# Setting up phone system

The following steps are a quick guide to setup your phone system. Please follow all steps to ensure that your line is operational. If you need us to do the initial setup for you, please fill out the form at the end of this document, sign it and return it to us. A 25$ setup fee will be billed to your account on your next bill.

# 1. Create Users

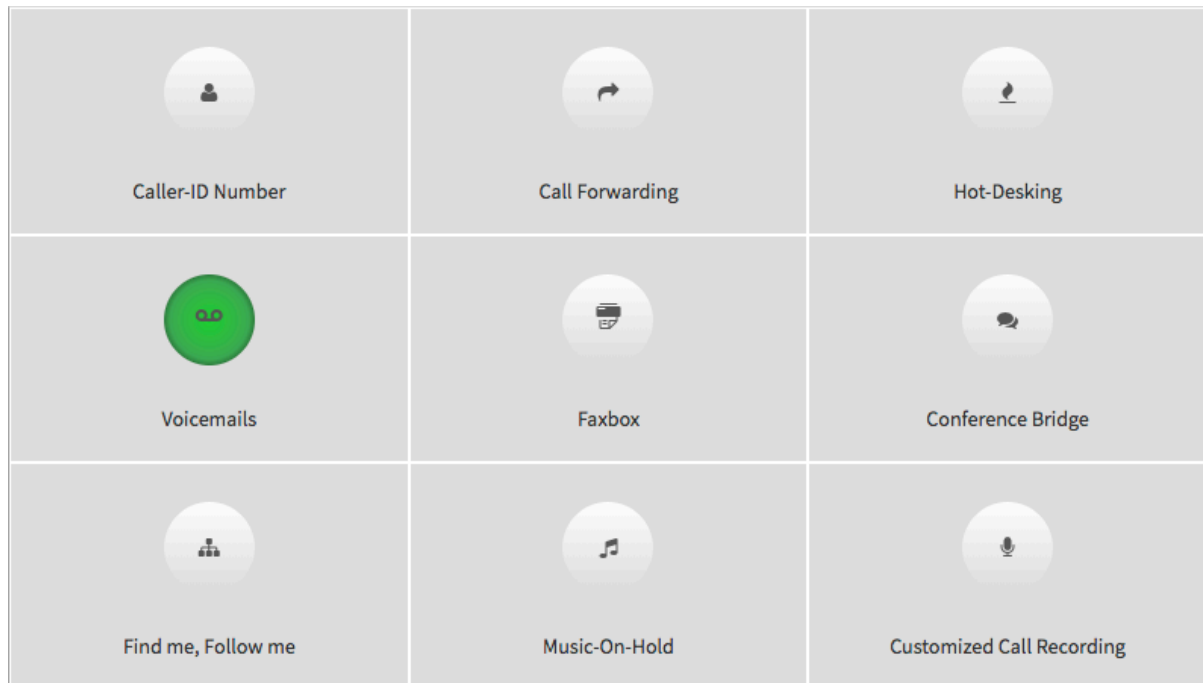1. Click on add a user: fill out all fields with required information.



2. Assign a Phone number if applicable

3. Assign a device if applicable. NOTE: the devices should be in the system already or you can create a device.
4. Setup the User Features:



1. Caller ID: if you want the caller ID to be different than the main number.
2. Call Forwarding: you can forward the calls to another line: landline or a mobile phone.

3. Hot-desking
4. Voicemail: sending out voicemails and notifications to the email on file



5. Faxbox: follow the instructions
6. Conference bridge: you need to have a main conference bridge number to enable this feature
7. Find me, Follow me: you need to have a device to enable this feature
8. Music-on-hold: upload a file to assign.

9. Customized call recording: select your options.

## Customized Call Recording

User Call Recording Customizations   **Enabled**

| | On | | Off |
|---|---|---|---|
| Inbound Internal: | On | Account Default (Off) | Off |
| Inbound External: | On | Account Default (Off) | Off |
| Outbound Internal: | On | Account Default (Off) | Off |
| Outbound External: | On | Account Default (Off) | Off |

Cancel   **Save Changes**

## 2. Create Groups

1. Click on add group
2. Add name, extension and select the users that are part of that group.

## Creating a group

Name this group                Extension          Q Find one

**Available Users**                    **Selected Users**

Create Group

3. Create group.

## 3. Main Number

1. Assign main company number. Under the dashboard tab, you will have the option to select your called ID. If you have more than one main number, you can select the caller ID from there.
2. Input your office hours



3. Input your Office Holidays if applicable
4. **Input your incoming call handling **** IMPORTANT!!!**
   a. You have 3 options when a call comes in, you want it to:
      i. Go to the virtual receptionist
      ii. Go to one of the users and then to the virtual receptionist
      iii. Go to one of the users and then to the main voicemail box
   b. Configure the virtual receptionist:

## Virtual Receptionist - Open Hours

Virtual Receptionist will answer incoming calls professionally and automatically transfer them to an appropriate department or person. Main Menu will allow you to set up call routes. Please type or record greetings that matches the Main Menu.

**Main Menu**

Press [Default ▼] for 👤 ✓ ▮▮▮▮▮▮▮▮

Add route

Directory
Users
▮▮▮▮▮▮▮▮
Call Queues
Devices
Media
Groups
Advanced Callflows
Voicemail Boxes
  Main Voicemail Box
  ▮▮▮▮▮▮▮VMBox

**Greetings**

Text to Speech 💬

Upload your own file ⬆

Record it over the phone ℹ

Cancel  | Save |

     i.  Add your routes:
1. **IMPORTANT, you have to create your users or groups before you do this!!**
2. When you create the user, you assign them an extension, so you don't have to put it as a route.
3. Routes should be for departments and the voicemail.

    ii.  Greetings: record and upload your incoming call greeting. Below is an example of an incoming greeting text.
1. Welcome to XYZ Company. If you know the extension of the party you are trying to reach, please dial it now. For sales, press 1, for accounting press 2, for technical support, press 3. To leave us a message, press 4.

5. If you have a main conference number, you can add it here.
6. If you have a main faxbox number, you can add it here.

## 4. Voicemail Boxes

By default, the main voicemail box is already there. Make sure you assign a PIN to the voicemail and record and upload the message for the voicemail.

# Account configuration setup form

| Users | Extension | Phone numbers | Mobile number | Email address |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Groups | Extension | Users in the group |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

**Main number**

- Caller ID: _____

- What are your office hours? _____

- Are you closed during lunch? If yes, what are the hours? _____

- Are you closed during the holidays? If yes, what are the dates? _____

- **INCOMING CALL HANDLING**
  - You have 3 options when a call comes in, select which one you want:
    - Go to the virtual receptionist
    - Go to one of the users and then to the virtual receptionist
    - Go to one of the users and then to the main voicemail box
  - Incoming greeting, please select one:
    - You will provide the recording
    - You want us to record it for you (there is an extra charge of $25.00)
    - an example of an incoming greeting text.
      - Welcome to XYZ Company. If you know the extension of the party you are trying to reach, please dial it now. For sales, press 1, for accounting press 2, for technical support, press 3. To leave us a message, press 4.
  - Call Tree, when caller presses:

- 1, call goes to _____
- 2, call goes to _____
- 3, call goes to _____
- 4, call goes to _____
- 5, call goes to _____
- NOTE:

Your account will be charged 25.00 $ for the setup configuration of your lines. This does NOT include any recordings (incoming or voicemail). Each recording is 25.00$ extra.

Signature of Client : _____