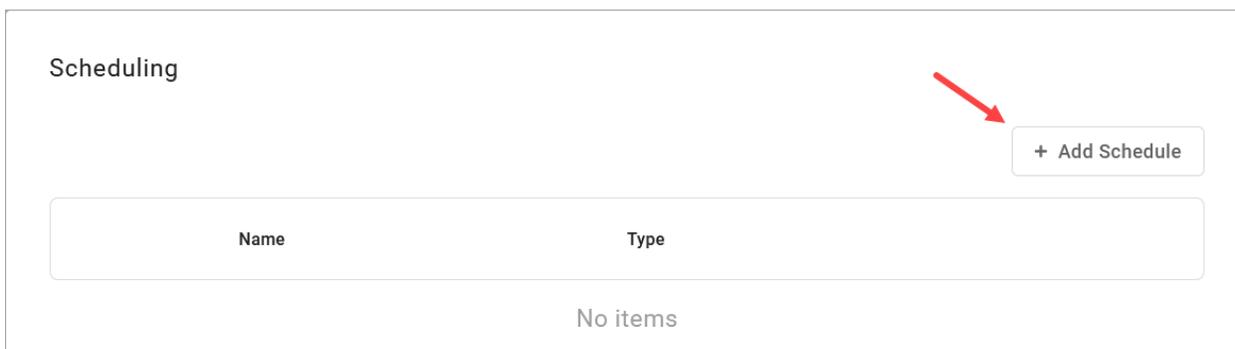
Schedules provide custom routing for your callers based on when they call, down to the very minute. Schedule times follow your account's default time zone.

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].



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



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.

The screenshot shows the 'Custom' schedule configuration interface. At the top, there are expand/collapse arrows and the title 'Custom'. Below this is a 'Schedule Name' text input field. A toggle bar contains two options: 'Custom' (which is selected and highlighted in dark grey) and 'Weekly'. To the right of the toggle bar is a '+ Add a Day' button. Below the toggle bar, there are two identical sections for adding days. Each section starts with a 'Date' field containing '2023-04-12', a calendar icon, and a close 'x' icon. Below each date field are two text input fields for 'Start Time' and '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.

The screenshot shows the 'Weekly' schedule configuration interface. At the top, there are expand/collapse arrows and the title 'Weekly'. Below this is a 'Schedule Name' text input field. A toggle bar contains two options: 'Custom' and 'Weekly' (which is selected and highlighted in dark grey). Below the toggle bar, there are seven rows, one for each day of the week: Sun, Mon, Tue, Wed, Thu, Fri, and Sat. Each row contains a day label, a 'Start Time' text input field, and an 'End Time' text input field.

5. **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.

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

---

Delete
Cancel
Confirm

6. 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.

Schedule Name:

Custom
Weekly
+ Add a Day

Date: 2023-04-12 📅

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

No Answer: Send to Voicemail after 20 seconds

Busy: Send to Voicemail

Out of Service: Send to Voicemail

---

Delete
Cancel
Confirm

# Reassign

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

### 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.

Ring Phone Forward All Sim Ring Find Me

Phone Numbers  + Add Number

Simultaneous Ring will ring all devices on this User and all numbers added to the list. The first Phone Number to pick up will take the call.

No Answer: Send to Voicemail after  seconds

---

Delete Reassign Cancel Save

**PERMISSIONS**

If you don't see the [Reassign] button below Call Handling, you may need additional permissions to use this feature. Please contact your account administrator for assistance.

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

## NEW USER DEFAULT SETTINGS

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

- Account History
- Call History
- Call Handling
- Call Screening
- Voicemail greetings, messages, and PIN

## FEATURES AND SETTINGS THAT SWITCH

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

- Calling plan assignments (not minutes used)
- Product tier
- Voice Portal access
- End user role (Admin or Limited)
- Caller ID phone number and settings
- Device lines assigned to the user
- Phone numbers routing to the user
- Cymbus device lines
- Extension number
- Language
- Time zone
- Shared lines, speed dials, and BLFs owned by or reference the user
- Paging and Pick Up Groups to which the user belongs
- Queues to which the user belongs
- IVR/Auto-Attendant references that point to the user, their device lines, or their voicemail box
- SIP trunk overflow routing (pointed at the user or their voicemail)

## STEPS TO REASSIGN AN END USER ACCOUNT

1. In the Admin Portal, go to Users and expand the user whose account you want to reassign.
2. In the user's Calls tab, scroll down to the bottom and click [Reassign] on the left.

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.

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

Phone Numbers  + Add Number

Simultaneous Ring will ring all devices on this User and all numbers added to the list. The first Phone Number to pick up will take the call.

No Answer Send to Voicemail after  seconds

Delete Reassign Cancel Save

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

Reassign user account

Enter the new user's information to reassign the account

Name

Username

Email  ✓

Block the welcome email

Cancel Save

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

### Reassign user account?

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

- **Access.** The name, username, and email address will be updated with the new user's information. The Voice Portal and Cymbus app passwords will be reset.
- **Settings.** The new user will retain most of the account settings, including any phone numbers(s), caller ID, device lines, IVR/Auto-Attendant references, etc. For privacy reasons, the voicemail box (messages, greetings, and PIN), call handling, and call screening settings will be erased.

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

Cancel

Save

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

Reassign Successful!

A new user has been reassigned to the account.

OK

### NOTE

Please remind the new user to configure their own [call handling](#), [call screening](#), and [voicemail](#) settings. They can visit the [Cymbus Help Center](#) if they have any questions.

# 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.

Dawn Smith
dawn.smith
1000
^

Calls
Devices
Settings
Voicemail 0

### 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	bbbccddd242	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](#) on page 70 for detailed information about these features and settings.

## CYMBUS SOFTPHONE 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
1000
^

Calls
Devices
Settings
Voicemail 0

### User Information

Name

Sarah
@

Jane

Language

English
▾

Time Zone

US/Mountain
▾

FEATURE	DESCRIPTION
Name	The user’s first and last name.
Language	<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>
Time Zone	The time zone displayed on the user’s device and call records.

## Feature Plan & Voice Portal

### Feature Plan & Voice Portal

Feature Plan **STANDARD** i

Voice Portal Access

Email  ✓

Username dawn.smith

End-User Role  i

✉ Resend Welcome Email
🔑 Reset Password

Last Send: Apr 12th 2023, 9:22 am

FEATURE	DESCRIPTION
Feature Plan	<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>
Voice Portal Access	<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>
Email	<p>A valid email address is required for every user who has access to the Voice Portal. This is where their Welcome and Forgot Password emails are sent.</p>
Username	<p>Their username. It cannot be changed. The user can log in to the Voice Portal with this or their email address.</p>
End-User Role	<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: #ffe0b2; padding: 5px;">You cannot change your own End-User Role.</p>
Resend Welcome Email	<p>Resend the Welcome email with the Voice Portal URL, a link to create a password, and their softphone account information (if applicable).</p>
Reset Password	<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 the SRT Business Center at 701.852.8888.

### Calling Plans

Calling Plan	Total Minutes	Minutes Used
Default	10000	3

Calling Plan **Default**

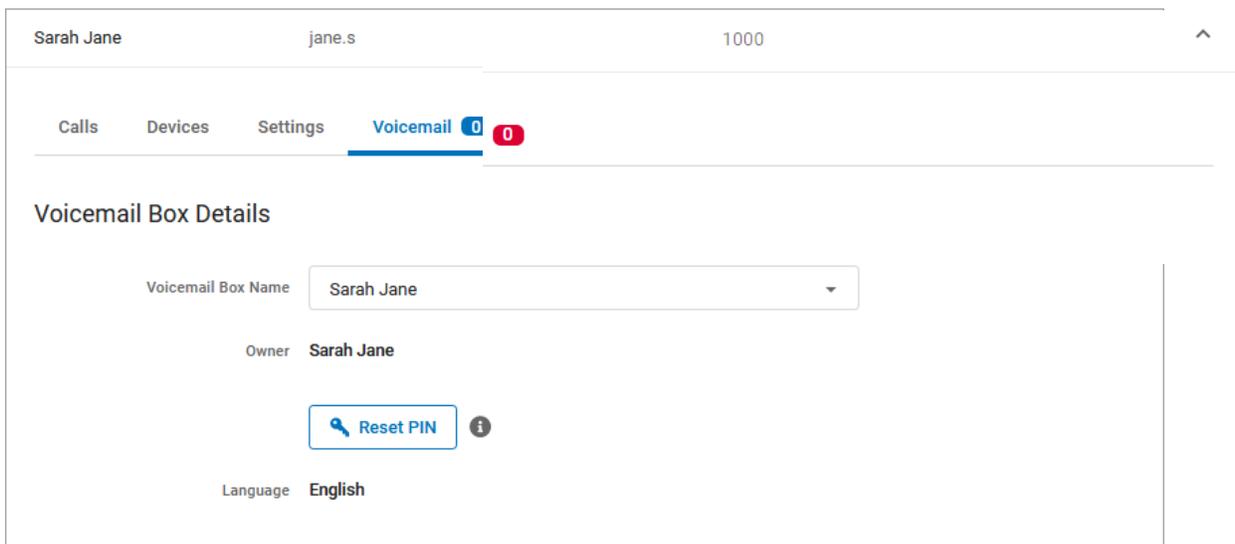
Minutes Used **3/10000**

# 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



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

Dawn Smith	dawn.smith	1000	^
------------	------------	------	---

- Calls
- Devices
- Settings
- Voicemail 0**

### Voicemail Box Details

Voicemail Box Name:

Owner: **Dawn Smith**

[Reset PIN](#) ⓘ

Language: **English**

### Voicemail Box Greetings ⓘ

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

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

No Answer Greeting:  [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
- Reassign
- 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 the SRT Service Center at 701.839.2121.

**Phone Numbers**

Phone Number	Type	Destination
1 (801) 998-9899	ELS	User - Dawn Smith (dawn.smith)
1 (801) 998-9989	ELS	Auto-Attendant - Main

**Phone Numbers**

1 (435) 625-0417

**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 x Q

Address Preview 353 E Spring Dr  
Beaver, UT 84713 **Manual Entry** v  
Lat/Long 38.279000, -112.635900  
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 the SRT Business Center at 701.852.8888.

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  x 🔍

Address Preview Manual Entry ▾

353 E Spring Dr  
Beaver, UT 84713

Lat/Long 38.279000, -112.635900

Provide Lat/Long

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

Dismiss
Save

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

## Phone Number Destination

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.
  - If the phone number is assigned to a user, you can check the box to assign this phone number as their caller ID (optional).
4. Select a priority ring tone, if necessary.
5. Click [Save]. The changes will be applied immediately.

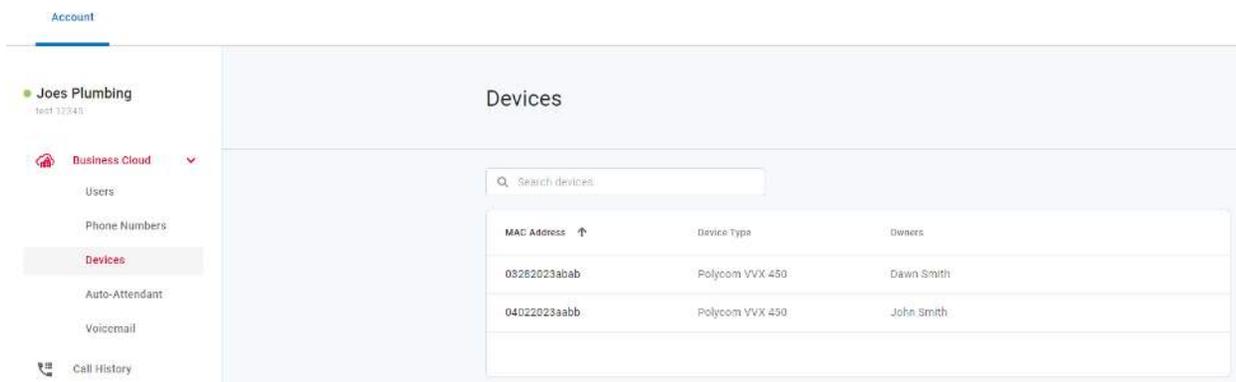
The screenshot shows the 'Phone Numbers' management page. At the top right is a '+ Add Number' button. Below is a search bar and a filter dropdown set to 'All'. A table lists phone numbers with columns for 'Phone Number', 'Type', and 'Destination'. The second row is expanded to show settings for '1 (435) 628-2138'. The settings panel includes a 'Phone Number Rings To' dropdown menu (currently set to 'Auto-Attendant - Main Office'), a 'Priority Ring' dropdown menu (also set to 'Auto-Attendant - Main Office'), and 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button.

## CUSTOMER SUPPORT

If you don't have access to the Phone Numbers page, please contact the SRT Service Center at 701.839.2121.

# DEVICES

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



To view and manage device settings:

- 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 SOFTPHONE 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.

03282023abab	Polycom VVX 450	Dawn Smith	^
--------------	-----------------	------------	---

**Device Info**

MAC Address: 03282023abab

Device Type: Polycom VVX 450

Configuration Status: **No** ✘ [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 the SRT Service Center at 701.839.2121 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 Device Lines

Import New Configuration

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
LINE_NUMBER	The numeric line number on the device. The import does not accept line numbers that don't exist on the device.
LINE_TYPE	Enter one of the following values to assign a feature to that line: <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 <b>must</b> be set to Line. 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 Deactivated.</li> </ul>
REFERENCE	The 3- to 6-digit extension of other users on the account (SpeedDialUser), or a speed dial phone number (SpeedDialTN).
REFERENCE_NAME	The user or object that owns the Reference. This field is listed on an export but is not required for an import.

## EXAMPLE IMPORT FILE

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

## 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	<b>Edit</b> ▾
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 the SRT Service Center at 701.839.2121.

## 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 the SRT Service Center at 701.839.2121.

**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 the SRT Service Center at 701.839.2121.

**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

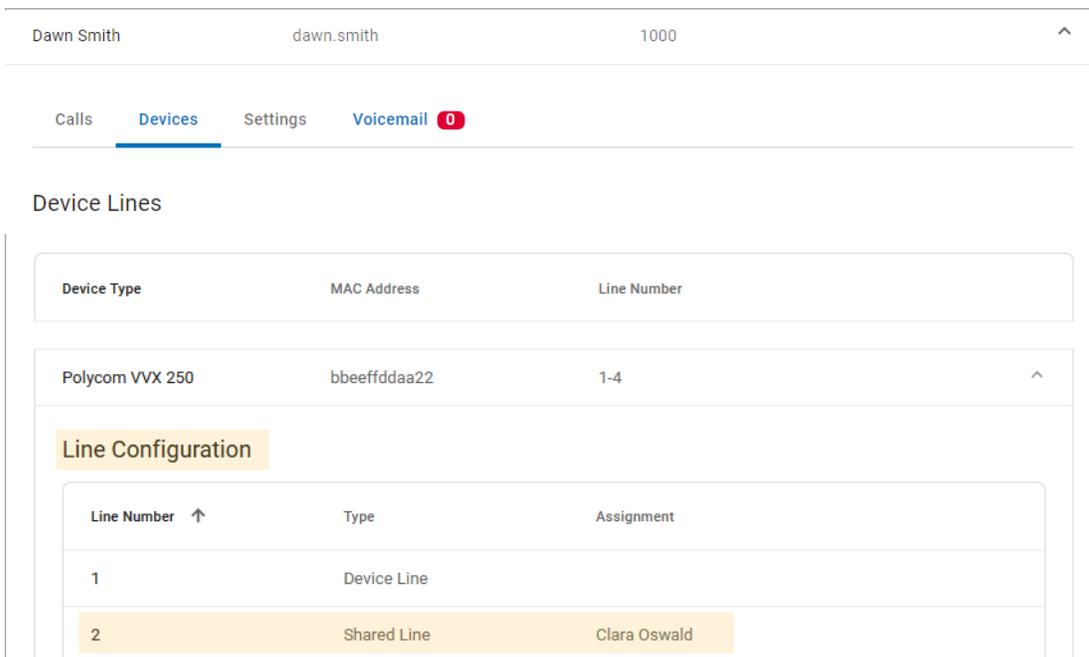
Type	Shared Line
Assignment	Clara Oswald

- **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.



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.

Dawn Smith      dawn.smith      1000      ^

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

### Device Lines

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

### Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
VVX250	bbeeffdaa22	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 line, or a star code, like a [Pick Up Group](#).

### ASSIGNING A SPEED DIAL

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

#### 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	^
<b>Device Line Info</b>			
Type	Speed Dial		
Assignment	-- Custom Speed Dial --		
Speed Dial	*456		
Speed Dial Display Name	Front Desk		

- **TYPE:** Speed Dial
- **ASSIGNMENT:** Custom Speed Dial
- **SPEED DIAL:** Enter a phone number or star code.
  - A custom speed dial star code must be less than 4 digits in total; anything longer will get an “invalid star code” error.
- **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.

<b>Sidecar</b>	
Sidecar Type	CP-BEKEM-3PCC
Number Of Sidecars	1

- **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

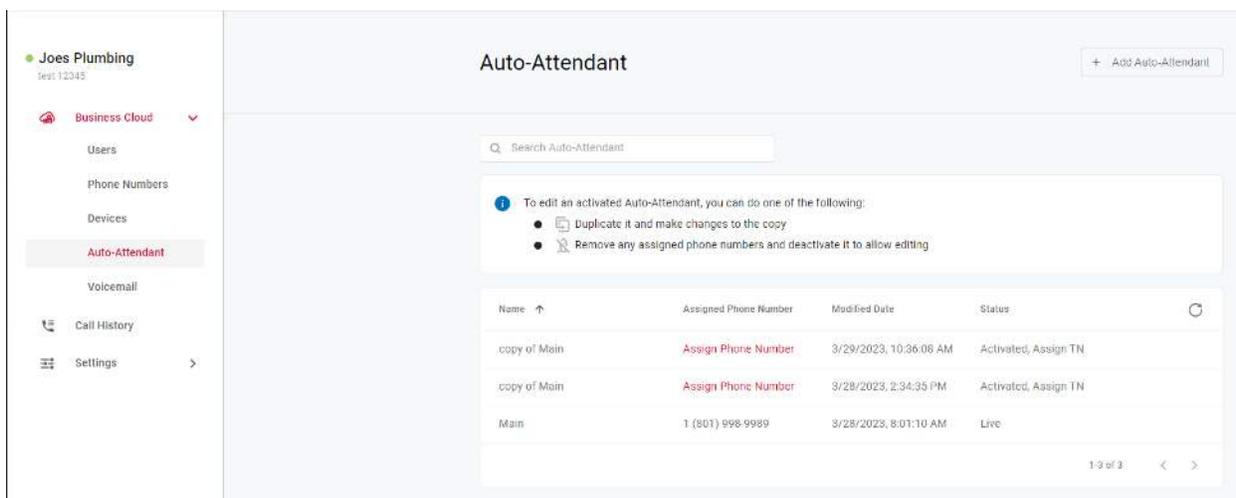
Managing inbound calls is a crucial part of how an organization handles everyday business. Auto-attendants enable identification, segmentation, and routing of callers to the most appropriate agent within your team. It's a simple, effective, and completely customizable tool which will significantly reduce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

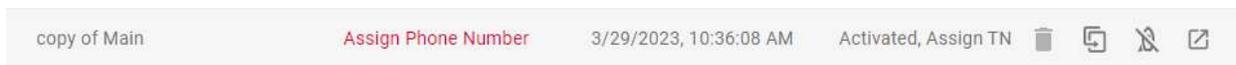
If you don't see Auto-Attendant in the menu, please contact the SRT Service Center at 701.839.2121.



FIELD	DESCRIPTION
[+Add Auto-Attendant]	Start creating a new auto-attendant. The builder will open in a new window, so you can look back at the auto-attendant list if you need to reference it.
Name	The name of the auto-attendant. If a name wasn't saved, it will be named "untitled auto-attendant" by default.
Assigned Phone Number	The phone number(s) directed to this auto-attendant. A phone number must be assigned before calls can be directed through the auto-attendant. If this is blank, contact the SRT Service Center at 701.839.2121 for assistance.
Modified Date	The last date the auto-attendant was modified: month, day, year, time.
Status	<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.



FIELD	DESCRIPTION
Delete	Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.
Duplicate	Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one.
Activate	When the status is Valid, click the Activate icon to activate it so the attendant will be available as a destination in the Phone Number menu.
Deactivate	Deactivate the auto-attendant. Activated status will be downgraded to Valid, and Linked status will be downgraded to Activated.

FIELD	DESCRIPTION
	The phone number must be unassigned before the auto-attendant can be edited. Please contact the SRT Service Center at 701.839.2121 for assistance.
Edit	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.
View Only	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

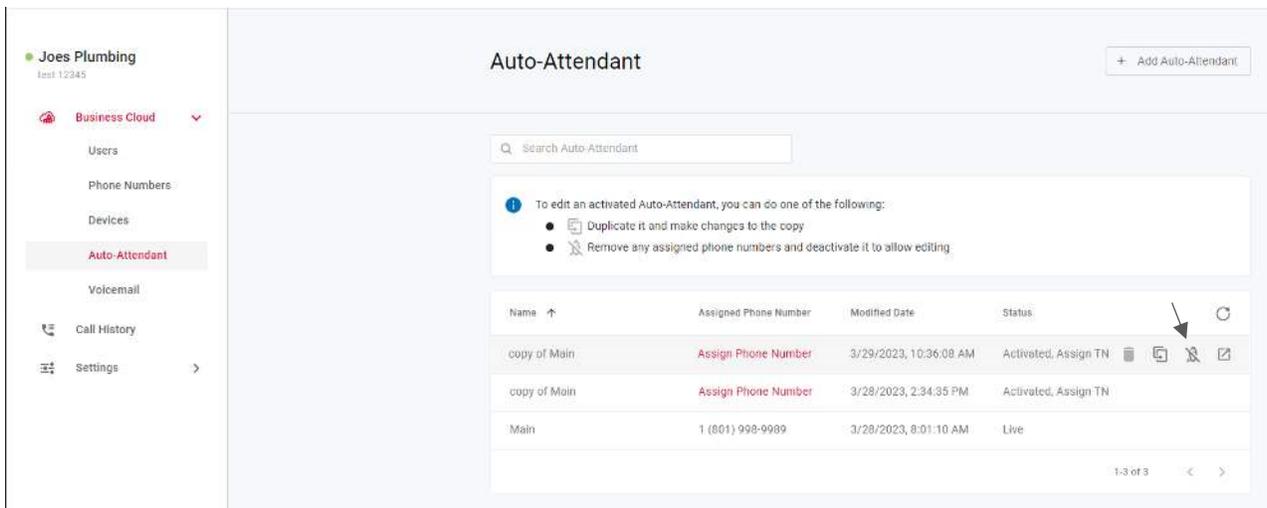
FIELD	DESCRIPTION
Schedule	Routes the caller to a call flow based on a defined schedule.
Menu	Plays a recording, typically the readout of the phone menu, and waits for the touch-tone input from the user to determine the next route.
Message	Plays a pre-recorded sound clip.
Group	Routes the caller to a group of users (not devices). This route also supports call queuing.

FIELD	DESCRIPTION
User	Routes the caller to a specific user's devices or the user's voicemail. The call will follow the user's call handling settings.
Hang Up	Ends the call.
Reference	Redirects the caller to another route in this auto-attendant. For example, if a call is routed to a user but the user doesn't answer, instead of ending the call there so they have to call back, you could reference the Main Menu so the caller can start over.

## Activate an Auto-Attendant

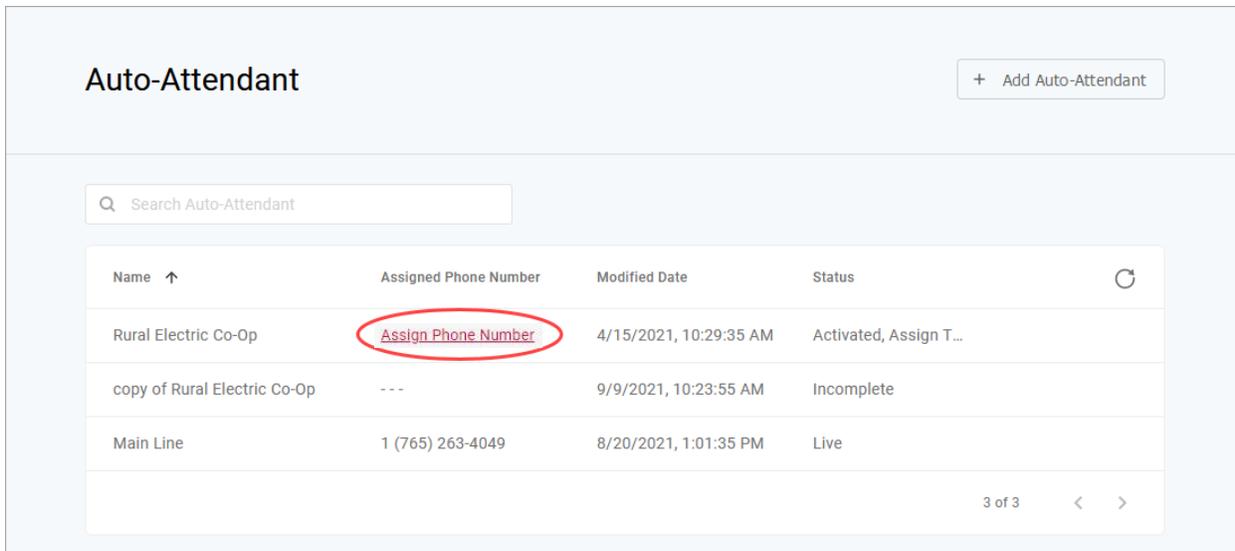
When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to "Ready to Activate."

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

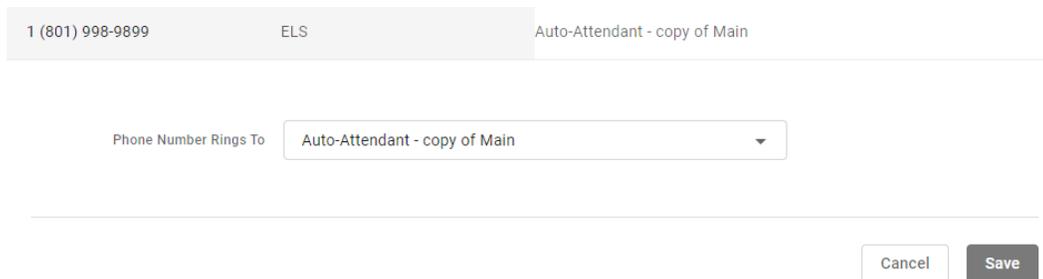


## Assign a Phone Number

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



1. Click the Assign Phone Number link to go to the Phone Numbers page.
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 the SRT Service Center at 701.839.2121 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.
5. If needed, click [+ Add Rule] to add another rule to this schedule.
6. 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

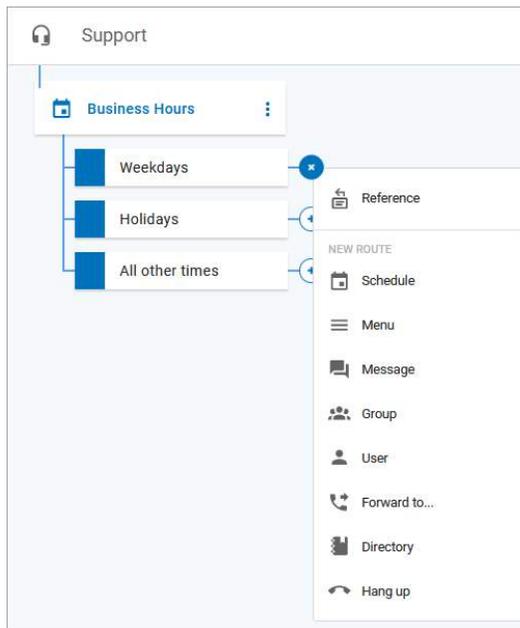
To delete a rule, click the  trash icon. The rule will be crossed out, but if you change your mind, it can still be  restored or  edited until the schedule is saved. Once you save the schedule, though, any deleted rules will be deleted permanently.



## 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.

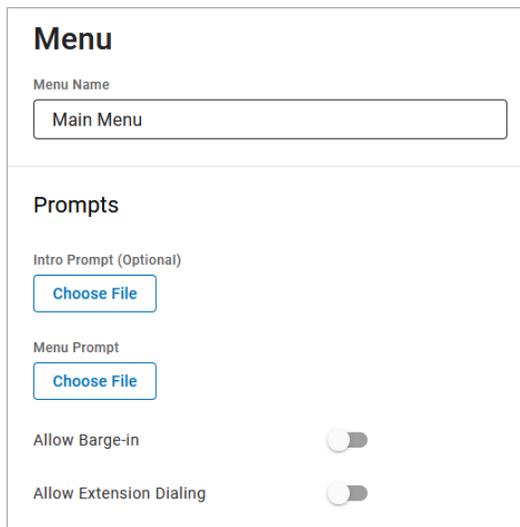
By default, an "All other times" route will be added to determine where calls are routed during times that aren't specified by a rule.



## 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
Intro Prompt	The recorded audio that a caller will hear upon entering the menu. A WAV file must be uploaded before the menu can be saved.
Menu Prompt	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	<p>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.</p> <p>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.</p>

## MENU OPTIONS

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

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

**Menu Options**

2  
ABC

🗑

3  
DEF

🗑

4  
GHI

🗑

+ Add Option

## FAILURE ROUTING

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

**Failure Routing**

Menu Timeout (Seconds)

30
▼

Max Invalid Selections

3
▼

Invalid Prompt

Choose File

FIELD	DESCRIPTION
Menu Timeout	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
Message Name	Enter a name for this message.
Message	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.

FIELD	DESCRIPTION
Group Name	Enter a name to identify this group.
Allow Call Queuing	Allows calls to enter a queue.
Max # of Calls	Enter the number of calls that can be in the queue at one time (1–50).
Max Time (Minutes)	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.
Ring Timeout (Seconds)	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.

## ALLOW CALL QUEUEING

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

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

- Group Name: Waiting Room
- Allow Call Queuing:  (toggled on)
- Max # of Calls: 10
- Max Time (Minutes): 30
- Ring Timeout (Seconds): 20
- Use Group Name in Caller ID:  (toggled off)
- User Ring Strategy:
  - Simultaneous: Ring all users at the same time
  - Sequential: Ring users in order
- Users:
  - Rose Tyler
  - Mickey Smith
  - + Add User
- Ring Timeout (Seconds): Number of Seconds (5-120)

A red box highlights the 'Allow Call Queuing' toggle and the three input fields (Max # of Calls, Max Time, Ring Timeout).

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:

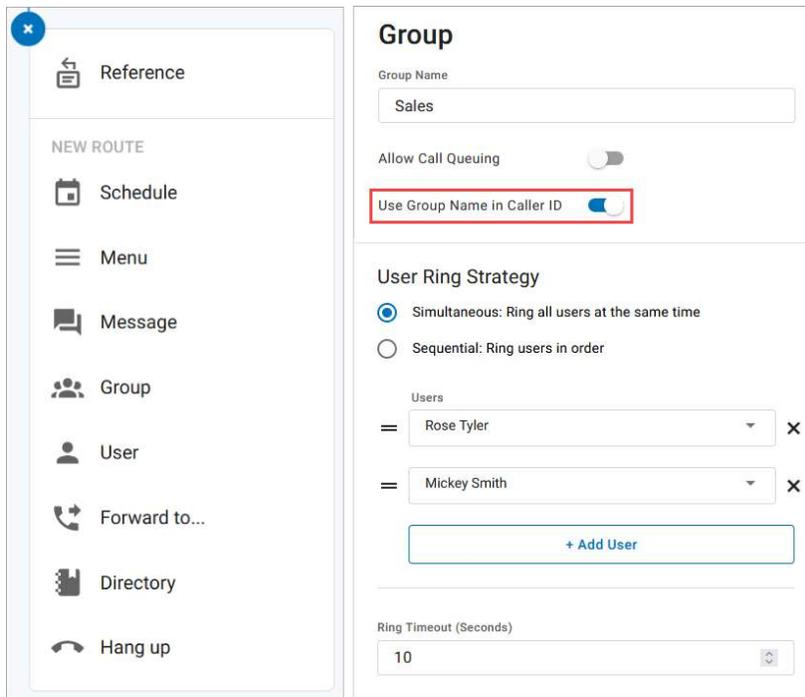
- Simultaneous: Ring all users at the same time.
  - Sequential: Ring users in order. The amount of time it routes to each user added to the group until the max time parameter has been met which will then route the call to the next route.
5. Finally, add individuals to the group.
  6. When you're done,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

### USE GROUP NAME IN CALLER ID

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

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

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



# 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)
<span style="margin-right: 5px;">=</span> <input type="text" value="Bob Ross"/> <span style="margin-left: 5px;">✕</span>	<input style="width: 100%;" type="text" value="15"/> <span style="margin-left: 5px;">✕</span>
<span style="margin-right: 5px;">=</span> <input type="text" value="Alice Cooper"/> <span style="margin-left: 5px;">✕</span>	<input style="width: 100%;" type="text" value="15"/> <span style="margin-left: 5px;">✕</span>

Total Ring Time: 0 min 30 sec

+ Add User

FIELD	DESCRIPTION
Simultaneous	Rings all devices in the group at the same time. The first user to answer gets the call.
Sequential	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.
Users	Add a user to the group.
Ring Timeout	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

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 on 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
Timeout (seconds)	Enter the number of seconds the call can be in the directory. (1–999)
Max Invalid Selections	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.

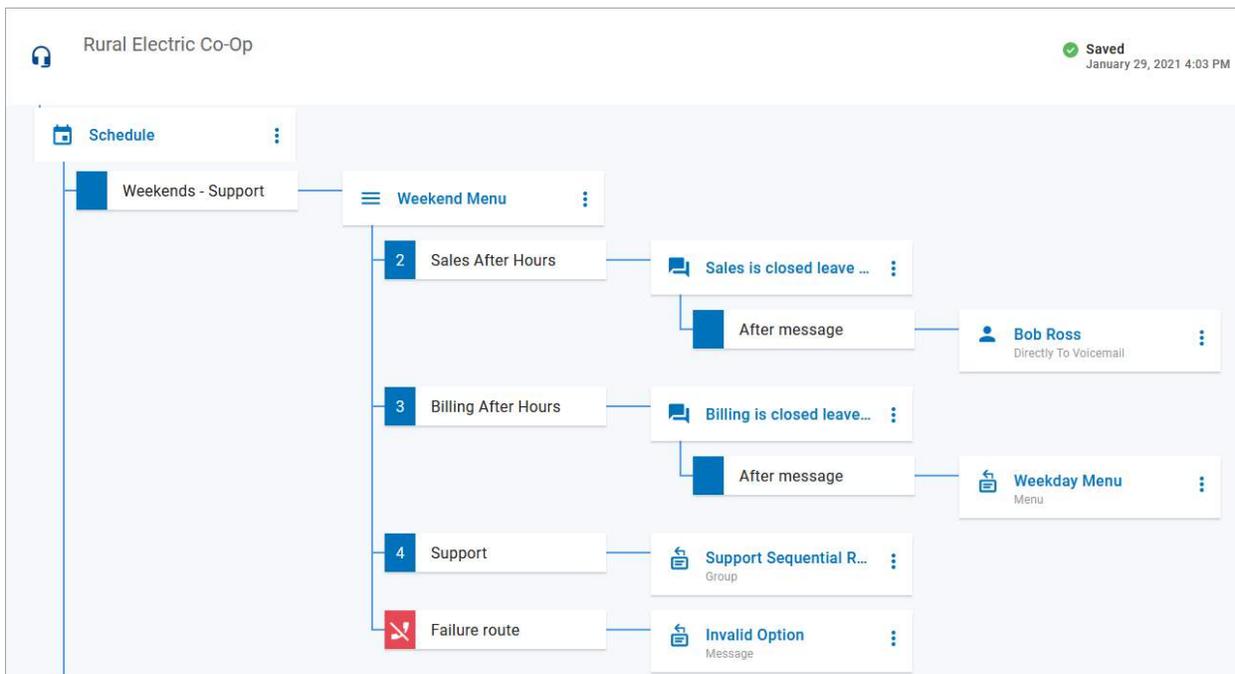
Choose which Group, Menu, Message, Schedule, or User a caller will be redirected to once they reach this point in the route, then click [Save].

### 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 <span style="float: right;">✓</span>
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.

Name ↑	Owners	Voicemails (New/Total)
Dale Smith		0/0
Dawn Smith	Dawn Smith	0/0
Dole Smith		0/0
John Smith	John Smith	0/0

## 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.

Sarah Jane	Sarah Jane	0/0	^
------------	------------	-----	---

### Voicemail Box Details

Voicemail Box Name

Owner **Sarah Jane**

Language **English**

## 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** ⓘ

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

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

**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
 Save	Change the status of the message to Saved.
 Delete	Delete this message from the box.

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

## MESSAGE WAITING INDICATOR

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

## Message Settings

**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:

Hi Mickey,

You got a new voicemail. Here are the details of your message:

From: Kevin O / 1000  
 Time: Tuesday, October 19, 2021 at 11:56 AM  
 Duration: 00:40  
 Transcription:

Mickey, this is a test of our voice transcription service on business cloud communications. All you have to do to test it is to call a number that's registered on the platform and leave a message and it will send you an email. I hope you're having a good day. Bye.

See attachment.

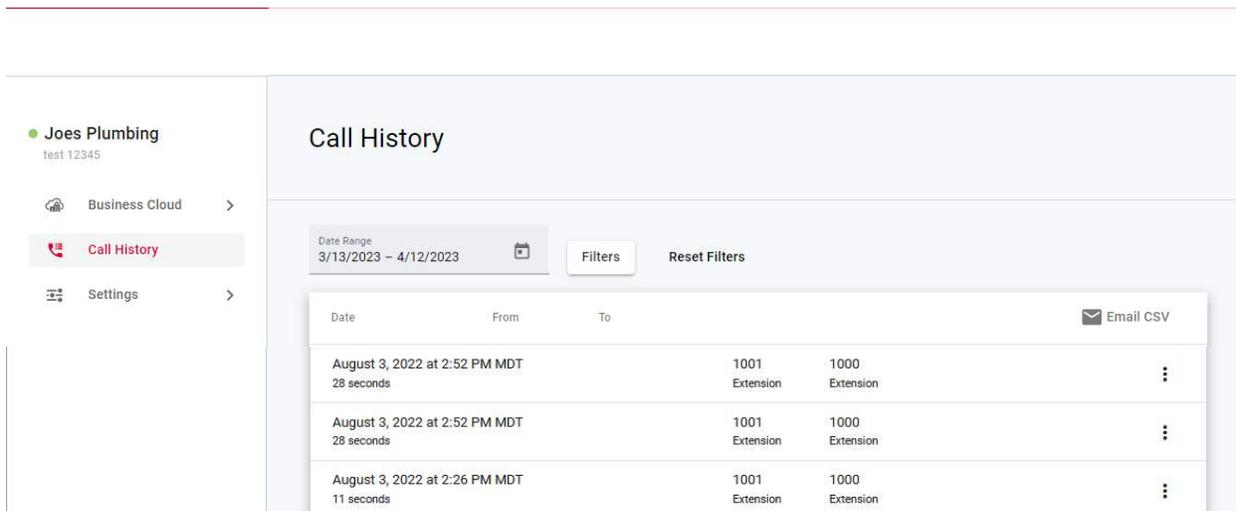
Thanks,

### 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

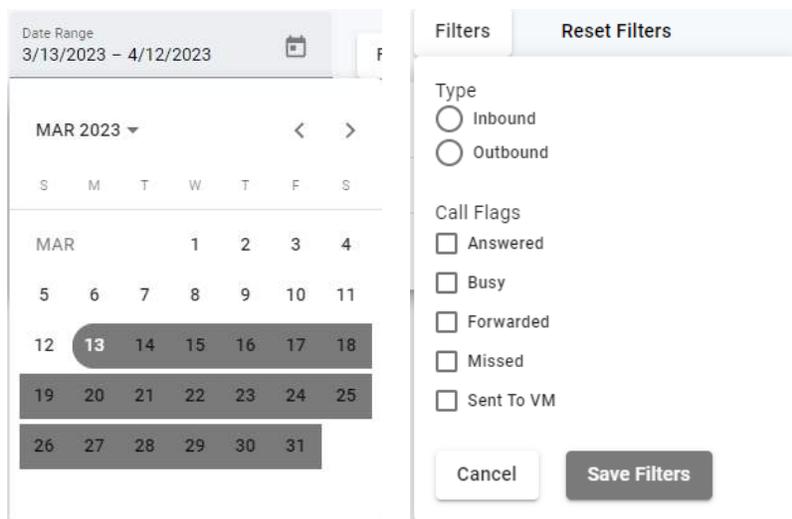
Call History holds the records of all calls made and received on the account. Calls are presented in chronological order with the most recent call at the top. At the top right of the table, the current record list can be emailed (exported) as a CSV file.



## Filters

The last 30 days of call records are shown by default, but you can either change the date range or delete it to get exactly the data you need. Records can also be filtered by Type and/or Call Flags. These settings 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 [Filter], set your criteria, and save your changes. If necessary, click Reset Filter to remove any parameters and display all calls again.



## Details

Click the three dots menu on the right of a call to view the details or technical details of the call. For inbound calls, you will also have the option to block the number.

August 3, 2022 at 2:52 PM MDT  
28 seconds

1001  
Extension

1000  
Extension

Block Number

Details

Technical Details

**Details**

**Time and Length**

Start Time August 3, 2022 at 2:52 PM MDT  
Connected Time August 3, 2022 at 2:52 PM MDT  
End Time August 3, 2022 at 2:52 PM MDT  
Billed Length 0 seconds  
Actual Length 28 seconds

---

**Cost**

Cost \$0.00  
In Calling Plan Yes  
Rate Per Minute \$0.00

---

**Origination**

Number 1001  
Location Extension  
Category OnNet

---

**Termination**

Number 1000  
Location Extension  
Category OnNet

Close

**Technical Details**

```

id "6b668bef-bad1-4a98-a77e-1d2461a873d3"
startTime "August 3, 2022 at 2:52 PM MDT"
connectTime "August 3, 2022 at 2:52 PM MDT"
endTime "August 3, 2022 at 2:52 PM MDT"
actualCallLengthSeconds 28
billCallLengthSeconds 0
ratePerMinute 0
cost 0
inPlan true
origNumber "1001"
origLocation "Extension"
origCarrier "ALIANZA"
origCallCategory "OnNet"
termNumber "1000"
termLocation "Extension"
termCarrier "ALIANZA"
termCallCategory "OnNet"
legType "Origination"
callType "OUTBOUND"
disconnectType "HangUpOther"
sessionId "f6bb8e2401b857ebf4b98fccc4c2ed6d9b32c47c"
accountBillableNumber "12012241000"
                    
```

Close

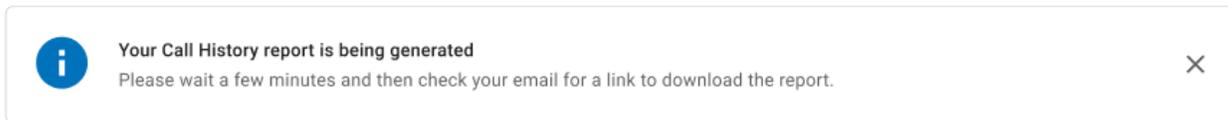
FIELD	DESCRIPTION
Block	If necessary, you can block the inbound caller. Click [Block] to add the inbound caller to the user's or account's blocked caller list (in Call Handling).
Time and Length	Start time, connected date and time, end date and time, billed length, and actual length.
Cost	The total cost, whether it was included in the calling plan, and the rate per minute.
Origination	The originating number, location, and category (On or Off Network).
Termination	The terminating number, location, and category (On or Off Network).

## Email a Call History Report

In the call table, you can see the date, time and duration of each call, the number the call originated from, and the number the caller dialed. At the right of the header, you have the option to export the report as a CSV file.

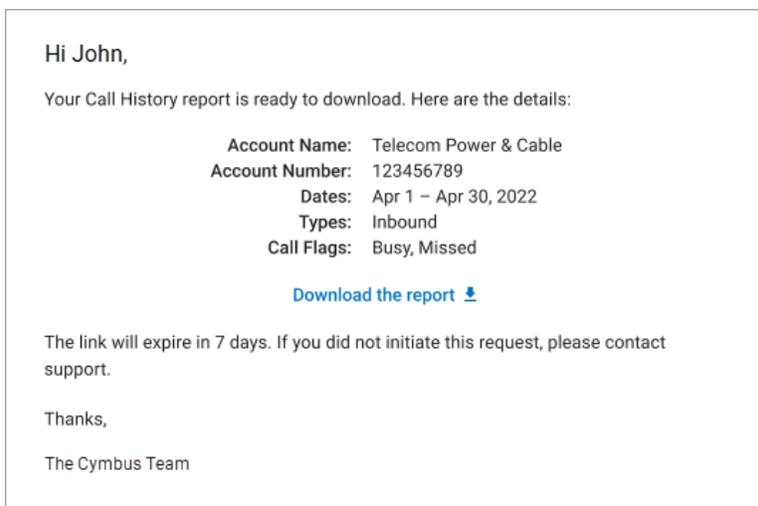
1. Go to Account > Call History.

2. Filter the list by Date, Type, and Call Flags to show only the information you need.
3. At the top right of the table, click  **Email CSV**. A banner will be displayed on the page to indicate that the system is now generating your report.



4. When the file is ready, an email will be sent to you with a link to download it. The link will expire in 7 days and can only be used once.

Here's an example of what the email looks like:



## EMAIL ADDRESS

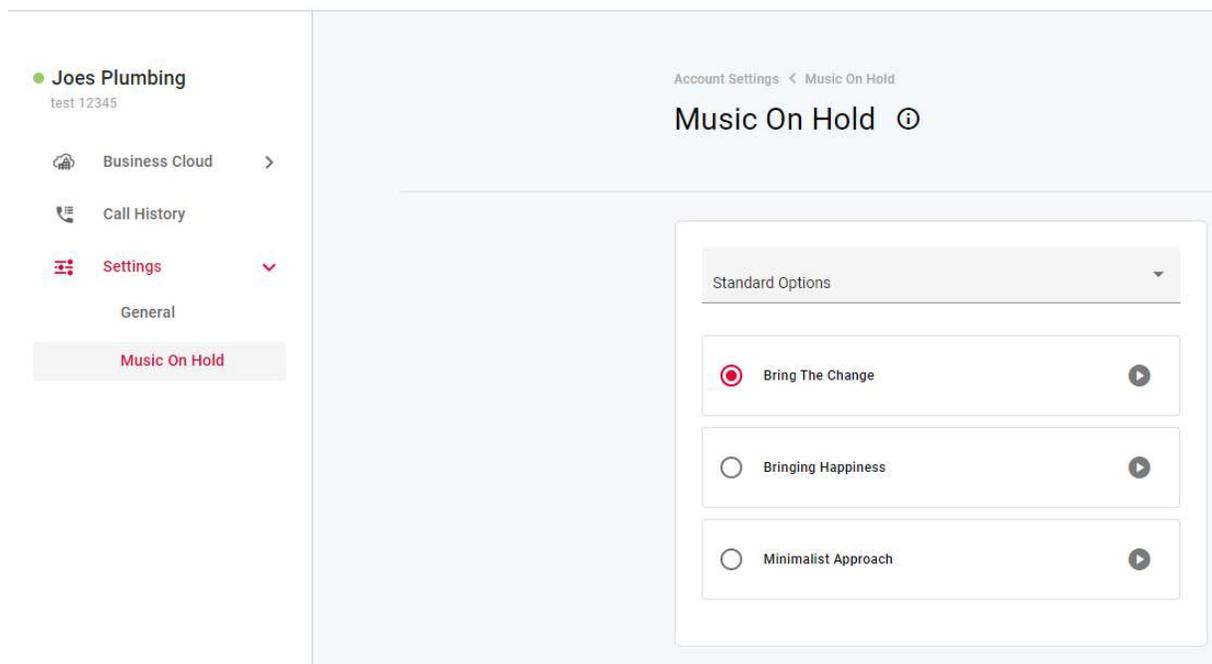
The link to download the Call History report is sent to the email address on your user account. If an email address is not linked to your account yet, you can add it in Users > Settings, or contact an account administrator for assistance.

# SETTINGS

Most settings that apply to the entire account can only be managed by your service provider, but the settings you can manage are available here.

## Music On Hold

On hold music and messaging is a proven marketing tool for any company. Silence, bad music, or playing the radio is a wasted opportunity to create a positive customer experience. With the right audio, callers are less likely to hang up, have a positive mood, and not churn.



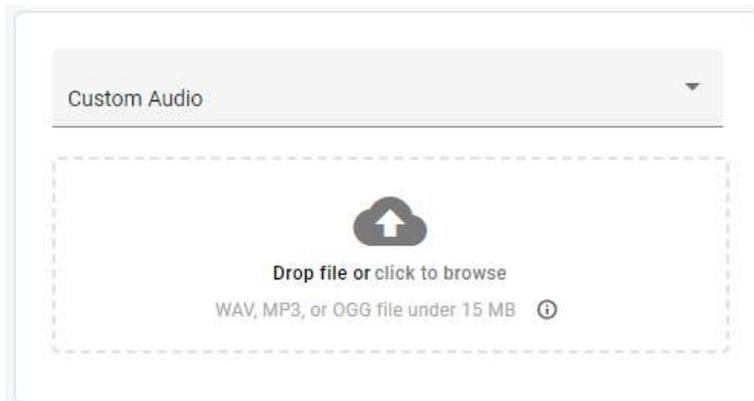
- Go to Settings > Music On Hold.
  - NONE (INTERMITTENT BEEP).** The caller will hear two short beeps every 15 seconds.
  - STANDARD OPTIONS.** Choose one of three looped, copyright-free audio files.
  - CUSTOM AUDIO.** Upload any WAV, MP3, or OGG file under 15 MB.
- The new setting will be applied to the account immediately — no saving necessary.

### LISTEN TO AUDIO FILES IN YOUR BROWSER

To hear what a file sounds like, click the  play button on the right. Standard options can be played before (and after) you make a selection, and a custom audio file can be played once it's been uploaded.

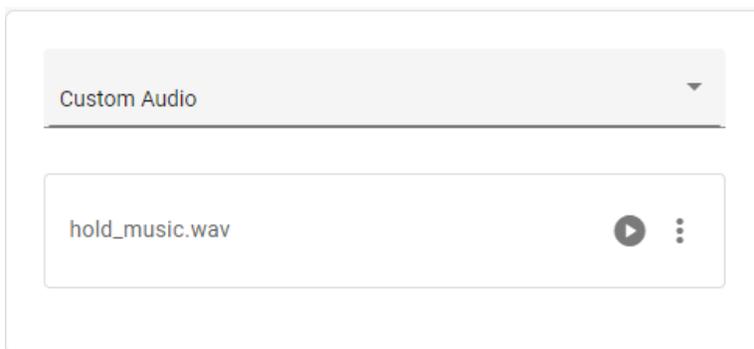
## Upload Custom Audio

Give your account a personal touch by uploading custom music for callers to listen to while on hold. Use any WAV, MP3, or OGG file under 15 MB that you have rights to.



1. To upload a custom audio file, do one of the following:
  - Drag and drop the file from your computer to the upload area.
  - Click the link in the upload area, then select an audio file from your computer, and click [Open].
2. Once uploaded, the file will be transcoded and optimized for use by the phone system, which will result in some degree of quality loss. To hear what it sounds like, click the  play button on the right or call a phone number on your account and ask to be placed on hold.

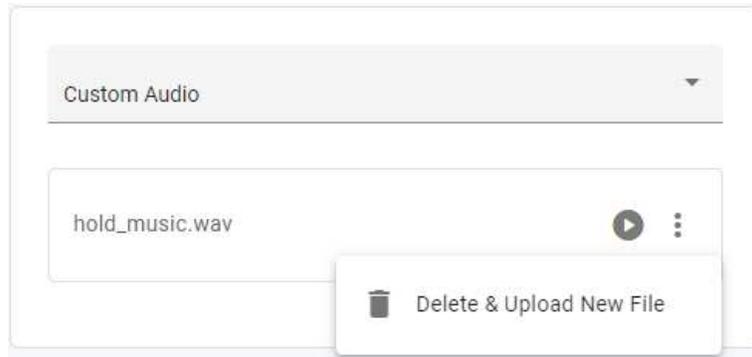
Once the page is refreshed, the file will be renamed to hold\_music.wav.



## Change Custom Audio

Only one custom audio file can be uploaded to the account at a time. To change the current audio file, open the  three dots menu on the right and select Delete & Upload New File, then drag and drop the new file to apply it to the account.

Between the time one file is deleted and another is applied, Music On Hold will be set to None (Intermittent Beep).





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