Breezeline Business Hosted Voice +

USER GUIDE

Table of Contents

Table of Contents

Getting Started

Welcome to your new unified communications account!

Your account on this system will allow you to make calls, receive voicemails, chat with other users in the organization and much more.

This document is designed to help teach you how to navigate to the Manager Portal, a web interface that allows you to access and control your account.

We will then break down the Manager Portal homepage and the application navigation icons, including the configuration options for them and how they change the behavior of the application.

Finally, we will discuss how to use those applications in a real-world use case scenario, so you understand what the applications do, the configuration options that control their behavior and how to apply your knowledge to configure the applications to meet your needs.

The Manager Portal

2.1 ACCESSING THE MANAGER PORTAL

To manage your account, you will use the Manager Portal, a web interface that allows you to easily communicate with others and manage your account settings.

In order to access the Manager Portal, open a web browser and enter your fully qualified domain provided by your administrator into your web browser, as seen in figure 2.1.1.a.

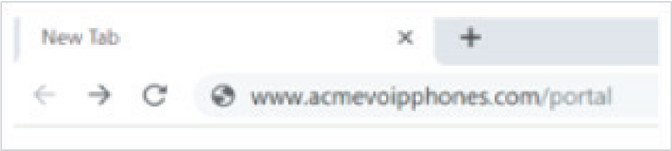


Figure 2.1.1.a

2.2 LOGGING IN

After entering the domain into your browser, you will be taken to the login page, as seen in figure 2.1.2.a. On the login page, enter your credentials provided by your administrator or click the "Are You a New User" link. Then enter your email and extension number and your credentials will be emailed to you. After entering your credentials, you will be taken to the homepage of your account, as seen in figure 3.1.a.

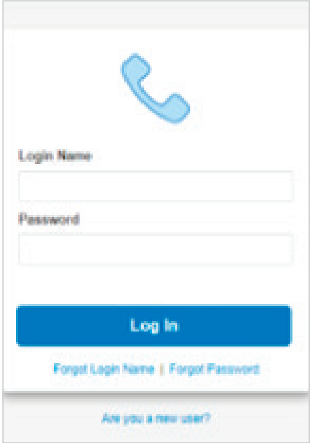


Figure 2.1.2.a

Homepage Layout

At the top, right-hand corner of the Manager Portal, you will see the links for the Attendant Console plus your name and extension number displayed. Clicking on your name and extension number will display the options to edit your Profile information and log out of the Manager Portal, as seen in figure 3.1.a.

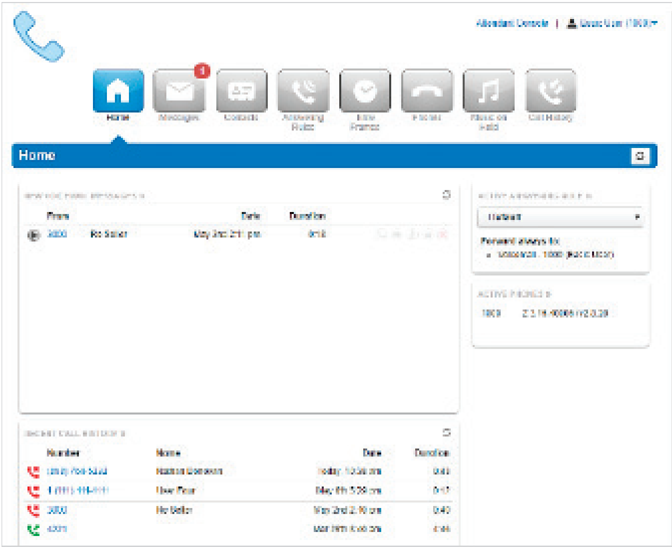


Figure 3.1.a

3.1 THE ATTENDANT CONSOLE

At the top, right-hand corner of the homepage is a link to the Attendant Console.

This link will open another webpage and take you to the Attendant Console Contact's page, as seen in figure 3.1.b.

3.1.1 Dynamic Call Parking

You can also enable Dynamic Call Parking from the Attendant Console. Call Parking enables you to put a call into a parking orbit so that another user can then retrieve the call when they are available. Dynamic Call Parking will place the caller in the first available parking spot. While Static Call Parking parks the call on a specific extension.

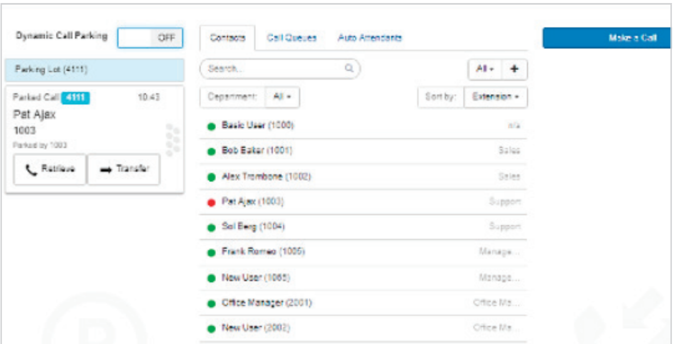


Figure 3.1.b

3.1.2 Contacts Tab

The Contacts tab provides you with an overview of all the contacts in your organization and provides a status indicator.

A green circle displayed next to a user's name and extension means that user is currently available. A red circle means the user is currently unavailable, as they are already on the phone with another user or set their status to "Do Not Disturb". Clicking on an extension will bring up a new window, as seen in figure 3.1.2b, where you can call the contact at their work extension, mobile number or home phone. You can also leave a voicemail for the contact.

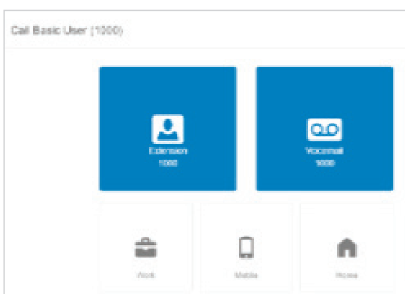


Figure 3.1.2.b

3.1.3 Call Queues Tab

The Call Queues tab will give you an overview of how many call queues your organization has, and the number of agents logged into each queue, as seen in figure 3.1.3.

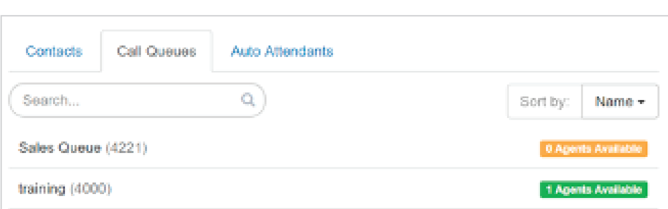


Figure 3.1.3

3.1.4 Auto Attendants tab

The Auto Attendants tab, as seen in figure 3.1.4, will provide you with an overview of the auto attendants in your organization and allow you to click on them to call them.

Back on the Manager Portal homepage, next to the "Attendant Console" link, you will see your name and extension number displayed, as seen in figure 3.1.4.a. This link lets you manage your profile information. When clicking on the "Profile" link, the Profile page will appear with the options to configure your account settings, as seen in figure 3.1.4 below.

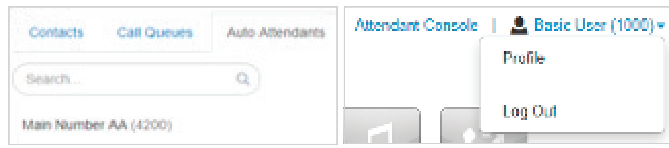


Figure 3.1.4

3.2 PROFILE

The Profile options, as seen in figure 3.2, allow for you to change your account options, such as your first or last name, and time zone.

3.2.1 Directory Options

Directory options allow you to configure how you are represented in the organization contacts in the Manager Portal and audible company directory.

3.2.1.1 Announce in Audio Directory

Checking the Announce in Audio Directory will list you in the company directory. Callers will be able to search for your extension when routed to a company directory.

3.2.1.2 List in Directory

The List in Directory option controls if your extension is listed in the organization contacts in the Manager Portal.

3.2.1.3 Caller ID Information

The Caller ID Information section allows you to edit your area code that will be in your Caller ID and appended when only dialing 7 digits on outbound calls. You cannot edit your Caller ID or 911 Caller ID. If you need that changed, contact your office manager.

3.2.2 Change Account Security

The Change Account Security section in the "Profile" window allows you to manage your passwords and email settings for your account.

3.2.2.1 Email Address

The Email Address field is where you configure the email address you would like to receive notification from. You can add more than one email address by clicking the green plus sign next to the Email Address field.

3.2.2.2 New Password

The New Password field allows you to configure your account with a new Manager Portal password used to log in with. Below the New Password field is the Confirm Password field, which requires you to enter the new password a second time for verification.

3.2.2.3 Current Password

The Current Password field is required to be filled out with your current password if changes are made to any of the "Change Account Security" options.

3.2.2.4 Change Voicemail PIN

The Change Voicemail PIN option allows you to change the numeric password used to check voicemail messages over the phone.

Below the "Profile" link is the Log Out option, as seen back in figure 2.1.a which will log you out of the Manager Portal and take you back to the login page.

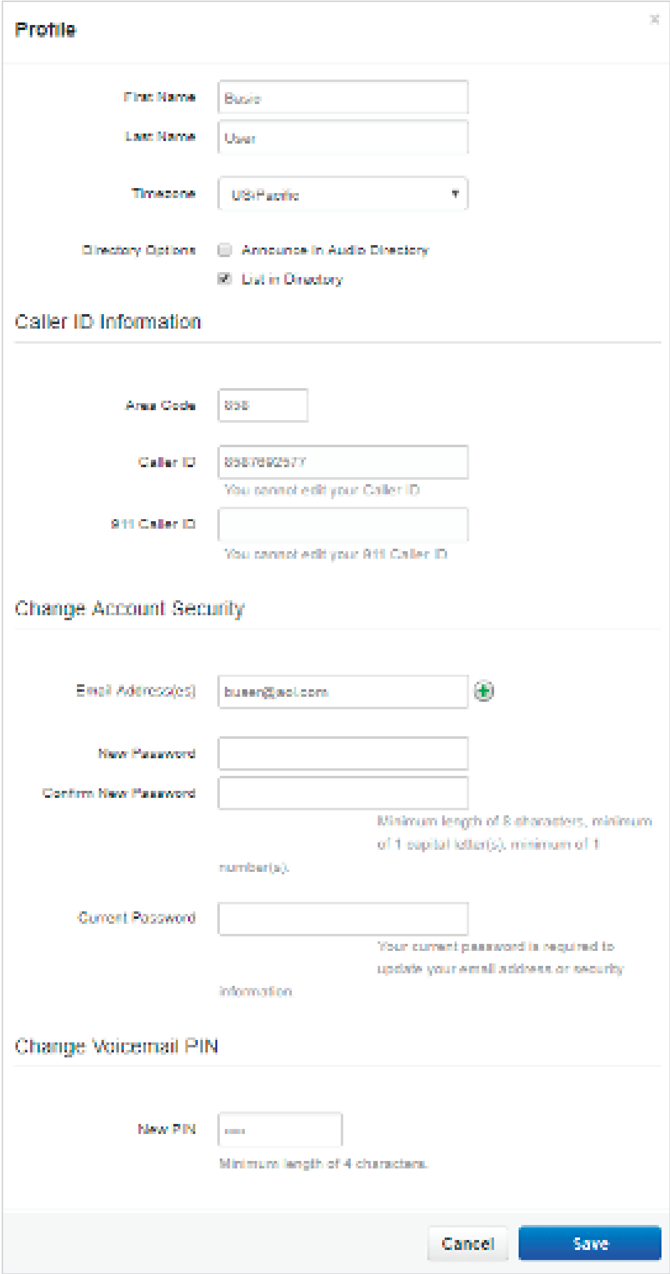


Figure 3.2

3.3 WIDGETS ON HOMEPAGE

3.3.1 New Voicemail Messages Panel

The New Voicemail Messages panel displays all new voicemails, as seen in figure 3.3.1. The voicemails display the phone number of the caller that left a voicemail, a Caller ID, the date and time the message was left and the duration of the voicemail.

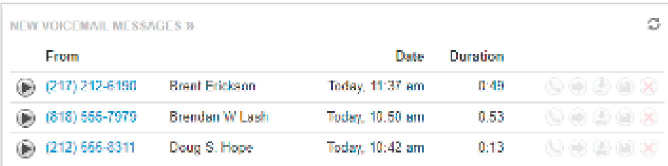


Figure 3.3.1

You will also see the options to Call to Play, forward the voicemail, download the voicemail locally to your computer or delete the voicemail message, as seen in figure 3.3.1.a.

Figure 3.3.1.a

3.3.2 Recent Call History Panel

The Recent Call History panel provides an overview of the last 10 calls, as seen in figure 3.3.2. A phone icon with a green arrow represents an outbound call. A phone with a red icon means a call was not answered. A phone icon with a blue arrow means an inbound call was answered, while a phone icon with 5 blue circles means that a call was placed to a conference bridge.

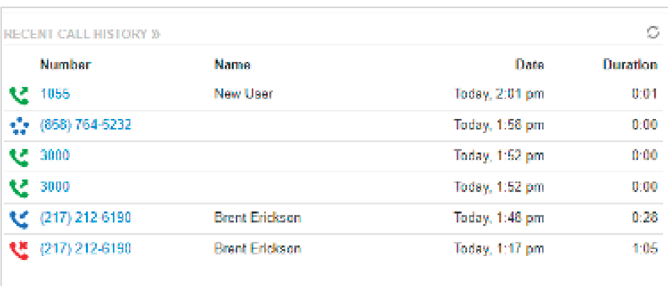


Figure 3.3.2

3.3.3 Active Answering Rule Panel

To the right, you will see the Active Answering Rule panel, which will display which rule is currently active and provide a

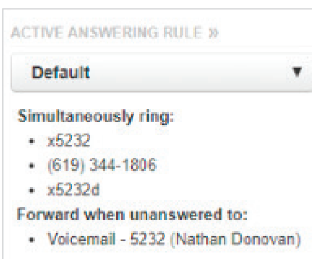


Figure 3.3.3

summary of how calls are routed when they reach your extension, as seen in figure 3.3.3. You can select a different answering rule by clicking on the Active Answering Rule drop-down and choosing a different rule.

3.3.4 Active Phones Panel

The Active Phone panel lists the active phones currently registered to your account that you can send and receive calls from, as seen in figure 3.3.4.

Figure 3.3.4

If you do not see a device listed there that should be, that means the device is not configured for your account or the device is currently unregistered.

3.4 NAVIGATION OPTIONS

On the top of the homepage under the Attendant Console, Profile and Log Out options is the application navigation menu, as seen in figure 3.4. Selecting an option here will take you to that application's management center for the option selected.

Figure 3.4

The Messages

The Messages icon, as seen in figure 4, is where all your voicemails, chat messages and account settings for voicemail options are stored.

Figure 4

4.1 VOICEMAIL TAB

Clicking the Messages Center icon, as see in figure 4, will take you to the Messages center voicemail tab, as seen in figure 4.1. On the top of the tab, you will see a new message indicator showing how many (if any) new voicemails your account has, as seen in figure 4.1.

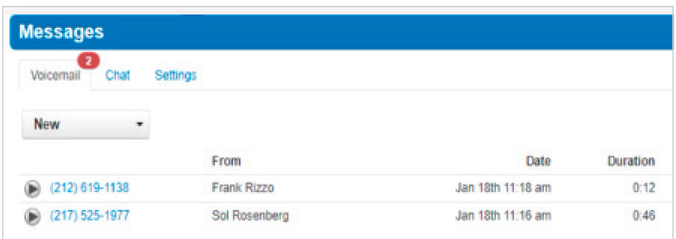


Figure 4.1

Underneath the tab selection, you will see a drop-down, as seen in figure 4.1.a, which will allow you to display new voicemails, saved messages or trashed messages.

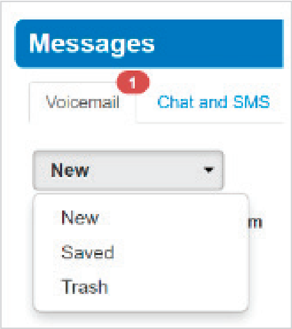


Figure 4.1.a

On the new page, you will see all your new voicemail messages displayed, including the phone number of the caller that left a voicemail, a Caller ID, the date and time the message was left and the duration of the voicemail, as seen in figure 4.1.

To the right of the message and message information, you will see the voicemail management options, as seen in figure 4.1.b.


Figure 4.1.b

4.1.1 Call to Play Voicemail 

The phone icon allows you to use the Call to Play options where the system will call your extension and play the voicemail.

4.1.2 Forward Voicemail 

An icon with the arrow pointing to the right allows you to forward the voicemail to another extension.

4.1.3 Download Voicemail 

An icon with the arrow pointing down allows you to download the voicemail to your computer.

4.1.4 Save 

The disk icon allows you to save the voicemail in your account's saved section and will appear when selecting the saved option from the voicemail box options, as seen in figure 3.4.

4.1.5 Delete 

An icon with the red "X", as seen in figure 3.1.2, is the delete option. Clicking on this icon will remove the voicemail. Once a voicemail has been deleted, it cannot be recovered from the phone system.

4.2 CHAT TAB

4.2.1 Chat and SMS Tab

On the Chat tab you can see all your chat conversations, as seen in figure 4.2. Each chat conversation contains the contact's name and the last message sent or received.

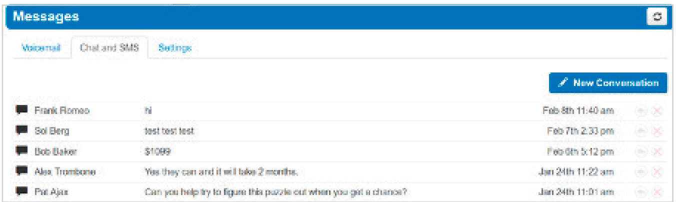


Figure 4.2

4.2.2 Start New Conversation

To start a new conversation, click the "New Conversation" button, as seen in the right-hand corner of figure 4.2, and a new chat window will appear. Start typing the contact's name or click on the drop-down menu to see a list of everyone in the organization you can select from. Or in your Contacts widget, click the chat box icon next to the contact's name, as seen in figure 4.2.2. After clicking one of the options, a chat window will appear. Click in the "Send a message…" field and start typing. Press "enter" when you would like to send your message.

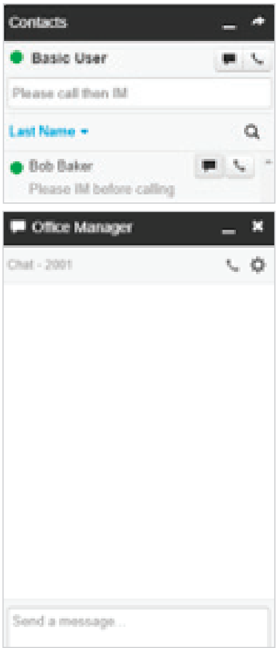


Figure 4.2.2

4.2.3 Replying to A Message

If you would like to reply to a message, simply type in the chat window that displays when receiving a message. You can also click the reply icon to the right of the message in the message center, as seen in figure 4.2.3.

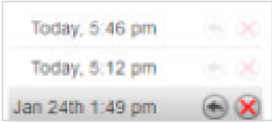


Figure 4.2.3

4.2.4 Delete A Message

To delete a message, click the icon with the red "X" that appears next to the reply icon when hovering over the message, as seen in figure 4.2.3.

4.3 SETTINGS TAB

The Settings tab, as seen in figure 4.3, is where you can make changes to how your account handles voicemail and is represented in the company audible directory and in the Contacts of the organization.

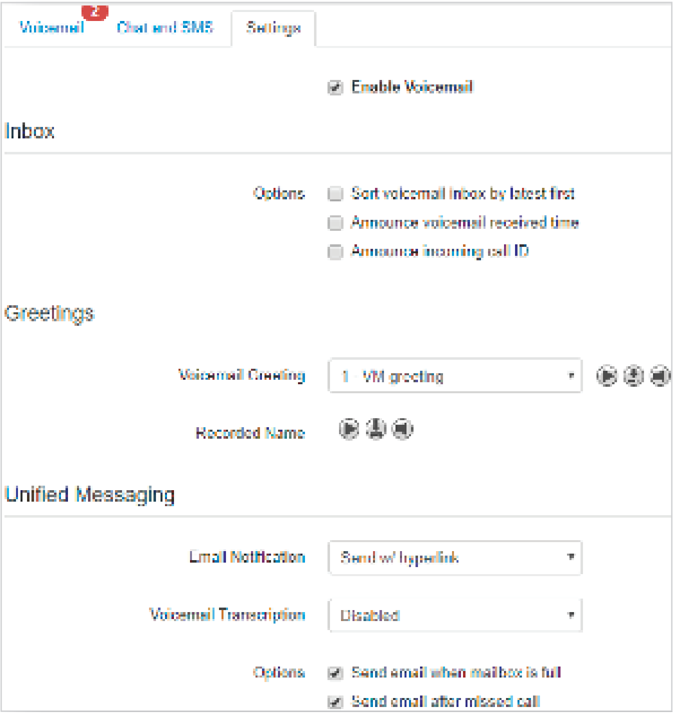


Figure 4.3

4.3.1 Enable/Disable Voicemail

You can enable or disable voicemail by clicking on the checkbox next to the Enable Voicemail option. A check means voicemail is enabled and an unchecked box means that it has been disabled.

4.3.2 Inbox Options

These options allow you to control your experience when calling into your voicemail box and checking your messages over the phone.

4.3.2.1 Sort Voicemail Inbox by Latest First

Clicking the box next to "Sort voicemail inbox by latest first" will configure your voicemail account to play the most recent voicemail message received as the first message you hear. If this option is not enabled, the voicemail messages will be played in the order they were received.

4.3.2.2 Announce Voicemail Received Time

Clicking the box next to "Announce voicemail received time" will configure your voicemail account to tell you the date and time that the voicemail was received.

4.3.2.3 Announce Incoming Call ID

Clicking the box next to "Announce incoming Call ID" will have your voicemail read the caller ID number to you.

4.3.3 Greetings

Under the voicemail inbox options, you will see the Voicemail Greeting section, which contains your voicemail greeting and recorded name used in the company directory.

4.3.3.1 Voicemail Greetings

You can have more than one voicemail greeting; the drop-down menu, as seen in figure 4.3.2.4.1, allows you to select which greeting callers will hear when reaching your voicemail. To the right of the message select option you will see 3 icons for the options to play the voicemail greeting, download the greeting or manage greetings.

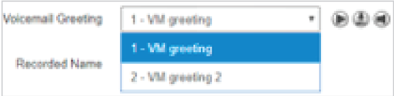


Figure 4.3.2.4.1

4.3.3.2 Manage Greetings

Clicking the Manage Greetings icon takes you to the Manage Greetings center, as seen in figure 4.3.2.4.1.1. Here you can add multiple greetings to be selected from your voicemail greetings drop-down list, as seen in figure 4.3.2.4.1.

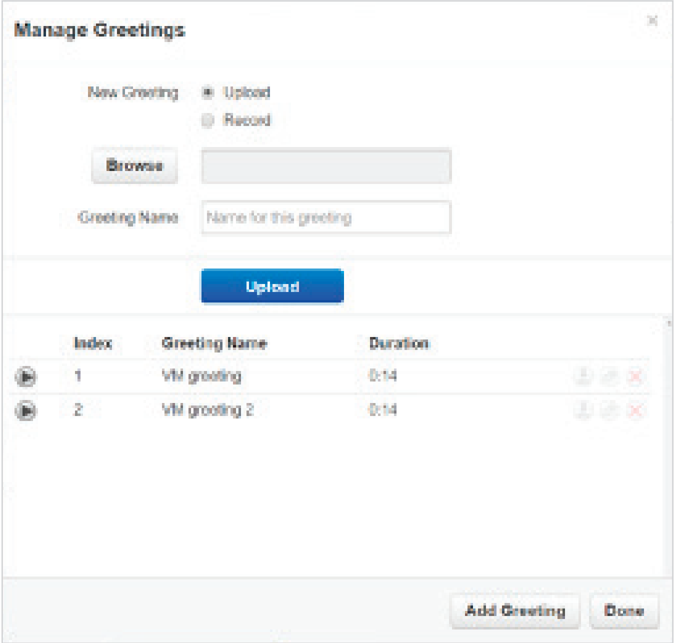


Figure 4.3.2.4.1.1

4.3.3.3 Add Voicemail Greetings

To add a voicemail greeting, click the “Add Greeting” button at the bottom of the Manage Greeting portal page. You will see the options to upload a new recording from a file on your computer or by selecting “Record”, which will call you to record a new greeting. After the greeting is created, you will see the message displayed, as seen in figure 4.3.2.4.1.1. To the right of the message, you will see options to download or edit the message, which will allow you to re-record the message or change the greeting. You will also see the option to delete the voicemail greeting message.

4.3.3.4 Recorded Name

The Recorded Name option, as seen in figure 4.3.3.4, allows you to record your name, which will be played when the company directory says your name. If no recording is uploaded, the system will read your name off by each letter. When clicking the Manage icon, the “Manage Recorded Name” window appears, as seen in figure 4.3.3.4.a, which will allow you to upload a recording from your computer. Or record your name by clicking on the Record button and having the system call you to record your name.

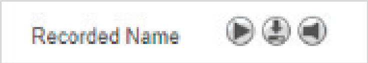


Figure 4.3.3.4

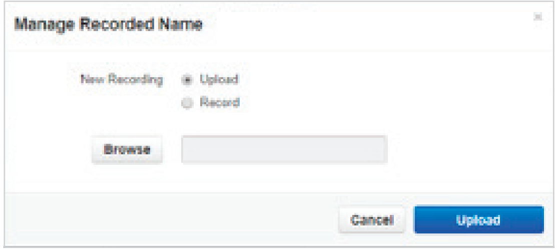


Figure 4.3.3.4.a

4.3.4 Unified Messaging

Under the Greetings tab, you will see the Unified Messaging options, as seen in figure 4.3.4, which will allow you to manage your email notifications when a voicemail is received, a call is missed or your mailbox becomes full.

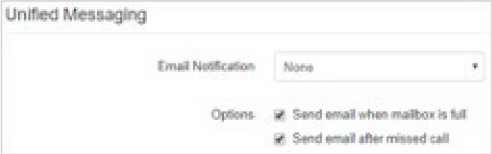


Figure 4.3.4

4.3.4.1 Email Notification

The Email Notification option allows you to select the format of email notifications that you receive.

4.3.4.1.1 None

By selecting None, you will not be notified by email of voicemails received.

4.3.4.1.2 Send w/ brief hyperlink
4.3.4.1.3 Send w/ attachment (move to saved)
4.3.4.1.4 Send w/ attachment (move to trash)
4.3.4.1.5 Send w/ brief attachment (leave as new)
4.3.4.1.6 Send w/ brief attachment (move to trash)

4.3.4.2 Send Email When Mailbox is Full

Enabling this option will send you an email when you’ve exceeded your mailbox data storage limit.

4.3.4.3 Send Email After Missed Call

Enabling the “Send email after missed call” option will email you each time you miss a call, even if the caller does not leave a voicemail.

For any of the changes to take effect, you must click on the “Save” button at the bottom of the page, as seen in figure 4.3.4.a. The “Cancel” button will disregard any changes made.

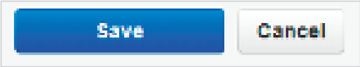


Figure 4.3.4.a

Contacts

The Contacts center icon, as seen in figure 5, is where all users with “List in Directory” enabled under their profile, as seen in back in figure 2.2, are listed. If you do not see a user listed in the contacts, that is because “List in Directory” has been disabled.

Figure 5

5.1 ADD CONTACT

The “Add Contact” button in the right-hand corner, as seen in figure 5.1, will open the new contact window, as seen in figure 5.1.a, and allow you to enter a new contact that will be displayed in your account’s contacts.

Figure 5.1

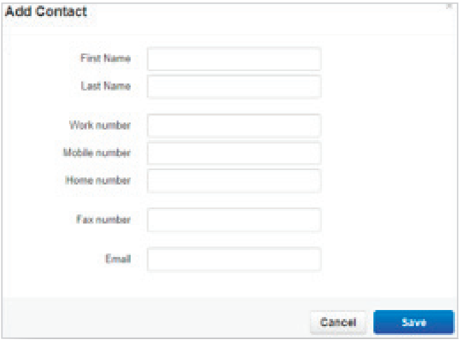


Figure 5.1.a

5.2 IMPORT

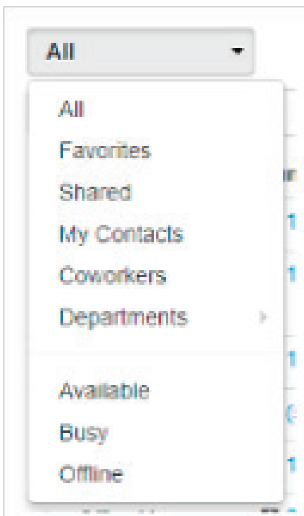
The Import option allows you to import contacts from a CSV file (Outlook, Google and Apple vCard) that will bulk create users in your contacts.

5.3 EXPORT

The Export button will allow you to create a CSV file for the contacts group you select in the "Contacts to export" drop-down. The Export format will export the CSV file into an Outlook, Google or Apple vCard CSV file format.

5.4 GROUPS

On the Contacts page, you will see a drop-down, as seen in figure 5.1, which will let you filter for:



5.4.1 All Users

Displays all users on the system with "List in Directory" enabled.

5.4.2 Your Favorites

Displays contacts you selected as favorites. Which you can add to by clicking the star next to the contact's name, as seen in figure 5.1.2.

Figure 5.1.2

5.4.3 Shared

Shared contacts are contacts available to the entire organization added by office managers.

5.4.4 My Contacts

Contacts you have manually added by clicking the "Add Contact" button in the top right.

5.4.5 Coworkers

Displays all contacts in the organization with "List in Directory" enabled.

5.4.6 Departments

Separates contacts by department.

5.4.7 Available Users

Displays contacts that are available to be called or chat via the portal.

5.4.8 Busy Users

Users currently on the phone or have their status set to "Do Not Disturb"

5.4.9 Offline Users

Users who do not have a registered device and not logged into the portal available to chat.

When selecting a contacts group option, the contacts for that group will appear, as seen in figure 5.4.9. You can sort them by Name, Status, Department and Email.

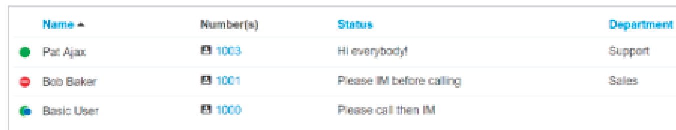


Figure 5.4.9

5.5 CONTACTS STATUS ICON

5.5.1 Green

Contacts displayed with a green dot are available.

5.5.2 Blue

Contacts displayed with a smaller blue dot in front of the green one means that person is available to chat in the portal.

5.5.3 Red

A contact displaying a red circle means the user is currently busy.

You can chat with the user by clicking the chat icon to the right, as seen in figure 5.2. Next to the chat icon you will see the Edit contact icon, as seen in figure 5.6.

Figure 5.5

5.6 CHAT WITH CONTACT

Clicking the Chat icon, as seen in figure 5.6, will open a chat window with that user.

5.7 EDIT

The Edit icon to the right of the contact will open the

"Edit Contact" window, as seen in figure 5.4, where you can configure the contact with a different:

- First Name
- Last Name
- Work Number
- Mobile Number
- Home Number
- Fax Number
- Email Address

Answering Rules

Clicking on the Answering Rules icon will take you to your Answering Rules center, as seen in figure 6. Here you will see your answering rules listed. Every account is configured with a default rule that cannot be deleted. You can also configure your system for how you want unanswered calls to be handled.

Figure 6

If you have multiple answering rules configured, the answering rule that is currently in effect will display "Active" next to the rule. Every rule is displayed with its name, a description of how the rule will route the call and the options to edit or delete (except the default) the rule.

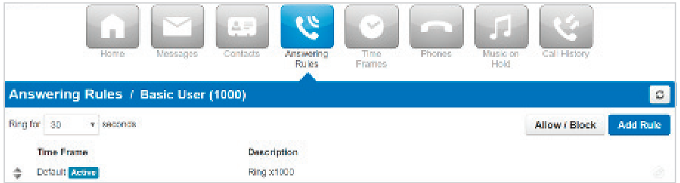


Figure 6.0

6.1 RING FOR __ SECONDS/RING TIME

When you click on Answering Rules, you will see the option to set the "Ring for __ seconds", as seen in figure 6.1. This is what controls the length of time a call will ring.

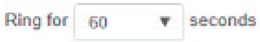


Figure 6.1

To set the ring time out, click the drop-down menu to select how many seconds you would like a call to ring before sending it to voicemail or the specified destination entered into the "When unanswered" field in the active answering rule.

If you do not want a ring time out, meaning you want your phone to ring indefinitely, select "Unlimited" at the bottom of the drop-down menu.

6.2 ALLOW AND BLOCK PHONE NUMBERS

To the right you will see the "Allow/Block" button, as seen in figure 6.2. This allows you to enter certain phone numbers to allow them to reach or prevent them from reaching you. Clicking the "Allow/Block" button will open the Allow/Block window, as seen in figure 6.2.a.

Figure 6.2

The allowed numbers are on the left. The Allow field lets you add numbers that are blocked by the domain so you can still receive calls from that user.

Figure 6.2.a

Phone numbers added to the Allow field will also let the call bypass Call Screening. If you have Call Screening enabled in an answering rule but want certain phone numbers to not have to record their name when calling you, add them to the Allow field. Then when that number calls you, it will be sent directly to you and not have to record its name first like other callers not listed.

The Block field enables you to add numbers you do not want contacting you. To add a phone number to Allow or Block, simply enter the number into the respective field and click the plus sign.

6.2.1 Block Anonymous or Unknown

You can block all anonymous or unknown callers simply by clicking the checkbox next to "Block *anonymous* or *unknown*".

6.3 ADD RULE

The "Add Rule" button, as seen in figure 6.3, allows you to configure a new answering rule for your account. Clicking the "Add Rule" button will display the "Add an Answering Rule" window, as seen in figure 6.3.a.

Figure 6.3

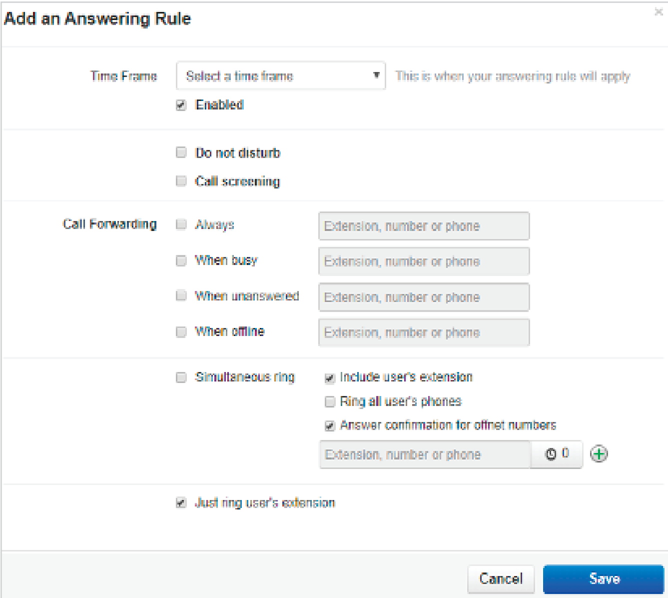


Figure 6.3.a

6.3.1 Answering Rule Time Frame

A Time Frame is a set period of time that covers when you want certain events to occur, such as your phone to ring. When configuring a new answering rule, you must first choose when the rule will be in effect by selecting a Time Frame, as seen in figure 6.3.1.

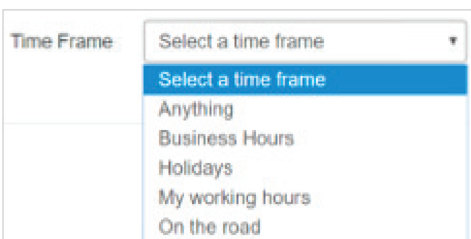


Figure 6.3.1

6.3.2 Enable/Disable Answering Rule Time Frame

The Enable option lets you easily enable and disable the rules from being in effect. A check in the box means the rules is enabled and will be in effect during the selected time frame.

6.3.3 Do Not Disturb

The *Do not disturb* option, as seen in figure 6.3.3, will prevent a call from reaching your devices and sends the call to voicemail if voicemail is enabled or disconnects the call if voicemail is not enabled.

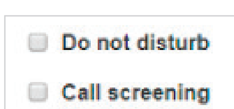


Figure 6.3.3

6.3.4 Call Screening

When Call Screening is enabled, callers record their name. After they record their name, then your devices will ring. If you answer the call, it will play the user's name and allow you to press 1 to be connected or hang up the call and have it sent to voicemail or wherever your Call Forwarding options are configured to send unanswered calls.

6.3.5 Call Forwarding

The Call Forwarding options, as seen in figure 6.3.5, will route calls based on the options selected. When entering a destination, it can be anything you would like, another user or another telephone number that does not have to be associated with your account or even on the system.

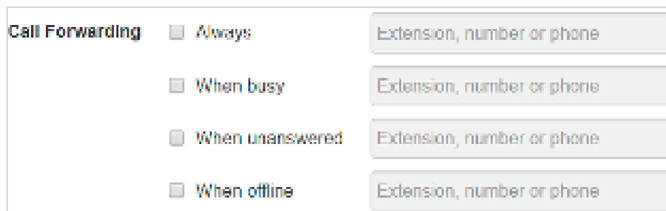


Figure 6.3.5

6.3.5.1 Always

Always will forward the call to the destination entered into the Extension, phone number or phone field every time your account receives a call.

6.3.5.2 When Busy

When busy forwards calls only when you are already on the line.

6.3.5.3 When Unanswered

When unanswered dictates where to send the call when the "Ring For X Seconds" has been reached.

6.3.5.4 When Offline

When offline routes the call to the desired destination entered into the extension, number or phone field when the user's devices are offline. If you use a softphone on your laptop and shut down the softphone, this is where your calls are forwarded.

6.3.6 Simultaneous Ring

The Simultaneous Ring options, also known as SIM ring for short, as seen in figure 6.3.6, allow you to configure what devices ring when receiving a call.

Clicking the Simultaneous Ring box will allow you to ring other extensions and/or phone numbers as well.

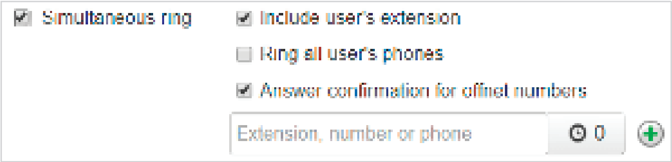


Figure 6.3.6

6.3.6.1 Include User's Extension

Enabling this option will make sure your extension rings when SIM ring is enabled.

6.3.6.2 Ring All User's Phones

This option will ring all devices registered to your account.

6.3.6.3 Answer Confirmation for Off Net Numbers

This option lets the user know the call is from their phone system and gives them the option to be connected to the user by pressing 1 or hanging up the call so they are not connected with the forwarded calling party.

6.3.7 Just Ring User's Extension

As seen in the bottom of figure 6.3.a, this option is only available if Simultaneous Ring is not enabled. If Just ring user's extension is enabled, it will just ring your default device configured under your account.

6.4 ANSWERING RULE CONFIGURATION EXAMPLE

If we wanted to create a rule when receiving an incoming call during business hours to ring our extension for 45 seconds before sending the call to voicemail, then after 10 seconds ring our cell phone, then after 30 seconds ring a receptionist's extension, then go to voicemail after business hours, we would:

1. On the Answering Rules page, we would adjust the Ring for time out option to 45 seconds.
2. Create a new rule by clicking Add Rule in the Answering Rules center.
3. On the Add an Answering Rule window, select the time frame you would like the rule to be in effect.
4. Make sure Enabled has a checked box.
5. Click the Simultaneous Ring option under Call Forwarding.
6. Click Include user's extension to ring your phone.
7. Enable Answer confirmation for offnet numbers so your cell phone voicemail does not take the call if your voicemail answers the call.
8. In the extension, number or phone field, enter your cell phone number you would like to ring, then click the Ring Delay option and slide to 10 seconds.

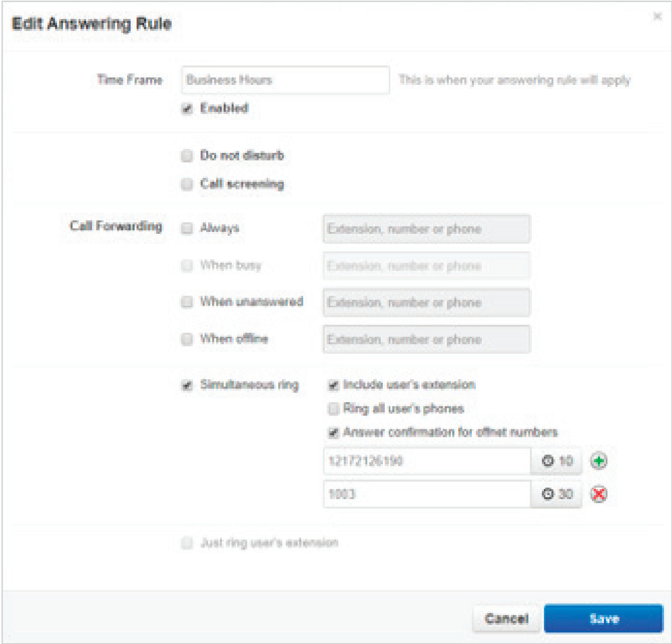


Figure 6.4

9. Then click the plus sign next to the extension, number, or phone field and in the new window that appears enter the extension of the receptionist 1003 and click save. Your rule should look like the example in figure 6.4.
10. Once the answering rule is created, you will see it appear in the answering rules list, as seen in figure 6.4.b. If the time frame you select is in effect, then you will see Active next to the rule.
11. To send calls directly to voicemail after hours, click the edit icon for the default answering rules.
12. On the Edit Answering Rule for the default rule, select Always in the Call Forwarding options, then enter your extension, select voicemail and click save.
13. Then slide the rule with the during business hours selected to the top of the answering rules and the default on the bottom, as seen in figure 6.4.b.

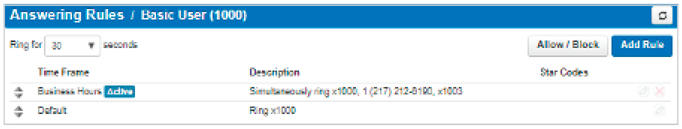


Figure 6.4.b

Now when your extension receives calls during business hours, your extension will ring. After 10 seconds, your cell phone will start ringing in addition to your extension. Then after 30 seconds have passed, it will ring the receptionist. If no one answers after 45 seconds, the call is sent to your voicemail.

If a call reaches your extension outside of the selected business hours time frame, then the Default rule would be active and route the calls directly to voicemail.

Time Frames

The Time Frames icon, as seen in figure 7, will take you to the Time frames application center. Time Frames are a set periods of time that cover when we want certain events to occur, such as our phone to ring.

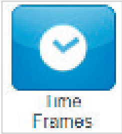
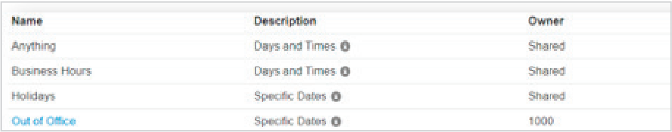


Figure 7

We create time frames with different time and date ranges so we can apply them to answering rules, which then allow you to control how calls are routed depending on the time of the day the call occurs.

To view and create your available time frames, click on the Time Frame icon in the top navigation menu bar, as seen in figure 7. Here you will see all the time frames available for you, as seen in figure 7.a. Time frames with names in black and without the option to edit or delete are time frames created at the domain level that are available to everyone in the domain to use. You can only edit the time frames with blue names that you created. If you need domain-level time frames changed, contact your office manager.



Name	Description	Owner
Anything	Days and Times	Shared
Business Hours	Days and Times	Shared
Holidays	Specific Dates	Shared
Out of Office	Specific Dates	1000

Figure 7.a

7.1 ADDING TIME FRAMES

To create a time frame, click on the "Add Time Frame" button, as seen in figure 7.1. After clicking the Add a Time Frame button, the Add a Timeframe window will appear, as seen in figure 7.1.a.

Figure 7.1

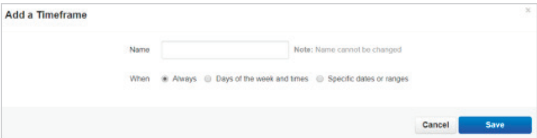


Figure 7.1.a

The Name field allows you to give it a name that will help identify the time frame. The name cannot be changed once the rule has been created. If you want to change the name, delete the rule and recreate it with the new name. Under the name field, you will see three options for when the time frame should be in effect:

7.1.1 Always

This option makes the time frame always in effect, 24 hours a day, 7 days a week.

7.1.2 Days of the Week and Times

This option allows you to select specific days of the week and the hours in the day you want the time frame to take effect. When selecting this option, the days of the week appear with a checkbox that allows you to select which days you would like the time frame active. Upon selecting a day of the week, a blue bar appears allowing you to slide the ends to when you would like the time frame to stop and start, as seen in figure 7.1.2. If would like your time frame to be in effect from 7am to 7pm, simply click on the edges of the blue bar and slide them over to the desired time, as seen in figure 7.1.2.a.

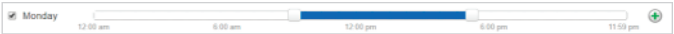


Figure 7.1.2

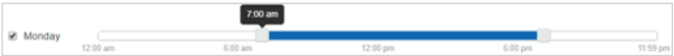


Figure 7.1.2.a

If you'd like a break in the middle of the time frame, click the plus sign next to the 11:59am, as seen in figure 7.1.2.b. You will then see another blue bar representing when the time frame will take effect, as seen in figure 7.1.2.c.

Figure 7.1.2.b

Figure 7.1.2.c

7.1.3 Specific Dates or Ranges

This option will allow you to configure a time frame to be in effect for specific dates and times. After selecting the "Specific dates or ranges" options, you will see the to and from dates, as seen in figure 7.1.3.

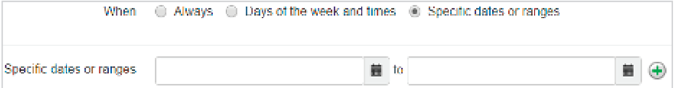


Figure 7.1.3

When clicking in the to and from date fields a calendar will appear, as seen in figure 7.1.3.a.

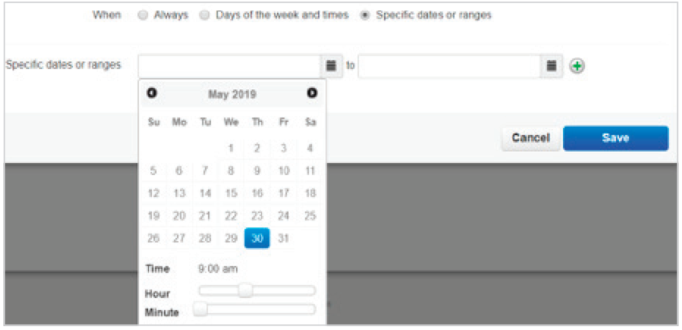


Figure 7.1.3.a

Then select the start and end dates you would like the time frame to start and stop.

Below the calendar is the Hour and Minute options so you can configure your time frames to start and stop at certain hours on the selected dates.

Clicking the plus sign will allow you to add more date ranges for the time frame to be in effect.

7.2 EDIT TIME FRAME

Figure 7.2

To edit a time frame, click the pencil icon, as seen in figure 7.2. You can edit the date and time ranges, but not the name. If you would like to rename the time frame, delete it and create a new one with the same date and time options, but with a new name.

7.3 DELETE TIME FRAME

To delete a time frame, click the red "X" icon, as seen in figure 7.2.

Phones

Figure 8

The phone icon, as seen in figure 8, will take you to your Phones Center where all registered devices to your account are listed, as seen in figure 8.a.

Name	Device Type	IP Address	MAC Address	Lin
5232	Polycom/5.4.1.14510 PolycomVVX-VVX_500-UA/5.4.1.14510	66.185.162.140:1041	00:04:F2:79:5E:71	
5232d	PolycomVVX-VVX_501-UA/5.8.2.4732	66.185.162.140:1048	64:16:7F:02:04:0F	
5232z	Z 3.15 40006 rv2.8.20	66.185.162.140:50409	-	
5232wp	SNAPmobile Web 40.0.1 (Chrome 74.0.3729.157)	66.185.162.140:50737	-	

Figure 8.a

A green icon next to the device means the device is registered and will be able to send and receive calls without issue.

A red icon means the device is unregistered. This could be caused by the device being turned off or the phone system is unable to communicate with the device.

To the right of the status indicator is the name of the device, followed by device type, the manufacturer and model number of the device, the IP address the device is registered at, the MAC address of the device and the line the device is on.

Music on Hold

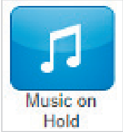


Figure 9

Clicking the Music on Hold icon, as seen in figure 9 will take you to your account's Music on Hold Center and will list all the custom music uploaded to your account that is played when you place someone on hold, as seen in figure 9. Music is played in a top-to-bottom order or randomized depending how the queue was created.

Figure 9.0

9.1 MUSIC ON HOLD SETTINGS

Clicking the "Settings" button will display the Music on Hold Settings, as seen in figure 9.1, which allows for the option Play introductory greeting to be enabled. When the option is selected, you will be asked to upload a WAV or mp3 file of the introductory greeting. This introductory greeting will always play before any selected music.

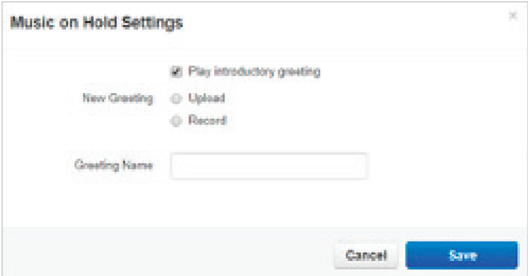


Figure 9.1

9.2 ADD MUSIC ON HOLD

The "Add Music" button, as seen in figure 9.2, will allow you to upload an mp3 or WAV file and name the music on hold file.

Figure 9.2

Call History

The Call History icon, as seen in figure 10, will take you to the Call History page, where you will see the calls made to and from your account for the specified date range, as seen in figure 10.a.

Figure 10

Figure 10.a

10.1 CALL HISTORY FILTERS

You can change the date range by clicking the “Filters” button, as seen in figure 10.1.

Figure 10.1

After clicking the “Filters” button, the Call History Filters window will appear, as seen in figure 10.1.a. Here you can change the call history date range.

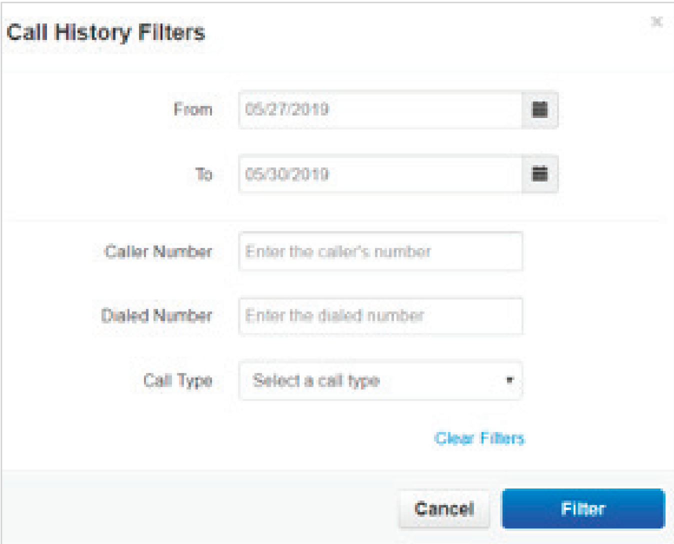


Figure 10.1.a

10.1.1 Caller Number

This allows you to search for calls from a specific phone number by entering the number into the “Caller Number” field.

10.1.2 Dialed Number

The “Dialed Number” field will let you filter for a specific number that you dialed.

10.1.3 Call Type

The Call Type drop-down, as seen in figure 10.1.3, lets you filter based off the type of call: Inbound, Outbound or Missed call.

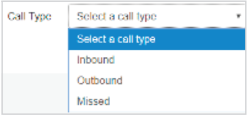


Figure 10.1.3

10.1.4 Calls Displayed

Clicking the “Filters” button, as seen in figure 10.1.a, will display the calls that match the filter criteria.

Calls displayed with a red "X" are missed calls.

Calls displayed with a green arrow are outbound calls.

Calls displayed with a blue arrow are inbound calls that were answered.

You can set the call history to display 15, 25, 50 and 100 calls per page, as seen in figure 10.1.4.

Figure 10.1.4

The caller can be added to your contacts by clicking the Add Contact icon.

You can add a caller to your contacts by clicking the Edit icon next to the call, which will display the contact information fields.

If call recording is enabled for your profile or device, or if the call was from a queue configured to record calls, you can download the call by clicking the Download icon.

If you’d like to listen to the call without downloading the call, you can click the Listen icon, which will open a media player right in your browser, as seen in figure 10.1.4.a.

Figure 10.1.4.a

10.2 EXPORTING CALL HISTORY

The Export icon, as seen in figure 10.2, allows you to download the call history into a CSV file that can be opened in any spreadsheet application, such as Excel or Apache OpenOffice.

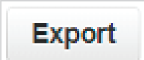


Figure 10.2

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