Kandy Business Solutions

Portal User Guide for Subscribers

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Contents

What’s new for Kandy Business Solutions Subscribers in version 49.2

Kandy Business Solutions (KBS) 49.2 includes new, changed, and deprecated features.

Revision 01.20

February 24, 2021. KBS 49.2.

Configuring a hunt group update

The following updates have been made to this procedure:

- **Wallboard** is not a field. Removed from field definition table.
- Added new procedure step: To access statistics, click **LAUNCH WALLBOARD**.

Modifying an advanced hunt group update

The following updates have been made to this procedure:

- **Wallboard** is not a field. Removed from field definition table.
- Added new procedure step: To access statistics, click **LAUNCH WALLBOARD**.

Revision 01.19

December 2, 2020. KBS 48.3.

End User Portal (EUP) update

Only Vertical Service Codes (VSCs) associated with the logged-in user will now be visible in the EUP.

Revision 01.18

October 26, 2020. KBS 48.2.

End User Portal (EUP) and call server language update

EUP language setting in the KBS Portal is now mapped to call server Subscriber language.

End User Portal (EUP) and Voicemail Portal update

EUP language setting in the KBS Portal now to Voicemail Portal preferences.

Revision 01.17

September 16, 2020. KBS 48.1.

Voicemail Portal login

A **MSG PORTAL** button for the Subscriber Messaging portal has been added in the KBS Admin Portal, under **Provision>Users>Subscribers** and in the End User Portal under **Service Settings>Voicemail**. The eye icon has been removed to view and hide the password.

Administrators can still changed the voicemail PIN for Subscribers.

Revision 01.16

August 12, 2020. KBS 47.3.

Browser Support

The following browsers have been tested for KBS support in 47.3:

Browser	Version
Edge chromium	81.0.416.68
Firefox	78.0.2
	78.0.2 (64-bit)
Chrome	83.0.4103.116
	84.0.4147.89
Safari	13.1.1
IE	11.1282.177763.0

Revision 01.15

March 4, 2020. KBS 46.2.

Portal enhancements

The following enhancements have been made the KBS portal to improve customer experience:

- All scroll bars nested within tables have been moved to the side of the screen.
- Under **Provision>Call Routing>Call Answer Groups**, the Advanced section is now available on the screen without clicking **ADVANCED** on the **Actions** menu.

Revision 01.14

January 15, 2020. KBS 46.1.

Agent Call Rules update

A note was added for Agent Call Rules for Hunt Groups and Advanced Hunt Groups that Agent Call Rules are not supported for Simring.

Revision 01.13

May 2, 2019. KBS 43.3.

Address Book picture

In the EUP, under **Provision>Address Book>Contacts**, a personal contact picture can now be up to 200 KB instead of 24 KB.

Revision 01.12

March 19, 2019. KBS 43.2.

Single Sign-On for EUP

Subscribers can now leverage their existing security identity management when accessing the KBS End-user portal. They can use the same security protocols that meet corporate requirements along with making it easier for subscribers to leverage a single authentication and authorization and not have to remember multiple passwords.

Note: For more information, contact your account prime.

EUP Voice Services Screen Update

When a user has the Standalone Meet Me Conferencing SKU, the **Settings>Voice Services** screen in the End-user portal (EUP) only shows the following:

- Time Zone
- Language
- **CONFERENCING** button

Revision 01.11

January 30, 2019. KBS 42.3.

Key Expansion Module Configuration for Yealink and Polycom

Key Expansion Modules (KEMs) for Yealink and Polycom can now be provisioned through the **Provision>Devices** menus of the KBS Portal.

Device Key Provisioning Templates

When configuring device keys in the KBS portal, users can now save the device key template of a certain device for re-use.

Revision 01.10

August 15, 2018. KBS 2.0.

Device Keys Enhancements

The following functionality has been updated for Device Keys:

- “Existing / Preassigned” has been added and this is the default setting. Indicates that the line currently has no function but an admin should feel free to set up another function in its place if desired.
- The “Unassigned” functionality has now been changed to “Clear Line Key” which will clear any existing function defined for the line. This will overwrite existing group parameters defined for the device.
- The BLF option has now been replaced with the following:
  - Busy Lamp Field (BLF) – Call Pickup — Used to monitor a specific user for status changes on IP phones. When the monitored user places a call, a busy indicator on the monitoring user's phone indicates that the user's phone is in use. When the monitored user's line is ringing, the monitoring user can press the BLF line key to pick up the call. When the monitored user is in a call, the monitoring user can press the BLF line key to join the ongoing call.
  - Busy Lamp Field (BLF) – Speed Dial — Used to monitor a specific user for status changes on IP phones. When the monitored user places a call, a busy indicator on the monitoring user's phone indicates that the user's phone is in use. When the monitored user is in a call, the monitoring user can press the BLF line key to initiate a call to the monitored user.
- Speed Dial function now allows non-numeric entry so it can be used as a custom function key with vertical service codes.
- New UX improvements that allow for better visibility with a pop-up dialog for selection of users from a list.
- Support for Polycom firmware 5.7 feature that no longer requires the use of PAB for Enhanced Function Keys (EFK).

  Note: A warning may appear if devices are not running 5.7 or higher. Also, if previously used, any entries in PAB for function keys will be cleaned up if device is upgraded to 5.7.
- Device parameter editing is now allowed for parameters that were pushed as part of device key provisioning UI.

  Note: This function should only be done by experienced users, as well as refer to the warning below.

> **Attention**
> An issue can appear if reg.x parameters have been defined in the device parameters for a specific device parameter group, and additional registrations have been added to the impacted Polycom device via device keys. Deleting the previously defined parameters from the Device Parameters section of the portal, will cause the additional registrations in the sequence to disappear from the phone the next time it loads a config.
>
> To address the issue, resave the impacted device on the device keys screen.

Generic Device Provisioning

Customers now have the ability to upload configuration profiles for "unmanaged " devices. This typically refers to devices that are supported on the KBS portal through the Device Parameter Configuration and Polycom ZTP or Yealink RPS. These templates define parameters that source data from KBS such as domain, user, username, password, proxy, proxy server, etc. much like what is done with RPS and ZTP. When using Generic Device Provisioning, the local DHCP server or other mechanism is used to point the device to the KBS provisioning server where it will then receive its configuration file based on the uploaded template that was provided. Support for Generic Device Provisioning can be enabled on a per-customer basis. The partner has the ability to define phone types and assign templates as well as push firmware to the phones from firmware paths they define. There is also the ability to query the device configuration using the existing Query Device function.

Revision 01.09

May 1, 2018. KBS 2.0.

Ribbon rebranding

The company name has been changed to Ribbon.

Support for phone key provisioning

This feature allows the Partner, Customer Admin, or End-user of a Yealink or Polycom phone to manipulate their Speed Dial, and soft keys from the EUP.

Call Park Notification

Call Park Notification feature provides a notification capability for the Call Park service. When a call is parked to a parking lot user, if there are any dialog subscriptions to that user, a “confirmed” notification is sent to the subscribed user. When the call is retrieved from parking lot user, a “terminated” notification is sent to the subscribed user.

End-User Portal in Spanish

Spanish speaking subscribers can now view the End-User Portal (EUP) in Spanish. Administrators now have the option to select Spanish as a site default for subscribers. Subscribers can also modify their language selection to Spanish directly from the EUP Voice Services page.

Revision 01.08

December 14, 2017. KBS 2.0.

Forget Password Reset

Login information has been added as well as a new feature that allows you to reset your forgotten password to the EUP. For more information, see “Accessing the Portal” (page 13).

Revision 01.07

November 1, 2017. KBS 2.0.

Advanced hunt group

This feature provides additional capabilities over regular Hunt Groups which allows for Hunt Group routing to change based on time of day. Functionality was added for Hunt Group administrators to specify working hours and off time hours for the Hunt Group. When a call hits the Hunt Group during working hours, it will be connected with an agent (or busy route). When a call hits the Hunt Group during off hours, it will be forwarded directly to Voicemail (or answering service). For more information, see “Modifying an advanced hunt group” (page 41).

Revision 01.06

September 18, 2017. KBS 2.0.

MCA no longer supported

Removed “multiple” option from simultaneous calls for SLA groups. All references to the multiple options have been removed from “Configuring a shared line appearance group” (page 49).

Revision 01.05

May 26, 2017. KBS 2.0

Historical Statistics

References to “real time” have been removed.

Kandy Business Solutions

Nuvia has been rebranded to KBS.

Revision 01.04

March 16, 2017. Nuvia 2.0

New features for Nuvia in 2.0

Version 2.0 for Nuvia includes Language and Wallboard for hunt groups enhancements.

Language Support

The EUP is now available French, Portuguese, and English.

Hunt Group Wallboard

The hunt group Wallboard is a web application that services active hunt group members with queue and call metrics statistics. The wallboard is a fully responsive web interface that can be accessed either from the admin portal or the End User Portal (EUP).

Document revision 01.03

October 31, 2016. Nuvia 2.0

New feature

- Added procedure “Downloading a client” (page 33) for Omni client feature.

Document revision 01.02

July 31, 2016. Nuvia 2.0

Modifications

Added “Add Network Call Waiting Disable to EUP” to “Modifying your voice service settings” (page 29).

Document revision 01.01

May 9, 2016. Nuvia 2.0

This is the first release of this document.

Accessing the Portal

Use these procedures to gain access to the portal.

Prerequisites

- Enable Javascript.
- Disable compatibility mode when using Internet Explorer to access the portal.
- The following browsers have been tested with the KBS Portal:
  - Edge chromium (81.0.416.68)
  - Firefox (78.0.2 and 78.0.2 (64–bit))
  - Chrome (83.0.4103.116 and 84.0.4147.89)
  - Safari (13.1.1)
  - IE (11.1282.17763.0)

> **Attention**
> If a button from the KBS Portal Actions menu is unresponsive, try enabling popups in your browser.

Resetting your portal password

Use this procedure if you have forgotten your portal password.

Procedure Steps

Step	Action
1	On the login page, click **Forgot your password?**
2	Enter your User ID in the User ID field and the email associated with your account in the E-mail Address field.
3	Click **RESET**, to receive an email with instructions to reset your password. *If the provided credentials match, we will send password reset instructions to the email account specified.*

Note: If the email is not received in 30 minutes, contact your administrator.

--End--

Logging into the portal

Use this procedure to log into the system.

Procedure Steps

Step	Action
1	On the login page, enter your email address in the **User ID** field.
2	If single sign-on has been enabled for your company, you will be redirected to your IDP to login.
3	If single sign-on is not enabled for your company, enter your portal password in the Password field.
4	Click **SIGN IN**. *Note:* If this is your first time accessing the portal, you are prompted to change your password and must accept the Terms of Use agreement to access your portal instance.
5	To change your password for a first-time login, type your current password in the Old Password field.
6	Type your new password in the New Password and Confirm Password fields using the following criteria: • Password must meet out of 4 of the following conditions: – One uppercase letter – One lowercase letter – One number – One special character • Password must be a minimum of 8 characters. • Password cannot consist of the first characters of username. • Password cannot use any of the previous 8 passwords. • Password must be reset after 90 days (maximum password age). • Password cannot be changed more than once in 24 hours (minimum password age).
7	Click **CHANGE**.
8	Log in again with your new password. Read the Terms of Use agreement and click **ACCEPT** to access the portal.

--End--

Logging out of the portal

Use this procedure to log out of the portal.

Procedure Steps

Step	Action
1	At the top of the page, click **Welcome <Your name>** and select **Logout**.

--End--

Changing your portal password

Use this procedure to change your portal password.

Procedure Steps

Step	Action
1	At the top of the page, click **Welcome <Your name>** and select **Change Password**.
2	Type your current password in the Old Password field.
3	Type your new password in the New Password and Confirm Password fields using the following criteria: • Password must meet out of 4 of the following conditions: – One uppercase letter – One lowercase letter – One number – One special character • Password must be a minimum of 8 characters. • Password cannot consist of the first characters of username. • Password cannot use any of previous 8 passwords. • Password must be reset after 90 days (maximum password age). • Password cannot be changed more than once in 24 hours (minimum password age).
4	Click **CHANGE**.
5	To log in again, replace the old password with the new password in the Password field and click **SIGN IN**.

--End--

Call and Voice Logs

Kandy Business Solutions (KBS) has voice and call logs that need to be managed.

Viewing call logs

Use this procedure to view all of the calls that you have received and made, as well as your voicemail messages if you are subscribed to voicemail service.

Procedure Steps

Step	Action
1	Click the **Messages>Voice** tab.
2	To remove call logs, select the checkbox beside each log to remove.
3	Click **REMOVE**.
4	Click **YES** to confirm.
5	To export the call log data, click the export icon in the table header. *The system automatically downloads the data to your local machine.*

--End--

Field definitions

Call logs field definitions

Field	Definition
Contact/Number	The caller’s contact name and number.
Duration	The duration of the call.
Event	The type of call event: Dialed, Received, Missed, or Message.
Status	The status of the call. All unread messages have a status of New.
Time	The time that the call was received.

Personal Address Book

There are two address books: yours and your company's. Your company address book consists of all of the members of your company and any additional entries added by your administrator. Your personal address book consists of regularly contacted members and notifications about their presence information. You can build your personal address book by copying entries from the corporate address book and modifying them or by adding a new entry from scratch. You can also choose to group your address book entries for easy sorting. To do this, create a group and then assign members from your personal address book to that group.

Adding a contact group

Contact groups help you to organize your contacts. Use this procedure to add a contact group.

Procedure Steps

Step	Action
1	Click the **Address Book>Contacts** tab.
2	Click **MANAGE GROUPS**.
	The system displays all of your current groups.
3	Click **ADD GROUP**.
4	Enter a group name and click the checkmark icon.

--End--

Adding a contact

Use this procedure to add an entry to your personal address book.

Procedure Steps

Step	Action
1	Click the **Address Book>Contacts** tab.
2	Click **ADD CONTACT**.

3	Enter or select the required information using the field definitions table below as a guide.
4	Click **SAVE CONTACT**.

--End--

Field definitions

Field definitions for adding a contact

Field	Definition
Business Phone	The contact's business phone number.
E-Mail	The contact's email address.
Group	The group you want the contact to be part of.
Home Phone	The contact's home phone number.
Mobile Phone	The contact's mobile phone number.
Name	The first and last name of the contact.
Nickname	An informal name for the contact.
Show Presence	Whether or not you want to see this contact's presence status, if applicable.
SIP Address	The contact's SIP address.

Adding company contacts to your personal address book

You can search your company address book for contacts, and then add those contacts to your personal address book. Use this procedure to add corporate contacts to your personal address book.

Procedure Steps

Step	Action
1	Click the **Address Book>Contacts** tab.
2	Click **VIEW COMPANY LIST**.
3	Enter a search term in the search box and click the search icon.
4	Select the checkbox beside the contact you want to add to your personal address book.
5	To add the contact to your personal address book, but not to any of your groups, click **COPY TO LIST**.
6	To add the contact to your personal address book, and include them in one of your groups, click **COPY TO GROUP** and select the group you want to add them to.

7	To return to your personal address book contact list, click **VIEW PERSONAL LIST**.

--End--

Adding or removing contact group members

Once you have created contact groups, you can add contacts to those groups when you add the contacts. You can also modify your contacts to add or remove them from groups. Use this procedure to add or remove contacts in your groups.

Procedure Steps

Step	Action
1	Click the **Address Book>Contacts** tab.
2	Click the name of the contact you want to add or remove from a group.
3	To add a contact to a group, select the group from the **Group** drop-down list.
4	To remove a contact from a group, choose **Select** from the **Group** drop-down list.
5	Click **SAVE CONTACT**.

--End--

Modifying your personal contact information

You can modify your entry in the company address book. You can also add a picture to your entry. Image files must be less than 200 KB and a maximum size of 160 x 120 pixels.

Use this procedure to modify your company address book entry.

Procedure Steps

Step	Action
1	Click the **Address Book>Contacts** tab.
2	Click **MANAGE SELF**.
3	Make the required changes.
4	To add a picture to your contact profile, click **ADD PICTURE**, click **SELECT**, navigate to your image file, click **Open**, and then click **UPLOAD**.
5	Click **SAVE CONTACT**.

--End--

Call Routing

Routing rules allow you to control how your calls are handled. There are two types of rules: basic and advanced. You can use either basic or advanced rules but not both. Moving from basic to advanced rules disables and removes any basic rules you have applied and vice versa. Basic rules handle the most common scenarios while advanced rules allow you to create complex call handling scenarios.

Basic routing rules allow you to define simple call rejection and redirection rules to ensure that you receive the calls you want, and reject the ones you don't.

Alternatively, you can configure advanced routing rules, which provide more complex routing options and automatically override basic routing rules.

Configuring basic routing rules

Use this procedure to configure basic routing rules.

Procedure Steps

Step	Action
1	Click the **Routing>Rules** tab.
2	Enter or specify the routing rules using the field definitions table below as a guide.
3	Click **SAVE ROUTE**.

--End--

Field definitions

Routing rules field definitions

Field	Definition
Action	Indicates whether you want to reject these calls, or direct them to voicemail.
Active	Allows you to select one option to flag calls for redirection. If you choose to screen all calls, you cannot configure any redirection rules.
drop-down lists	Define whether the simultaneously or sequentially ringing phones are yours (My Client), or others (Other).
Mode	The type of redirection. The remaining page display changes based on this selection. If you have chosen to screen all calls, this option is disabled.
Number (Presence Based)	The number to which a call will be redirected.
Number (Simultaneous or Sequential)	Other Number contains the number of the other phone to ring simultaneously or in sequence.
Number of Rings (Presence Based or Simultaneous)	The number of times your phone rings before the redirection routing occurs.
Number of Rings (Sequential)	The number of times each phone in the sequence rings before redirecting the call to the next phone in the sequence.
Overflow to Voicemail	Allows unanswered calls to be directed to voicemail.
Priority	Allows you to change the sequence of the phones through which the call will route.
Redirect If	Contains the presence conditions that will trigger the redirect.

Advanced routing rules

Advanced routing rules allow you to define more precise rejection and redirection rules than basic rules. Each advanced routing rule is a set of conditions, routing options, and exceptions. You can have multiple rules. When you configure advanced routing rules, they automatically disable and remove basic routing rules.

Configuring WHEN options

Use this procedure to configure WHEN routing options.

Procedure Steps

Step	Action
1	Click the **Routing> Rules** tab.
2	Click **ADVANCED MODE** and click **YES** to confirm.
3	Enter a **Route Name**.
4	In the **WHEN** options, to define the trigger conditions for call routing, select the checkbox beside the desired conditions.
5	If applicable, define the condition details as follows: • To define details for people in your personal address book, click the **THESE PEOPLE** link and select the checkbox beside the desired contacts. • To define details for people in your corporate address book, click the **THESE PEOPLE** link, enter a search term in the search box and click the magnifying glass icon. Select the checkbox beside the desired contacts. • To define details for people in your personal address book groups, click the **THESE GROUPS** link and select the checkbox beside the desired groups. • To define phone numbers details, click the **THESE NUMBERS** link and select the checkbox beside the required number. To add another number to the list, click the plus icon in the header, enter a label and the number, and click the checkmark icon. To delete a number in the list, click the x icon beside the number. Only numbers that are not in use in any rules can be deleted. • To define details for your presence states, click the **THESE STATES** link and select the checkbox beside the desired states. • To define time of day details, click the **THESE TIMES** link and select the checkbox beside the desired schedule. To add another schedule to the list, click the plus icon in the header, enter a label, click each day and hour block to add it to the schedule, and click **SAVE**.

--End--

Field definitions

WHEN options field definitions

Field	Definition
Route Name	The name of this advanced route.
FROM THESE PEOPLE	Allows you to reroute calls from any contacts in your personal address book or your company address book.

WHEN options field definitions (cont'd)

Field	Definition
FROM THESE GROUPS	Allows you to reroute calls from all contacts in any contract group you have created in your personal address book.
FROM THESE NUMBERS	Allows you to reroute calls from specific phone numbers.
From Anonymous	Allows you to reroute calls from any callers who have blocked their identity.
My presence is in THESE STATES	Allows you to reroute calls based on your presence state.
Received at THESE TIMES	Allows you to reroute calls at certain times, and also to define regular and vacation schedules for use with this option.

Configuring ROUTE options

Use this procedure to configure ROUTE options.

Procedure Steps

Step	Action
1	In the **ROUTE** options, to redirect the call to another number, select the checkbox beside a **Ring THESE NUMBERS** condition.
2	To define phone numbers details, click the **THESE NUMBERS** link and select the checkbox beside the required number. To add another number to the list, click the plus icon in the header, enter a label and the number, and click the checkmark icon. To delete a number in the list, click the x icon beside the number. Only numbers that are not in use in any rules can be deleted.
3	To redirect an unanswered call to voicemail, select the checkbox beside **Send to Voicemail** or to send a call straight to voicemail, select **Send Straight to Voicemail**.
4	To reject an unanswered call, select **Reject the Call**.

--End--

Field definitions

ROUTE options field definitions

Field	Definition
Ring THESE NUMBERS	Allows you to automatically reroute calls to one or more phone numbers.
If busy ring THESE NUMBERS	Allows you to reroute calls to one or more phone numbers if your line is busy.

ROUTE options field definitions (cont'd)

Field	Definition
If no answer ring THESE NUMBERS	Allows you to reroute calls to one or more phone numbers if you are unable to answer the call.
If unreachable ring THESE NUMBERS	Allows you to reroute calls to one or more phone numbers if your line is unavailable.
Send to voicemail	Allows you to reroute unanswered calls to your voicemail.
Send straight to voicemail	Allows you to reroute calls straight to your voicemail.
Reject the call	Allows you to automatically reject the call.

Configuring UNLESS options

Use this procedure to configure UNLESS options.

Procedure Steps

Step	Action
1	In the **UNLESS** options, to define any exceptions to the routing rules, select the checkbox beside the desired exceptions.
2	If applicable, define the exception details as follows: • To define details for people in your personal address book, click the **THESE PEOPLE** link and select the checkbox beside the desired contacts. • To define details for people in your corporate address book, click the **THESE PEOPLE** link, enter a search term in the search box and click the magnifying glass icon. Select the checkbox beside the desired contacts. • To define details for people in your personal address book groups, click the **THESE GROUPS** link and select the checkbox beside the desired groups. • To define phone numbers details, click the **THESE NUMBERS** link and select the checkbox beside the required number. To add another number to the list, click the plus icon in the header, enter a label and the number, and click the checkmark icon. To delete a number in the list, click the x icon beside the number. Only numbers that are not in use in any rules can be deleted. • To define details for your presence states, click the **THESE STATES** link and select the checkbox beside the desired states.
3	Click **SAVE ROUTE**.

--End--

Field definitions

UNLESS options field definitions

Field	Definition
From THESE PEOPLE	Allows you to exclude specific contacts in your personal address book or your company address book from this rule.
From THESE GROUPS	Allows you to exclude all contacts in a contact group that you have created in your personal address book from this rule.
From THESE NUMBERS	Allows you to exclude all calls from specific phone numbers from this rule.
From Anonymous	Allows you to exclude calls from any callers who have blocked their identity from this rule.
My presence is in THESE STATES	Allows you to exclude any calls received while you are in a specific presence state from this rule.

Managing Your Service Settings

This chapter contains procedures used to manage your service settings.

Modifying your voice service settings

Fields displayed for voice services vary, depending on which voice services you are subscribed to. Use this procedure to modify your voice service settings.

1. Click the **Services>Settings** tab.
2. Make the required changes using the field definitions table below as a guide.
3. Click **SAVE SETTINGS**.

Voice service settings field definitions

Field	Definition
Note: Field availability depends on your subscribed services.	
Authorized Grabber	The phone number you will use to grab calls (typically your mobile number).
Auto Retrieve	If enabled, parked calls are automatically retrieved after a set period of time.
Auto Retrieve Timer	If Auto Retrieve is enabled, the number of seconds before a parked call is automatically retrieved.
Call Grabber Access	The telephone number you use the access the Call Grabber service from an external line.
Call Return	If enabled you can trigger call return using VSCs. See your VSC list for details.
Hot desk Password	Your password for enabling hot desking.
ID Restriction	If enabled, your caller ID information is hidden.
Inactivity timer	If Report when Inactive is Enabled, the number of idle seconds that will trigger a status of Inactive.

Voice service settings field definitions (cont'd)

Field	Definition
Language	The language presented in the portal. Default is “English”. When not updated, portal language automatically defaults to organization language settings.
Network Call Waiting	Enable or disable Network Call Waiting.
On the Phone Presence	If enabled, a status of On The Phone displays while you are on a call.
Report when Inactive	If enabled, you display an Inactive status after a set number of idle seconds.
Time Zone	Your time zone.
VOIP Numbers	Your assigned telephone numbers.
VSC PIN	Some services are enabled or disabled using vertical service codes (VSCs) entered through your phone (for example, *72). Some of these services require you to provide a PIN code. Set the PIN code here.

Signing into the Messaging Portal

Users can sign into the Messaging Portal to access messaging services using the new single sign-on **MSG PORTAL** button on the Actions menu.

Procedure Steps

Step	Action
1	Click the **Services>Settings** tab.
2	To sign into the Messaging Portal, click **MSG PORTAL** on the Actions menu.

--End--

Modifying your voicemail service settings

Use this procedure to modify your voicemail service settings.

1. Click the **Services>Settings** tab.
2. Click **VOICEMAIL SERVICES**.
3. Make the required changes, using the field definitions table below as a guide.
4. Click **SAVE SETTINGS**.

Voicemail service settings field definitions

Field	Definition
Note: Field availability depends on your subscribed services.	
Access Number	The telephone number you dial to access your voicemail.
E-mail Address	Your email address for voicemail notifications.
Notification	If enabled, you receive an email notification when a voicemail message is received.
PIN	The personal identification code you use to access your voicemail.
Playback Options	Determines the order in which voicemail messages are played back to you.
Standard Greeting, Extended Absence Greeting, Busy Greeting.	See "Managing your voicemail greetings" (page 31).

Managing your voicemail greetings

You have various types of greetings: Standard, Extended Absence, and Busy. For your Standard greeting, you can choose a standard system greeting, or upload a .wav file for a personalized greeting. Your Extended Absence and Busy greetings are personalized .wav files that you upload for playback to callers. You can activate and deactivate your Busy or Extended Absence greetings as required, and allow or prevent callers from leaving voicemails messages during your absence.

Use this procedure to manage your voicemail greetings.

1. Click the **Servicess>Setting** tab.
2. Click **VOICEMAIL SERVICES**.
3. To set the type of standard message you want, click the Standard Greeting Active drop-down list and select the Standard greeting you want to use.

   If you chose a personalized Standard greeting, the system displays an UPLOAD button.
4. To upload a recorded .wav file for use as a personalized Standard, Extended Absence, or Busy greeting, under the appropriate greeting type, click **UPLOAD**, click **SELECT**, navigate to your .wav file, click **Open**, and then click **UPLOAD**.
5. To play back your uploaded recording, click the arrow icon.

6. To activate or deactivate your **Extended Absence Greeting** or **Busy Greeting**, click the **Status** drop-down list under the appropriate greeting and select **Enabled** or **Disabled**.
7. To allow or prevent callers from leaving voicemail messages during an extended absence, under the **Extended Absence Greeting**, click the Message Deposit drop-down list and select **Enabled** or **Disabled**.
8. Click **SAVE SETTINGS**.

Voicemail greetings field definitions

Field	Definition
Active	Allows you to choose a Standard Greeting. Choices are System, Personalized Voice, and Personalized Name. Personalized Greetings are uploaded .wav files.
Message Deposit	If enabled, allows callers to leave a message when your Extended Absence Greeting is active.
Status	If enabled, activates your Extended Absence or Busy Greeting.
UPLOAD	Allows you to upload a .wav file for a Personalized Voice, Personalized Name Standard, Extended Absence, or Busy Greeting.

Modifying your conferencing service settings

Use this procedure to modify your conferencing service settings.

1. Click the **Services>Settings** tab.
2. Click **CONFERENCING**.
3. Make the required changes, using the field definitions table below as a guide.
4. Click **SAVE SETTINGS**.

Conferencing service settings field definitions

Field	Definition
Note: Field availability depends on your subscribed services.	
Access Code	The code you enter to access a conference.
Access Number	The phone number to access the conferencing service.
Chairperson PIN	The personal identification code for the conference chairperson controls.
Code, Event	For information only, lists your conferencing service vertical service codes (VSCs) and the corresponding action.

Conferencing service settings field definitions (cont'd)

Field	Definition
End on Chair Exit	If enabled, the conference automatically ends when the Chairperson exits the conference.
Fast Start	If enabled, the conference automatically starts when a participant enters the Chairperson PIN.
Participant Notification	Enables a tone denoting participants joining or leaving a conference.
Recording Target	The email address that conference recordings are automatically sent to.
Status IMs	If enabled, IMs are sent to the conference chairperson regarding the conference status and participants.

Viewing your client settings

Use this procedure to view your client settings.

1. Click the **Services>Settings** tab.
2. To view the settings for your client devices, click **CLIENTS**.

Downloading a client

Use this procedure to download clients.

Procedure Steps

Step	Action
1	Click the **Services>Settings** tab.
2	To view the settings for your client devices, click **CLIENTS**.
3	Select the appropriate link to download clients for MAC and PC.

--End--

Configuring device keys and Key Expansion Modules

Use this procedure to assign lines and services to keys and Key Expansion Modules (KEMs) on supported devices.

Attention

An issue can appear if reg.x parameters have been defined in the device parameters for a specific device parameter group, and additional registrations have been added to the impacted Polycom device via device keys. Deleting the previously defined parameters from the **Device Parameters** section of the portal, will cause the additional registrations in the sequence to disappear from the phone the next time it loads a config.

To address the issue, resave the impacted device on the device keys screen.

Prerequisites

Note 1: If device keys cannot be modified, contact your administrator to enable this service.

Note 2: When a Polycom device using device keys that is running on firmware less then 5.7 is upgraded to a firmware greater than or equal to 5.7, the phone may reboot as new parameters are sent down.

Procedure Steps

Step	Action
1	On the menu bar, click **Services>Settings**.
2	On the Actions menu, click **DEVICE KEYS**.
3	On the Actions menu, click **Manage Buttons**.
4	In the "Key configuration" section, select the desired device from the list of available devices for the specified subscriber in the **Device** drop-down.
5	From the Key Type dropdown, choose **Phone keys**, **Soft keys**, or **Key Expansion Module**.
6	If you selected Soft keys, the following 5 functions are available: • Speed dial • Call return • Call retrieve • Call park directed • Call park with notification *Note:* Polycom phones allow up to 10 custom softkeys.
7	To add more lines there is an Add button in the left corner of the table heading bar.
8	To delete, select a row and click **DELETE ROW**.
9	If you selected KEM, see “Adding a Key Expansion Module (KEM) to a device” (page 36). *The KEM will now be available on the Key Type dropdown list.*
10	In the phone key and soft key configuration table that references the telephone diagram, enter the following information for each of the keys:

Key information

Column heading	Description
Key	Key position.
Function	Use the drop-down menu to select the function of the key (for example, speed dial). For specific field configuration, see “Field definitions” (page 35).
Key Label	Create the desired Key label.
Swap Key	Use this column to move the key placement.

Note 1: For Polycom devices, the name for Key Label of Call Park, Call Retrieve, Call Return, Speed Dial and Call Park with Notification, they must be different from each other.

Note 2: Polycom supports a maximum of 50 Enhanced Feature Keys (EFK) per device.

11 To send check sync notification, click **CHECK SYNC**.

12 To show the parameters generated by device keys, click **SHOW PARAMETERS**.

13 To query the final config for a given device, click **SHOW CONFIG**.

14 To save a device key template for use with another terminal, click **SAVE TEMPLATE**.

15 To manage the existing templates, click **MANAGE TEMPLATES**.

16 To save the phone configuration, click **SAVE**.

--End--

Field definitions

Function fields for available device buttons

Function	Field
Call Return — Provides a simple method to return a call to the number of the last received call.	Function
	Key Label
Speed Dial — Allows users to transfer calls to pre-programmed speed dial numbers.	Function
	Key Label
	Type *Note:* When **Custom** is selected the Number field will allow between 2 and 128 alphanumeric characters.

Function fields for available device buttons (cont'd)

Function	Field
	Number
Call Park — Allows users to temporarily place a call into a holding area and to retrieve parked calls at a later time. The user who parks the call can request a return of the call if it is not retrieved within a specified length of time.	Function
	Call Park Type • **Call Park Notification** provides a notification capability for the Call Park service. When a call is parked to a parking lot user, if there are any dialog subscriptions to that user, a “confirmed” notification is sent to the subscribed user. When the call is retrieved from parking lot user, a “terminated” notification is sent to the subscribed user. • With **Call Park Directed**, a subscriber can Park a call to a specific user using a vertical service code (VSC). This feature enables the service for the most basic of terminals, where only a keypad exists, using VSC dialing.
	Parking Subscriber
	Subscriber Number
Call Retrieve — Users can park a call where it can be retrieved by anyone, or they can park a call while waiting for a specific user to retrieve it. Retrieval is based on user IDs.	Function
	Key label

Adding a Key Expansion Module (KEM) to a device

Use the described information to add a Key Expansion Module (KEM) for a device.

Procedure Steps

Step	Action
1	On the menu bar, click **Services>Settings**.
2	On the Actions menu, click **DEVICE KEYS**.
3	On the Device Keys Configuration tab, choose the subscriber you want to configure.
4	Under the Actions menu, click **ADD EXPANSION**.
5	In the LIST KEMS popup window, choose a KEM and to save a new KEM for the current phone that the user is configuring, click **OK**. *When pop up disappears after clicking OK, a new "Key Type" menu will appear below the "Device" menu.*

--End--

Viewing vertical service codes

A vertical service code (VSC) is a special code dialed prior to (or instead of) a telephone number that triggers a special telephone service or feature. Typically preceded by a * (star) key on the touch-tone keypad and often referred to as star codes, most are two digits in length.

Use this procedure to view your available VSCs. You can use the VSCs for any services subscribed to you.

1. Click the **Services>Settings** tab.

   The system displays your voice service settings.

2. To view your VSC codes, click **VSC**.

Managing call answer groups

If you have been granted administrative permissions for a hunt group, you can configure some of the group settings. Use this procedure to configure settings for a hunt group to which you have been granted administrative permissions.

If you have been assigned administrative permissions for a call answer group, you can configure some of the group settings. If you have administrative permissions for more than one group or type of group, use the Group Name and Type columns of the call answer group list to determine the group you want to configure.

Use the following procedures to configure call answer group settings for which you have been granted administrative permissions.

Note: Some combinations of call handling features may not be compatible.

1. On the menu bar, click **Configuration** and select **Call Routing>Call Answer Groups**.

   The system displays all call answer groups for which you have administrative permissions. The Type column indicates the type of call answer group, and the Group Name column indicates the specific group.

2. Click the **Group Name** link of the group that you want to configure.

Hunt groups

Basic configuration options determine the numbers (and aliases, if applicable) that route into a hunt group, overflow numbers for busy conditions, and group members. An advanced hunt group allows advanced call routing determined by the select business hours.

Advanced options allow you to specify how long the call remains at each group member before routing to the next, the routing action if a call is unanswered, and whether or not agent call rules (if applicable) are to be applied to call routing.

Alpha tags allow you to set a Caller ID that is shown to group members. You can specify a Caller ID to show to all group members for all numbers and aliases, or for calls that originate from specific numbers or aliases. You can use this feature to let the members know by Caller ID whether a call came in from a main number or from one of its aliases.

With the wallboard for hunt groups, depending on your SKU, you can view the following call statistics:

- Agents on Call — All agents in an active call
- Average Talk Time — Sum of minutes of calls answered over all calls answered since start time
- Calls Abandoned — The caller disconnects before the connection occurs
- Calls Answered — A call is answered and eventually released by either party
- Overflowed — Total number of calls that hit the busy route since the start time
- Overflowed Percentage — Percentage of all calls that hit the busy route since the start time. Total overflowed over total calls

For information on wallboard thresholds, see “Enabling wallboard thresholds” (page 43).

Note: Wallboards calculate their counts based on a start date/time which can be reset.

Configuring a hunt group

If you have been granted administrative permissions for a hunt group, you can configure some of the group settings. Use this procedure to configure settings for hunt groups to which you have been granted administrative permissions.

Prerequisites

Note: Portal users using Safari will need to disable the pop-up blocker from the Safari Preferences menu. Click on, **Preferences>Security>uncheck, 'Block Pop-up Windows'**.

Procedure Steps

Step	Action
1	To synchronize call answer groups, which are provisioned from other portals, click **SYNCHRONIZE**.
2	On the menu bar, click **Configuration** and select **Call Routing>Call Answer Groups**.
	The system displays all call answer groups for which you have administrative permissions. The Type column indicates the type of call answer group, and the Group Name column indicates the specific group.
3	Click the **Group Name** link of the group you want to administer.
4	To select the numbers that will route into this group, click the **Number** field.
	The system displays only selected provisioned numbers.
5	Select the checkbox beside each number that will route into this call group and click **ACCEPT NUMBER**.
6	Enter an alias that will route into this call group in the **Aliases** field and click **Add an Alias**. A new field appears to add extra aliases.
7	Enter a number to which calls will be routed if all lines in this call group are busy in the **Busy Route** field.
8	To specify the amount of time that a call waits for each member before further routing, enter the number of seconds in the **Wait Time** field.
9	To specify the desired action if a call is not answered, select an option in the **No Answer Action** field.
10	To add members to the group, select the checkbox beside the name of each person to be included in the **GROUP MEMBERS** list.

11 To display Caller IDs to group members, click **MANAGE ALPHA TAGS**. Enter the text that you want displayed in the **Tag** field to the right of any or all of the **Group Name**, **Number**, and **Aliases** fields.

Note: If no tag is assigned to the numbers or aliases, the group tag is used for all numbers and aliases.

12 Click **SAVE GROUP**.

13 To access statistics, click **LAUNCH WALLBOARD**.

Note: With “Per Activation” SKU as opposed to “Unlimited”, depending on number ordered, you can toggle the wallboard option for specific customers.

--End--

Field definitions

Hunt group customization field definitions

Field	Definition
Agent Call Rules	If enabled, applies individual group member call rules (if applicable) to call routing. For example, if a member has call forwarding rules configured, if enabled, those call rules are applied. If disabled, those call rules are ignored. *Note:* This option is not available for Simring.
Aliases	Any aliases for the numbers that will route to this group. For example, an internal extension number.
Busy Route	The number that a call will route to if all group members are busy, and the provisioned No Answer Action advanced option is Use Busy Route.
Group Name	A name for the group.
No Answer Action	The action that happens if, after all provisioned call routing takes place, a call remains unanswered.
Number	The telephone numbers that will route to this group.
Tag	A free-form field for the Caller ID information that is displayed to all group members. Can apply to all originating calls, or calls from specific numbers and aliases.
Type	The type of Call Answer Group. For Hunt Groups, it can be linear (calls route in a specified order), circular (calls route in "round-robin" order), or simring (all phones ring when the call comes in).
Wait Time (sec)	The amount of time, in seconds, that a call will remain with each member before being routed to the next.

Modifying an advanced hunt group

If you have been granted administrative permissions for an advanced hunt group (AHG), you can configure some of the group settings. Use this procedure to configure settings for an advanced hunt group to which you have been granted administrative permissions.

Prerequisites

- For advanced hunt groups, the service must be purchased and have available inventory.
- An AHG admin can only view voicemail(s) from the Manage VM button under AHG menu.
- When using Safari, disable the pop-up blocker from the Safari Preferences menu. Click on, **Preferences>Security>uncheck, 'Block Pop-up Windows'**.
- No input for alpha tags is required. The only supported alpha tag is "Group alpha tag" and it is fixed to the group name.
- When an agent sees the call, they typically see the group alpha tag as caller ID. However, the group alpha tag will not appear as part of the 'Contact / Number' field in the Call Logs list.

Procedure Steps

Step	Action
1	On the menu bar, click **Provision** and select **Call Routing>Call Answer Groups**.
2	On the menu bar, click **Configuration** and select **Call Routing>Call Answer Groups**. *The system displays all call answer groups for which you have administrative permissions. The Type column indicates the type of call answer group, and the Group Name column indicates the specific group.*
3	Click the **Group Name** link of the group you want to administer.
4	To select the numbers that will route into this group, click the **Number** field. *The system displays all of the available provisioned numbers.*
5	Select the radio button beside the number that will route into this call group and click **ACCEPT NUMBER**.
6	Enter an alias that will route into this call group in the **Alias** field. To add more aliases, click the plus icon and enter another alias.
7	Enter a number to which calls will be routed if all lines in this call group are busy in the **Busy Route** field.

8 To specify the amount of time that a call waits for each member to answer the call before routing, enter the number of seconds in the **Wait Time** field.

9 Select a Time Zone.

10 To specify the desired action if a call is not answered, select an option in the **No Answer Action** field.

11 To add members to the group, select the checkbox beside the name of each person to be included in the **GROUP MEMBERS** list.

12 To create an admin to manage the group, select the corresponding checkbox. For Advanced hunt groups, at least one admin must be selected.

13 To launch Time of Day window, click **MANAGE TIME OF DAY**.

14 Select office hours to determine which calls will forward immediately to voicemail (outside office hours) and which will be forwarded to the hunt group pilot to engage with agents (within office hours).

15 To close Time of day window, click **Save**.

16 To access Call Logs and Service Settings, click **VIEW CALL LOG/VM**.

Under the Calls and Messages section, you can view call logs and integrated voicemail messages for incoming after-hours calls.

17 Under the Service Settings tab, you can view the voicemail settings, reset your PIN, enable notifications, and customize your settings.

18 Click **SAVE SETTINGS**.

19 Click **SAVE GROUP**.

20 To access statistics, click **LAUNCH WALLBOARD**.

Note: With "Per Activation" SKU as opposed to "Unlimited", depending on number ordered, you can toggle the wallboard option for specific customers.

--End--

Field definitions

Advanced hunt group customization field definitions

Field	Definition
Agent Call Rules	If enabled, applies individual group member call rules (if applicable) to call routing. For example, if a member has call forwarding rules configured, if enabled, those call rules are applied. If disabled, those call rules are ignored.

Advanced hunt group customization field definitions (cont'd)

Field	Definition
	Note: This option is not available for Simring.
Alias	Any aliases for the numbers that will route to this group. For example, an internal extension number.
Busy Route	The number that a call will route to if all group members are busy, and the provisioned No Answer Action advanced option is Use Busy Route.
Group Name	A name for the group.
No Answer Action	The action that happens if, after all provisioned call routing takes place, a call remains unanswered.
Number	The telephone numbers that will route to this group.
Time Zone	This is the time zone that will be applied to the time of day routing.
Type	The type of Call Answer Group. For Hunt Groups, it can be advanced linear (calls route in a specified order), advanced circular (calls route in "round-robin" order), or advanced simring (all phones ring when the call comes in).
Wait Time (sec)	The amount of time, in seconds, that a call will remain with each member before being routed to the next.

Enabling wallboard thresholds

All of the wallboard tiles support thresholds. Use this procedure to enable a threshold.

Procedure Steps

Step	Action
1	Click on the gear icon for the tile. *The backside of the tile is shown with configuration details.*
2	Click on the **Enable Threshold** checkbox. *New options will appear.*
3	Select a threshold color that will appear when the threshold value is crossed.
4	Select a threshold value that, when reached, will change the color of the tile to the set threshold color.
5	Click **Apply** to save the tile settings.
6	Click the disk icon from the wallboard to save the wallboard layout. *The tile threshold settings persist when the wallboard is re-launched.*

--End--

Configuring a call parking lot

Call Park Notification feature provides a notification capability for the Call Park service. When a call is parked to a parking lot user, if there are any dialog subscriptions to that user, a “confirmed” notification is sent to the subscribed user. When the call is retrieved from parking lot user, a “terminated” notification is sent to the subscribed user.

Use this procedure to configure the call parking lot.

Procedure Steps

Step	Action
1	In the KBS portal, navigate to the Provision menu and select **Call Routing>Call Answer Groups**.
2	Enter the Name and Number in the corresponding fields.
3	Click **Save**.

--End--

Configuring a call pickup group

If you have been granted administrative permissions for a call pickup group, you can configure some of the group settings. Use this procedure to configure settings for call pickup groups to which you have been granted administrative permissions.

Basic provisioning options determine the numbers that route into a call pickup group, whether or not vertical service code (VSC) dialing can be used by group members.

Advanced options allow you to specify the maximum number of group members, the maximum number of call queues, and whether or not SIP dialog event package subscriptions are enabled.

Procedure Steps

Step	Action
1	On the menu bar, click **Configuration** and select **Call Routing>Call Answer Groups**. *The system displays all call answer groups for which you have administrative permissions. The Type column indicates the type of call answer group, and the Group Name column indicates the specific group.*
2	Click the **Group Name** link of the group that you want to configure.

3 To select the telephone numbers that will route into this group, you can click the **Number** field.

The system displays all of the available provisioned numbers.

Or

Leave the Number field blank to generate a random DID.

> *Note:* Random generated DID will begin with 555 and be 20 digits long.

4 Select the checkbox beside each number that will route into this call group and click **ACCEPT NUMBER**.

5 To enable VSC dialing, select **Enabled** in the **Alias Status** field.

6 To specify the maximum number of members allowed in this group, enter a number in the **Max Group Size** field.

7 To specify the maximum number of calls allowed in the queue for this group, enter a number in the **Max Queue Size** field.

8 To enable SIP dialog event package subscriptions, select **Enabled** in the **Active Subscriptions** field.

9 To add members to the group, select the checkbox beside the name of each person to be included in the **GROUP MEMBERS** list.

10 Click **SAVE GROUP**.

--End--

Field definitions

Call pickup group field definitions

Field	Definition
Active Subscriptions	If enabled, allows SIP dialog event package subscriptions.
Alias Status	If enabled, allows VSC dialing.
Group Name	A name for the group.
Max Group Size	The maximum number of members that can belong to this group.
Max Queue Size	The maximum number of calls allowed to queue into this group.
Number	The telephone numbers that will route to this group.
Type	The type of Call Answer Group.

Call Distribution Groups

Basic provisioning options determine the numbers (and aliases, if applicable) that route into a call distribution group, the Caller ID information that identifies your company to callers on their devices, and group members.

Advanced options allow you to configure the queue state, a closure route, and a number of timing values to optimize the experience for your callers.

Alpha tags allow you to set a Caller ID that is shown to group members. You can specify a Caller ID to show to all group members for all numbers and aliases, or for calls that originate from specific numbers or aliases. You can use this feature to let the members know by Caller ID whether a call came in from a main number or from one of its aliases.

With the wallboard for call distribution groups, depending on your SKU, you can view the following call statistics:

- Agents on Call — All agents in an active call
- Average Talk Time — Sum of minutes of calls answered over all calls answered since start time
- Calls Abandoned — The caller disconnects before the connection occurs
- Calls Answered — A call is answered and eventually released by either party
- Current Longest Wait — Current longest wait time of any caller in the queue
- Max Longest Wait — Max wait time of any caller since the start time
- Total Calls — Total calls count includes all answered, abandoned, and in-progress calls within the start time
- Total Talk Time — Sum of minutes of all answered calls since start time
- Waiting — Callers in queue

Note: All statistics are pertinent to the displayed queue and wallboards calculate their counts based on a start date/time which can be reset.

Configuring a call distribution group

If you have been granted administrative permissions for a call distribution group, you can configure some of the group settings. Use this procedure to configure settings for call distribution groups to which you have been granted administrative permissions.

Prerequisites

Note: Portal users using Safari will need to disable the pop-up blocker from the Safari Preferences menu. From the **Type** list, select **Call Distribution**.

Procedure Steps

Step	Action
1	On the menu bar, click **Configuration** and select **Call Routing>Call Answer Groups**. *The system displays all call answer groups for which you have administrative permissions. The Type column indicates the type of call answer group, and the Group Name column indicates the specific group.*
2	Click the **Group Name** link of the group that you want to configure.
3	To select the numbers that will route into this group, click the **Number** field. *The system displays all of the available provisioned numbers.*
4	Select the checkbox beside each number that will route into this call group and click **ACCEPT NUMBER**.
5	Enter an alias that will route into this call group in the **Aliases** field and click **Add an Alias**. A new field appears to add extra aliases..
6	Enter a name that will display in the Caller ID in the **Display Name** field.
7	Select the action to be taken if the group queue is closed in the **Queue Closure Rule** field.
8	Select the action to be taken if maximum participants are exceeded in the **Queue Max Rule** field.
9	Select the action to be taken if queue timeout is reached in the **Queue Timeout Rule** field.
10	If you selected Route for the Queue Closure Rule, Queue Max Rule, or Queue Timeout Rule, enter the phone number that calls will route to in the **Route** field.
11	Enter the identity that will display in the Caller ID in the **Called Party** field.
12	Enter the time to wait for an agent to answer in the **Presentation** field.
13	Enter the maximum amount of time that a caller can spend in the queue in the **Max Wait Time** field.
14	Enter the maximum number of calls allowed in the group queue in the **Max Queue Size** field.
15	Enter the number of seconds before an announcement is played in the **Annc Delay** field.

16 To add members to the group, select the checkbox beside the name of each person to be included in the GROUP MEMBERS list.

17 To display Caller IDs to group members, click MANAGE ALPHA TAGS. Enter the text that you want displayed in the Tag field to the right of any or all of the Group Name, Number, and Alias fields.

Note that, if no tag is assigned to the numbers or aliases, the group tag is used for all originating numbers and aliases.

18 To open a currently closed queue, click OPEN QUEUE. Conversely, to close a currently open queue, click CLOSE QUEUE.

19 Click SAVE GROUP.

--End--

Field definitions

Call distribution group field definitions

Field	Definition
Aliases	Any aliases for the numbers that will route to this group. For example, an internal extension number.
Annc Delay (sec)	The amount of time, in seconds, before an announcement plays. Must be between 10 and 1200 seconds.
Called Party	The identity that will display in the Caller ID.
Call Route Number	Displays if Queue Closure Rule, Queue Max Rule, or Queue Timeout Rule are set to “Route”. The number that calls route to when the queue is closed, the timeout is reached or participants are exceeded.
Class of Service (CoS)	Class of Service is used to allow or deny redirections or transfers of a UCD call to the PSTN network.
Display Name	The name that will display in the Caller ID.
Group Name	A name for the group.
Max Queue Size	The maximum number of calls allowed in the queue. Must be between 1 and 10000.
Max Wait Time (sec)	The maximum amount of time, in seconds, that a caller can wait in the queue. Must be between 60 and 5400 seconds.
Number	The originating numbers that will route to this group.
Presentation (sec)	The maximum amount of time, in seconds, for an agent to answer a call. Must be between 2 and 180 seconds.
Queue Closure Rule	Action taken if the group queue is closed: Route or Announcement.

Call distribution group field definitions (cont'd)

Field	Definition
Queue Max Rule	Action taken when maximum participants are exceeded: Route or Announcement.
Queue Timeout Rule	Action taken when queue timeout is reached: Route or Announcement.
Type	The type of Call Answer Group.
Wallboard	If enabled, provides access to statistics. *Note:* With “Per Activation” SKU as opposed to “Unlimited”, depending on number ordered, you can toggle the wallboard option for specific customers.

Configuring a shared line appearance group

If you are the primary account in an SLA group, you can configure some of the group settings. Use this procedure to configure settings for SLA groups in which you are the primary account.

Basic provisioning options determine the primary subscriber (as opposed to the delegate subscribers).

Procedure Steps

Step	Action
1	On the menu bar, click **Configuration** and select **Call Routing>Call Answer Groups**. *The system displays all call answer groups for which you have administrative permissions. The Type column indicates the type of call answer group, and the Group Name column indicates the specific group.*
2	Click the **Group Name** link of the group that you want to configure.
3	To allow group members to join an active call, select Enabled in the **Bridging** field.
4	If bridging is enabled, to sound a warning tone when another group member joins an active call, select Enabled in the **Bridging Warning Tone** field.
5	To allow members to use private hold, select Enabled in the **Private Hold** field.
6	To add members to the group, select the checkbox beside the name of each person to be included in the **GROUP MEMBERS** list.
7	Click **SAVE GROUP**.

--End--

Field definitions

Shared line appearance group field definitions

Field	Definition
Bridging	Allows other SLA group members to join a call.
Bridging Warning Tone	Displays only if Bridging is enabled. If enabled, warns when a SLA group member joins a call.
Group Name	A name for the group.
Primary Account	The user name of the subscriber who will act as the primary line for this SLA. This user automatically has administrative privileges for the group.
Private Hold	Allows private hold (only the member who put the call on hold can retrieve it). If disabled, allows public hold (any member can retrieve a held call).
Type	The type of Call Answer Group.