



BUSINESS USER GUIDE

TABLE OF CONTENTS

Table of Contents	2
Quick Reference Guide	5
Star Codes	5
Voicemail Guide	6
Access Your Voicemail	6
Remote Access to Voicemail	6
Personalize Your Voicemail	6
Phone User Guide	7
Setting up Your Phone.....	7
Emergency Services – 911.....	7
Caller ID	7
Directory	8
Speed Dial	8
Line Monitoring/BLF.....	9
Shared Lines	9
Adding a Sidecar/Expansion Module.....	9
Managing Calls	9
How to Dial.....	9
Social and Public Services	9
Call Conference	10
Call Hold	11
Call Park.....	11
Call Return.....	12
Call Transfer – Attended Transfer.....	12
Call Transfer – Blind Transfer	12
Call Transfer – Directly to Voicemail	12
Call Waiting	13
Directed Call Pick Up	13
Pick Up Group.....	14
Paging	14
Do Not Disturb	14
How and Which Calls Ring your Phone	15

Call Screening.....	15
Call Forwarding.....	17
Scheduled Rules.....	18
Voicemail and Unified Messaging.....	18
Account-wide Services	19
Auto Attendant	19
Music on Hold	19
Faxing	19
Portal Guide – Standard User	21
Getting Started	21
Logging Into the Elevate Voice Online Voice Portal.....	22
First-Time Login	22
Future Logins	22
The Elevate Voice Online Voice Portal.....	24
User Info	24
Phone Numbers.....	24
Call Handling.....	24
Call Screening.....	26
Voicemail Box Settings.....	27
Resetting Your Portal Password	28
Creating a Schedule.....	29
Portal Guide – Admin User	33
Getting Started	33
Logging Into the Elevate Voice Online Voice Portal.....	34
First-Time Login	34
Future Logins	34
The Elevate Voice Online Voice Portal.....	36
Users	36
Voicemail.....	45
Devices	46
Call History	47
Resetting Your Portal Password	49
Creating a Schedule.....	50

Managing IP Phones 54

QUICK REFERENCE GUIDE

STAR CODES

CODE	FEATURE	CODE	FEATURE
*00 + Extension	Send Call Directly to Voicemail	*77	Anonymous Call Reject Enable
*11	Group Member Call Pickup	*78	Do Not Disturb Activation
*12 + Extension	Directed Call Pickup	*79	Do Not Disturb Deactivation
*43	Call Waiting – Enable	*82	Enable User Caller ID Next Call
*44	Call Waiting – Disable	*87	Anonymous Call Reject Disable
*52	Call Park	*90 or *91	Call Forwarding Busy Menu
*53 + parking slot	Call Park Retrieval	*92 or *93	Call Forwarding No Answer Menu
*57	Call Trace	*95	Call Forward Out of Service Menu
*58	Add Custom Caller Block w/ Message	*96	Anonymous Caller Block w/ Message
*60 or *80	Add Custom Caller Block	*97	Disable Anonymous Caller Block w/ Message
*63 or *83	Add Custom Caller Forward	*98	Enter Voicemail
*64 or *94	Add Custom Caller Allow	0	Call Operator – <i>Additional fees apply</i>
*67	Disable Caller ID Next Call	211	Call Public Services - <i>Information provided on non-emergency services available in the local community.</i>
*68	Manage Caller ID for All Calls	411	Call Information – <i>Additional fees apply</i>
*69	Call Return	611	Call Elevate Voice Customer Service
*70	Disable User Call Waiting Next Call	711	Call Telecommunications Relay Service - <i>Permit persons with a hearing or speech disability to use the telephone system via a text telephone (TTY) or other device</i>
*72 or *73	Call Forwarding Menu	811	Call Utility Public Services - <i>“Call before you dig”</i>
*74	All Other Callers Allow	911	Call Emergency Services - <i>Always ensure Elevate Voice has your correct address.</i>

VOICEMAIL GUIDE

Voicemail can be a big part of how we communicate, and it's getting more customizable every day. Here's a few quick instructions on how to access your voicemail from either your phone or remotely and how to personalize your voicemail greeting.

Access Your Voicemail

- 1) Dial ***98** from the phone that is connected to your account.
- 2) Enter your **4-digit PIN**, followed by **#**.
 - Your **default PIN** is **1234**.
- 3) Press **1**.

Actions Include:

Skip Message <i>Marks the voicemail as unread</i>	Press 1
Save Message <i>Marks the voicemail as read</i>	Press 2
Delete Message	Press 3
Repeat Message	Press 9
Exit Menu	Press 0

Remote Access to Voicemail

- 1) Dial your **10-digit phone number** from a phone not connected to your account.
- 2) When you hear your voicemail greeting, **press #**.
- 3) Enter your **4-digit PIN**, followed by **#**.

Personalize Your Voicemail

- 1) Dial ***98** from the phone that is connected to your account.
- 2) Enter your **4-digit PIN**, followed by **#**.
 - Your **default PIN** is **1234**.
- 3) Press **8**.

Actions Include:

Change your PIN	Press 1
Personalize your greeting	Press 2
Record your personal name	Press 3
Set up Call Forwarding	Press 5
Set up a Call Screening Forwarding Number	Press 6
Repeat personal options	Press 9
Exit Menu	Press 0

PHONE USER GUIDE

SETTING UP YOUR PHONE

Emergency Services – 911

When someone dials 911, the call is sent to the closest PSAP (Public-Safety Answering Point) – a special 911 call center belonging to the local police, fire, and ambulance services.

To ensure rapid response times, 911 addresses are standardized so that they are accurate and unambiguous for the emergency response units.

The PSAPs are responsible for standardizing all addresses in their jurisdiction. That record of standardized addresses is known as the MSAG (Master Street Address Guide).

When activating a number, we require an address to be associated with that number. Sometimes the address initially provided is not in a standard format: referring to a street by a nickname versus the official name, omitting the directional, the street name has changed, etc. This can cause confusion with where you are located and can delay response times for emergency services or worse.

To best serve you, we validate every address back to the MSAG.

If the address cannot be validated, we will contact you to correct it.

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

Important Note: *If there is loss of power or internet access, your Hosted PBX phone may be unavailable to place a 911 call.*

911 for Remote Office Users

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

Caller ID

Outbound Caller ID

The caller ID number sent with outbound calls is set on each user. Users can send out the main company number, a specific user-assigned number, or not send out any caller ID.

Note: Calls to 911 ignore the caller ID settings of the user and send the 911 callback number set on the device.

Internal Caller ID

When calling another user on your PBX, the user's extension with their name is the caller ID.

Caller ID Block per Call

Prevents your caller ID (name and number), from being displayed to the next person you call.

- 1) Lift the receiver.
- 2) **Dial *67** + the number of the party you're trying to reach.
 - Your caller ID will **not** be displayed to the party you called.
 - Your caller ID will be displayed on future calls.

Unblock Caller ID per Call

To allow your caller ID to be sent to the person you dial:

- 1) Lift the receiver.
- 2) **Dial *82** + the number of the party you're trying to reach.
 - Your caller ID will be displayed to the party you called.
 - Your caller ID will **not** be displayed on future calls.

Manage Caller ID for All Calls

To set your caller ID to show for all calls or to be blocked for all calls:

- 1) Lift the receiver.
- 2) **Dial *68**
- 3) **Enter your 4-digit PIN**, followed by **#**.
 - Your **default PIN** is **1234**.

Actions Include:

Enable Caller ID	Press 1
Disable Caller ID	Press 2
Repeat personal options	Press 9
Exit Menu	Press 0

Caller ID Name/CNAM

The name sent with caller ID, sometimes referred to as CNAM, is a setting on the phone number.

Note: Most mobile phone carriers don't send Caller ID Name to mobile phones. Mobile phones use the Caller ID number and look-up the name in the phone's contact list.

Directory

If available on the IP phone you are using, a company directory will be accessible.

Note: This directory is automatically generated based on the user information on the account.

Speed Dial

To quickly dial numbers that are commonly called, you can use the additional buttons on your phone as speed dials.

Note: These buttons must be configured in the voice web portal.

Line Monitoring/BLF

Working closely with other members of your team sometimes involves answering their phones. Line Monitoring, or Busy Lamp Field (BLF), allows you to set one of your unused phone lines to monitor the status of another user. This functions as a speed dial and can be used to answer a call ringing on another person's phone, or to see if your team member is currently on the phone or not.

Note: These buttons must be configured in the voice web portal.

Shared Lines

When a team wants to work together to answer the same calls, this simple method allows multiple phones to share the same extension. All calls ringing to the assigned extension will ring any of the phones sharing this line. When receiving a call, the IP Phone display will show which extension is ringing.

Note: Users can also place an outbound call from their normal extension or choose from any shared extensions they have configured.

Note: These buttons must be configured in the voice web portal.

Adding a Sidecar/Expansion Module

If you need access to additional speed dial/monitored lines/shared line buttons, an expansion module can be added to most IP phone models.

Note: Configuration of the buttons found on an expansion module must also be configured in the voice web portal.

MANAGING CALLS

Using your phone to perform common tasks

How to Dial

Because your phone is an IP phone, it allows you to pick up the handset and, once you hear the dial tone, dial the number or it allows you to dial the number before picking up the handset. In either scenario, you can “backspace” to correct the number you are dialing without redialling the number from the beginning.

Note: To let us know you are calling a number that isn't an extension, dial a 9 and we will know to let you finish entering the full phone number.

Social and Public Services

The following services are available using a short code through your phone service.

211 – Community Services Assistance

Access to information about health and human services by dialing “211” (United States).

411 – Directory Assistance

Nationwide U.S. Directory Assistance can be reached by dialing “411”.

611 – Call Elevate Voice Customer Service

Specially set up short code for you to be able to contact our customer service team.

711 – Telecommunications Relay Service

Telecommunications Relay Service (TRS) can be accessed by dialing “711” (United States and Canada).

811 – Local Utilities “Call Before You Dig”

Each state has its own 811 call center to help you get digging. An 811 representative will take information about your project and notify appropriate utility companies to mark buried lines, so you can dig safely around them.

911 - Emergency Services

When you dial “911”, your call is connected to a local 911 operator in the nearest Public Safety Answering Point (PSAP) based on your address.

Note: The 911 operator is sent the callback number and address for that number.

Call Trace

Call Trace allows you to mark a harassing or threatening phone call.

Use Call Trace

- 1) After hanging up the call, **Dial *57**.
- 2) You will hear a prompt saying, “The previous call will be marked in your call history.”
- 3) In your call history, there will be a log for the call trace.

Note: This action doesn’t initiate any law enforcement or actions against the caller. You must take additional actions to establish a case with your local law enforcement agency.

Call Conference

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

Use Call Conference on Polycom VVX

- 1) While on a call, press **[More]** then **[Confnc]**.
- 2) Enter the second number/extension to have on the call
- 3) When the second party answers, press **[More]** then **[Confnc]**.

*Note: To split the conference call back into individual calls, press **[Split]**.*

*Note: To re-join the callers again, press **[Join]**.*

Use Call Conference on Yealink

- 1) While on a call, press **[Conference]**.
- 2) Enter the second number/extension to have on the call.

- 3) When the second party answers, press **[Conference]**.

*Note: To split the conference call back into individual calls, press **[Split]**. There is not way to rejoin the callers once split.*

Call Hold

When placing a call on hold, the caller will listen to hold music. Your phone will let you know that you have a call holding for you by displaying the holding call.

Use Call Hold

- 1) While on a call, press **[Hold]**.
- 2) To retrieve the call, press **[Resume]**.

Call Park

When you need to transfer a call to another person or another phone, call park can be used as a place to hold the call and retrieve it from another phone. The caller will hear hold music, and you can change phones, or have someone else retrieve the call from any other phone on the account.

Use Call Park via Assigned Line on IP Phone

When you have a parking spot assigned to a line on your phone, you can send calls there and retrieve them at the click of a button.

Note: Please contact Customer Care to set up the parking spots. Once created, the parking spots can be assigned to your IP phone via the online voice portal.

Park a Call

- 1) While on a call, press the button assigned to the parking spot.
- 2) The call will be placed in that parking spot.

Retrieve a Parked Call

- 1) Press the button on the phone with the assigned parking spot the call has been placed in.
- 2) You will be connected with the parked caller.

Use Call Park via Star Code

If you do not want to use a line on your phone as a reserved parking spot, you can still park calls via the Call Park and Call Park Retrieval star codes.

Park a Call via Star Code

- 1) While on a call, press **[Transfer]**.
- 2) **Dial *52.**
- 3) The system will indicate the parking spot the call has been placed in.
 - Ex: "Call parked at location 01."
- 4) Hang up.

Retrieve a Parked Call via Star Code

- 1) **Dial *53 + the parking spot** the call was placed in.

- Ex: *5301
- 2) You will be connected with the parked caller.

Call Return

If you want to call back the last person that called you, instead of dialing their number, you can use Call Return.

Use Call Return

- 1) Lift the receiver.
- 2) **Dial *69.**
- 3) You will be connected to the last number that called you.

Call Transfer – Attended Transfer

When you want a chance to talk to the person to whom you are transferring a call, try this. The person you are calling will see that the call is coming from your caller ID.

Use Attended Transfer

- 1) While on a call, press **[Transfer]**.
 - The caller will begin to hear hold music.
- 2) **Dial** the extension/phone number where the call should be transferred.
- 3) When the extension/phone number called picks up, **inform** them of the transfer.
- 4) **Hang up**
 - The caller will be transferred over to the new extension/phone number.

Call Transfer – Blind Transfer

If you are sending a call to another party and do not need to talk to them before transferring the call, use this method. The party you transfer the call to will see the call as if it is coming from the original caller.

Use Blind Transfer

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

*Note: On Yealink phones, to Blind Transfer: press **[Transfer]**, dial the extension/phone number and press **[Transfer]** again. This will show the phone number of the person transferring the call.*

Call Transfer – Directly to Voicemail

When you want to transfer a current call to the correct person without interrupting their current call or having it ring at their desk, you can transfer the current call directly to that user's voicemail box.

Use Transfer Directly to Voicemail

- 1) Place caller on **Hold**.
 - The caller will begin to hear hold music.
- 2) **Dial *00 + the extension.**
- 3) Press [**Dial**].
- 4) Press [**More**].
- 5) Press [**Join**].
- 6) **Hang up**
 - The caller will be in the other user's voicemail box.

*Note: On Yealink phones, to transfer a call to voicemail: press [**Transfer**], dial *00 + the extension, and press [**B Transfer**].*

Call Waiting

While on a call, if a second call comes in, you'll hear the Call Waiting tone. To answer that call, you can choose to place your current call on hold and pick up the incoming call. Additionally, you can temporarily or completely enable or disable Call Waiting from your phone, or from your Elevate Voice Online Voice Portal.

Note: Reference the Call Handling section for how to enable/disable Call Waiting from the online portal.

Use Call Waiting

When Call Waiting is enabled on your phone, follow the directions below to switch between your current call and a new incoming call.

- 1) When notified of a second incoming call, press the line button on your phone.
- 2) Your first call will be placed on hold, and your second call will be active.
 - You can switch between the two calls by pressing the line button for the call you want to switch to.

Temporarily Disable Call Waiting – One Call

Keep the next phone call you make from being interrupted.

- 1) Lift the receiver.
- 2) **Dial *70 + the number of the party you're trying to reach.**
 - Call Waiting is disabled for the current call.
- 3) After you hang up, Call Waiting will be active again.

Enable/Disable Call Waiting – All Calls

Enable or Disable Call Waiting on all future calls.

- 1) **Dial *43 to enable** Call Waiting for all calls.
- 2) **Dial *44 to disable** Call Waiting for all calls.

Directed Call Pick Up

When you want to be able to answer calls for other people in your office, you can use the Directed Call Pick Up feature.

Use Directed Call Pick Up

When you'd like to answer the phone for someone else in the office follow these simple steps.

- 1) **Dial *12** + the user's extension.
- 2) You will now be connected with the caller.

Pick Up Group

Instead of dialing a star code and extension to pick up another person's call, you can create a pick up group and answer anyone's call in that group with just a star code.

Note: Please contact Customer Care to set up the pick up group(s).

Use Pick Up Group

When you'd like to answer the phone for someone else in the office who is in the same pick up group, follow these simple steps.

- 1) **Dial *11.**
- 2) You will now be connected with the caller.

Paging

You can make an announcement to all the phones on your account by using the paging service. All phones that are not in use will use the speakerphone to play the message. This allows you to send a message to the people in your company, without disturbing the lobby or other sensitive areas.

Note: Please contact Customer Care to set up the paging group(s). Once created, the paging group(s) can be assigned to your IP phone via the online voice portal.

Use Paging

When you'd like to make an announcement to others in the office.

- 1) **Press** the button assigned to the paging group
- 2) You will now be connected with all users in the paging group.

Do Not Disturb

When you are busy and don't want your phone to ring, you can activate "Do Not Disturb". This will cause all calls to be sent directly to your voicemail box.

Note: This can also be enabled and disabled in the online voice portal.

Enable/Disable Do Not Disturb – All Calls

- 1) **Dial *78** to **enable** Do Not Disturb for all calls.
 - You will hear a prompt saying, "Do not disturb enabled".
- 2) **Dial *79** to **disable** Do Not Disturb for all calls.
 - You will hear a prompt saying, "Do not disturb disabled".

HOW AND WHICH CALLS RING YOUR PHONE

Call Screening

You have control to ensure you receive important calls. You can limit the callers that ring your phone, filter callers, or forward important callers to another number. Calls from anonymous callers, or other callers, can be given special treatment: either being blocked, sent directly to voicemail, forwarded to another phone number (like your mobile), or having a custom ring pattern assigned.

Anonymous Call Block

Calls from anonymous callers or phones not sending a caller ID, can waste your time and distract you from other calls you want to take. These calls can be filtered from even ringing your phone. You can choose to have anonymous callers either hear a busy signal or a message informing them that you are not accepting calls from anonymous callers.

Enable/Disable Anonymous Call Block

Anonymous caller will hear a busy tone.

- 1) **Dial *77 to enable** Anonymous Call Block.
 - You will hear a prompt saying, “Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line”.
- 2) **Dial *87 to disable** Anonymous Call Block.
 - You will hear a prompt saying, “Your anonymous call rejection service has been deactivated”.

Enable/Disable Anonymous Call Block with Message

Anonymous caller will hear a message indicating anonymous callers are not allowed.

- 1) **Dial *96 to enable** Anonymous Call Block with Message.
 - You will hear a prompt saying, “Your anonymous call rejection service has been activated. All incoming calls will be checked for number privacy before they are allowed to complete to your line”.
- 2) **Dial *97 to disable** Anonymous Call Block with Message.
 - You will hear a prompt saying, “Your anonymous call rejection service has been deactivated”.

Call Screening – All Callers

If you don't want to receive calls from anyone, you can use this feature and then enable only specific callers to reach you (see [Allow Custom Caller](#)).

- 1) **Dial *75 to enable** All Other Callers Block.
 - You will hear a prompt saying, “Your selective call accept service has been activated”.
- 2) **Dial *74 to disable** All Other Callers Block.
 - This will allow calls from everyone NOT specifically blocked.

- You will hear a prompt saying, “Your selective call accept service has been deactivated”.

Call Screening – Custom Number

If you want to screen calls from a specific number, you can use the Custom Call Screening feature to control who can call your phone and what happens when they do. This can be done via the online voice portal or star code.

Allow Custom Caller

If you have blocked all callers and want to allow a specific caller to contact you, use this feature.

- 1) **Dial *64 or *94**
- 2) Enter your voicemail **PIN** followed by **#**.
- 3) Enter the **number** to be blocked followed by **#**.
 - You will hear a prompt saying, “Calls from [phone number you entered] will be allowed”.

Block Custom Caller

If you have allowed all callers and want to block a specific caller, use this feature. The caller will hear a busy signal instead of reaching you.

- 1) **Dial *60 or *80**
- 2) Enter your voicemail **PIN** followed by **#**.
- 3) Enter the **number** to be blocked followed by **#**.
 - Be sure to include “1” before the 10-digit phone number.
 - You will hear a prompt saying, “Calls from [phone number you entered] will be blocked”.

Block Custom Caller with Message

The caller will hear a message indicating that calls are not being accepted at this time.

- 1) **Dial *58**
- 2) Enter your voicemail **PIN** followed by **#**.
- 3) Enter the **number** to be blocked followed by **#**.
 - Be sure to include “1” before the 10-digit phone number.
 - You will hear a prompt saying, “Calls from [phone number you entered] will be blocked”.

Note: The message the caller will hear is “The number you have dialed is not accepting calls at this time. Please try again later.”

Forward Custom Caller

- 1) **Dial *63 or *83**
- 2) Enter your voicemail **PIN** followed by **#**.
- 3) Enter the **number** to be forwarded followed by **#**.
 - You will hear a prompt saying, “Calls from [phone number you entered] will be forwarded”.

*Note: A screening forward number **must** be set up in the online voice portal. All callers configured with the Forward setting without a Screening Forward Number will fail over to the All Other Callers setting.*

Call Forwarding

When you will not be available to answer calls on your phone, you can have the calls forwarded somewhere else.

Access Call Forwarding Menu

- 1) **Dial *72 or *73**
- 2) Enter your **PIN** followed by **#**.
- 3) Current Status of Call Forwarding feature will be given.
- 4) To **forward** all calls, **press 1**.
 - Enter **forwarding** destination number followed by the **#** sign.
 - You will hear, "All calls will be forwarded".
- 5) To send all calls to your line, **press 2**.
 - You will hear, "Calls will ring your line, goodbye".

Call Forwarding - Remote Access

When you are away from your phone, but still want to receive calls, you don't need to get back to your phone to set things up. Unconditional call forwarding, or forwarding of all calls, is available remotely using the voicemail system.

Note: This service will continue to function even if there is a power outage, Internet outage, or device failure.

Remotely Access Call Forwarding for All Calls

- 1) Access Your Voicemail Menu
 - **Dial your 10-digit phone number** from a phone not connected to your account.
 - When you hear your voicemail greeting, **press #**.
 - Enter your **4-digit PIN**, followed by **#**.
- 2) **Press 8** for personal options.
- 3) **Press 5** to access the Call Forwarding Menu.
- 4) Current Status of Call Forwarding feature will be given.
- 5) To **forward** all calls, **press 1**.
 - Enter **forwarding destination number** followed by the **#** sign.
 - You will hear, "All calls will be forwarded".
- 6) To send all calls to your line, **press 2**.
 - You will hear, "Calls will ring your line, goodbye".

Call Forward – Busy

When you are on another call or your phone is off-hook you can send your calls to another number.

Use Call Forward – Busy

- 1) **Dial *90 or *91**
- 2) Enter your **PIN** followed by **#**.

- 3) To **forward** all calls when your line is **busy**, **press 1**.
 - Enter **forwarding destination number** followed by the **#** sign.
 - You will hear, “All calls will be forwarded when your line is busy, goodbye”.
- 4) To **send** all calls to **voicemail** when your line is **busy**, **press 2**.
 - You will hear, “Calls will be sent to voicemail when your line is busy, goodbye”.

Call Forward – No Answer

Rather than have your unanswered calls go to voicemail, you can have calls forwarded to another phone number.

Use Call Forward – No Answer

- 1) **Dial *92 or *93**
- 2) Enter your **PIN** followed by **#**.
- 3) To **forward** all calls when not answered, **press 1**.
 - Enter **forwarding destination number** followed by the **#** sign.
 - You will hear, “All calls will be forwarded when not answered, goodbye”.
- 4) To **send** all calls to **voicemail** when not answered, **press 2**.
 - You will hear, “Calls will be sent to voicemail when not answered, goodbye”.

Call Forward – Out of Service

Use Call Forward – Out of Service

- 1) **Dial *95**
- 2) Enter your **PIN** followed by **#**.
- 3) To **forward** all calls when your line is out of service, **press 1**.
 - Enter **forwarding destination number** followed by the **#** sign.
 - You will hear, “All calls will be forwarded when your line is out of service, goodbye”.
- 4) To **send** all calls to **voicemail** when your line is out of service, **press 2**.
 - You will hear, “Calls will be sent to voicemail when your line is out of service, goodbye”.

Scheduled Rules

You may set up a schedule to forward calls during certain hours, like a lunch break. Your phone will be forwarded at the same time every day, based on the schedule you set.

Note: Schedules will need to be created and managed in the online voice portal.

Voicemail and Unified Messaging

You can have your voicemail messages delivered to an email address or listen to your voicemail messages by dialing into the voicemail system.

Note: For instructions on using the voicemail features, see your [Voicemail Guide](#).

Voicemail to Email

Voicemail messages can be converted to a .mp3 file and sent to an email address or list of email addresses. Voicemail to email can be setup using the online voice portal.

Access on Power/Connectivity Failure

In the event of a power outage, internet outage, or device failure; people that attempt to call you will go to your voicemail. Call Forwarding, Sim Ring, or Find-Me/Follow-Me will continue to function.

Remote Access to Voicemail

Even when you are away from your phone, you can call into your voicemail box to check voicemail messages. Dial “#” while listening to your voicemail message to access your voicemail box.

Note: You must have set up a PIN from your phone to be able to access your voicemail remotely.

Busy and No Answer Voicemail Greetings

You can let callers know a little more about why you did not answer the phone. You can have callers hear a different greeting when you are on the phone (busy) versus when you are not around to answer (no answer).

Voicemail Message Waiting Indicator (MWI)

A stuttered dial tone indicates your voicemail box has unread messages. This tone lets you know you have new messages or messages marked as unread in your voicemail box.

Shared Voicemail

A voicemail box can be set up to be accessed by multiple people. Each user has an independent PIN to log into the voicemail box. Any user assigned to the voicemail box can listen to messages, set up a greeting, and forward messages to email.

ACCOUNT-WIDE SERVICES

Auto Attendant

Inbound calls to your main company number can be answered by a recorded message allowing callers to make a selection and get connected with the right department or person.

Music on Hold

This allows you to set not only music, but also specific messaging for your company that your callers will hear whenever they are placed on hold.

Note: This feature is limited to one audio file for your account.

Faxing

The Virtual Fax (VFax) solution is an alternative to a physical fax machine which allows you to receive faxes via email. This gives you flexibility, allowing you to work from anywhere. This is accomplished by our system converting faxes it receives into PDF files, which are then delivered to the specified email address. We offer both Dedicated VFax, where a line on your account is strictly for receiving faxes, and Shared VFax, where a line may receive both phone calls and faxes and the system will differentiate which is which and react appropriately.

Note: To send a fax, you will need to use a fax machine with an analog to digital adapter.

PORTAL GUIDE – STANDARD USER

GETTING STARTED

Welcome to the Elevate Voice Voice Platform!

As part of our services we offer you access to your own online voice management portal (elevatevoice.user.alianza.com).

It is within this portal that you can control who can contact you, how they will reach you, and even when they will reach you.

This is in addition to the star codes that allow you to control voice features right from your phone.

To obtain your login information, you will need to contact our Customer Service team at 1 (913) 307-8585 or by dialing 611 from your Elevate Voice phone.

LOGGING INTO THE ELEVATE VOICE ONLINE VOICE PORTAL

To log into the Elevate Voice Online Voice Portal, you will need to have your username and password.

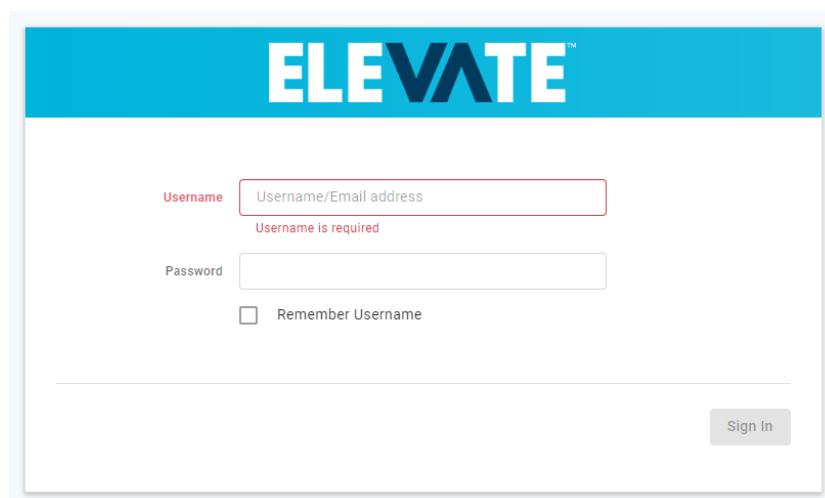
First-Time Login

- 1) Go to elevatevoice.user.alianza.com.
- 2) Enter your username.
- 3) Enter the temporary password.
- 4) Click **[Sign In]**.
 - There is the optional choice to have your username be remembered.
- 5) When prompted, create a new password.
 - Your password must have:
 - At least 8 characters
 - A lowercase letter
 - An uppercase letter
 - A number
 - No parts of your username

Future Logins

- 1) Got to elevatevoice.user.alianza.com.
- 2) Enter your username.
- 3) Enter the password you created.
- 4) Click **[Sign In]**.

Note: For information on changing your password, see [Resetting Your Portal Password](#).



The screenshot shows the login interface for the Elevate Voice Online Voice Portal. At the top, there is a blue header with the "ELEVATE" logo in white. Below the header, the login form is centered. It includes a "Username" label, a text input field with the placeholder "Username/Email address", and a red error message "Username is required" below the field. Below the username field is a "Password" label and a corresponding text input field. Under the password field is a checkbox labeled "Remember Username". At the bottom right of the form is a "Sign In" button.

ELEVATE™

You must change your password.

New Password

Confirm Password

Your password has expired and must be changed. Your password must contain 2 of the following: special character, number, upper case letter, or lower case letter

Confirm

THE ELEVATE VOICE ONLINE VOICE PORTAL

Within the Elevate Voice Online Voice Portal, there are five sections: [User Info](#), [Phone Numbers](#), [Call Handling](#), [Call Screening](#), and [Voicemail Box Settings](#).

User Info

The User Info section will show your account name and number, the phone number(s) pointed to you, your E911 address, which phone number is being used as your outbound caller ID, and the device(s) assigned to you.

Note: If the E911 address is NOT correct, contact Customer Service right away.

User Info - Peter Martinez (8014206491)	
Account Name	Customer Demo
Account Number	87654321
Direct Phone Numbers	1 (801) 206-4901
E911 Address	333 S 520 W, Lindon, UT 84042
Outbound Caller ID	18012064901
Devices	TM502G - Line 2

Phone Numbers

Lists the phone number(s) on the account that are routed to you and your phone(s).

Phone Numbers	
Routed to User	1 (801) 206-4901

Call Handling

Within this section a schedule can be created and other actions setup for when you get a call. If the call is not answered; the call can be sent to voicemail, forwarded to another number, or given a busy tone.

Actions Include:

- **Scheduling**
 - Create one or more schedules to dictate different behaviors based on the date/time the call comes in.
 - See [Creating a Schedule](#) for more information on creating these.
- **Call Waiting**
 - Checking this box will allow a second call to ring through while you are already on the phone.

- **Do Not Disturb**

- Checking this box will stop the phone from ringing and follow the call flow set for when a call is not answered (usually directing it to voicemail).

- **Ring Phone**

- This will ring the phone associated with the account.
- There are 3 ways the call could not be answered:
 - The call is unanswered after a set number of seconds.
 - The device is busy (already in use and Call Waiting is not enabled) so couldn't take the call.
 - The device is out of service (device lost power and is not showing as an active device).

The screenshot shows the 'Call Handling' settings page. At the top, there is a 'Scheduling' section with a 'Create Schedule' button and '0 Schedules'. Below this, there are checkboxes for 'Call Waiting' (checked) and 'Do Not Disturb' (unchecked). A row of four buttons is present: 'Ring Phone' (highlighted in blue), 'Forward All', 'Sim Ring', and 'Find Me'. Under 'Ring Phone', there are three settings: 'No Answer' set to 'Send to Voicemail' with a dropdown arrow, 'after 20 seconds'; 'Busy' set to 'Busy Tone' with a dropdown arrow; and 'Out of Service' set to 'Forward to' with a dropdown arrow and a text input field containing '1 (308) 555-1234'.

- **Forward All**

- Allows you to choose an alternate phone number to which all calls will be sent.

The screenshot shows the 'Forward All' settings page. At the top, there are four buttons: 'Ring Phone', 'Forward All' (highlighted in blue), 'Sim Ring', and 'Find Me'. Below these buttons, there is a 'Forwarding Number' label and a text input field containing '1 (308) 555-1234'.

- **Sim Ring**

- Simultaneous Ring will ring all numbers added to the list. The first phone number to pick up will take the call.

Note: Use [+Add Number] to add more phone numbers.

- A time limit can be given for how long the numbers receive the call or the call can ring forever.
 - If a time limit is given, the No Answer options to choose from are Busy Tone, Forward to, and Send to Voicemail.

- **Find Me**

- Find Me Follow Me will ring each destination sequentially.
- If the call isn't answered by any of the destinations, the call will be sent to the Timeout Action (Busy Tone or Send to Voicemail).
- The order for the different destinations can be changed using the carrots (highlighted in yellow below).

*Note: Use **[+Add Destination]** to add more destinations (up to 4 total destinations).*

Call Screening

Like sunscreen, Call Screening can help you block out unwanted things trying to reach you. Plus, using this tool you can decide what happens to the calls you turn away. Are they hung up on automatically, or do they hear a message first? Do you forward them to another number, or do you send them to your voicemail?

*Note: Specific telephone numbers can be added to the list by selecting **[+Add a Caller]**. If there are more than 2 custom callers (specific phone numbers), they can be hidden.*

Actions Include:

- **Allow**

- Call will ring through and follow the call handling settings setup.

- **Allow with Priority Ring**
 - There is the standard ring and then 7 other ring patterns to choose from.
- **Block**
 - Caller will hear a busy signal.
- **Block with Message**
 - Before the call is disconnected, the caller will hear a message play: “The number you have dialed is not accepting calls at this time. Please try again later.”
- **Forward**
 - If you choose to forward calls from caller, you must choose the number those calls are forwarded to in the **Screening Forward Number** field.
- **Voicemail**
 - Caller will be sent to your voicemail.

Call Screening

+ Add Caller

Screening Forward Number

1 (908) 555-1234

This is the destination Number used when Forward is selected as a Call Screening setting.

Anonymous Caller

Block with Message

Toll-free Caller

Block

All Other Callers

Allow

Custom Caller(s)

12125551234

Allow with Priority Ring

×

Priority Ring

Priority Ring 3

17175551324

Forward

×

18015551234

Voicemail

×

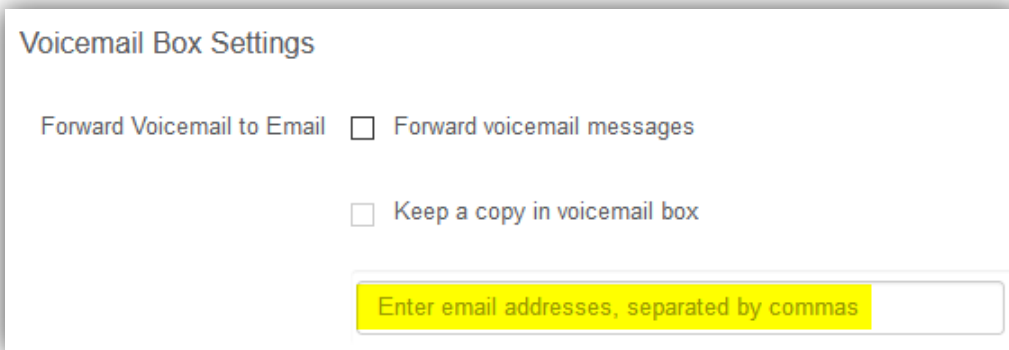
hide extra callers

Voicemail Box Settings

Messages left on your voicemail box can be sent as an MP3 file to one or more email addresses.

You have the option to keep the voicemail in the voicemail box:

- These settings allow you to choose to listen to the message on your phone or via an MP3 file.
- If a copy is kept in the voicemail box, the message waiting indicator on your phone will stay on until the voicemail is listened to from the phone or saved/deleted from the visual voicemail box.

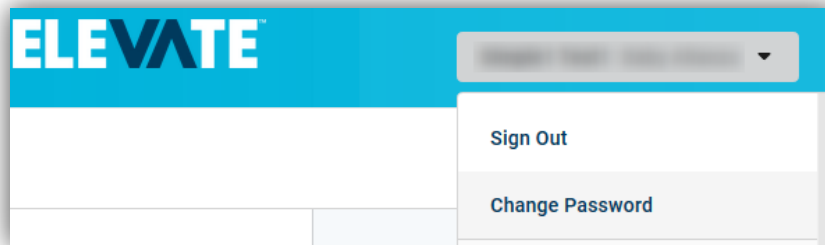


The image shows a 'Voicemail Box Settings' form. It has a title 'Voicemail Box Settings' at the top. Below the title, there are two checkboxes: 'Forward Voicemail to Email' followed by 'Forward voicemail messages', and 'Keep a copy in voicemail box'. At the bottom of the form, there is a text input field with a yellow background and the placeholder text 'Enter email addresses, separated by commas'.

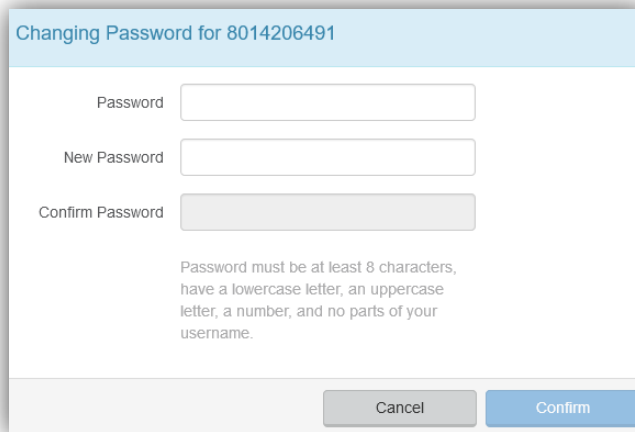
Resetting Your Portal Password

If you ever need to reset your portal password, the steps are simple.

- 1) Click **your name** in the top-right area of the screen.
- 2) Click [**Change Password**].



- 3) Enter your **current password** in the field provided.
- 4) Enter your **new password** in the field provided.
- 5) **Confirm your new password** in the field provided.
 - Your password must be at least 6 characters in length and contain 2 of the following:
 - A special character
 - A number
 - An upper-case letter
 - A lower-case letter
- 6) Click [**Confirm**].



Changing Password for 8014206491

Password

New Password

Confirm Password

Password must be at least 8 characters, have a lowercase letter, an uppercase letter, a number, and no parts of your username.

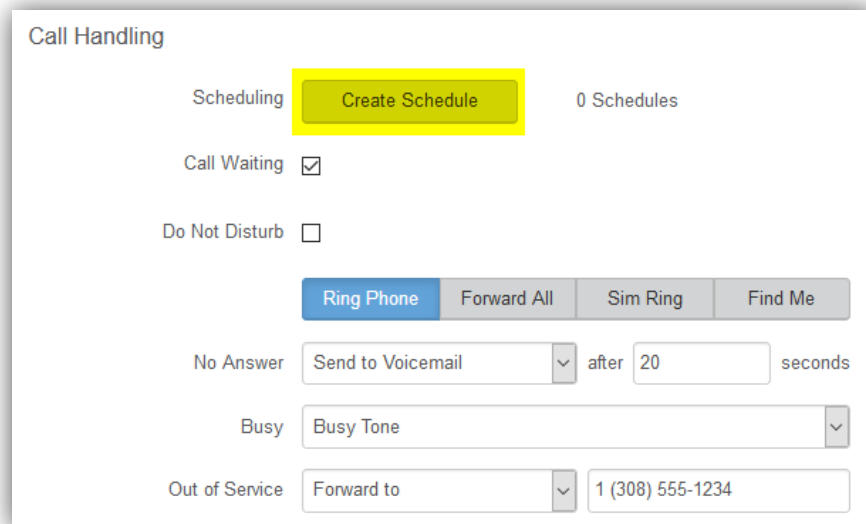
Cancel Confirm

Creating a Schedule

Within the scheduler, the call handling options will be the same as what's in the main call handling section: Ring Phone, Forward All, Sim Ring, and Find Me (see [Call Handling](#) for information on those features).

Note: The main call handling options will take effect OUTSIDE of the scheduled hours.

- 1) Navigate to **Call Handling**.
- 2) Click [**Create Schedule**].
 - If there are already schedules on the account, the button will read **Manage Schedule**.



Call Handling

Scheduling **Create Schedule** 0 Schedules

Call Waiting ☒

Do Not Disturb ☐

Ring Phone Forward All Sim Ring Find Me

No Answer Send to Voicemail after 20 seconds

Busy Busy Tone

Out of Service Forward to 1 (308) 555-1234

- 3) In the newly opened scheduling window, click [**+Add Schedule**].

The screenshot shows a 'Scheduling' window. At the top right is a yellow button labeled '+ Add Schedule'. Below it is a table with two columns: 'Name' and 'Type'. The table is currently empty, with the text 'No items' centered below the column headers. At the bottom right of the window are two buttons: 'Dismiss' and 'Save'.

- 4) Enter a **Schedule Name** for the new schedule.
- 5) Choose whether this will be specific dates (“Custom”) or recurring (Weekly).
- 6) Fill in the **dates and times**.
 - The start time cannot be later than the end time.
 - If not using 24-hr time, include “am” and “pm” after the time.
 - For weekly recurring schedules, you do NOT have to provide times for all days – just the days of the week you want this call handling to take effect.
- 7) Choose the **call handling** to happen DURING the specified times.
 - In the **custom schedule** example below, any call received during the specific time being set will be forwarded to 19085551234.
- 8) Click [**Confirm**] to save the schedule.
- 9) Click [**Save**] to exit out of the scheduler window.

Scheduling

+ Add Schedule

Name	Type
^ v	Weekly ^ Edit
Schedule Name <input type="text"/>	
<div>Custom Weekly</div>	
Sun	Start Time <input type="text"/> End Time <input type="text"/>
Mon	Start Time <input type="text"/> End Time <input type="text"/>
Tue	Start Time <input type="text"/> End Time <input type="text"/>
Wed	Start Time <input type="text"/> End Time <input type="text"/>
Thu	Start Time <input type="text"/> End Time <input type="text"/>
Fri	Start Time <input type="text"/> End Time <input type="text"/>
Sat	Start Time <input type="text"/> End Time <input type="text"/>
<div>Call Handling</div>	
Call Waiting <input checked="" type="checkbox"/>	
Do Not Disturb <input type="checkbox"/>	
<div>Ring Phone Forward All Sim Ring Find Me</div>	
No Answer	<div>Send to Voicemail v after 20 seconds</div>
Busy	<div>Send to Voicemail v</div>
Out of Service	<div>Send to Voicemail v</div>
<div>Delete Cancel Confirm</div>	

Custom Schedule Example

[+ Add Schedule](#)

Name	Type
^ v	Custom ^ Edit

Schedule Name

Custom

Weekly

+ Add a Day

Date

2018-12-10

Start Time

End Time

Call Handling

Call Waiting

☒

Do Not Disturb

☐

Ring Phone

Forward All

Sim Ring

Find Me

Forwarding Number

1 (908) 555-1234

Delete

Cancel

Confirm

PORTAL GUIDE – ADMIN USER

GETTING STARTED

Welcome to the Elevate Voice Voice Platform!

As part of our services we offer you access to your own online voice management portal (elevatevoice.user.alianza.com).

It is within this portal that you can control who can contact you, how they will reach you, and even when they will reach you.

This is in addition to the star codes that allow you to control voice features right from your phone.

To obtain your login information, you will need to contact our Customer Service team at 1 (913) 307-8585 or by dialing 611 from your Elevate Voice phone.

LOGGING INTO THE ELEVATE VOICE ONLINE VOICE PORTAL

To log into the Elevate Voice Online Voice Portal, you will need to have your username and password.

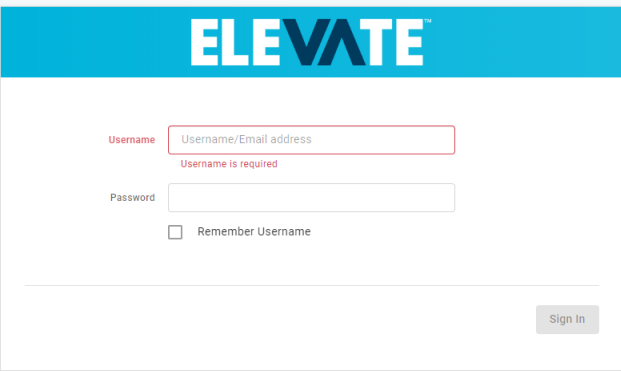
First-Time Login

- 1) Go to elevatevoice.user.alianza.com.
- 2) Enter your username.
- 3) Enter the temporary password.
- 4) Click **[Sign In]**.
 - There is the optional choice to have your username be remembered.
- 5) When prompted, create a new password.
 - Your password must have:
 - At least 8 characters
 - A lowercase letter
 - An uppercase letter
 - A number
 - No parts of your username

Future Logins

- 1) Got to elevatevoice.user.alianza.com.
- 2) Enter your username.
- 3) Enter the password you created.
- 4) Click **[Sign In]**.

Note: For information on changing your password, see [Resetting Your Portal Password](#).



ELEVATE™

You must change your password.

New Password

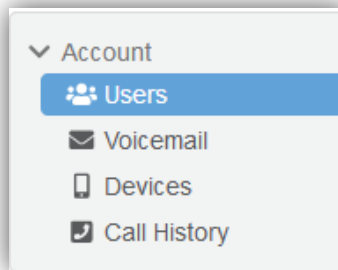
Confirm Password

Your password has expired and must be changed. Your password must contain 2 of the following: special character, number, upper case letter, or lower case letter

Confirm

THE ELEVATE VOICE ONLINE VOICE PORTAL

Within the Elevate Voice Online Voice Portal, there are 4 sections: [Users](#), [Voicemail](#), [Devices](#), and [Call History](#).

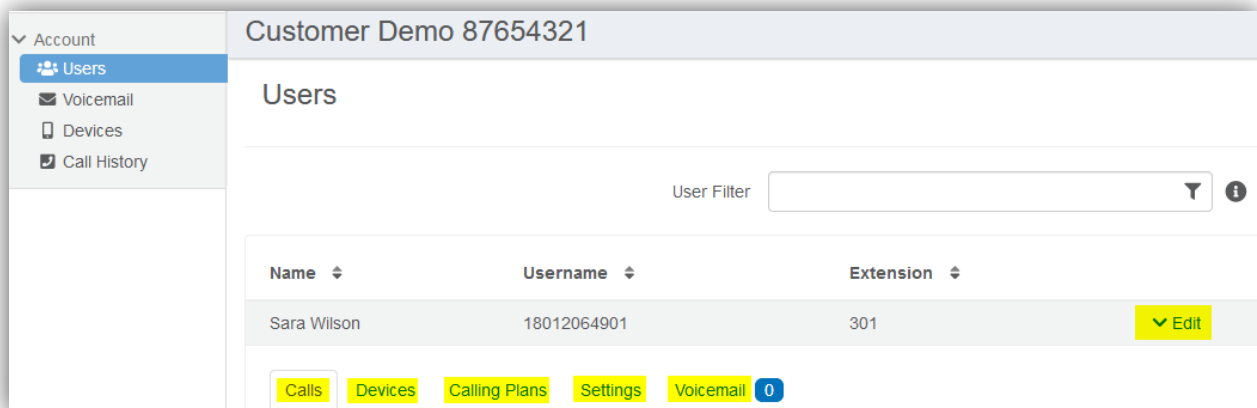


Users

All users on your account will be listed here and this is where you will control how calls are received by each user. To edit these settings for a specific user, you will need to select Edit next to the user in your list of users.

Under each user, there are 5 sub-sections to organize the permissions/features:

1. [Calls](#)
2. [Devices](#)
3. [Calling Plans](#)
4. [Settings](#)
5. [Voicemail](#)



Calls

This is the sub-section to see which phone numbers are directed to this user and to control how incoming calls to this user will be handled via [call screening](#) and [call handling](#).

Sara Wilson
18012064901
301

Calls
Devices
Calling Plans
Settings
Voicemail 0

Phone Numbers

Routed to User 1 (801) 206-4901

Call Screening

Screening Forward Number

_ () _ - _

This is the destination Number used when Forward is selected as a Call Screening setting.

Anonymous Caller

Allow

Toll-free Caller

Allow

All Other Callers

Allow

Call Handling

Phone Numbers

All phone numbers pointing to this user will appear here. When these numbers are called, they will follow the call handling/screening options that you have setup.

Call Screening

You can control how calls from anonymous numbers, toll-free numbers, and other callers (including specific phone numbers) are handled by our system.

*Note: To add custom callers (specific phone numbers) to screen, use the **[+Add Caller]** button. If there are more than 2 custom callers, they can be hidden.*

Actions Include:

- **Allow**
 - Call will ring through and follow the call handling settings setup.
- **Allow with Priority Ring**
 - There is the standard ring and then 7 other ring patterns to choose from.
- **Block**
 - Caller will hear a busy tone.
- **Block with Message**
 - Before the call is disconnected, the caller will hear a message play: “The number you have dialed is not accepting calls at this time. Please try again later.”.
- **Forward**

- If you choose to forward calls from caller, you must choose the number those calls are forwarded to in the Screening Forward Number field.
- **Voicemail**
 - Caller will be sent to your voicemail.

Call Screening

+ Add Caller

Screening Forward Number

1 (908) 555-1234

This is the destination Number used when Forward is selected as a Call Screening setting.

Anonymous Caller

Block with Message

Toll-free Caller

Block

All Other Callers

Allow

Custom Caller(s)

12125551234

Allow with Priority Ring

×

Priority Ring

Priority Ring 3

17175551324

Forward

×

18015551234

Voicemail

×

hide extra callers

Call Handling

Within this section a schedule can be created and other actions setup for when you get a call. If the call is not answered; the call can be sent to voicemail, forwarded to another number, or given a busy tone.

Actions Include:

- **Scheduling**
 - Create one or more schedules to dictate different behaviors based on the date/time the call comes in.
 - See [Creating a Schedule](#) for more information on creating these.
- **Call Waiting**
 - Checking this box will allow a second call to ring through while you are already on the phone.
- **Do Not Disturb**
 - Checking this box will stop the phone from ringing and follow the call flow set for when a call is not answered (usually directing it to voicemail).
- **Ring Phone**
 - This will ring the phone associated with the account.
 - There are 3 ways the call could not be answered:
 - The call is unanswered after a set number of seconds.

- The device is busy (already in use and Call Waiting is not enabled) so couldn't take the call.
- The device is out of service (device lost power and is not showing as an active device).

Call Handling

Scheduling Create Schedule 0 Schedules

Call Waiting ☒

Do Not Disturb ☐

Ring Phone Forward All Sim Ring Find Me

No Answer Send to Voicemail after 20 seconds

Busy Busy Tone

Out of Service Forward to 1 (308) 555-1234

- **Forward All**

- Allows you to choose an alternate phone number to which all calls will be sent.

Ring Phone Forward All Sim Ring Find Me

Forwarding Number 1 (308) 555-1234

- **Sim Ring**

- Simultaneous Ring will ring all numbers added to the list. The first phone number to pick up will take the call.

Note: Use [+Add Number] to add more phone numbers.

- A time limit can be given for how long the numbers receive the call or the call can ring forever.
 - If a time limit is given, the No Answer options to choose from are Busy Tone, Forward to, and Send to Voicemail.

- **Find Me**

- Find Me Follow Me will ring each destination sequentially.
- If the call isn't answered by any of the destinations, the call will be sent to the Timeout Action (Busy Tone or Send to Voicemail).
- The order for the different destinations can be changed using the carrots (highlighted in yellow below).

Note: Use [+Add Destination] to add more destinations (up to 4 total destinations).

Devices

Within this section you will see the devices that have been assigned to this user.

- All devices assigned to the user will appear in the **Device Lines** sub-section.

Sara Wilson

18012064901

301

▼ Edit

Calls

Devices

Calling Plans

Settings

Voicemail 0

Device Lines

Device Type	MAC Address	Line Number	
Arris TM502G	bbcceedd1234	1	▼ Edit

Referenced Devices

Device Type ▼	MAC Address ▼	Line Number ▼	Device Owner ▼
VVX400	aabbccdde22	2	Tyler Wilson

- If the device is an IP phone, there are additional features available: BLF/Presence, Call Park, Paging, Speed Dial, and Shared Line (see [Managing IP Phones](#)).
 - If the user's line is being shared with another user, it will show under the Referenced Devices area.
- If you click on **Edit** next to the device, you will be able to see additional technical details about the device.
 - All device changes outside of the IP phone line assignment features (BLF/Presence, Call Park, Paging, Speed Dial, and Shared Line) will need to be managed by our customer service team.

Sara Wilson

18012064901

301

▼ Edit

Calls

Devices

Calling Plans

Settings

Voicemail 0

Device Lines

Device Type	MAC Address	Line Number	
Arris TM502G	bbcceedd1234	1	▼ Edit

Device Info

Device Type

Arris TM502G

MAC Address

bbcceedd1234

Registration Status

No ✖

Provisioning Logs

Logs

Device Line Info

Line Number

1

Line Name

Line 1

911 Callback Number

18012064901

Registration Status

No ✖

Advanced Line Settings

Fax Enabled

☐ This line is connected to a fax machine

Incoming faxes answered by the voicemail box are always allowed. Enabling fax here changes the device configuration to enable fax settings. These settings will negatively affect voice call quality.

Calling Plans

This section will show you the calling plan(s) that have been assigned to the user. The calling plan(s) will dictate where that user is allowed to call.

Note: For changes to permitted calling areas, please contact Customer Service.

Sara Wilson	18012064901	301	▼ Edit
Calls	Devices	Calling Plans	Settings
			Voicemail 0
Calling Plans			
Calling Plan	Total Minutes	Minutes Used	
US48 Unlimited Residential	Unlimited	0	▼ Edit

Settings

The Settings section under a user grants access to the user's information and settings, including the outbound caller ID number for that user, the time zone used by the system, and the language used in the voicemail menu.

- When the PIN is reset, it is reset to the default: 1234.
 - This will have to be changed on the phone before remote access to your voicemail will be permitted.
- If no caller ID number is chosen, the call will be sent out as Anonymous and could be blocked by the called party's phone system.
 - If no caller ID is wanted, choose an outbound caller ID number and uncheck the Caller ID Enabled box.
 - The caller ID will then be shown as BLOCKED.
- The two roles are Standard and Admin and **cannot** be changed.
- English and French are the two language options for the voicemail menu.

Sara Wilson
18012064901
301
Edit

Calls
Devices
Calling Plans
Settings
Voicemail 0

User Information

Username 18012064901

Name

Sara

Wilson

Extension Number 301

Reset PIN

Reset PIN

Caller ID

Caller ID Number

1 (801) 206-4901

Caller ID Name (CNAM) Company

Caller ID Enabled ☒

User Settings

Time Zone

US/Eastern

End User Role ADMIN

Language

English (United States)

Voicemail

A user's voicemail section shows you the voicemail box they have setup along with granting you access to the voicemail features: voicemail to email and visual voicemail.

Voicemail Box Settings

Messages left on the user's voicemail box can be sent as an MP3 file to one or more email addresses.

You have the option to keep the voicemail in the voicemail box:

- Allows the user to choose to listen to the message on their phone or via an MP3 file.
- If a copy is kept in the voicemail box, the message waiting indicator on the user's phone will stay on until the voicemail is listed to from the phone or saved/deleted from the visual voicemail box.

Voicemail Box Settings

Forward Voicemail to Email ☐ Forward voicemail messages












☐ Keep a copy in voicemail box

Enter email addresses, separated by commas

Visual Voicemail

Shows a timestamp for messages left within the voicemail box, what number left the message, how long the call was, and the status of the message (New or Saved).

- Messages can be sorted by Time/Date, Length, and Status.
- To listen to the message from here you must download it using the download icon.
- All, multiple, or individual voicemails can be selected to delete at one time.
- To delete, check the box next to the voicemail message and click the trashcan icon.
- To save a message, click on the letter icon.
- When you hover your mouse over an icon, the icon's function will show.

Time/Date ▾	Originating Number	Length ▾	Status ▾	 
Jul 21, 2018 2:35 PM	1 (509) [REDACTED]	1 second	New	  
Oct 31, 2017 1:46 PM	1 (801) [REDACTED]	35 seconds	New	  
Jan 11, 2017 12:19 PM	1 (509) [REDACTED]	10 seconds	New	  

Voicemail

This section of the Elevate Voice Online Voice Portal will enable you to manage the voicemail boxes and associated settings for all users on the account.

- Select the voicemail box to manage and then edit the same features presented [above](#).

Account

Users

Voicemail

Devices

Call History

Customer Demo 87654321

Voicemail Boxes

Voicemail Filter

Name	Owners	Voicemails (New/Total)	
Tyler Wilson	Tyler Wilson	1/1	Edit
Sara Wilson	Sara Wilson	0/0	Edit
Peter Martinez	Peter Martinez	0/0	Edit

Account

Users

Voicemail

Devices

Call History

Customer Demo 87654321

Voicemail Boxes

Voicemail Filter

Name	Owners	Voicemails (New/Total)	
Tyler Wilson	Tyler Wilson	1/1	Edit

Voicemail Box Settings

Forward Voicemail to Email

☐ Forward voicemail messages

☐ Keep a copy in voicemail box

 Enter email addresses, separated by commas

Visual Voicemail

Time/Date	Originating Number	Length	Status	
Jun 6, 2017 10:47 AM	1 (801) 561-0187	12 seconds	New	

Devices

This section allows you to manage all the devices on the account without having to go to the specific user.

Note: For more information on devices, see the [Devices](#) sub-section under the [Users](#) section.

© Elevate Voice Confidential

Page 46 of 65

ELEVATE

Account

Users

Voicemail

Devices

Call History

Customer Demo 87654321

Devices

+ Add Device

Device Filter

MAC Address	Device Type	Owners
aabbccdde22	Polycom VVX 400/410	Tyler Wilson
bbcceedd1234	Arris TM502G	Shared by 2

Account

Users

Voicemail

Devices

Call History

Customer Demo 87654321

Devices

+ Add Device

Device Filter

MAC Address	Device Type	Owners
aabbccdde22	Polycom VVX 400/410	Tyler Wilson

Device Info

MAC Address aabbccdde22

Device Type Polycom VVX 400/410

Configuration Status No Details

Swap Device Swap

Bulk Line Configuration

Line Configuration

Line Number	Type	Assignment
1	Device Line	
2	Shared Line	Sara Wilson

Call History

The Call History menu will display all call records. View call records for the current month or search for a specific date range, type of call, and/or specific inbound call flags. This allows you to see the pattern of the calls: What calls are being missed, how many are sent to voicemail, etc. Once the parameters are set, results will be displayed below and can be downloaded into a CSV.

Note: *[Reset Filter] will remove any parameters set and display ALL calls again.*

Account

Users

Voicemail

Devices

Call History

Customer Demo 87654321

Date

between 2018-11-14 and 2018-12-14

Call Types

☐ Inbound
☐ Outbound

Inbound Call Flags

☐ Answered
☐ Busy
☐ Forwarded
☐ Missed
☐ Sent to VM

All None

Reset Filter

Download CSV

Date

From

To

- All calls will be presented in chronological order with the most recent call at the top of the list.
- Use the **Details** link next to the number to access the **block** button and additional information about the call: Time and Length, the Originating number and its location, & the Terminating number and its location.

Date	From	To	
12/6/2018 3:14 PM MST 8 seconds	1 (801) [REDACTED] SALT LAKE CITY, UT	1 (801) [REDACTED] SALT LAKE CITY, UT	Details
11/26/2018 4:14 PM MST 8 seconds	1 (801) [REDACTED] PROVO-OREM, UT	1 (801) [REDACTED] PROVO-OREM, UT	Details
11/16/2018 10:56 AM MST 11 seconds	1 (385) [REDACTED] OGDEN-CLEARFIELD, UT	1 (801) [REDACTED] SALT LAKE CITY, UT	Details

- Use the **block** button to quickly add a specific number to a user's blocked caller's list in the Screening Calls section.
 - After clicking **[Block]**, choose which user's call screening this number will be added to.

12/6/2018 3:14 PM MST
8 seconds

1 (801) [REDACTED]
SALT LAKE CITY, UT

1 (801) [REDACTED]
SALT LAKE CITY, UT

Details

Block 1 (801) [REDACTED]

Block

Time and Length

Start Time 12/06/2018 3:14:43 PM MST

Connected Time 12/06/2018 3:14:43 PM MST

End Time 12/06/2018 3:14:52 PM MST

Actual Length 8 seconds

Origination

Number 1 (801) [REDACTED]

Location SALT LAKE CITY, UT

Termination

Number 1 (801) [REDACTED]

Location SALT LAKE CITY, UT

Select Screening Location

Location

User - Sara Wilson (18012064901)

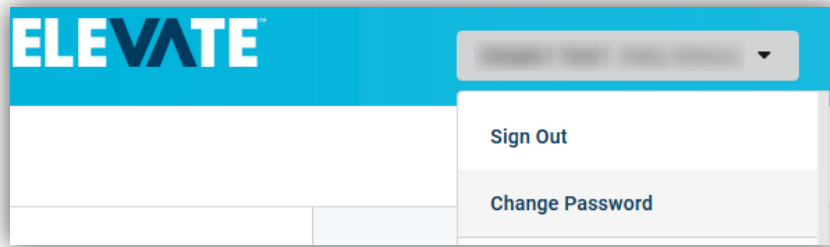
Dismiss

Confirm

Resetting Your Portal Password

If you ever need to reset your portal password, the steps are simple.

- 1) Click **your name** in the top-right area of the screen.
- 2) Click **[Change Password]**.



- 3) Enter your **current password** in the field provided.
- 4) Enter your **new password** in the field provided.
- 5) **Confirm your new password** in the field provided.
 - Your password must be at least 6 characters in length and contain 2 of the following:
 - A special character
 - A number
 - An upper-case letter
 - A lower-case letter
- 6) Click [**Confirm**].

A screenshot of a modal window titled 'Changing Password for 8014206491'. The modal has a light blue header. Inside, there are three input fields: 'Password', 'New Password', and 'Confirm Password'. Below the fields is a text block stating: 'Password must be at least 8 characters, have a lowercase letter, an uppercase letter, a number, and no parts of your username.' At the bottom right of the modal are two buttons: 'Cancel' (grey) and 'Confirm' (blue).

Creating a Schedule

Within the scheduler, the call handling options will be the same as what's in the main call handling section: Ring Phone, Forward All, Sim Ring, and Find Me (see [Call Handling](#) for information on those features).

Note: The main call handling options will take effect OUTSIDE of the scheduled hours.

- 1) Navigate to **Call Handling**.
- 2) Click [**Create Schedule**].
 - If there are already schedules on the account, the button will read **Manage Schedule**.

Call Handling

Scheduling **Create Schedule** 0 Schedules

Call Waiting ☒

Do Not Disturb ☐

Ring Phone Forward All Sim Ring Find Me

No Answer Send to Voicemail after 20 seconds

Busy Busy Tone

Out of Service Forward to 1 (308) 555-1234

3) In the newly opened scheduling window, click **[+Add Schedule]**.

Scheduling

+ Add Schedule

Name	Type
No items	

Dismiss Save

- 4) Enter a **Schedule Name** for the new schedule.
- 5) Choose whether this will be specific dates (“Custom”) or recurring (Weekly”).
- 6) Fill in the **dates and times**.
 - The start time cannot be later than the end time.
 - If not using 24-hr time, include “am” and “pm” after the time.
 - For weekly recurring schedules, you do NOT have to provide times for all days – just the days of the week you want this call handling to take effect.
- 7) Choose the **call handling** to happen DURING the specified times.
 - In the **custom schedule** example below, any call received during the specific time being set will be forwarded to 19085551234.
- 8) Click **[Confirm]** to save the schedule.
- 9) Click **[Save]** to exit out of the scheduler window.

Scheduling

+ Add Schedule

Name	Type
^ v	Weekly ^ Edit
Schedule Name <input type="text"/>	
<div>Custom Weekly</div>	
Sun	Start Time <input type="text"/> End Time <input type="text"/>
Mon	Start Time <input type="text"/> End Time <input type="text"/>
Tue	Start Time <input type="text"/> End Time <input type="text"/>
Wed	Start Time <input type="text"/> End Time <input type="text"/>
Thu	Start Time <input type="text"/> End Time <input type="text"/>
Fri	Start Time <input type="text"/> End Time <input type="text"/>
Sat	Start Time <input type="text"/> End Time <input type="text"/>

Call Handling

Call Waiting ☒

Do Not Disturb ☐

Ring Phone Forward All Sim Ring Find Me

No Answer

Send to Voicemail v after 20 seconds

Busy

Send to Voicemail v

Out of Service

Send to Voicemail v


Delete

Cancel

Confirm

Custom Schedule Example

[+ Add Schedule](#)

Name	Type
^ v	Custom ^ Edit
<div>Schedule Name <input type="text"/></div> <div><div>Custom</div><div>Weekly</div><div>+ Add a Day</div></div> <div>Date <input type="text" value="2018-12-10"/> </div> <div>Start Time <input type="text"/> End Time <input type="text"/></div> <div>Call Handling<div>Call Waiting <input checked="" type="checkbox"/></div><div>Do Not Disturb <input type="checkbox"/></div><div><div>Ring Phone</div><div>Forward All</div><div>Sim Ring</div><div>Find Me</div></div><div>Forwarding Number <input type="text" value="1 (908) 555-1234"/></div></div>	
Delete	Cancel Confirm

Managing IP Phones

Within our voice platform there are 7 features supported on IP phones that can be managed within the voice portal: [Device Line](#), [Call Park](#), [Paging Group](#), [Presence](#), [Shared Line](#), [Speed Dial](#), & Deactivated.

*Note: The default state for all lines after line 1 is Deactivated (the default for line 1 is to be your main device line). To change a device line from the default of Deactivated to another option, select the **Edit** option on the device line. The device line types are available from the **Type** drop down.*

The screenshot shows the 'Line Configuration' interface. At the top is a table with columns 'Line Number', 'Type', and 'Assignment'. Line 1 is a 'Device Line' with an 'Edit' button. Line 2 is a 'Shared Line' assigned to 'Sara Wilson' with an 'Edit' button. Below the table is the 'Device Line Info' section for Line Number 2. It has a 'Type' dropdown menu currently showing 'Shared Line'. The dropdown list includes: Call Park, Deactivated, Device Line, Paging Group, Presence/BLF, Shared Line (highlighted), and Speed Dial. At the bottom are 'Deactivate' and 'Save' buttons.

Line Number	Type	Assignment
1	Device Line	
2	Shared Line	Sara Wilson

Device Line Info

Line Number 2

Type: Shared Line

Assignment: Deactivated, Device Line, Paging Group, Presence/BLF, Shared Line, Speed Dial

Deactivate Save

Call Park

Parking Spots can be created on an account and then assigned to a line on the device. This allows you to take an active call and put the caller in a designated parking spot at the press of a button. The call can then be picked up on any phone that has the parking spot set up in their line configuration by picking up the phone and pressing the assigned “Call Park” button.

Note: Contact our Customer Service team to enable parking spots.

Assigning a Parking Spot

- 1) In the Device Line Info section, choose “**Call Park**” as the **Type**.
- 2) For the Assignment field, choose from dropdown list of parking spots.
- 3) Click [**Save**].

Line Configuration

Line Number	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit
3	Presence/BLF	Sara Wilson	▼ Edit
4	Speed Dial	18885554321	▼ Edit
5	Speed Dial	19085551234	▼ Edit
6	Call Park	Parking Spot 1	▼ Edit

Device Line Info

Line Number 6

Type

Call Park

Assignment

Parking Spot 1

Parking Spot 1

Deactivate

Cancel

Save

Device Line

Selecting a Device Line adds an additional line assigned to the owner of the device. This line functions as a new device line for the user. The device line is a traditional line, able to place calls with the outbound caller ID of the user as well as receive or pick up calls sent to the user.

Adding Another Device Line

- 1) In the Device Line Info section, choose “**Device Line**” as the **Type**.
- 2) Click [**Save**].

Line Configuration

Line Number	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit
3	Presence/BLF	Sara Wilson	▼ Edit
4	Speed Dial	18885554321	▼ Edit
5	Device Line		▼ Edit

Device Line Info

Line Number

5

Type

Device Line

911 Callback Number

Registration Status

No

Advanced Line Settings

Fax Enabled

☐ This line is connected to a fax machine

Incoming faxes answered by the voicemail box are always allowed. Enabling fax here changes the device configuration to enable fax settings. These settings will negatively affect voice call quality.

Deactivate

Cancel

Save

Paging Group

Paging groups are used to make one-way announcements to one or more devices. By assigning users to a Paging Group, all of the users assigned to that group can be contacted at once via their device's speaker, just by pressing the paging group set up in the line configuration of the device.

Note: Contact our Customer Service team to create paging groups.

Assigning a Paging Group

- 1) In the Device Line Info section, choose “**Paging Group**” as the **Type**.
- 2) For the **Assignment** field, choose from dropdown list of paging groups.
- 3) Click [**Save**].

Line Configuration

Line Number	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit
3	Presence/BLF	Sara Wilson	▼ Edit
4	Speed Dial	18885554321	▼ Edit
5	Device Line		▼ Edit
6	Call Park	Parking Spot 1	▼ Edit
7	Paging Group	Everyone	▼ Edit

Device Line Info

Line Number 7

Type

Paging Group

Assignment

Everyone

Everyone

Deactivate

Cancel

Save

Presence/BLF

This feature will let you add other users to extra lines on your phone, so you'll know when they are on a call, have a call coming in, or are free. Lines assigned to presence will also enable Speed Dialing between users.

Assigning Presence/BLF

- 1) In the Device Line Info section, choose "**Presence/BLF**" as the **Type**.
- 2) For the **Assignment** field, choose from dropdown list of users.
- 3) Click [**Save**].

Line Configuration

Line Number ▾	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit
3	Presence/BLF	Sara Wilson	▼ Edit

Device Line Info

Line Number 3

Type Presence/BLF ▼

Assignment Sara Wilson ▼

Peter Martinez

Sara Wilson

will also enable Speed Dialing between users.

Deactivate

Cancel

Save

Shared Line

A shared line allows the user to select another user on the account and to receive and place calls as that user from their IP Phone. For inbound calls, the selected line rings when the user it's assigned to receives a call and the user can answer that ringing call on their IP Phone. For outbound calls, placing a call from the shared line utilizes the outbound caller ID as the shared user. Dialing a * code (for forwarding calls, accessing voicemail, etc.) while on the shared line also affects the assigned user.

Assigning a Shared Line

- 1) In the Device Line Info section, choose “**Shared Line**” as the **Type**.
- 2) For the **Assignment** field, choose from dropdown list of users.
- 3) Click **[Save]**.

Line Configuration

Line Number	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit

Device Line Info

Line Number 2

Type Shared Line

Assignment Sara Wilson

Deactivate

Cancel

Save

Note: For users that have been assigned as a shared line on another device, that device will show in the Referenced Devices section of their Devices section.

- In Images A & B below, we have an example of the user, Tyler Wilson, having a shared line setup on his Polycom VVX400 phone with Sara Wilson.
 - In [Image A](#) we see under Sara's Device section that the VVX400 phone belonging to Tyler Wilson is shown in the Referenced Devices area. Her extension has been set up as a shared line on Tyler's second line.
 - In [Image B](#) we see in Tyler's Devices section, that Line 2 of his Polycom VVX 400 has been configured as a Shared Line with Sara.

Image A

Sara Wilson 18012064901 301 ▼ Edit

Calls

Devices

Calling Plans

Settings

Voicemail 0

Device Lines

Device Type	MAC Address	Line Number	
Arris TM502G	bbcceedd1234	1	▼ Edit

Referenced Devices

Device Type	MAC Address	Line Number	Device Owner
VVX400	aabbccdde22	2	Tyler Wilson

Image B

Tyler Wilson 18014068300 300 Edit

Calls Devices Calling Plans Settings Voicemail 1

Device Lines

Device Type	MAC Address	Line Number	
Polycom VVX 400/410	aabbccdde22	1-12	Edit

Device Info

MAC Address aabbccdde22

Device Type Polycom VVX 400/410

Configuration Status No ✖ Details

Swap Device Swap

Bulk Line Configuration

Line Configuration

Line Number	Type	Assignment	
1	Device Line		Edit
2	Shared Line	Sara Wilson	Edit

Speed Dial

The speed dial type allows you to configure quick one-touch dialing from your IP phone. Speed dial buttons can be configured to [dial other users](#) on your account or [custom speed dials](#).

Assigning a Speed Dial

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

- 1) In the Device Line Info section, choose “**Speed Dial**” as the **Type**.
- 2) For the **Assignment** field, choose a user on the account from dropdown list of users.
- 3) Click [**Save**].

Assigning a Custom Speed Dial

This will allow you to speed dial other phone numbers.

- 1) In the Device Line Info section, choose “**Speed Dial**” as the **Type**.
- 2) For the **Assignment** field, choose “**Custom Speed Dial**”.
- 3) Enter the speed dial number in the **Speed Dial** field.

- 4) Choose what should show on your phone for that line in the **Speed Dial Display Name** field.
- 5) Click [**Save**].

Line Configuration

Line Number ↕	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit
3	Presence/BLF	Sara Wilson	▼ Edit
4	Speed Dial	Sara Wilson	▼ Edit
5	Speed Dial	19085551234	▼ Edit

Device Line Info

Line Number 5

Type

Speed Dial ▼

Assignment

-- Custom Speed Dial -- ▼

Speed Dial

19085551234

Speed Dial Display Name

Line 5

Deactivate

Cancel

Save

Bulk Line Configuration

If you need to configure the lines for multiple IP Phones on the account, you can utilize the Import/Export functionality of the IP Phone Provisioning in the Device Info section (Click the **"Bulk Line Configuration"** link to access the feature).

Utilizing this feature, you can make minimal changes to a CSV file while making a unique configuration for each user's device and then uploading those changes for a quick setup.

Tyler Wilson
18014068300
300
Edit

Calls
Devices
Calling Plans
Settings
Voicemail 1

Device Lines

Device Type	MAC Address	Line Number	
Polycom VVX 400/410	aabbccdde22	1-12	Edit

Device Info

MAC Address aabbccdde22

Device Type Polycom VVX 400/410

Configuration Status No ✖ Details

Swap Device Swap

Bulk Line Configuration

Export Current Configuration Device Lines Export

Import New Configuration Click here Import

Expected header row of LINE_NUMBER, LINE_TYPE, REFERENCE, REFERENCE_NAME

Import File Format

The import file for IP Phone setup requires specific headers and must be a Comma Separated Value (CSV) file to be accepted.

Table 1 will include the required headers and field values.

Table 1 – Import Values

IP Phone Import File Format	
Header Row Name	Field Values
LINE_NUMBER	Numeric Line Number. The import does not accept line numbers that don't exist on the device.
LINE_TYPE	Should be set to 1 of 8 values: <ol style="list-style-type: none"> Line – Device line assigned to the owner of the IP Phone. Line 1 <u>must</u> be a Line Type of "Line" ReferencedUser – Shared line with another user on the account PresenceBlfUser – Assignment of the device line to monitor the state of another user on the same account

	4) SpeedDialUser – Assignment of the device line to another user on the account as a speed dial 5) SpeedDialTn – Assignment of the device line to an external number, or * code. 6) CallParkingSpot – Assignment of the device line to a parking spot 7) SipPaging - Assignment of the device line to a paging group 8) Blank – Device Line is Deactivated
REFERENCE	The 3 to 6-digit extension of other users on the account or the speed dial phone number
REFERENCE_NAME	This field displays in the Export but is not required for the import. The field shows the user/object that owns the REFERENCE

Example Import File

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

Sidecar Provisioning

Sidecars, also called Expansion Modules, are also available on the platform. To enable a sidecar, an IP Phone must first be added. Once an IP Phone has been added, the options for sidecar provisioning are visible under the Line Configuration section.

You can select from the available sidecar types as well as the number of sidecars. These sidecar types will only display options that are compatible with the IP Phone that is being managed. After selecting the number of sidecars, select **[Save]** and the sidecar lines will appear for editing.

Note: Sidecar lines can be setup individually like the lines on the IP phone or via the Bulk Sidecar Setup option.

Line Configuration

Line Number ⇅	Type	Assignment	
1	Device Line		▼ Edit
2	Shared Line	Sara Wilson	▼ Edit
3	Presence/BLF	Sara Wilson	▼ Edit
4	Speed Dial	Sara Wilson	▼ Edit
5	Speed Dial	19085551234	▼ Edit
6	Call Park	Parking Spot 1	▼ Edit
7	Paging Group	Everyone	▼ Edit
8	Deactivated		▼ Edit
9	Deactivated		▼ Edit
10	Deactivated		▼ Edit
11	Deactivated		▼ Edit
12	Deactivated		▼ Edit

Sidecar

Sidecar Type

Polycom VVX Expansion Module
▼

Polycom VVX Color Expansion Module
Polycom VVX Expansion Module

Number Of Sidecars

Bulk Sidecar Setup

There are three bulk sidecar setup options which allow you to setup speed dial assignments: Alphabetically, by Extension Number, or Custom.

Note: The bulk options are limited to only add the number of users to available lines on the sidecars. Also, any bulk setup will overwrite current sidecar configurations.

- 1) **Alphabetically** will add all possible users ordered by last name.
- 2) **By Extension** will add all possible users ordered by extension number.
- 3) **Custom** will allow you to choose specific users as sidecar lines in a single operation.

Sidecar

Sidecar Type

Number Of Sidecars

^ Bulk Sidecar Setup

Sidecar Line Setup

Line Number

Sidecar 1 - Page 1 Line 1

Alphabetically
By Extension
Custom
Deactivated

Custom Sidecar Setup

Sidecar

Sidecar Type

Number Of Sidecars

^ Bulk Sidecar Setup

Sidecar Line Setup

Bulk Sidecar Setup will overwrite the current Sidecar setup.

Unassigned Users

Peter Martinez
Sara Wilson

Assigned Users

Adds all users to the Assigned Users list

Adds only the selected user from the Unassigned Users list

Removes the selected user from the Assigned Users list

Removes all users from the Assigned Users list