

Setting up phone system



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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.

Create User

First Name

Last Name

Email used for Login

Password (Min. 6 characters)

Enter a password

Main Extension Number

6684

☐

Include User in the Company Directory

☐

Send emails to an alternate address

☐

Send credentials to this user

Create User

2. Assign a Phone number if applicable

Total Users 1

Add User

Search.....

Users Settings

Extensions

Phone Numbers

Devices

User Features

Melissa Verwey

200

None

None

There are no numbers assigned to this user.

Add from Spare Numbers

Buy Numbers

Cancel

Save Changes

List of Spare Numbers

Spare Numbers of Ent! Marketing

Search.....

☐

1-847-930-0058

☐

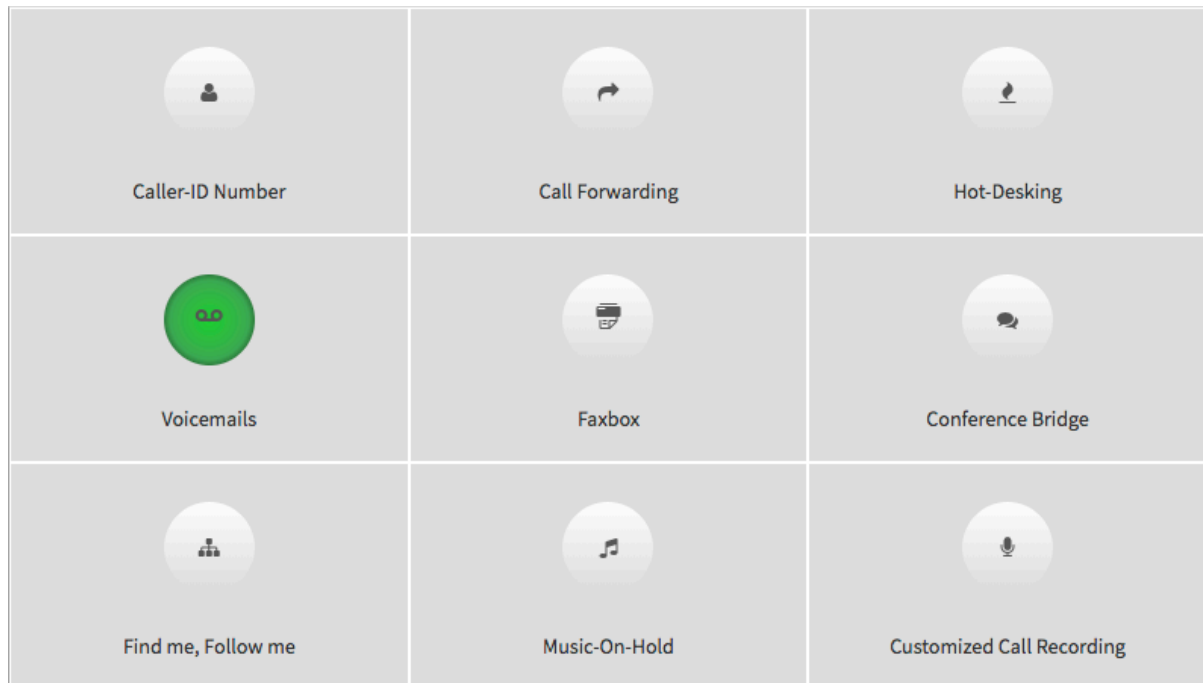
1-847-930-0048

Cancel

Add selected numbers

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.

Call Forwarding

User Call Forwarding Settings

OnFailover ModeOff

Forward all calls to

A Desk Phone

This number

+14157283992

☒ Leave voicemails on forwarded numbers

☐ Forward direct calls only

☐ Keep Original Caller-ID

In order to leave voicemails on forwarded numbers, your ringing timeout needs to be set to at least 30sec. By saving now, you will automatically be redirected to the user edition where you can update the ringing timeout.


Cancel

Save Changes

3. Hot-desking

4. Voicemail: sending out voicemails and notifications to the email on file


Voicemails



Voicemail-to-Email Settings Enabled

An e-mail will be sent to for every new voicemail

☐ Delete messages from database after sending the notification.



If you want to change where email notifications go to, please edit the user's email address in the User Administration section

Cancel Save Changes


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.

Music-On-Hold




User Music-On-Hold Settings Enabled

Music on Hold: Silence Upload

Cancel Save Changes

9. Customized call recording: select your options.

Customized Call Recording



User Call Recording Customizations

Enabled

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 [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

 Office Hours Strategy 

☐ 24 hours Open Office
Choose this option if you want incoming calls to be handled the same way all the time.

☒ Custom Office Hours
Choose this option if you want incoming calls to be handled differently when your office is closed.

Custom Hours

Company Timezone: New York (America)

<input checked="" type="checkbox"/> Monday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Tuesday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Wednesday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Thursday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Friday	9:00	to	17:00	Open
<input type="checkbox"/> Saturday				Closed
<input type="checkbox"/> Sunday				Closed

☐ Are you closed for lunch 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 **[User Icon]**

[Add route](#)

Greetings

Text to Speech

Upload your own file

Record it over the phone

[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 : _____