Sipwise Customer Self-Care Handbook
PRO/CARRIER

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Chapter 1. Introduction

1.1. Welcome

This handbook is your guide to the Customer Self-Care portal PRO/CARRIER edition, the web page where you manage your own telephone line. From here you can see who has called you, change how your calls are handled, listen to your voicemail, send a fax, and much more, all without needing to understand how the underlying phone system works.

You may also hear this page called the "CSC portal" or "CSC panel", CSC simply stands for Customer Self-Care.

1.2. Who This Handbook Is For

This handbook assumes no technical background at all. Wherever a feature uses a term that isn't everyday language, for example an abbreviation shown in the portal itself, this handbook explains what it means the first time it comes up, so you never have to guess.

Most of this handbook, gathered together as **Everyday Features and Personal Settings**, describes features that every subscriber can use to manage their own phone: making and receiving calls, voicemail, call forwarding, faxes and similar personal settings.

Some accounts, however, are also responsible for a whole company's phone system rather than just a single line: colleagues' extensions, shared company contacts, the automated attendant, number assignment and so on. If your account has this extra responsibility, your portal shows two additional menu entries that a regular subscriber does not see: **PBX Statistics** and **PBX Configuration**. If you see them, the second half of this handbook, **Administrator Settings**, is written for you; if you don't, you can safely skip it, since none of it applies to your account.

1.3. A Note on Feature Availability

Not every feature described in this handbook is guaranteed to be available on your own system. Some of them depend on optional modules or licenses that your operator may or may not have installed or activated. If a feature described here doesn't appear in your portal, or doesn't behave quite as described, that's most likely the reason, it isn't a sign that something is broken.

Wherever this applies, the chapter covering that feature notes which module or license it requires, so you know exactly what to ask your operator to enable if you'd like to use it.

1.4. What You Can Do From the Portal

However your account is set up, the Customer Self-Care portal generally lets you:

- See a list of your recent calls, voicemails and faxes.
- Decide what happens to calls you don't answer, or don't want to answer at all.
- Listen to and manage your voicemail messages.
- Send and receive faxes.
- Keep a personal address book and set up speed-dial shortcuts.

- Change your password and see which phones or apps are currently registered to your line.

Every one of these is covered in its own chapter later in this handbook, with screenshots of the actual portal to guide you along the way.

Chapter 2. Getting Started

2.1. Signing In

To open the Customer Self-Care portal, go to the web address your operator gave you and sign in with the **username** and **password** you were provided. The username usually looks like an email address (for example `username@yourdomain`), this is not necessarily your actual email address, just the format the sign-in page expects.

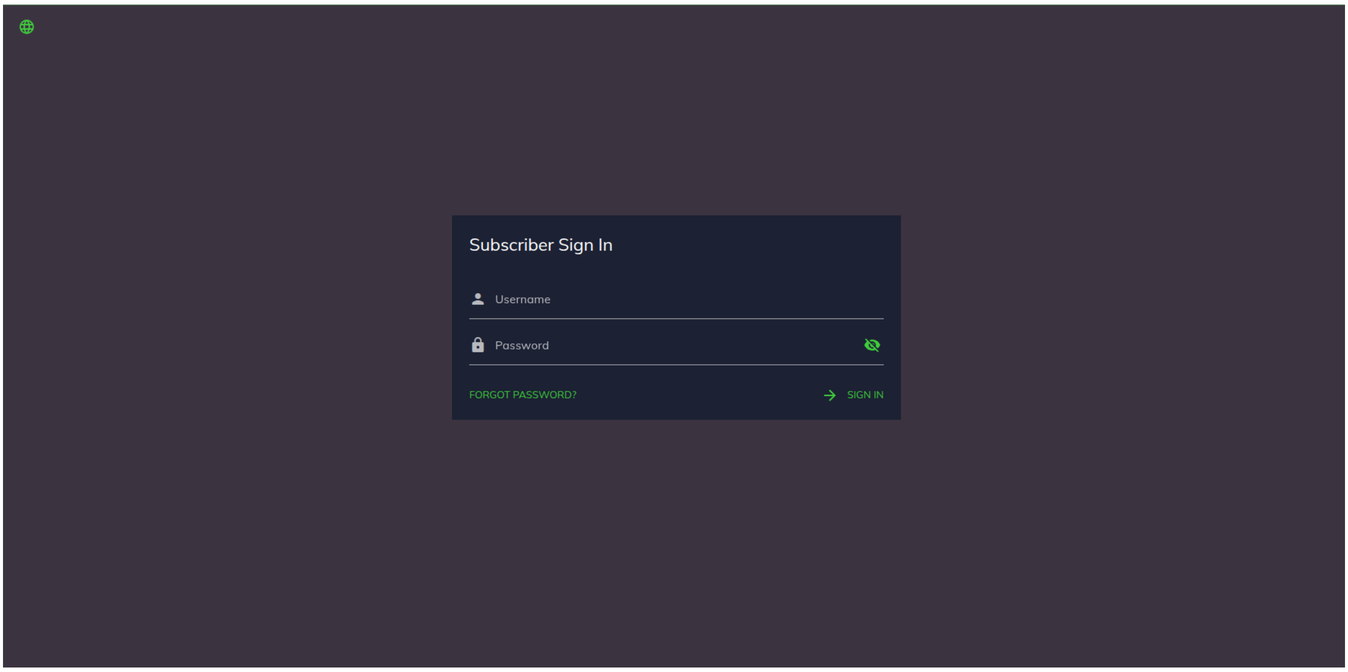

Figure 1. The sign-in page

If you forget your password, select **Forgot password?** on the sign-in page, enter your username, and follow the instructions sent to you. This only resets the password you use for the web portal; it never changes how your phone itself connects to the service, so you don't need anyone's help to reset it.

2.2. Two-Factor Authentication

Depending on how your operator has set up your account, you may be required to set up two-factor authentication the first time you sign in — an extra check, on top of your password, that proves it's really you. If your account requires it, the sign-in page asks you to set it up as soon as you enter your username and password correctly, before letting you continue.

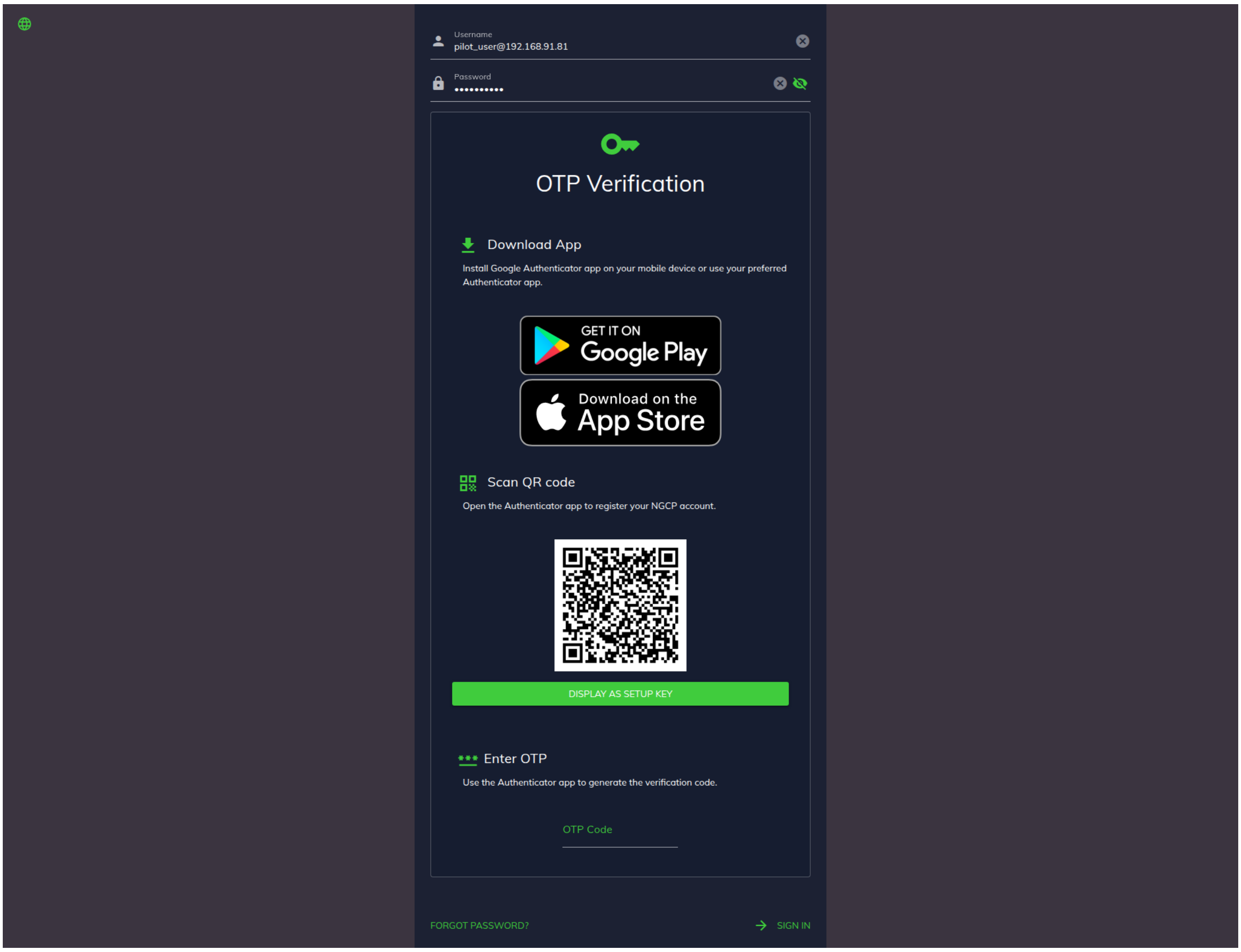

Figure 2. Setting up two-factor authentication during sign-in

Setting it up means installing an authenticator app — such as Google Authenticator — on your phone, then connecting it to your account either by scanning the QR code shown on screen with that app, or, if scanning isn't convenient, by selecting **Display as setup key** and typing the text key it shows into the app instead. Either way, the app then starts generating a new code every few seconds; type the current one into the **OTP Code** field to finish setting it up.

Once it's set up, every future sign-in simply asks for that code after your username and password, without needing to set anything up again.

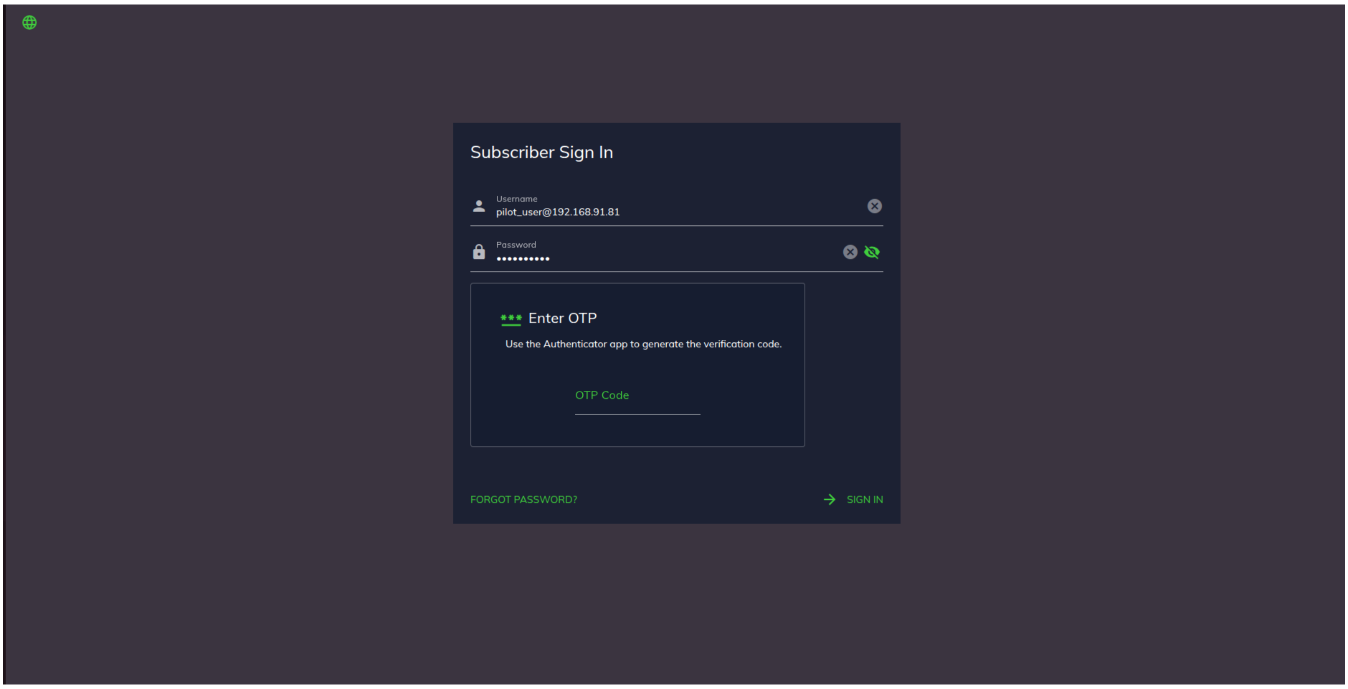

Figure 3. Signing in once two-factor authentication is already set up

2.3. Choosing a Language

The globe icon in the top corner of the sign-in page (and later, of every page in the portal) lets you switch the interface to a different language.

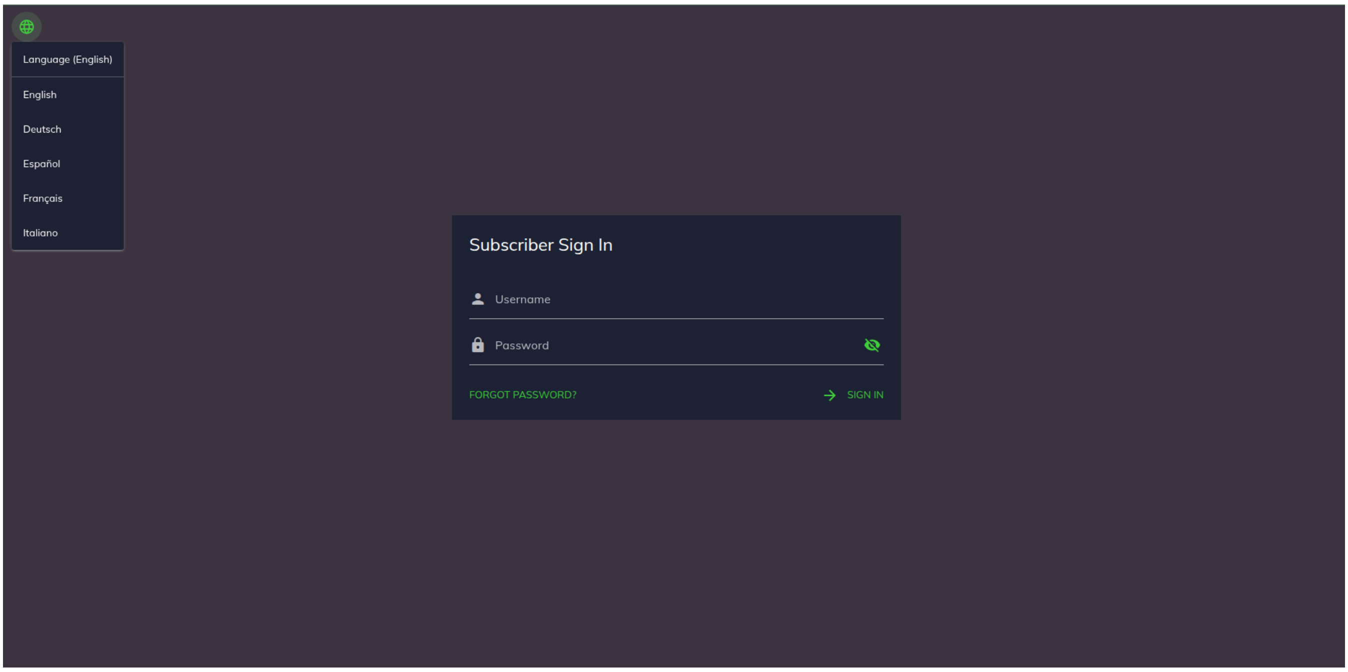

Figure 4. Switching the portal's language

The portal remembers your choice, so you only need to set it once.

2.4. Finding Your Way Around

Once you're signed in, you land on the **Dashboard**, described in the next chapter. A menu on the left side of the screen gives you access to every other part of the portal. Depending on what your account is set up to do, you'll see most or all of the following:

- **Dashboard** — a quick overview of your line.
- **Start new call** — place a call straight from your browser.
- **Conversations** — your call, voicemail and fax history.
- **Subscriber Phonebook** — your personal contacts.
- **Call Settings** — forwarding, voicemail, blocking and other call-related preferences.
- **Fax Settings** — how incoming and outgoing faxes are handled.
- **Extension Settings** — features tied specifically to your own extension, such as a personal call queue or automated menu.
- **Registered Devices** — the phones and apps currently signed in with your account.

If you'd rather have more room for the page itself, a small arrow near the top of the side menu collapses it down to icons only, hiding the text labels.

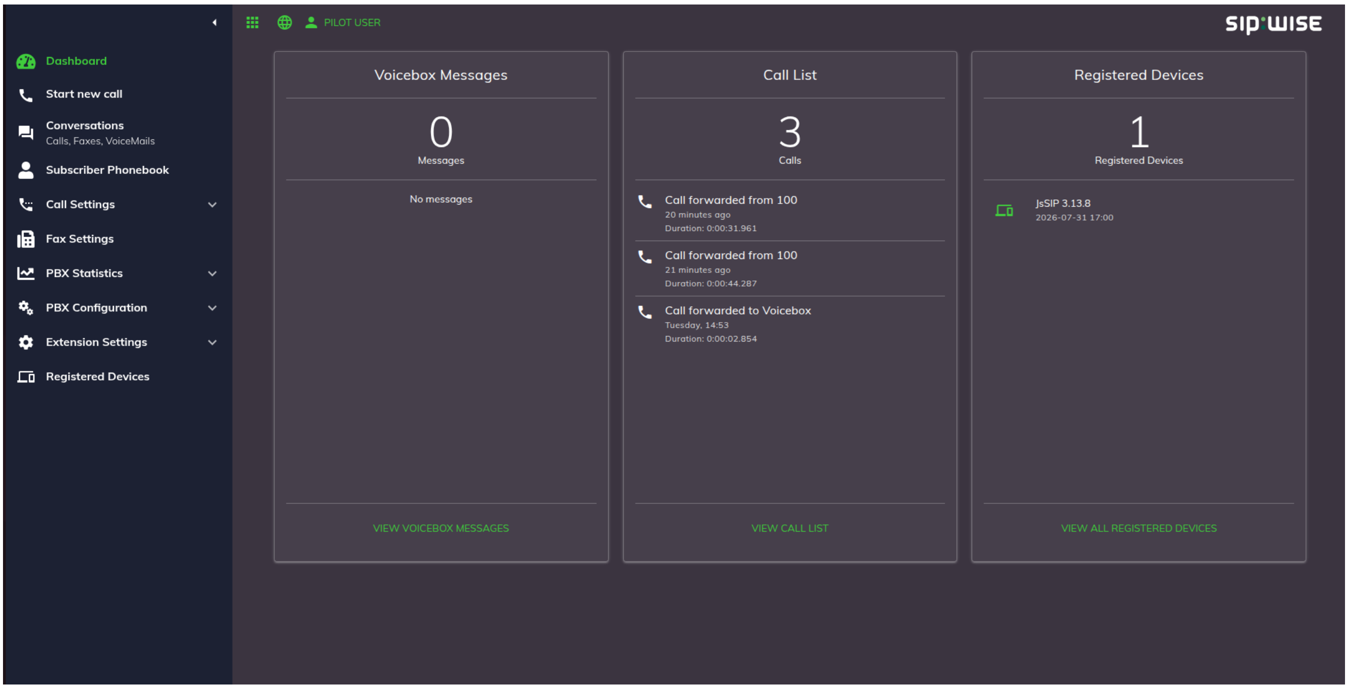

Figure 5. The side menu, with the collapse arrow near the top

To bring the labels back, hover over the collapsed menu: a pin icon briefly appears near the top, and selecting it pins the menu back open.

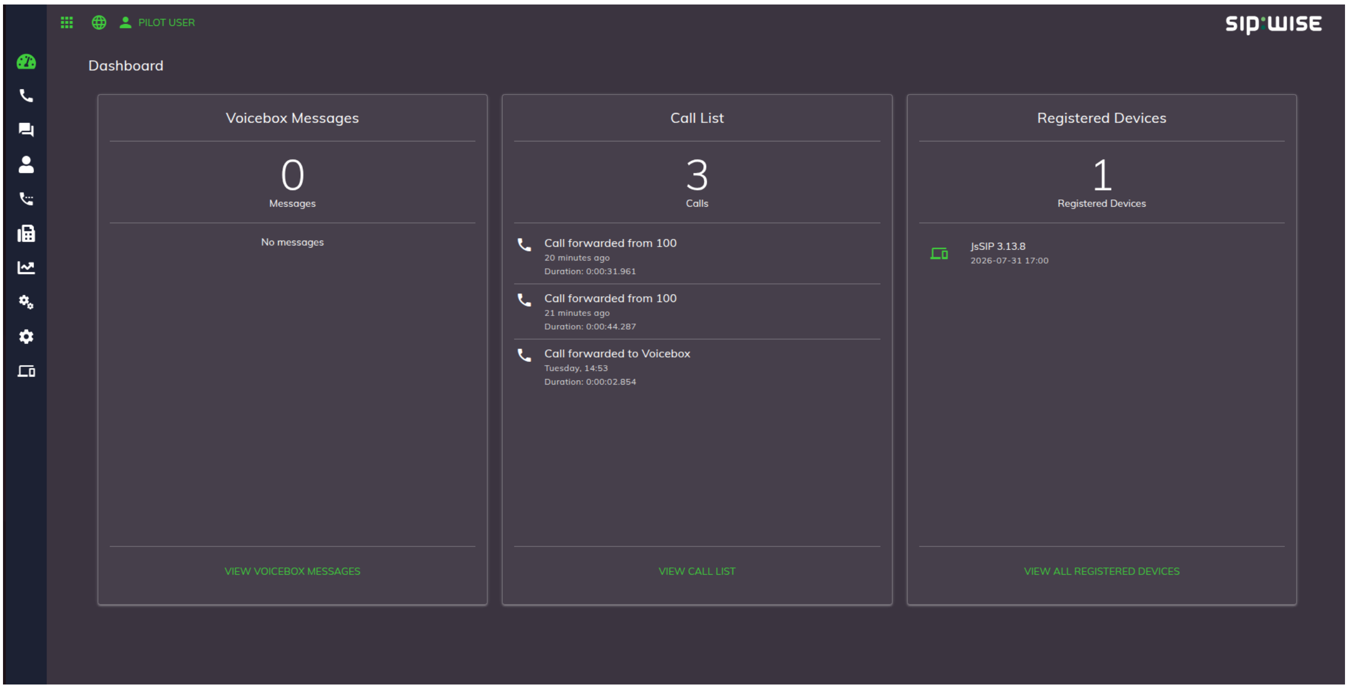

Figure 6. The collapsed side menu

In the top-right corner, your account name opens a small menu with your phone numbers, your account **Settings** (covered in Account Settings), and the option to sign out.

Each of these areas gets its own chapter later in this handbook, in the same order they appear in the menu, so you can simply read on or jump straight to the chapter you need.

2.5. Signing In to the sip:phone App

NOTE This feature requires the **sip:phone** license installed on the NGCP system.

A small QR-code icon next to your account name, in the same top-right corner, and a **sip:phone** logo with links to the Apple App Store and Google Play at the bottom of the side menu, offer a quicker way into **sip:phone**, a dedicated app for making and receiving calls from your phone or computer.

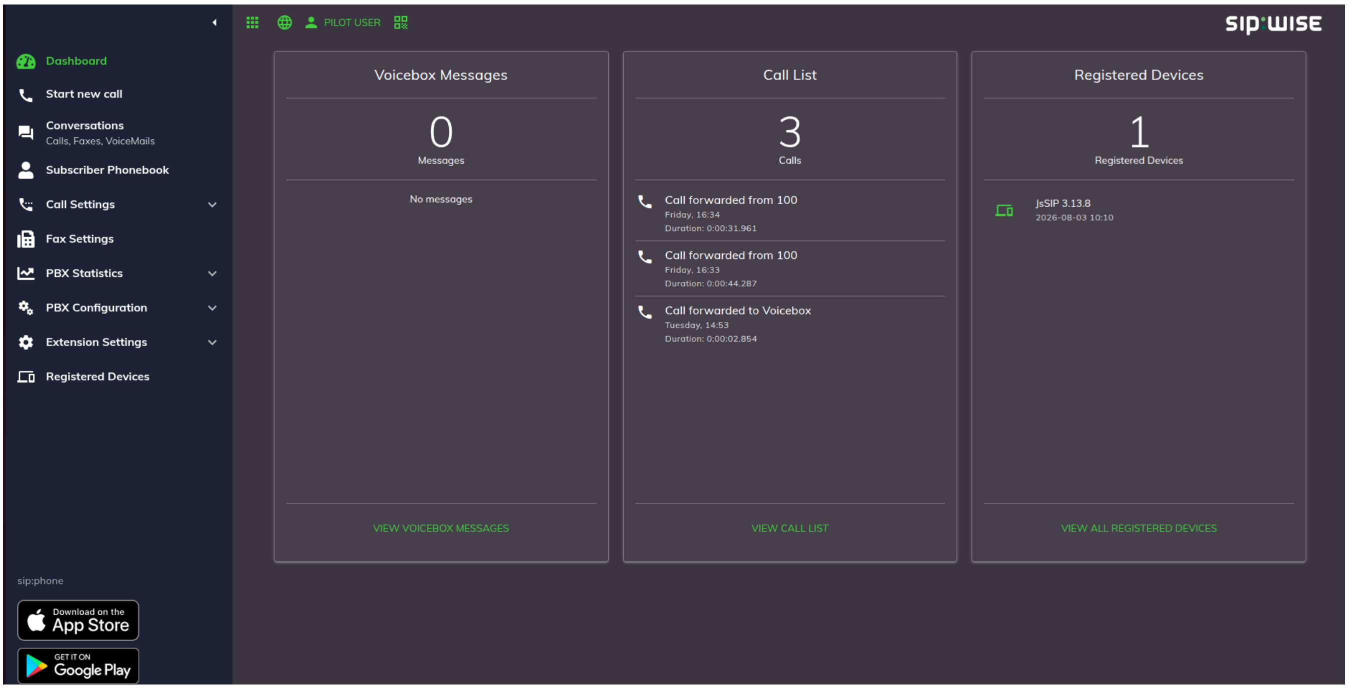

Figure 7. The sip:phone QR-code icon and app-store links

Selecting the QR-code icon opens a QR code on screen; scanning it from within the sip:phone app signs that app straight into your account, without having to type your username and password again.

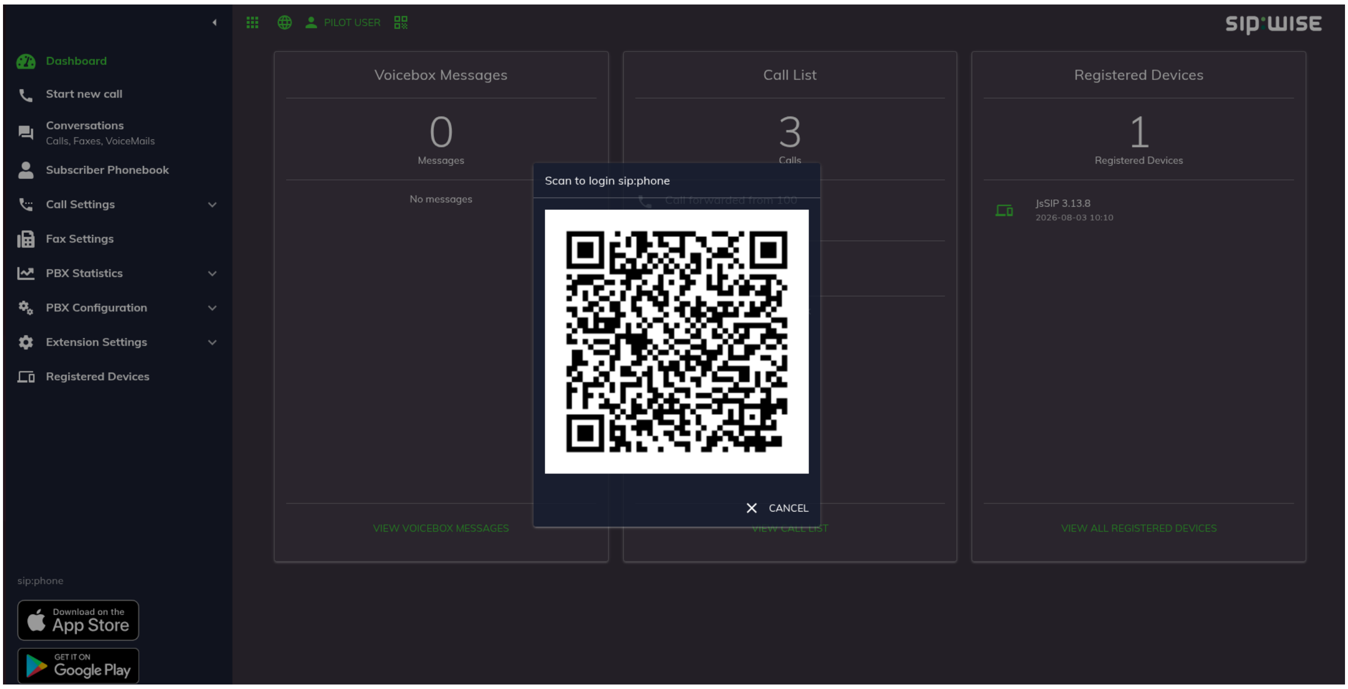

Figure 8. Scanning the QR code to sign in to sip:phone

Chapter 3. Everyday Features and Personal Settings

3.1. Dashboard

3.1.1. Your Dashboard at a Glance

The Dashboard is the first page you see after signing in, and it gives you a quick summary of your phone line without having to open any other page.

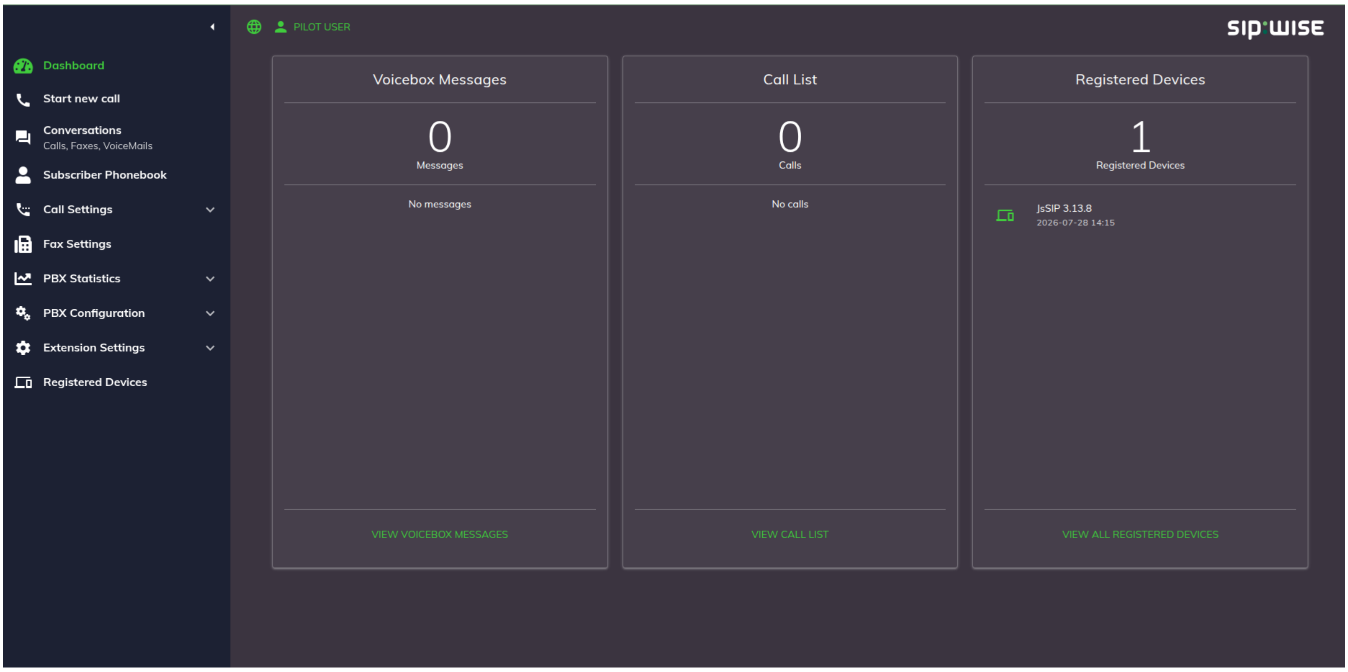

Figure 9. The Dashboard

Three cards summarize the essentials: how many voicemail messages are waiting for you, how many calls appear in your recent call list, and how many devices — phones or apps — are currently registered to your line and able to receive calls. If any of these numbers look wrong (for example, no devices are registered even though your phone is switched on), that's usually the first sign to check your phone's own connection settings, or to contact your operator.

3.1.2. Quick Actions

A small grid icon near the top of the page opens a menu of quick actions you can take without navigating anywhere else — for instance, sending a fax straight away. It's simply a shortcut to something you could also reach through the regular menu, covered in Sending a Fax.

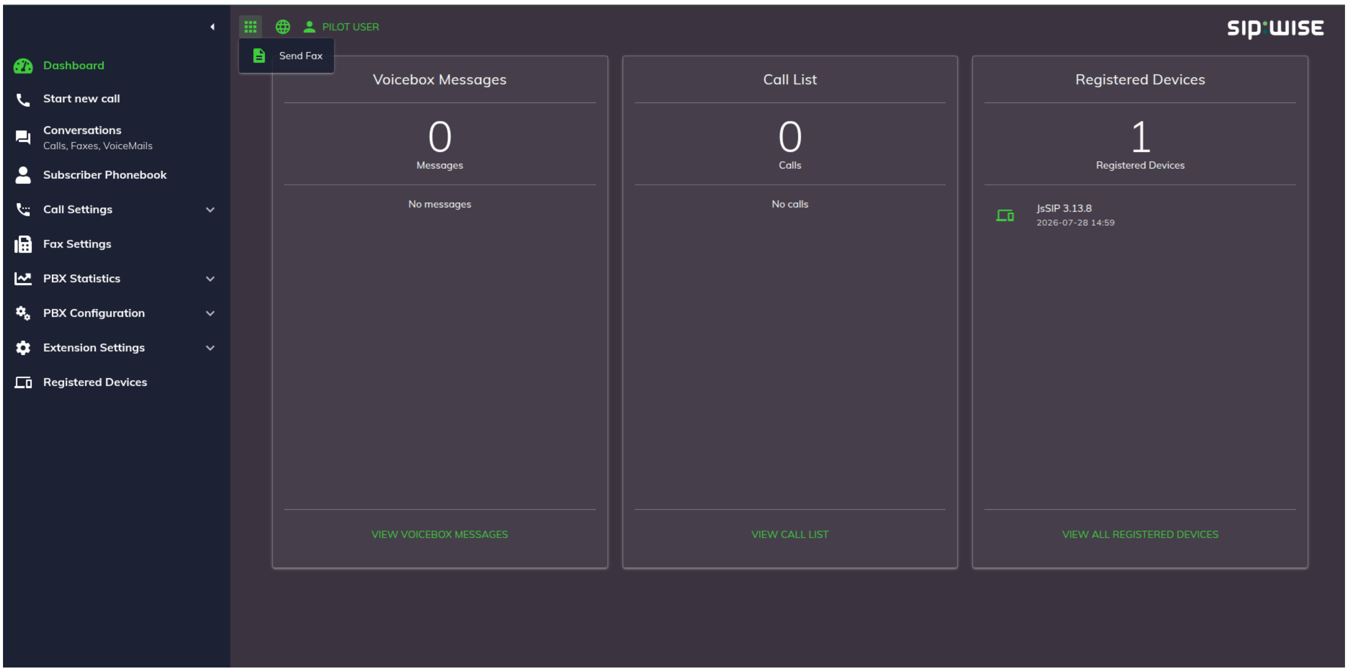

Figure 10. Quick actions from the Dashboard

3.2. Making Calls

3.2.1. Starting a Call From Your Browser

The **Start new call** page lets you place a call directly from your web browser, without picking up a handset. Type the number you want to reach into the field and select the call button that appears.

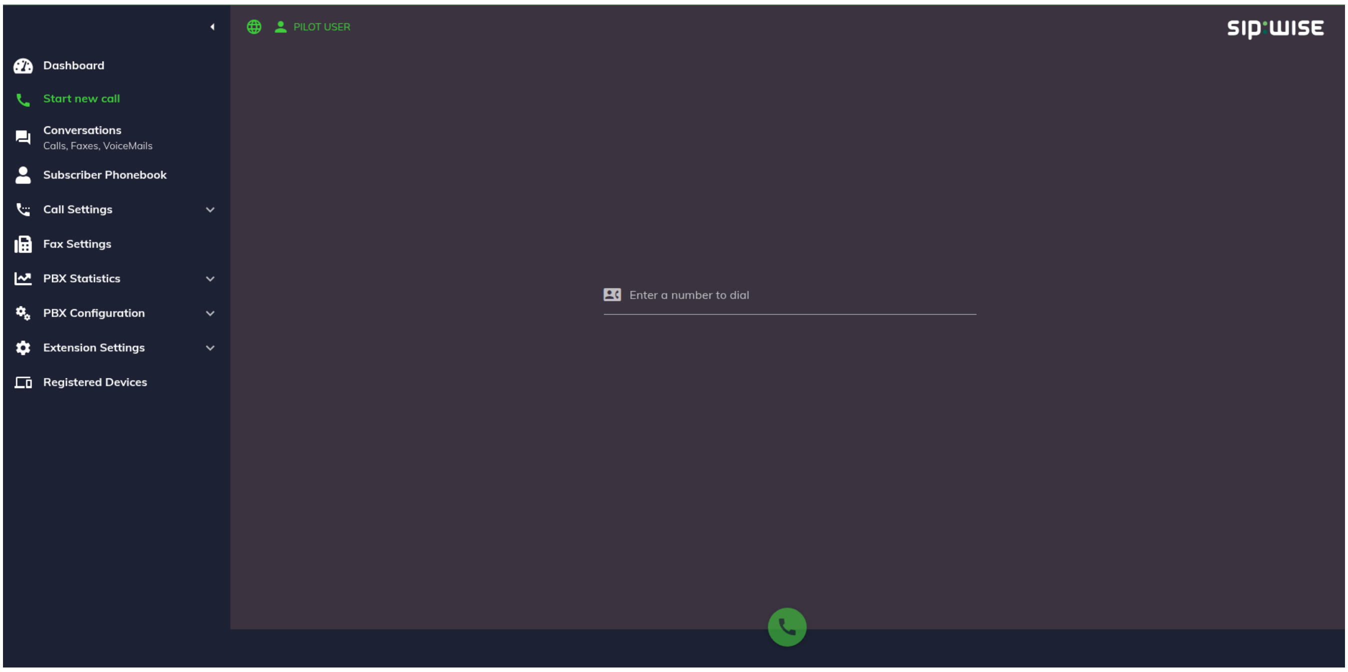

Figure 11. Starting a call from the browser

The first time you do this, your browser will ask permission to use your microphone — this is expected, and needed for the call's audio to work. If you decline by mistake, your browser's own settings let you allow it again for this website.

This browser-based calling is a convenient way to call back a number you see in your history or phonebook (covered in the following chapters) even when you're away from your desk phone, but it does not replace your regular phone or app: calls that come in while your browser isn't open will still ring on your other registered devices, listed in Registered Devices.

3.2.2. Answering an Incoming Call

When somebody calls your number, the **Start new call** entry in the side menu turns into an alert showing who's calling, and a green button to answer or a red button to decline appears at the bottom of the screen.

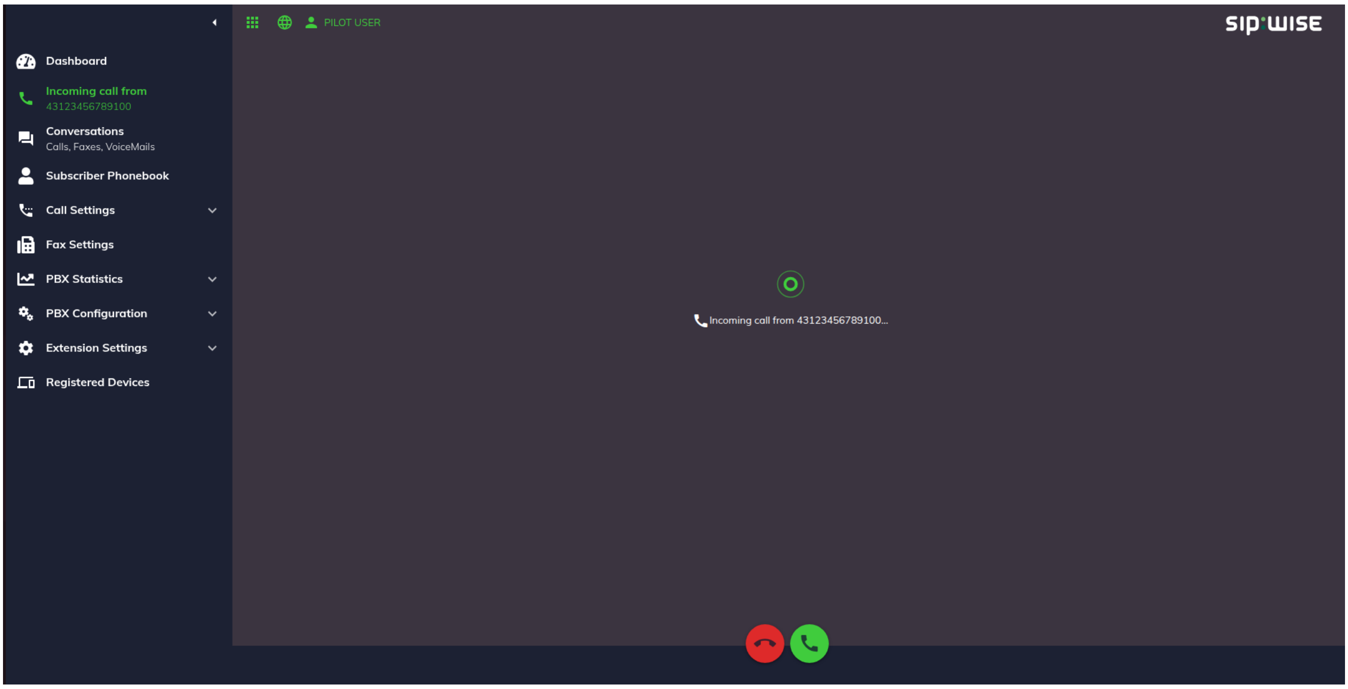

Figure 12. An incoming call arriving in the browser

You don't need to be on that particular page to see it: the same accept and decline buttons follow you as a banner docked at the bottom of the screen no matter which page of the portal you're currently looking at — for example the Dashboard.

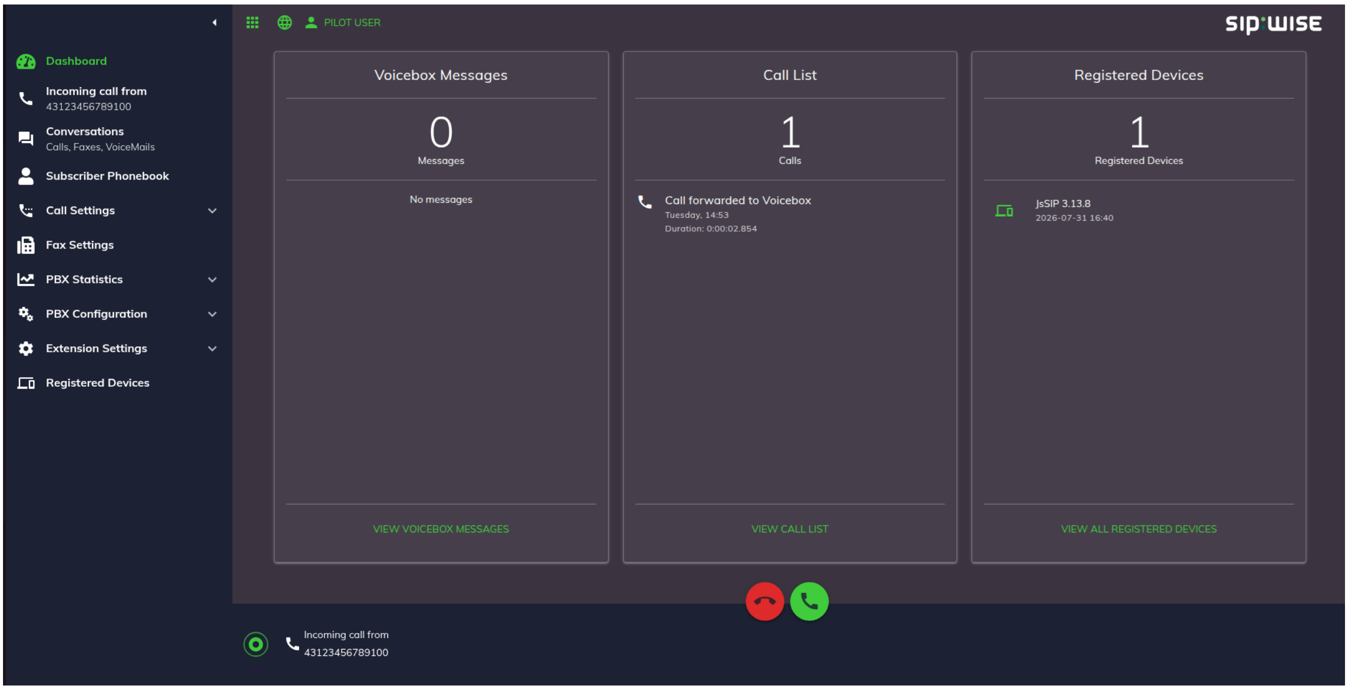

Figure 13. The incoming-call banner shown on the Dashboard

3.2.3. Controls During a Call

Once a call connects, the side menu shrinks down to icons only, giving the call itself the whole screen. A row of buttons along the bottom lets you control it: mute/unmute your microphone, put the call on hold, transfer it to someone else, turn your camera on/off, share your screen with the other party, mute/unmute the speaker, and hang up.

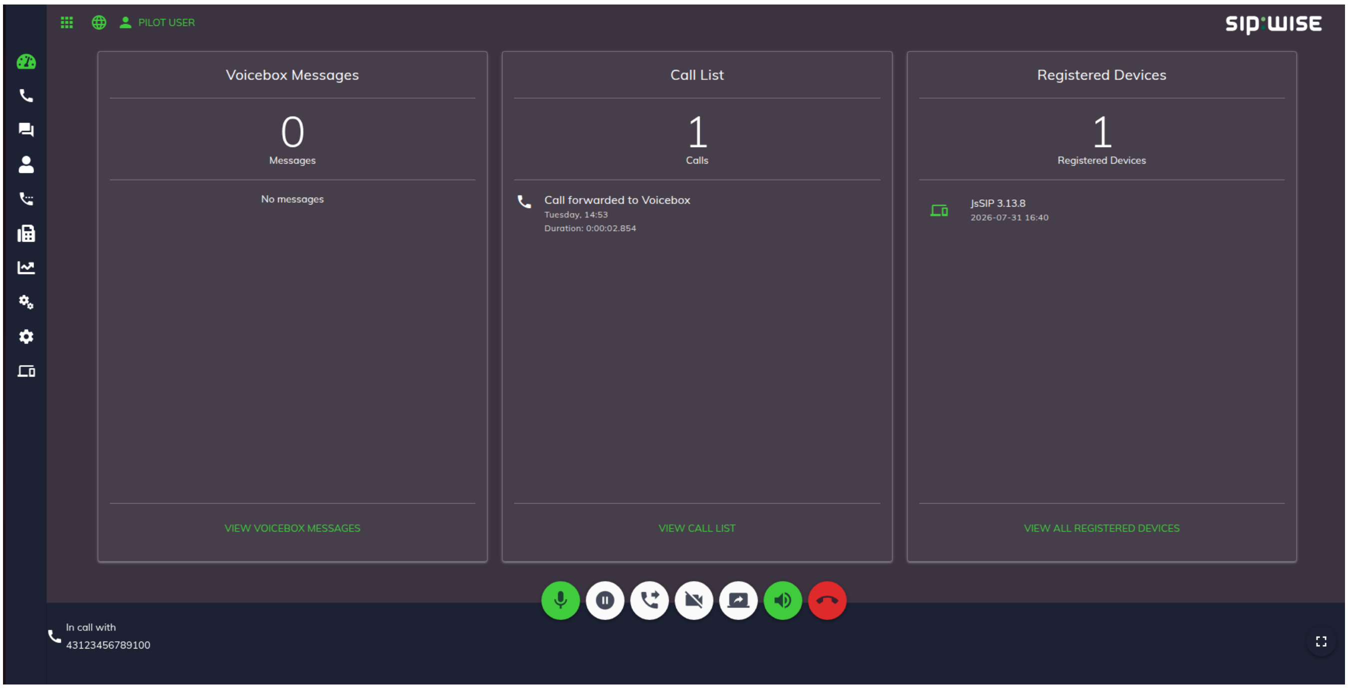

Figure 14. The controls available during a call

3.2.4. Using the Keypad During a Call

Selecting the small keypad symbol next to the "In call with…" indicator opens a number pad over the call, letting you send a tone for each key you press. This is what you need whenever the person or system on the other end asks you to "press 1 for…", or asks for a PIN or extension number once you're already connected — for example when reaching a colleague's voicemail or an automated menu.

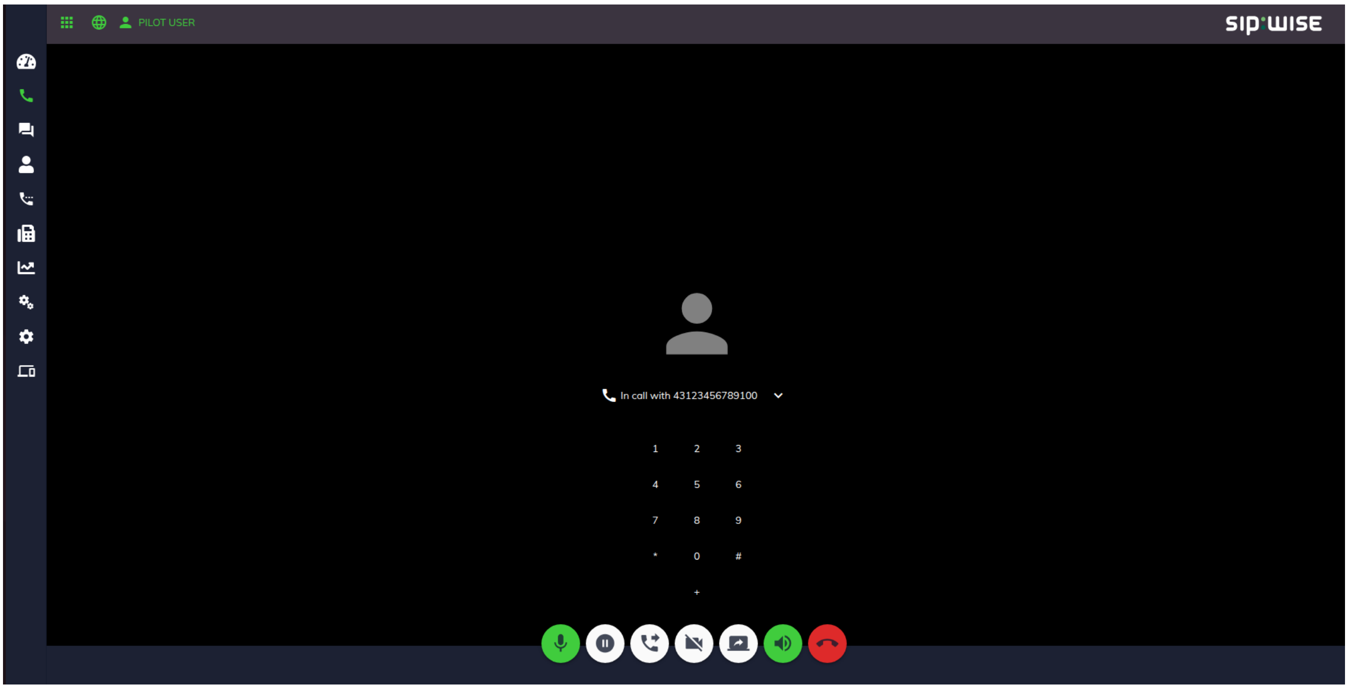

Figure 15. Sending key tones during a call

3.2.5. Transferring a Call

Selecting the transfer button opens a number pad over the call and, at the same time, puts the other party on hold. Type the number you want to hand the call over to and select the green call button to complete the blind transfer. The two smaller icons next to it let you clear a typed number or cancel the transfer and go back to the original call.

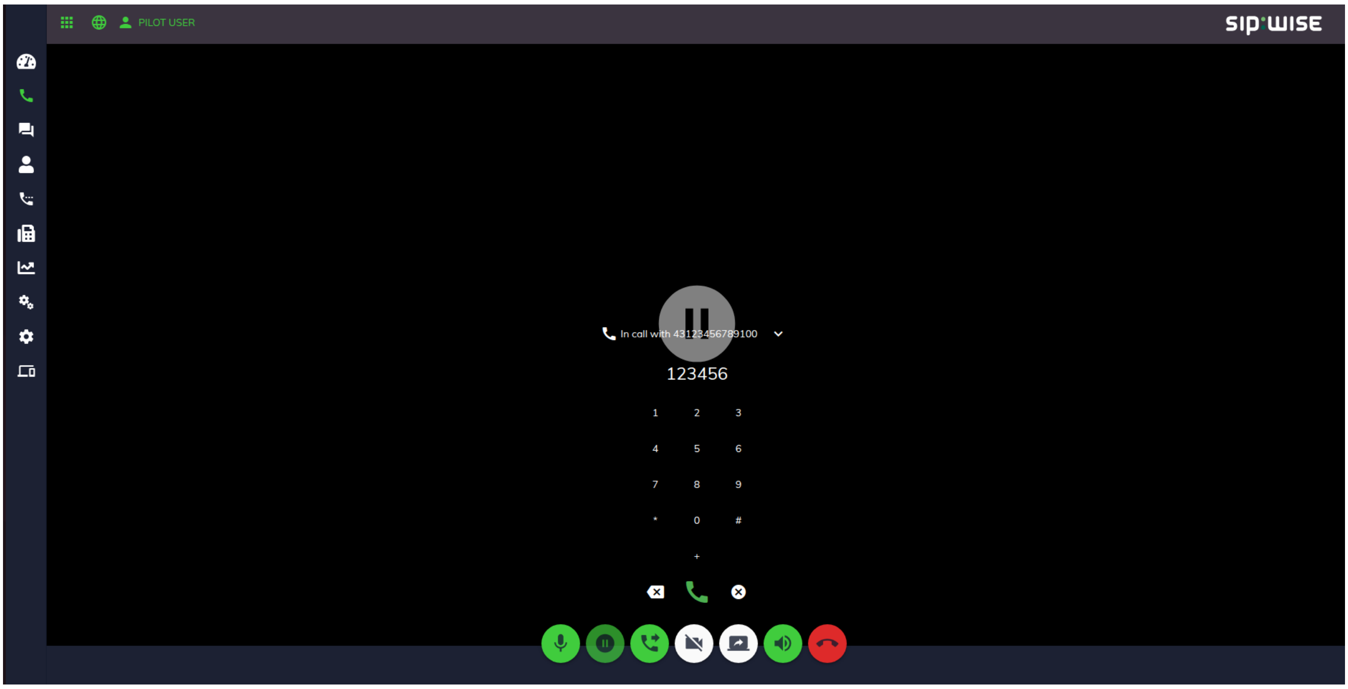

Figure 16. Dialing a number to transfer a call to

3.3. Conversations

3.3.1. Your Call, Voicemail and Fax History

The **Conversations** page keeps a record of everything that has happened on your line: calls you made or received, voicemail messages, and faxes. The **ALL** tab shows everything together, in the order it happened, together with how long each call lasted and, where billing applies, what it cost.

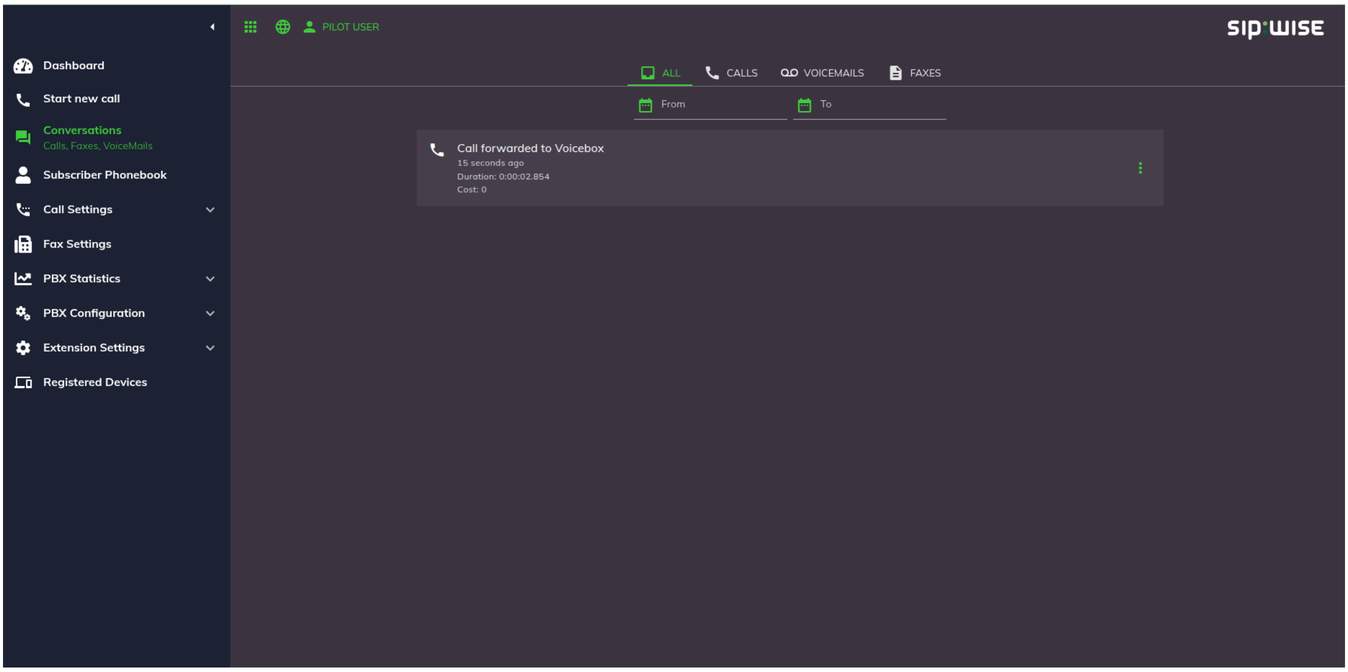

Figure 17. Your call history

Three further tabs — **CALLS**, **VOICEMAILS** and **FAXES** - narrow the list down to just one type of activity. A date range at the top of the page lets you look further back than the most recent entries.

3.3.2. Acting on a Call

Selecting the three dots next to any entry in the **ALL** or **CALLS** tab opens a menu of things you can do with that specific call: call the number back, add it to your phonebook, or block it — either just incoming calls from that number, just outgoing calls to it, or both.

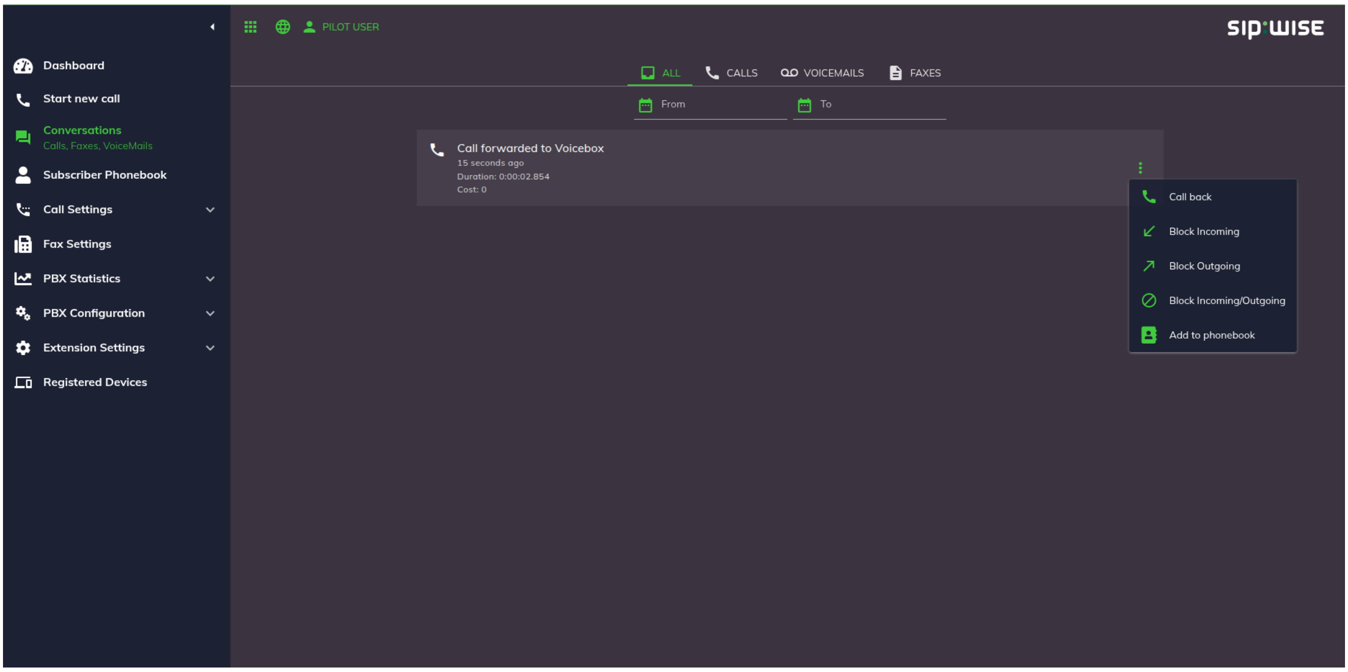

Figure 18. Acting on a past call

Blocking a number this way has the same effect as adding it manually in Blocking Numbers — it's simply a faster way to block a number you've already seen calling you.

3.4. Phonebook

3.4.1. Your Personal Contacts

The **Subscriber Phonebook** is your own address book inside the portal. Each entry has a name and a number, and once saved, calling that person back is as simple as selecting their entry.

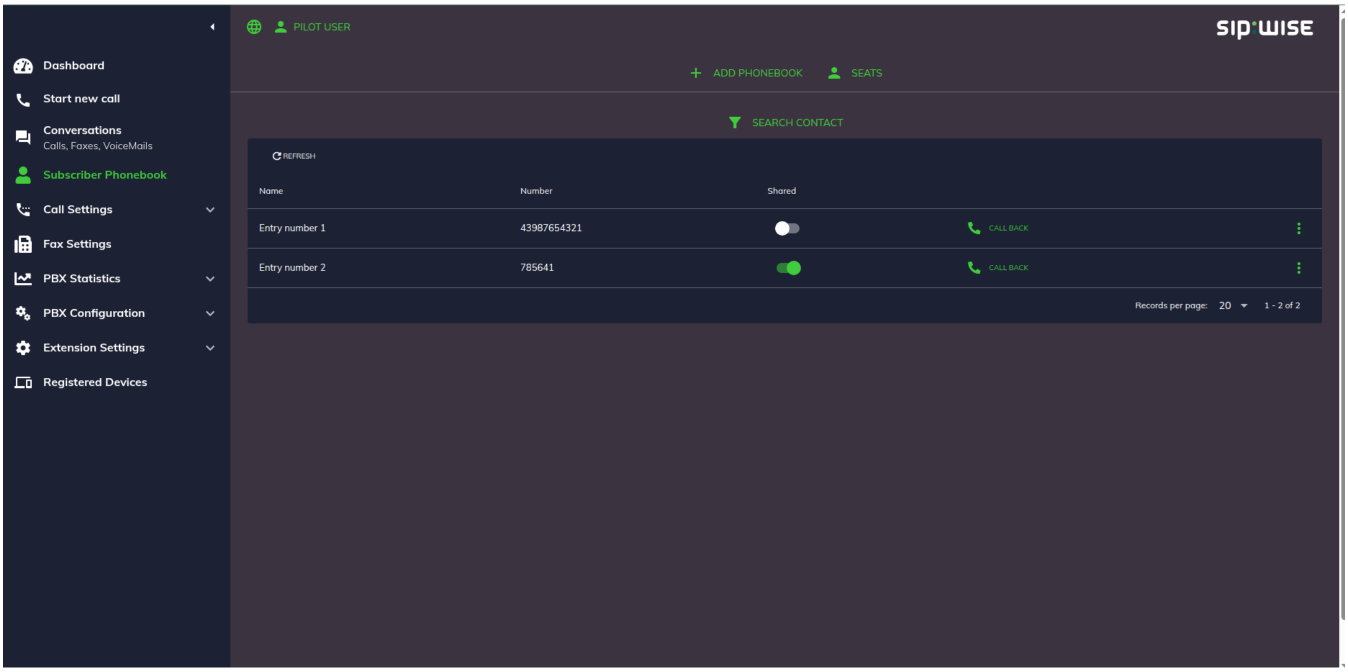

Figure 19. Your personal phonebook

To add someone, select **Add Phonebook** and fill in their name and number. A **Shared** switch on each entry decides whether only you can see that contact, or whether it's also visible to your colleagues, if your line is part of a company phone system — the same sharing you'll find again in the company-wide phonebook in Part Two of this handbook. A search box, opened from the icon at the top of the list, helps you find an entry quickly once you have more than a handful.

3.4.2. Looking Up a Colleague

If your line is part of a company phone system, a **Seats** link above your phonebook shows every colleague who has an extension on that system, along with their extension number, so you can call or look them up without needing to save them as a personal contact first.

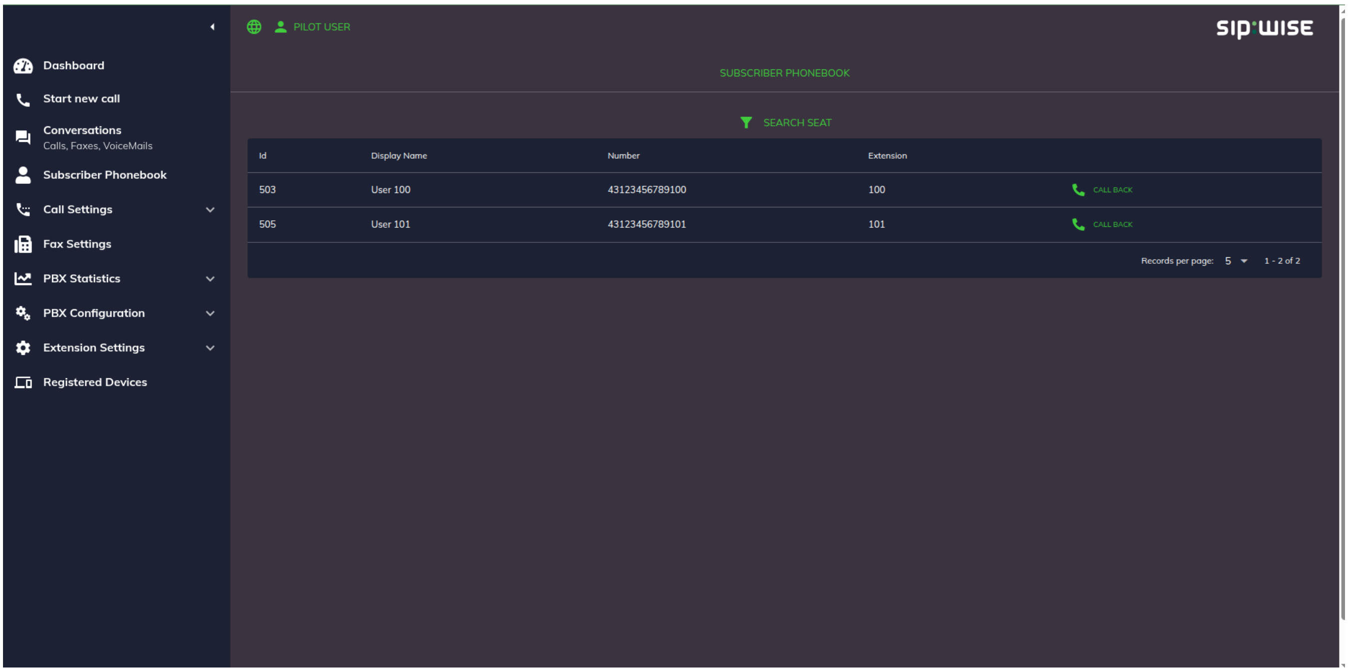

Figure 20. Looking up a colleague's extension

3.5. Call Settings

Call Settings is where you'll find most of the personal settings that control how your own line behaves — from simple switches like Do Not Disturb to more detailed features like call forwarding, blocking, privacy, speed dial, reminders and recordings. The rest of this chapter walks through each of these, one at a time.

3.5.1. General Call Behavior

The **General** tab under Call Settings holds two simple switches that change how your phone behaves during a call.

Music on Hold plays music to the other person whenever you put them on hold, instead of silence. **Do Not Disturb** — often shortened to **DND** — is a switch you can turn on when you don't want your phone to ring at all; while it's on, callers are treated as if you didn't answer, and are handled according to the rules you set up in Call Forwarding.

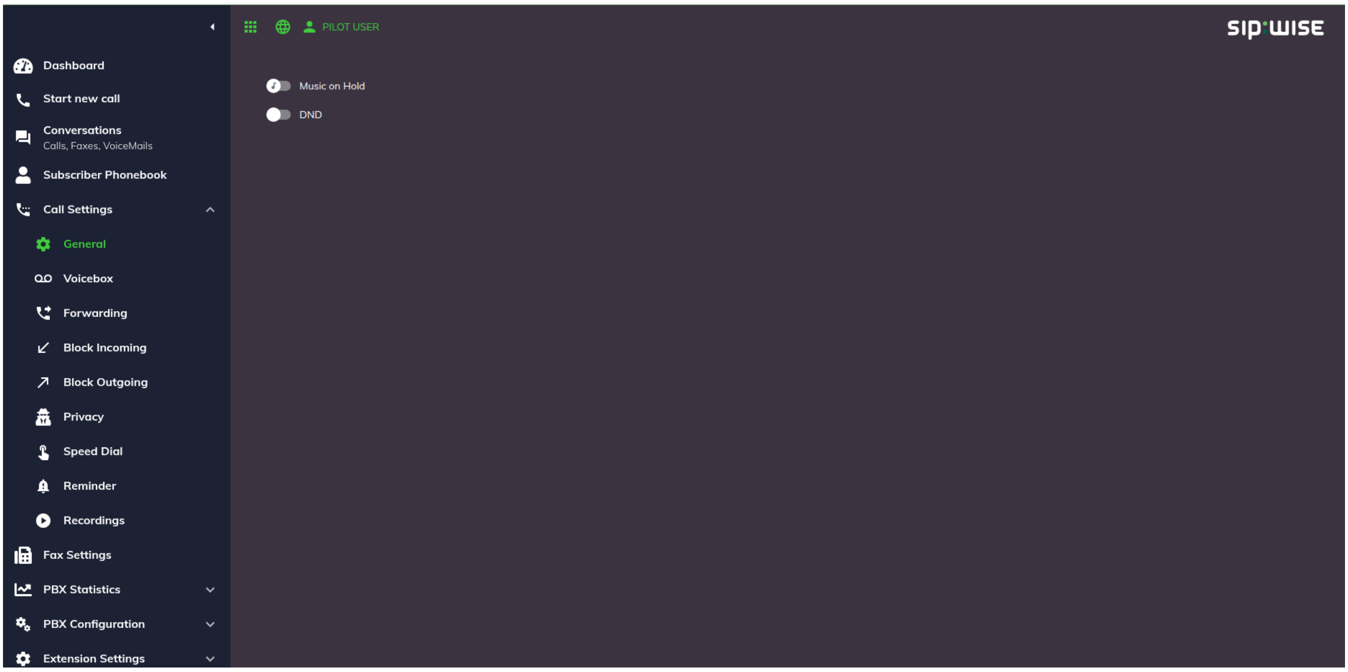

Figure 21. General call settings

3.5.2. Voicemail

Your Voicemail Settings

The **Voicebox** tab under Call Settings — "voicebox" is just another word for voicemail — is where you manage everything about the messages callers leave you when you can't answer.

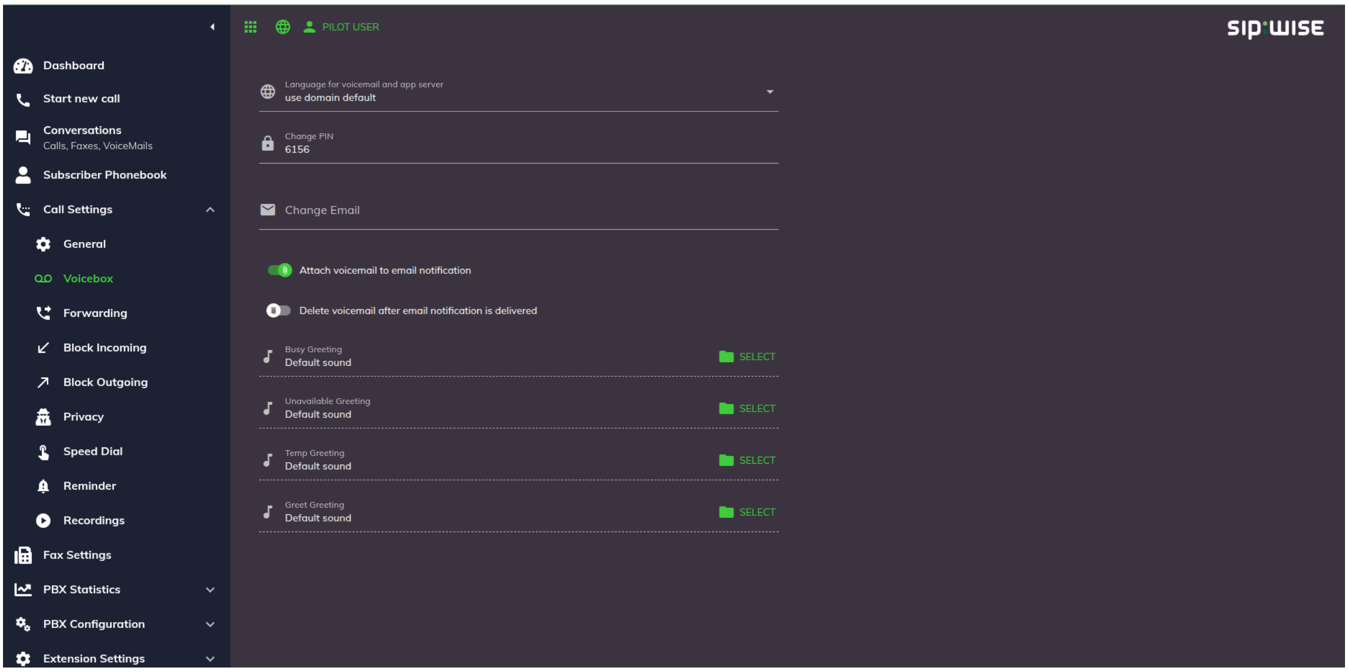

Figure 22. Voicemail settings

Here you can change the **PIN** you use to listen to your messages by phone, change the **email address** your voicemail notifications are sent to, and decide whether a recording of the message itself should be attached to that email — handy if you'd rather listen from your inbox than dial in. A related switch lets you delete a message automatically once it has been emailed to you, so your voicebox doesn't fill up with messages you've already heard elsewhere. A **language** option controls which language the automated voicemail system speaks to your callers in.

Recording Your Greetings

Four separate greetings cover different situations: one for when you're already on another call, one for when you don't answer at all, a standard default greeting used otherwise, and a temporary one you can switch on for a short period — for example while you're on vacation — without losing your normal greeting underneath it. Each greeting starts out using a generic default recording, until you upload your own.

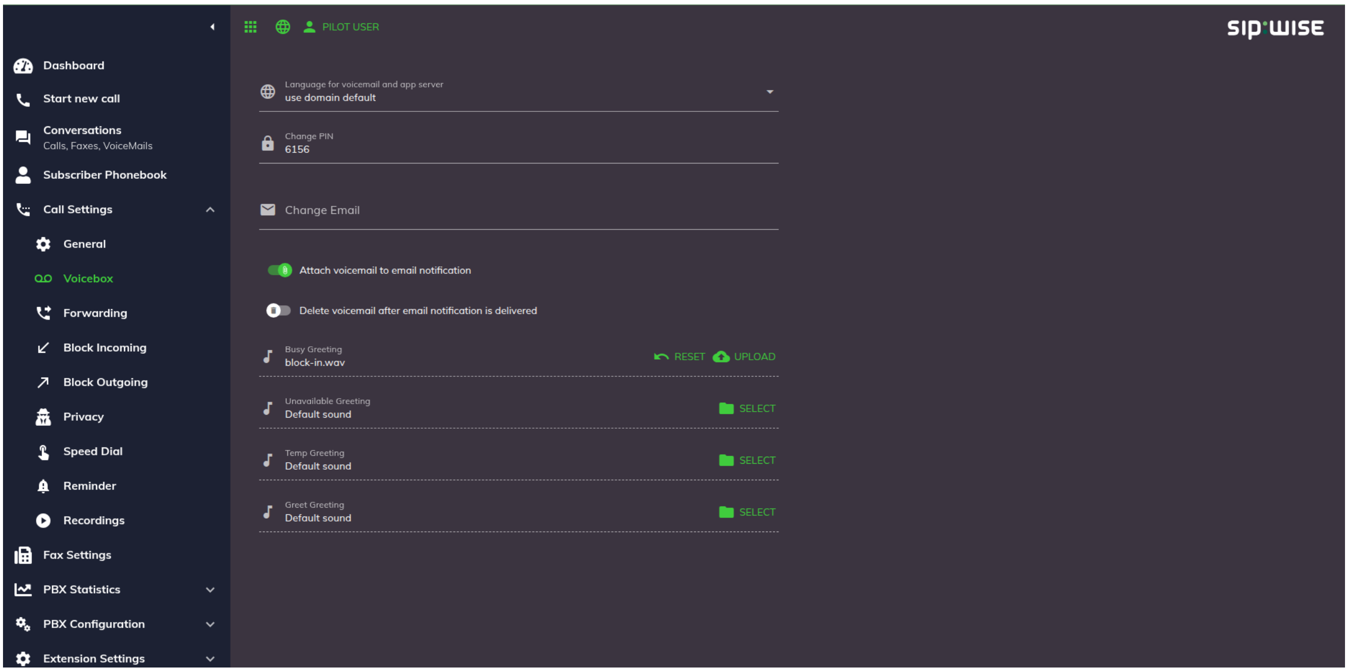

Figure 23. Uploading a personal greeting

3.5.3. Call Forwarding

Deciding Where Your Calls Go

Call forwarding lets you send incoming calls somewhere other than your own phone. The **Forwarding** tab under Call Settings groups your rules into four situations: **Always**, **If not available**, **If busy**, and **On no answer** — so you can, for example, always forward calls to your mobile while also setting up a different rule for when you simply don't pick up in time.

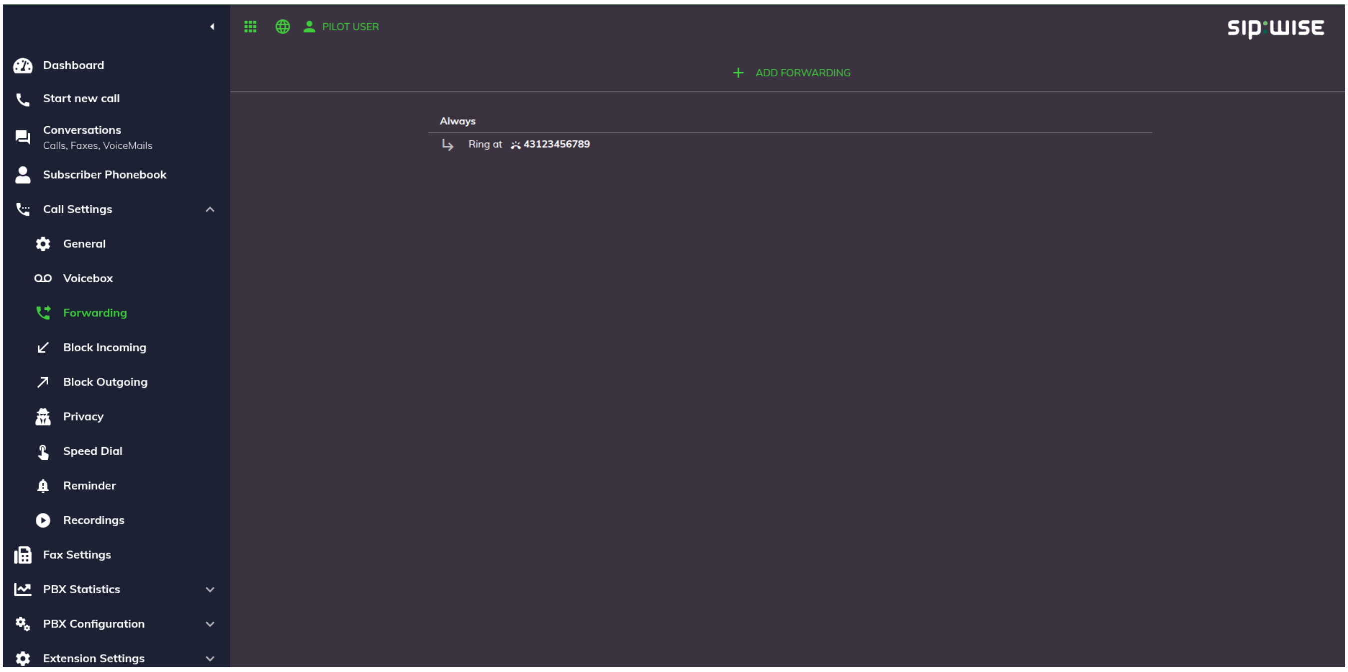

Figure 24. Your forwarding rules

Each rule can be switched on or off at any time without deleting it, so you can prepare a forwarding rule in advance — say, for when you're on vacation — and simply flip it on when you need it.

Where a Call Can Be Forwarded To

When you create or edit a rule, **Forward to** offers a wide range of destinations: another phone number, your voicemail, a conference room, a recorded announcement, a fax-by-email address, and several more advanced options that this handbook covers in their own chapters, such as an automated menu (see Extension Features).

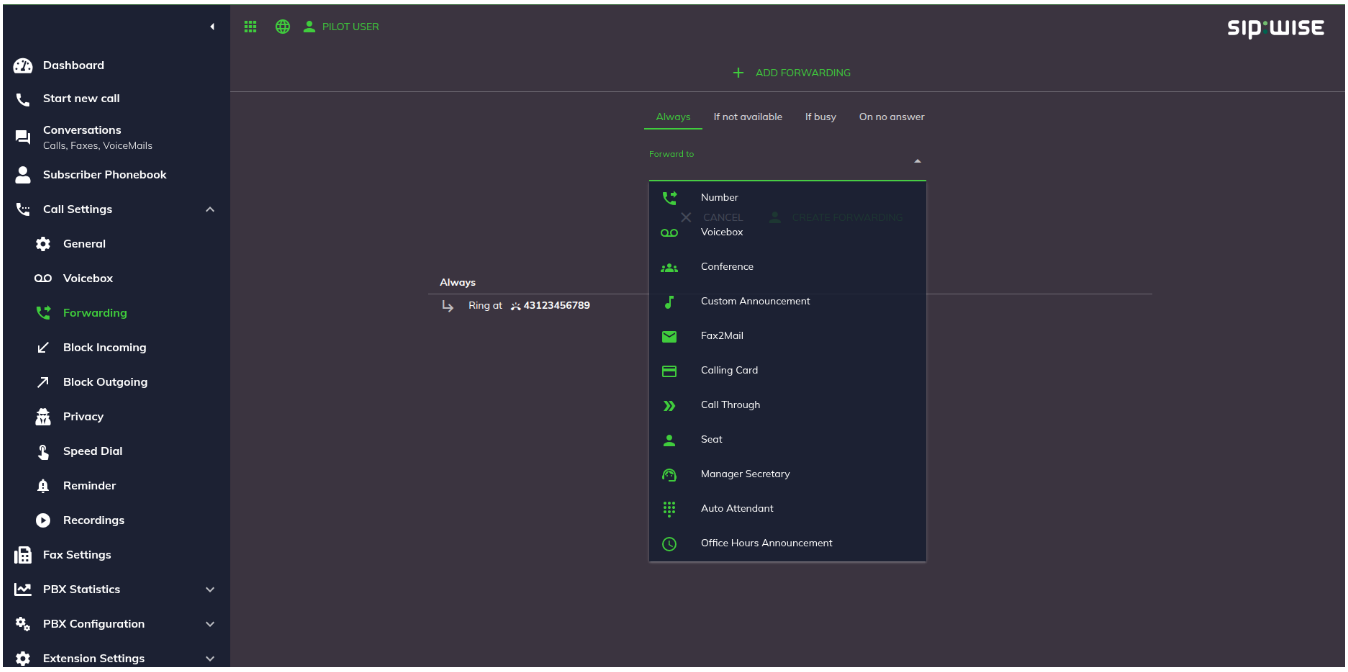

Figure 25. Choosing where a call goes

You're not limited to a single destination per rule: a rule can ring one destination for a set number of seconds, and if nobody answers there, automatically move on to a second one — for instance, ringing your mobile number for a minute before falling back to a conference room or your voicemail.

Forwarding Only in Certain Situations

Beyond the four basic situations, a **Condition** can narrow a rule down even further — for instance, only forwarding calls that come from a specific list of numbers, only on a particular date, or only outside your usual working hours.

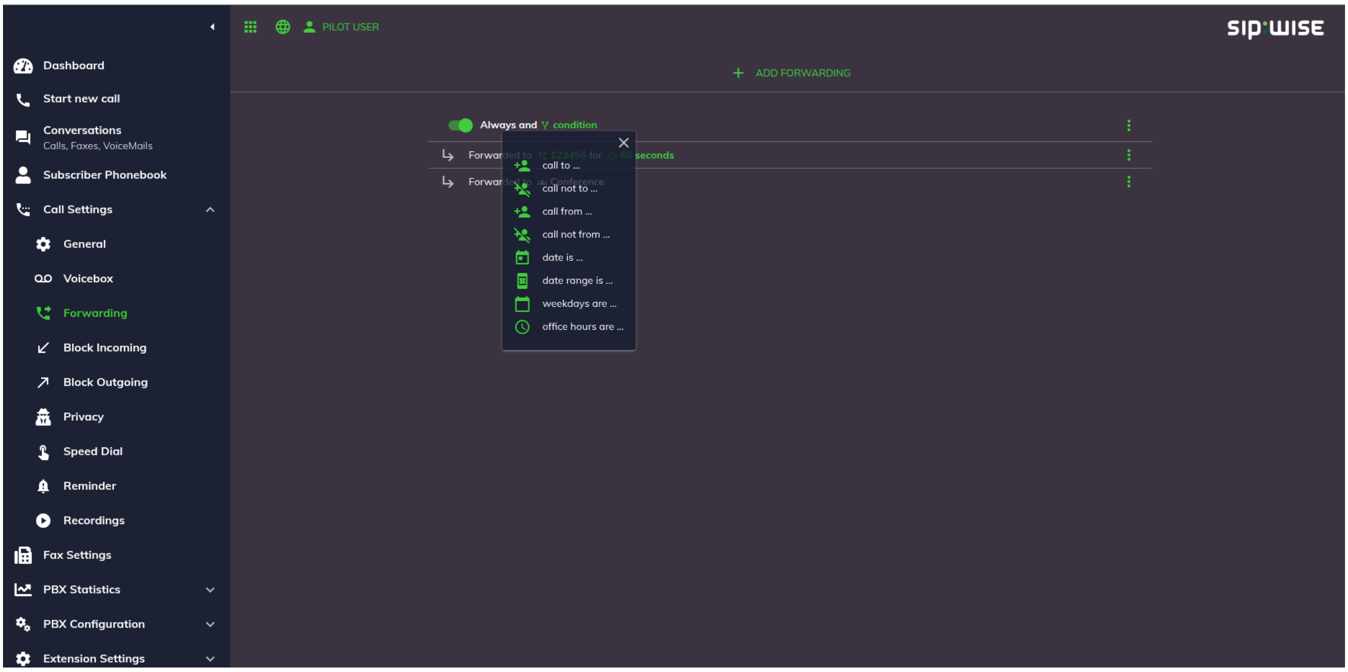

Figure 26. Adding a condition to a rule

Conditions can also be combined — a single rule might apply only when the call comes from one of a chosen list of numbers **and** only on a specific date — which makes it possible to set up quite precise forwarding behavior without needing more than one rule.

3.5.4. Blocking Numbers

Blocking Incoming Calls

The **Block Incoming** tab lets you control who can reach you. You can switch on **All anonymous incoming calls are blocked** to reject any call that arrives without caller-ID information at all. Below that, a choice lets you pick the style of blocking that suits you: either block only the specific numbers you list, or — the opposite approach — allow only the numbers you list and block everyone else.

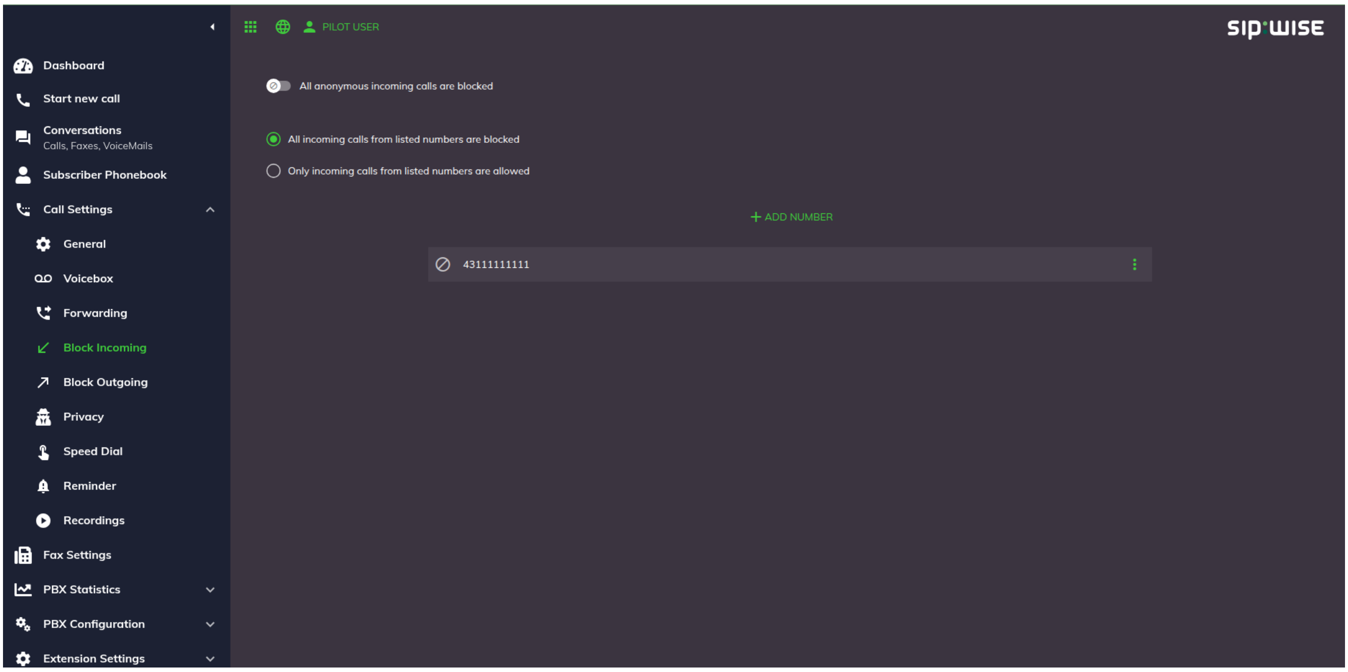

Figure 27. Blocking incoming calls

Whichever style you choose, **Add Number** is how you build up your list.

Blocking Outgoing Calls

The **Block Outgoing** tab works the same way, but for calls you make rather than calls you receive: you can block specific numbers, or restrict yourself to only being able to call the numbers on your list.

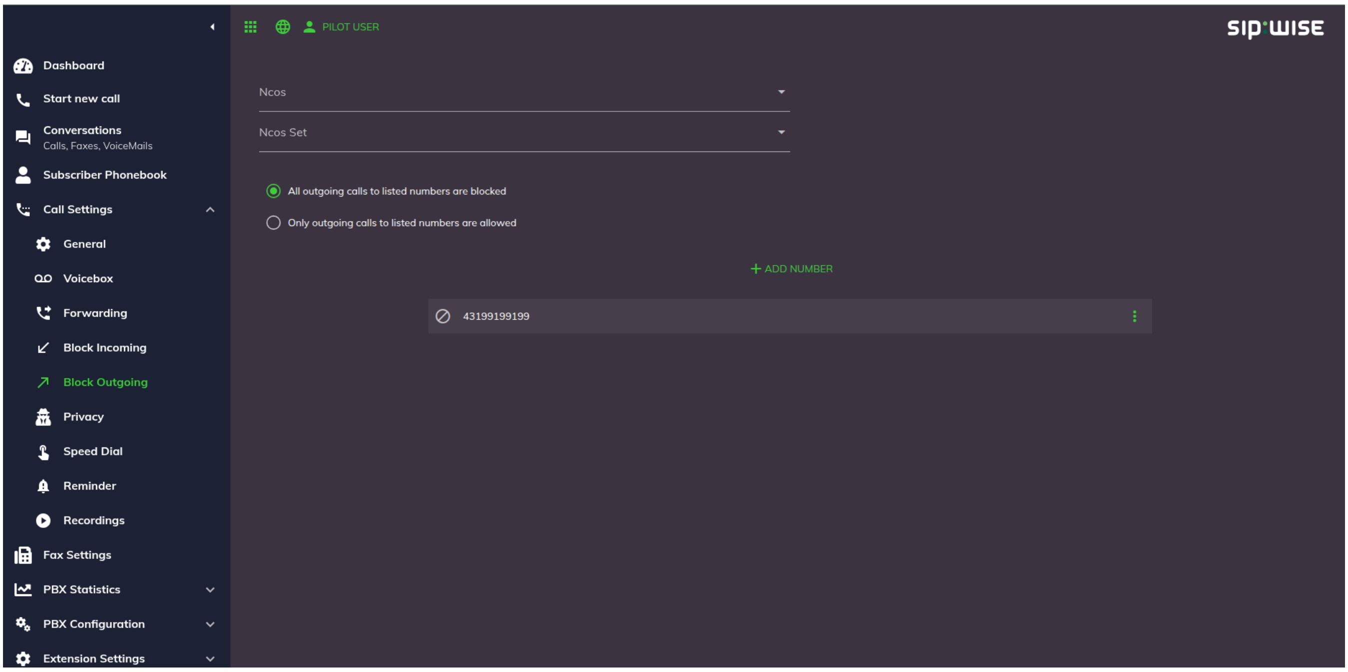

Figure 28. Blocking outgoing calls

This page may also show **Ncos** options. Ncos stands for "Number Class of Service" — it's simply a way your operator can group whole categories of destinations together, such as international numbers or premium-rate numbers, so that an entire category can be allowed or blocked at once instead of you having to list every number individually. If your operator hasn't set this up for your account, you can simply ignore it and manage your outgoing block list one number at a time.

3.5.5. Hiding Your Caller ID

The **Privacy** tab lets you decide whether the person you're calling can see your number. Turning on **Hide your number to the callee** makes your calls appear as "Anonymous" to people outside your phone system, much like the caller-ID blocking feature offered by many mobile carriers. A second, separate switch **Hide number to the callee within own PBX** lets you hide your number also from colleagues within your own company phone system.

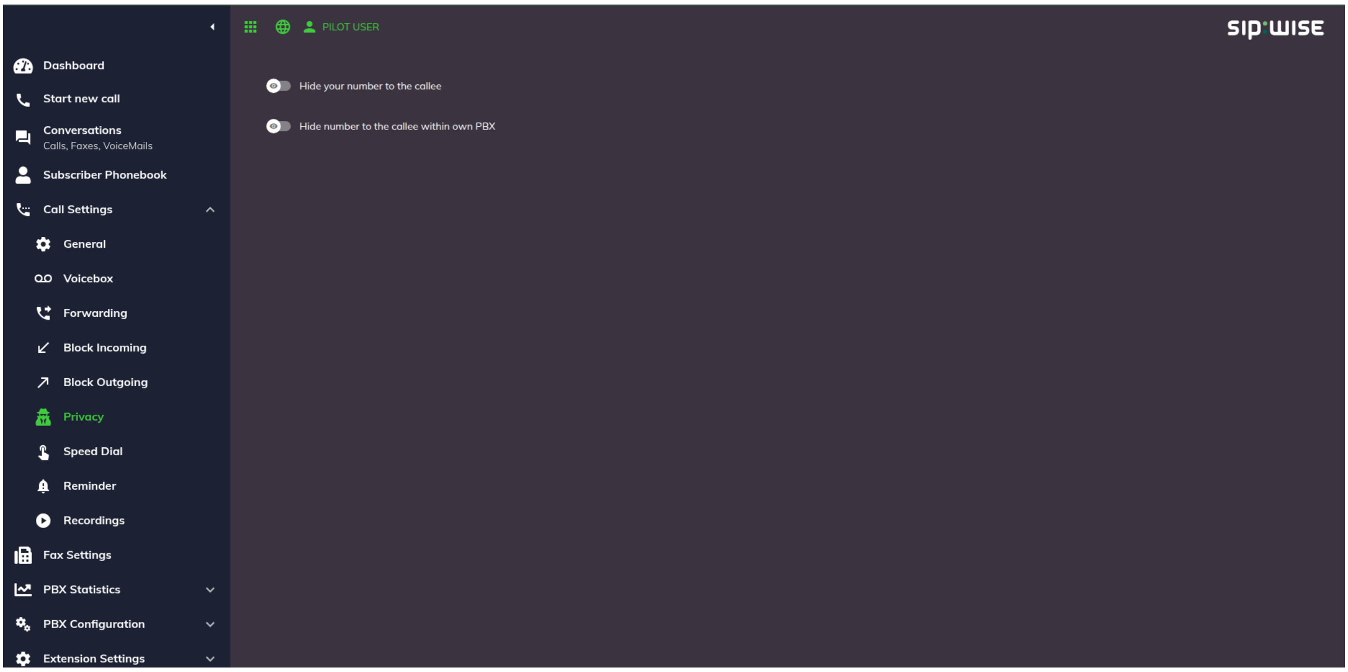

Figure 29. Hiding your caller ID

Keep in mind that hiding your number doesn't guarantee every phone system will honor the request — some emergency services and toll-free numbers are required by law to see the real caller ID regardless of this setting.

3.5.6. Speed Dial

Dialing Shortcuts

Speed dial lets you reach a number you call often by dialing a short code from your phone instead of the full number. Each entry in the **Speed Dial** list shows the code and the number it dials — for example, dialing `*0` might ring your partner's mobile number directly.

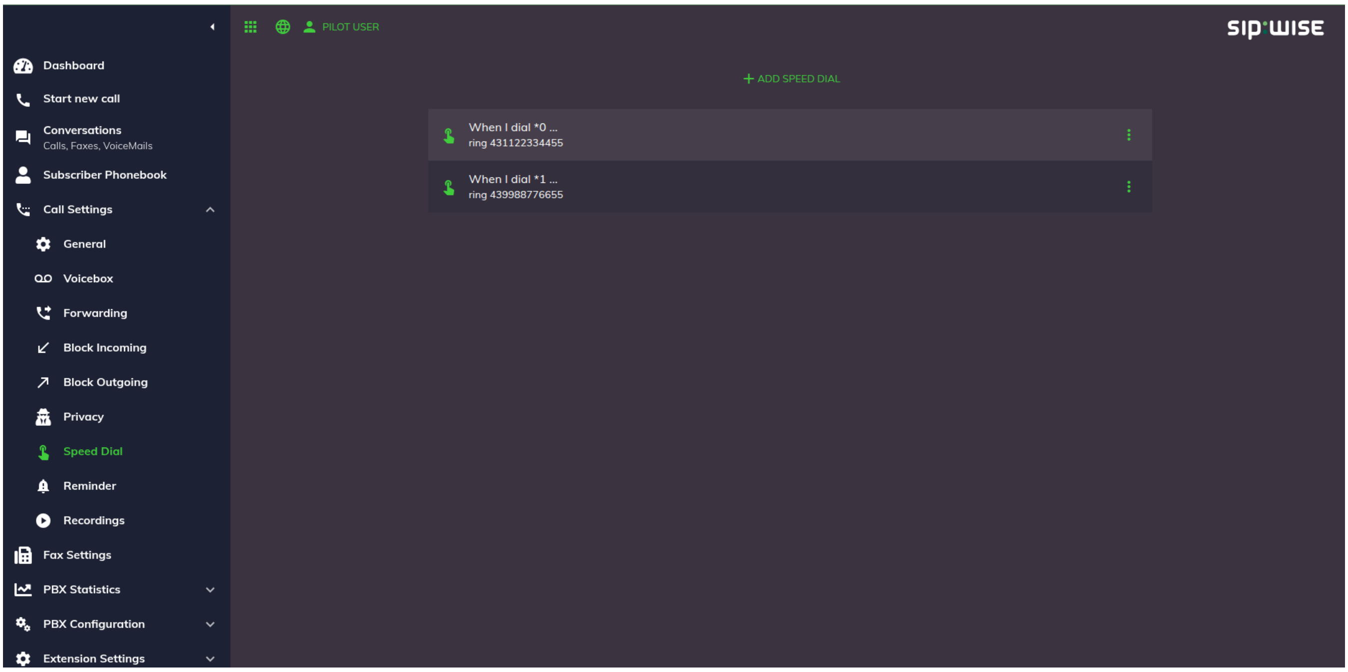

Figure 30. Your speed-dial shortcuts

Adding a Shortcut

Select **Add Speed Dial**, then choose which code should trigger it and which number it should dial. Only a limited set of codes is available (from 0 to 9), since they have to stay short enough to be quick to dial and not clash with other features of your phone system.

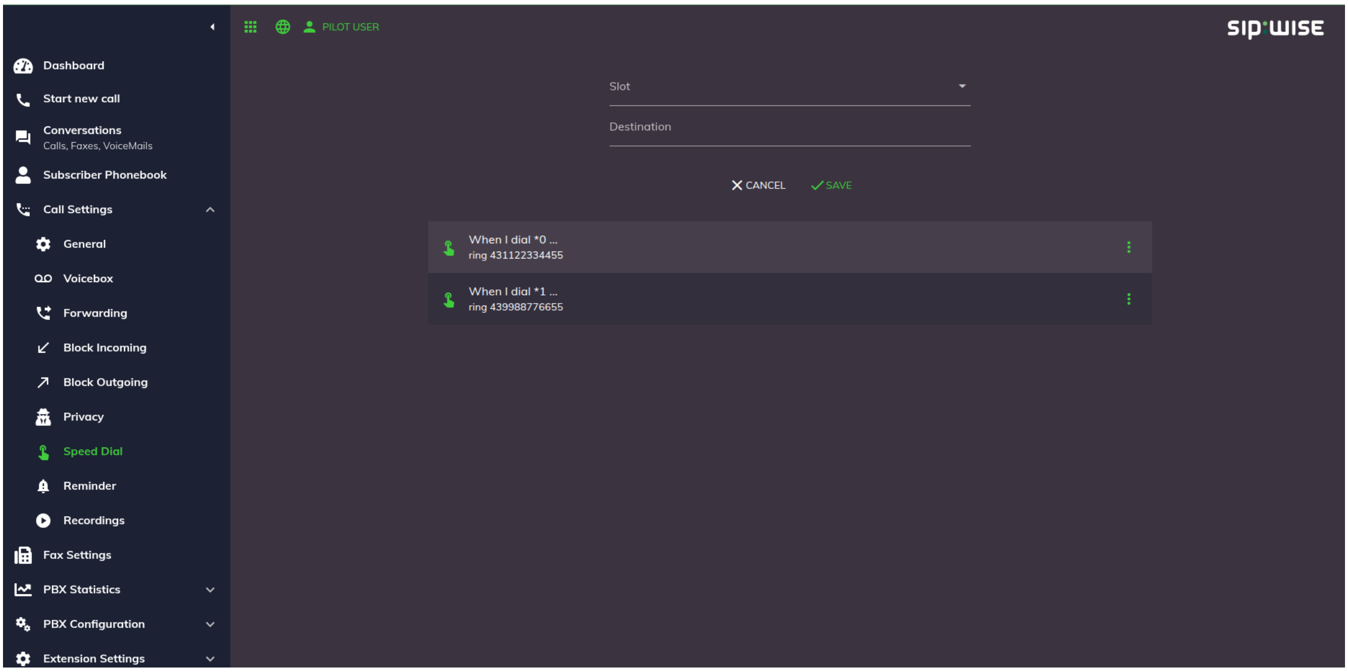

Figure 31. Adding a new shortcut

3.5.7. Reminder Calls

Setting a Wake-Up or Reminder Call

The **Reminder** tab turns your phone into a simple alarm clock: at the time you choose, it rings you, just like a hotel wake-up call.

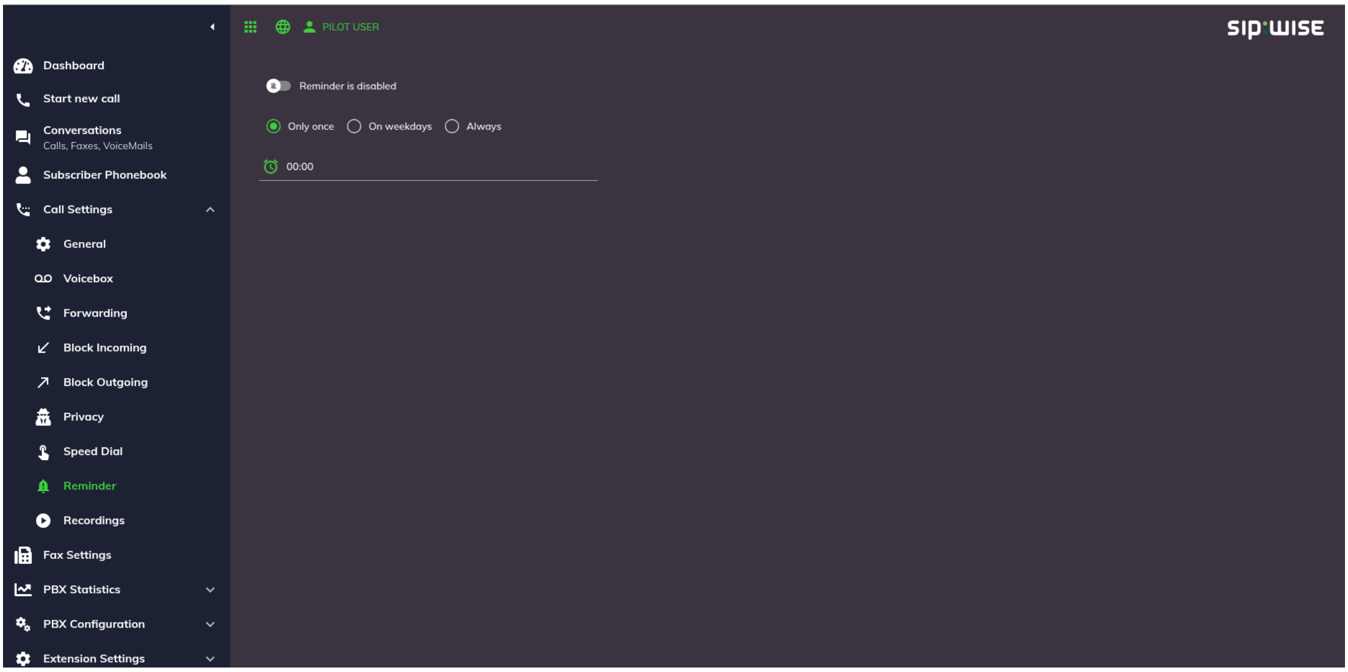

Figure 32. Setting up a reminder call

Once you switch the feature on, you can choose whether it should ring you **only once**, **every weekday**, or **always** (every day), and pick the time using a simple clock.

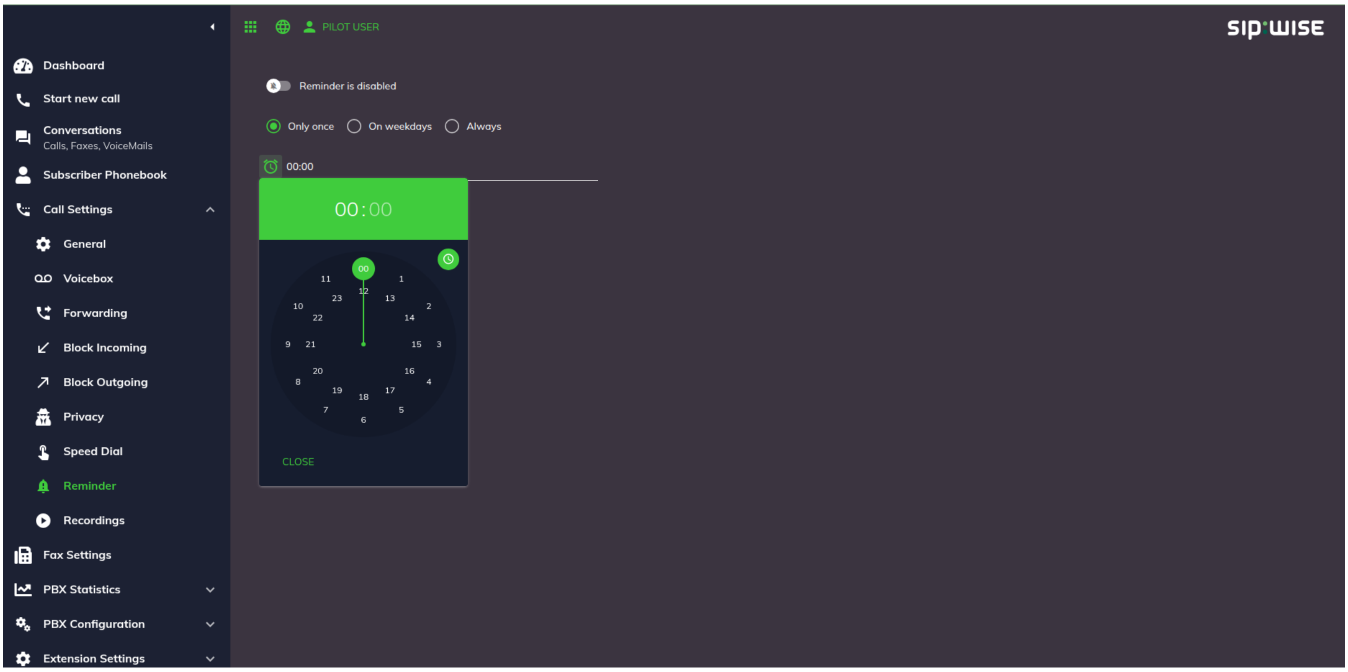

Figure 33. Choosing the reminder time

3.5.8. Call Recordings

Listening Back to Recorded Calls

If your operator has enabled call recording for your line, recordings appear under the **Recordings** tab, listed by date and time together with the caller and callee involved, so you can find and listen back to a specific call.

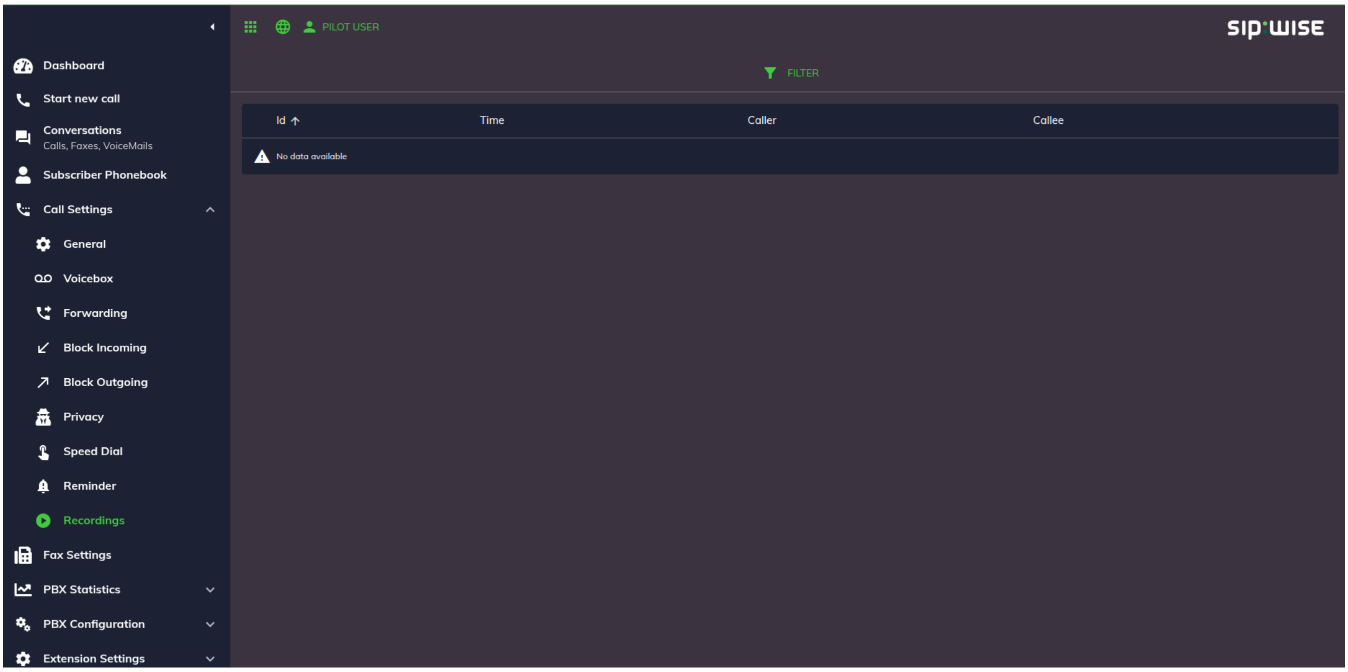

Figure 34. Call recordings

The **Filter** button lets you narrow the list down, which becomes useful once you have more recordings than fit comfortably on one page.

3.6. Fax

NOTE This feature requires the **fax** license installed on the NGCP system.

3.6.1. Receiving Faxes by Email

The **Fax to Mail and Sendfax** tab controls what happens to faxes sent to your number: once switched on, each incoming fax is delivered straight to one or more email addresses you choose, as a file attachment, instead of printing out anywhere.

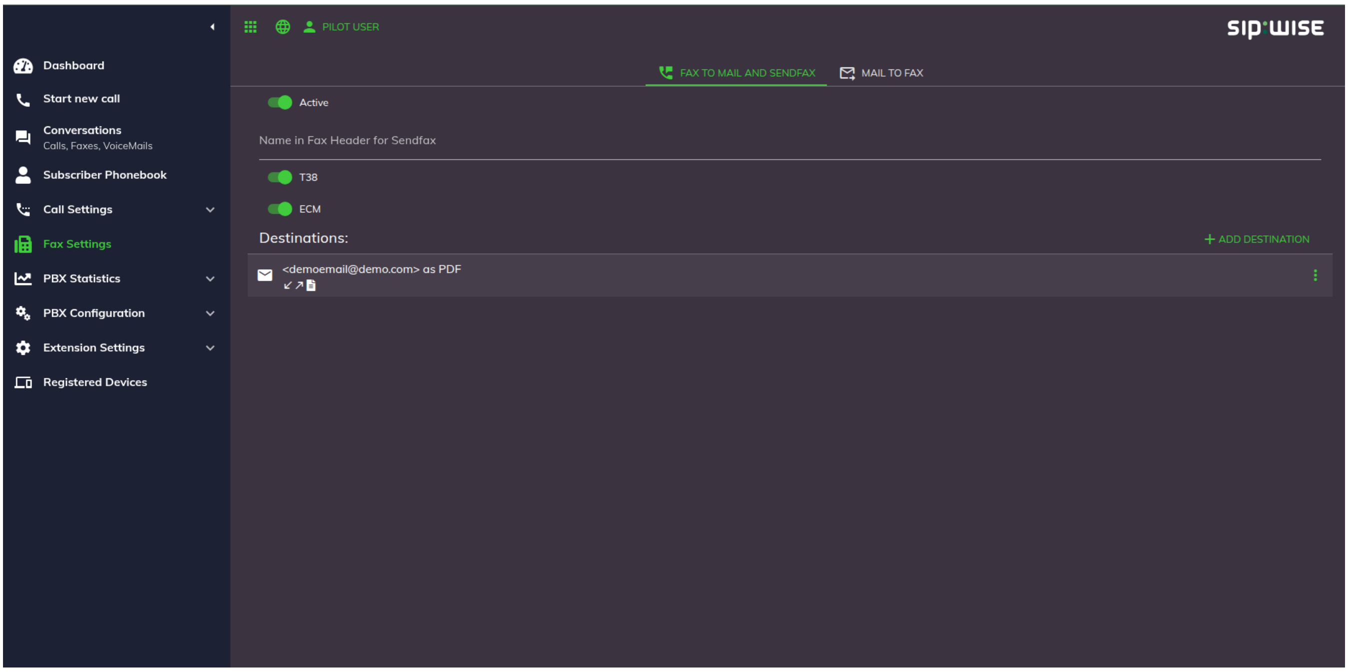

Figure 35. Receiving faxes by email

When adding a destination email, you can pick the attached file's format, and decide separately whether that address should receive incoming faxes, outgoing faxes, or just a delivery report confirming a fax you sent went through. Two further switches, **T38** and **ECM**, are technical settings that improve fax reliability over internet-based phone connections; don't change them unless your operator specifically advises otherwise.

3.6.2. Sending a Fax by Email

The **Mail to Fax** tab works the other way around: it lets you send a fax simply by emailing it to a special, secret email address tied to your account, without opening the portal at all — whatever you attach to that email arrives at the destination as a fax.

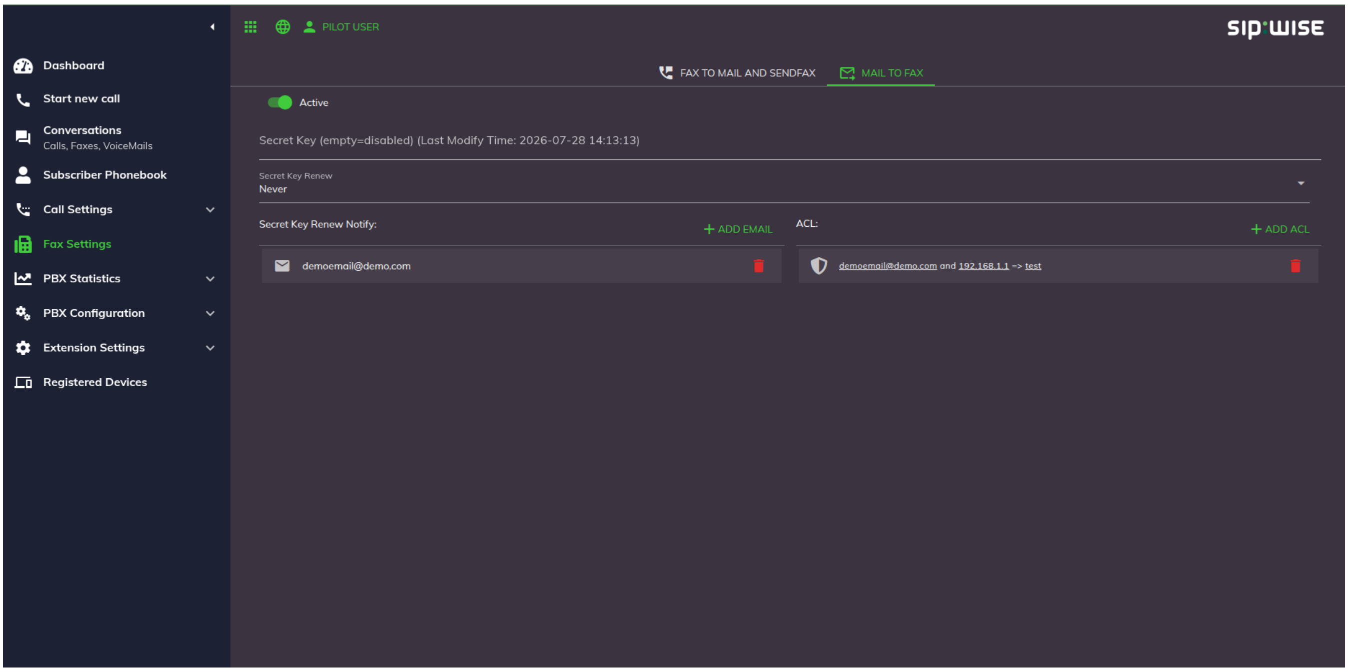

Figure 36. Sending a fax by email

Because anyone who knows this secret address could send faxes on your behalf, **Secret Key Renew** lets you have it change automatically — never, daily, weekly or monthly — and an access list lets you restrict which senders or networks are allowed to use it at all, for extra peace of mind.

3.6.3. Sending a Fax Right Away

For a one-off fax, there's no need to change any setting at all: the **Send Fax** quick action, reachable from the Dashboard, lets you type a destination number, attach a file, and send it immediately.

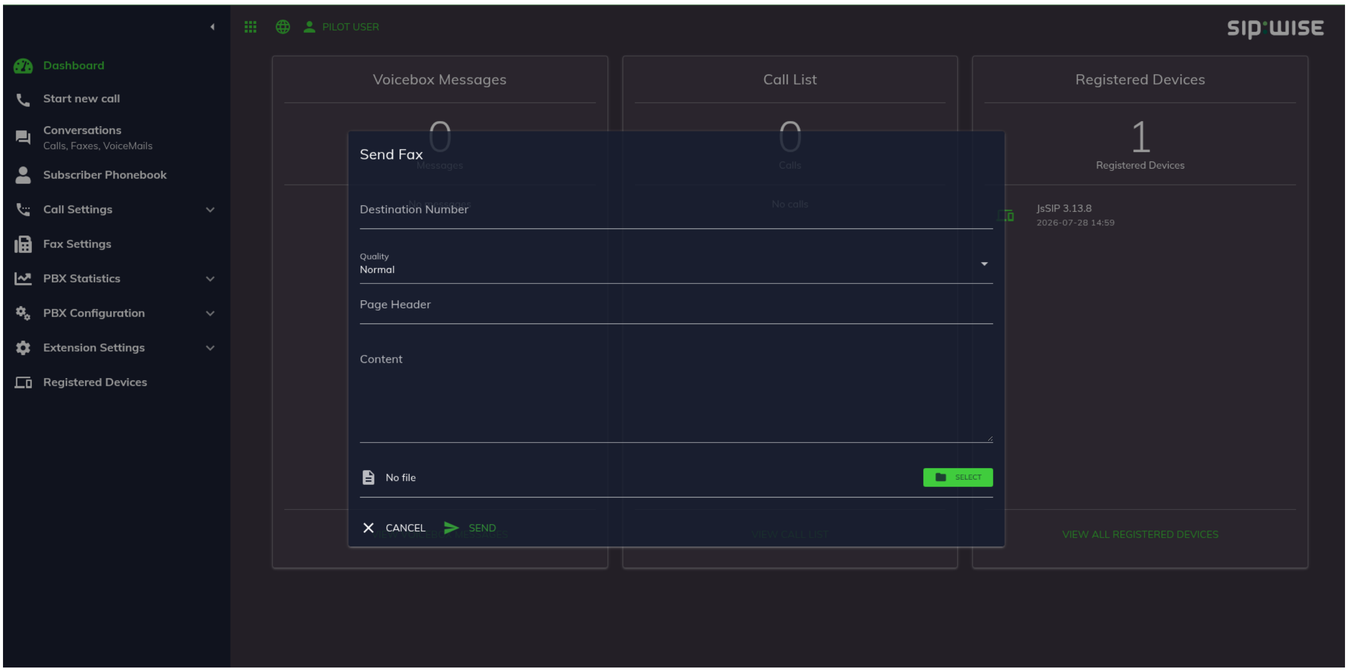

Figure 37. Sending a fax immediately

A **Quality** option controls how much detail is preserved in the transmitted pages — **Normal** is fine for text, while **Fine** or **Super** are better suited to faxes containing small print or images.

3.7. Extension Features

NOTE All the following features requires the **CloudPBX** license installed on the NGCP system.

3.7.1. Features of Your Own Extension

Extension Settings gathers a handful of more advanced features that belong specifically to your own line, separate from the call-handling settings covered in earlier chapters.

Your Own Call Queue

If you're often busy on one call while another comes in, a personal call queue lets extra callers wait in line for you instead of hearing a busy signal. **Queue Length** sets how many callers can wait at once, and **Wrap up time** gives you a short pause after finishing a call before the next queued caller rings through, so you have a moment to catch your breath.

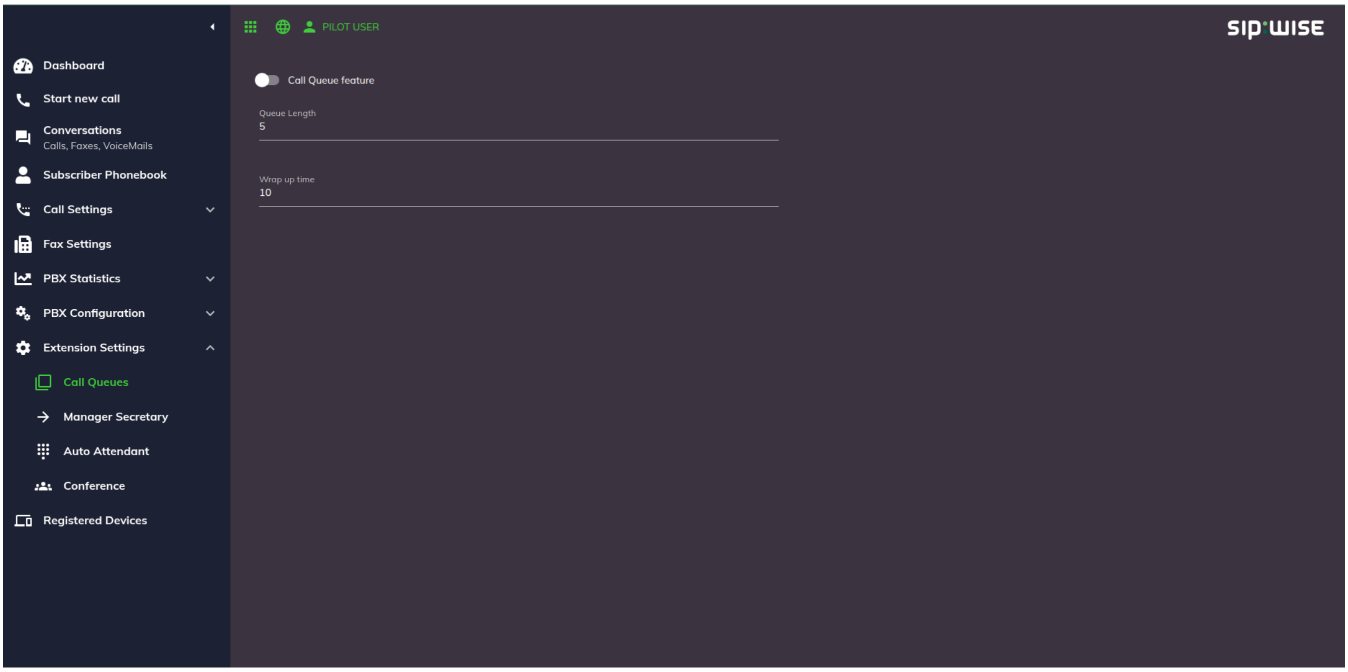

Figure 38. Your own call queue

Letting Someone Screen Your Calls

The **Manager Secretary** feature lets you nominate one or more colleagues who can answer or screen calls on your behalf. Once switched on and given at least one number, calls to your extension can be routed to your chosen secretary rather than ringing you directly.

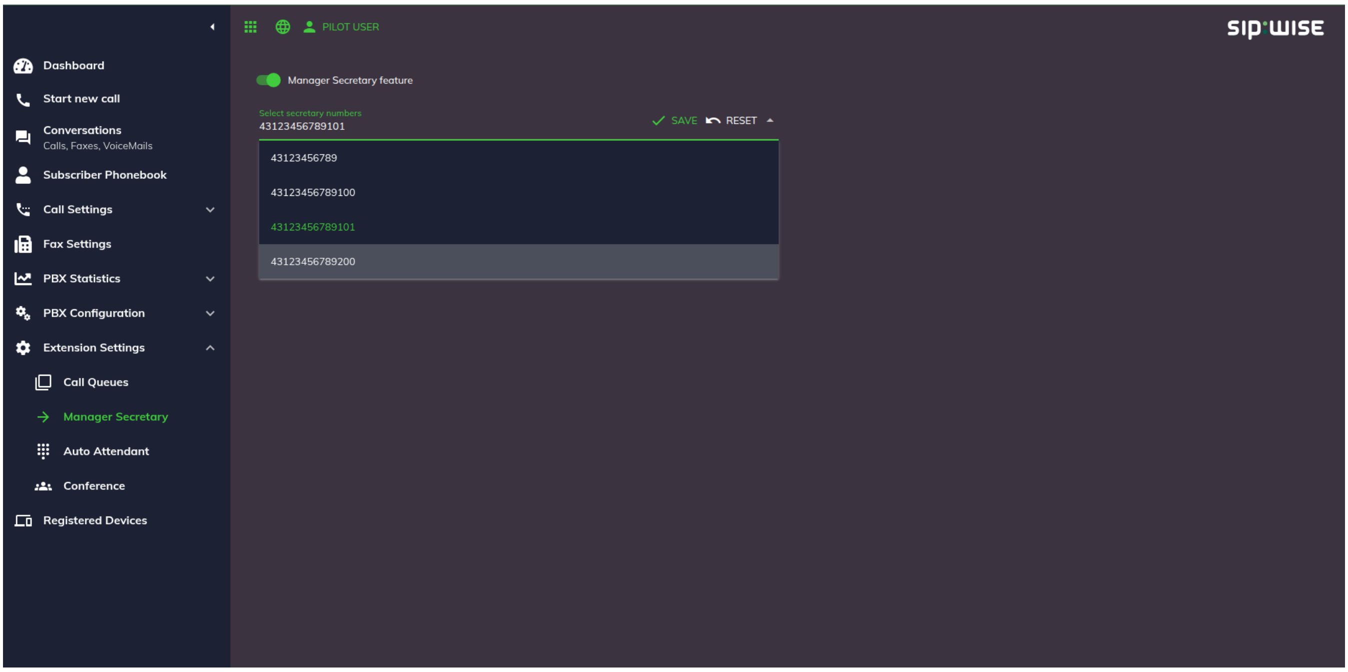

Figure 39. Choosing who screens your calls

Your Own Automated Menu

Auto Attendant lets you build a small automated phone menu for your own extension — the kind that tells a caller "press 1 for this, press 2 for that". Each **Slot** maps one digit to a destination, and a special **default** slot handles callers who don't press anything at all.

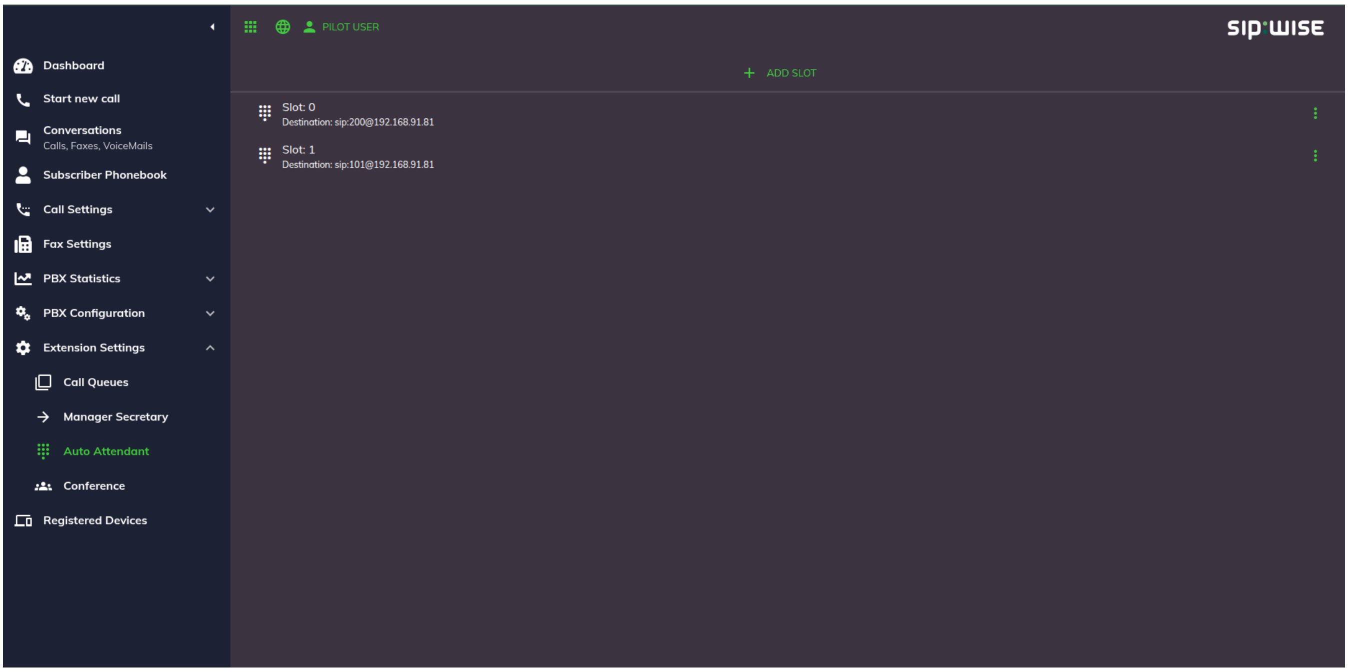

Figure 40. Your personal automated menu

Your Personal Conference Room

Finally, the **Conference** tab gives you a personal conference room that other people can dial into using a **Conference PIN** you set, with a maximum number of participants you choose to allow at once.

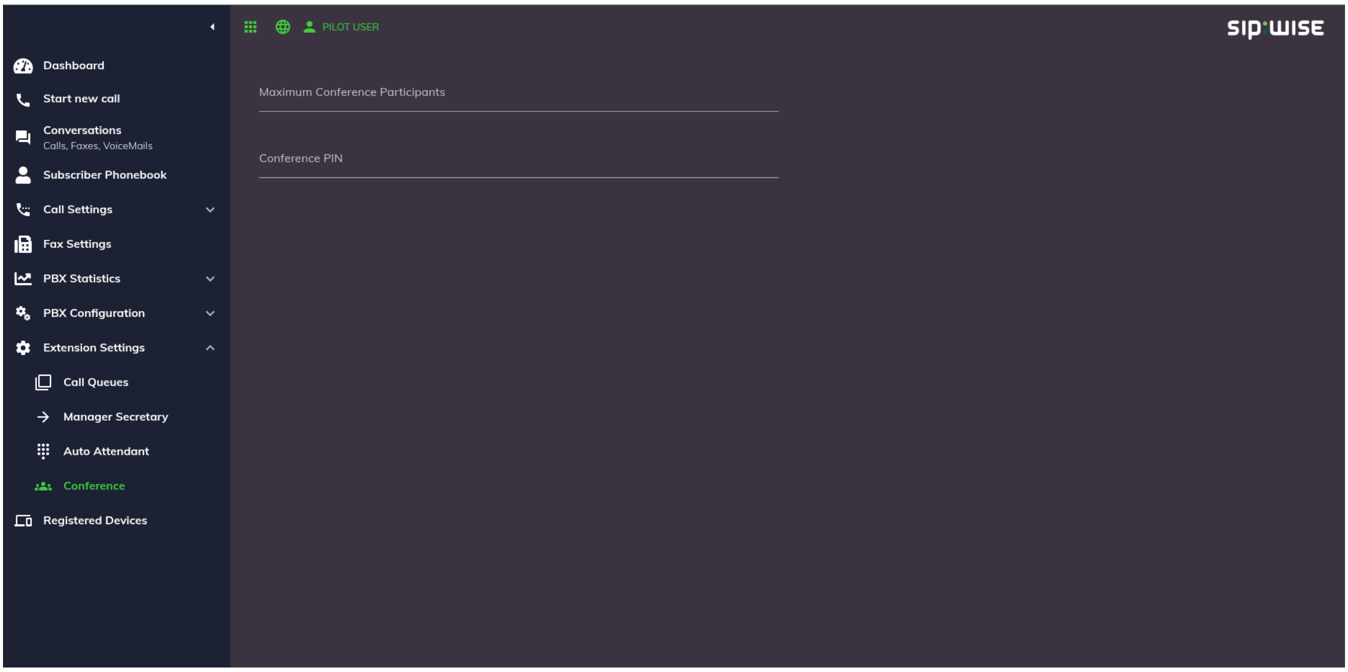

Figure 41. Your personal conference room

3.8. Registered Devices

3.8.1. What's Currently Connected to Your Line

Registered Devices lists every phone, app or piece of software currently signed in and able to receive calls on your number. Each entry shows what kind of device or app it is, and how long its connection is valid for before it needs to reconnect on its own — this happens automatically in the background, so you don't normally need to do anything about it.

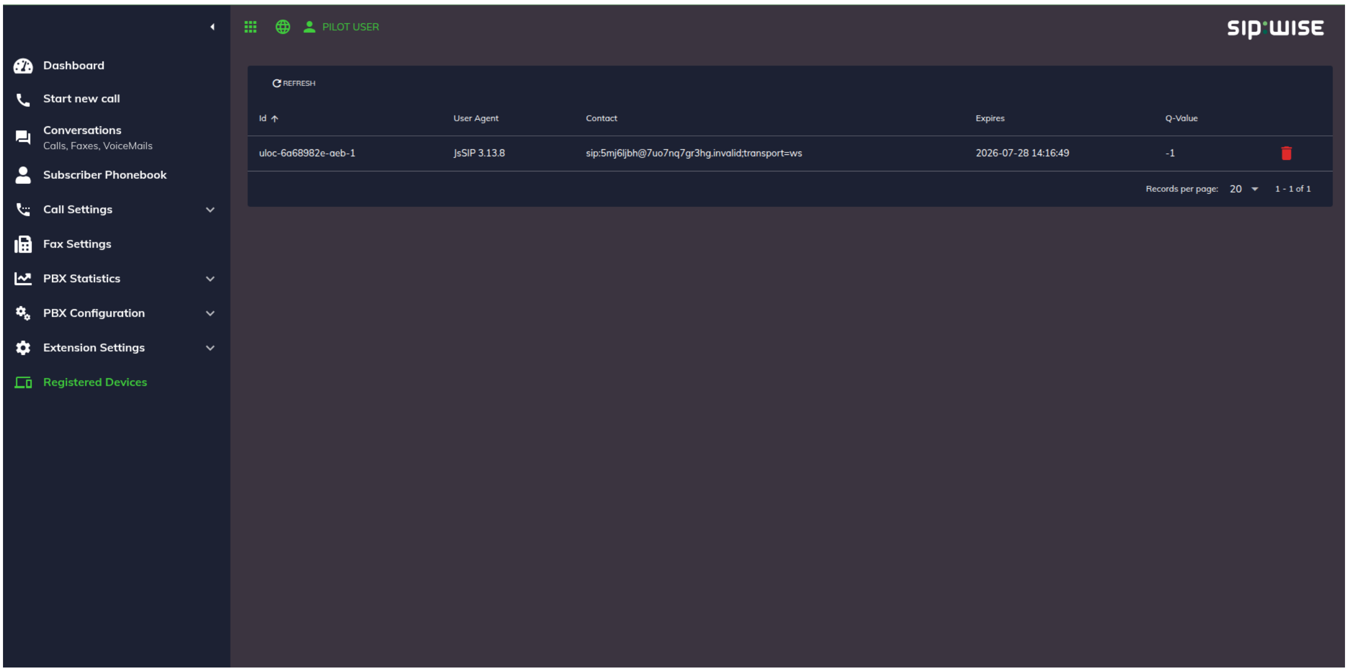

Figure 42. Devices connected to your line

If you see a device here that you don't recognize, or one you've stopped using — an old phone, for instance — you can remove it from this list. This is also a useful first stop if calls to your number aren't reaching you: checking that the device you expect to ring is actually listed here can quickly tell you whether the problem is with the phone system or with the device itself.

NOTE If your account administers the company's phone system, this page lists every device registered across the whole company, not just your own — including your colleagues'.

3.9. Account Settings

3.9.1. Getting to Your Account Settings

Selecting your name in the top-right corner of any page opens a small menu with your phone numbers, **Settings**, and the option to sign out.

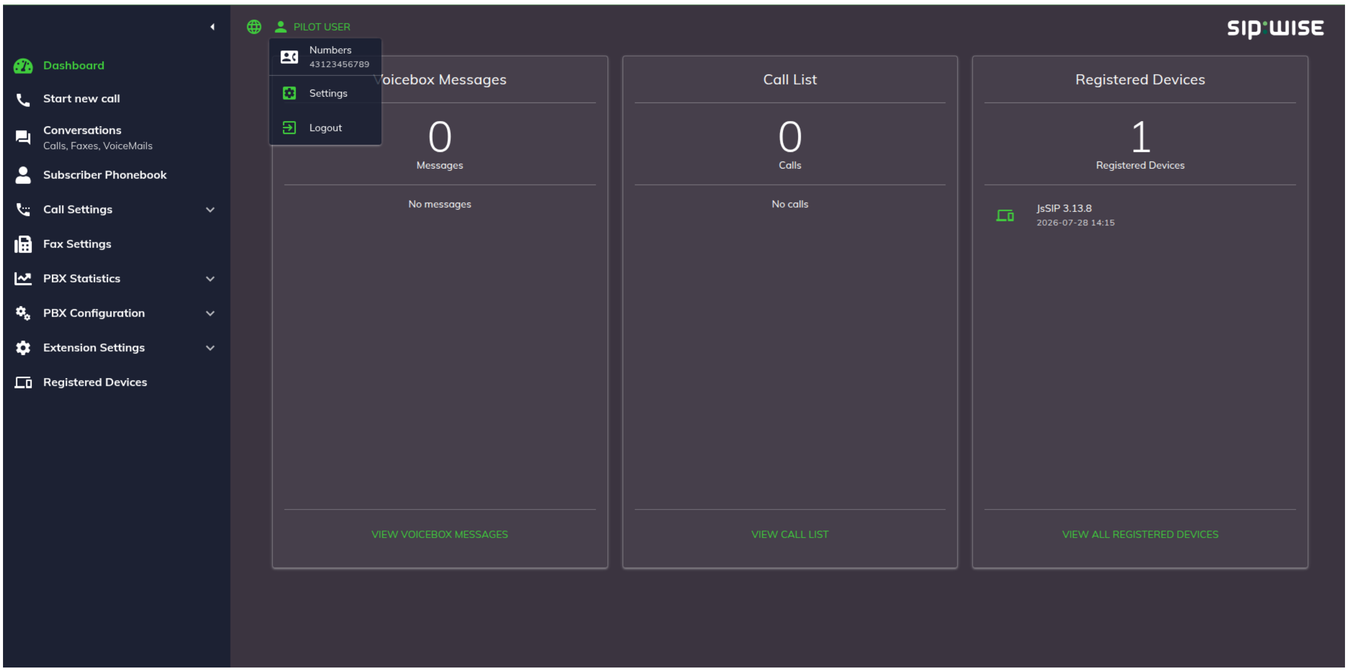

Figure 43. Opening your account settings

The Settings page shown from there holds two separate passwords, which is worth understanding clearly: your **web password** is what you type in on the sign-in page to reach this portal, while your **SIP password** is a separate, usually longer code that your physical phone or softphone app uses behind the scenes to register with the phone system and place calls. Changing one never affects the other.

NOTE	the **SIP password** is visible and can be modified only by a user that can administer the entire company's phone system.

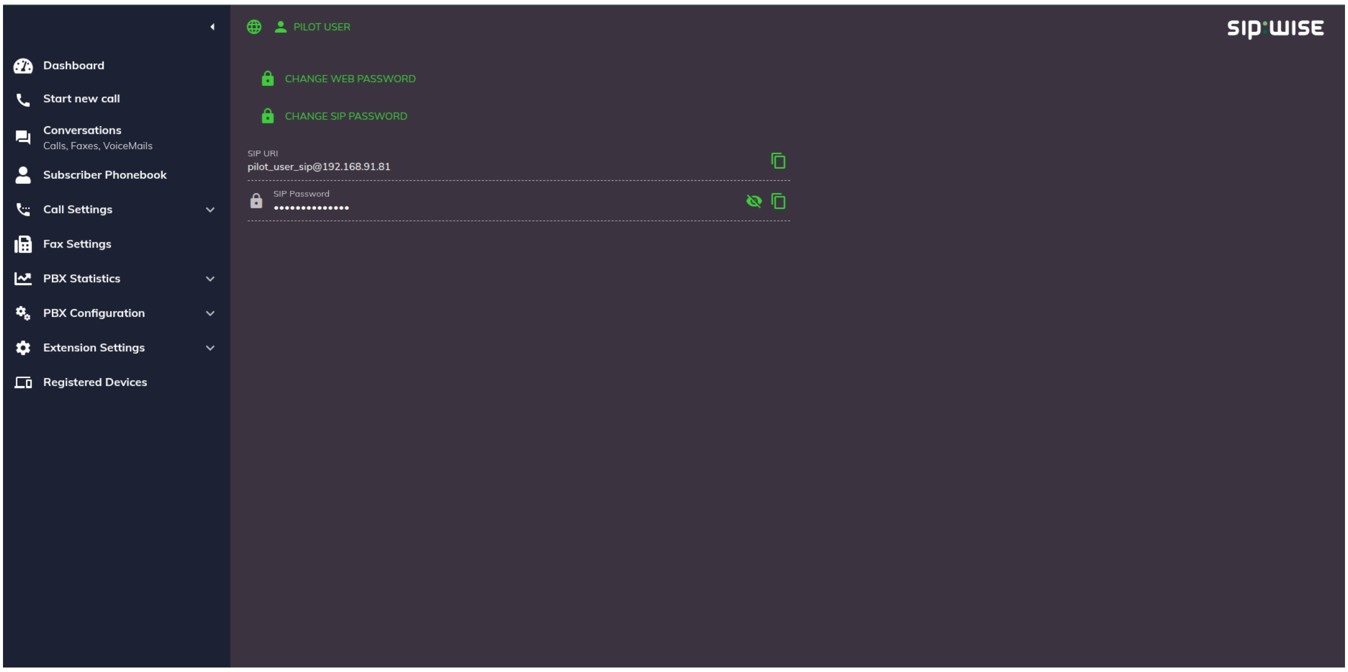

Figure 44. Your account settings

3.9.2. Changing Your Password

Selecting **Change Web Password** opens a small form where you type your new password twice, with a strength indicator to help you judge whether it's strong enough.

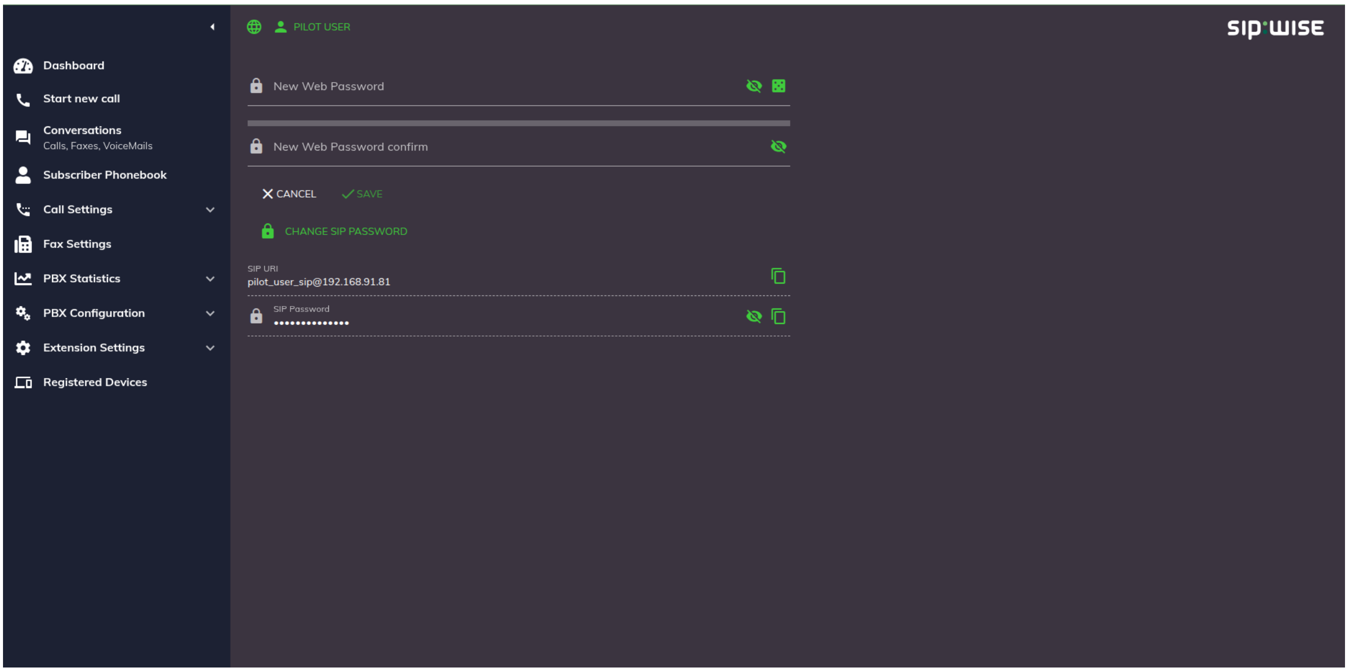

Figure 45. Changing your web password

Change SIP Password works the same way, but only ever needs to be touched if your operator or installer asks you to — for instance, when setting up a new phone, since that password (together with the SIP URI shown on the same page) is what gets entered into the phone itself, not into a web browser.

Chapter 4. Administrator Settings

NOTE All the following features requires the **CloudPBX** license installed on the NGCP system.

4.1. Administering Your Company’s Phone System

4.1.1. Is This Part for You?

Everything up to this point in the handbook applies to any subscriber. From here on, this handbook switches to a different audience: accounts that don’t just manage a single phone line, but administer an entire company’s phone system — its extensions, shared contacts, and company-wide call rules.

You can tell straight away whether this applies to your account: if your portal’s menu includes two extra entries, **PBX Statistics** and **PBX Configuration**, alongside everything described so far, then this part of the handbook is written for you. If you don’t see them, none of the following chapters apply to your account, and you can stop reading here — though you’re welcome to read on out of curiosity.

4.1.2. What’s Different Here

The features in the rest of this handbook are no longer about your own, personal line — they’re company-wide. A rule you set up in Company Call Rules, for instance, applies to every extension in the company, not just yours; the phonebook covered in Company Phonebook is shared by everyone, not private to you. Think of this part of the handbook as the toolbox for whoever is responsible for keeping the company’s phone system organized — typically an office manager, a receptionist, or whoever set the system up in the first place.

4.2. Company Call History

4.2.1. Reviewing Every Call Across the Company

PBX Statistics gives you a call history covering every extension in the company, not just your own — sometimes called **CDRs**, short for "Call Detail Records", a record of who called whom, when, for how long, and in which direction.

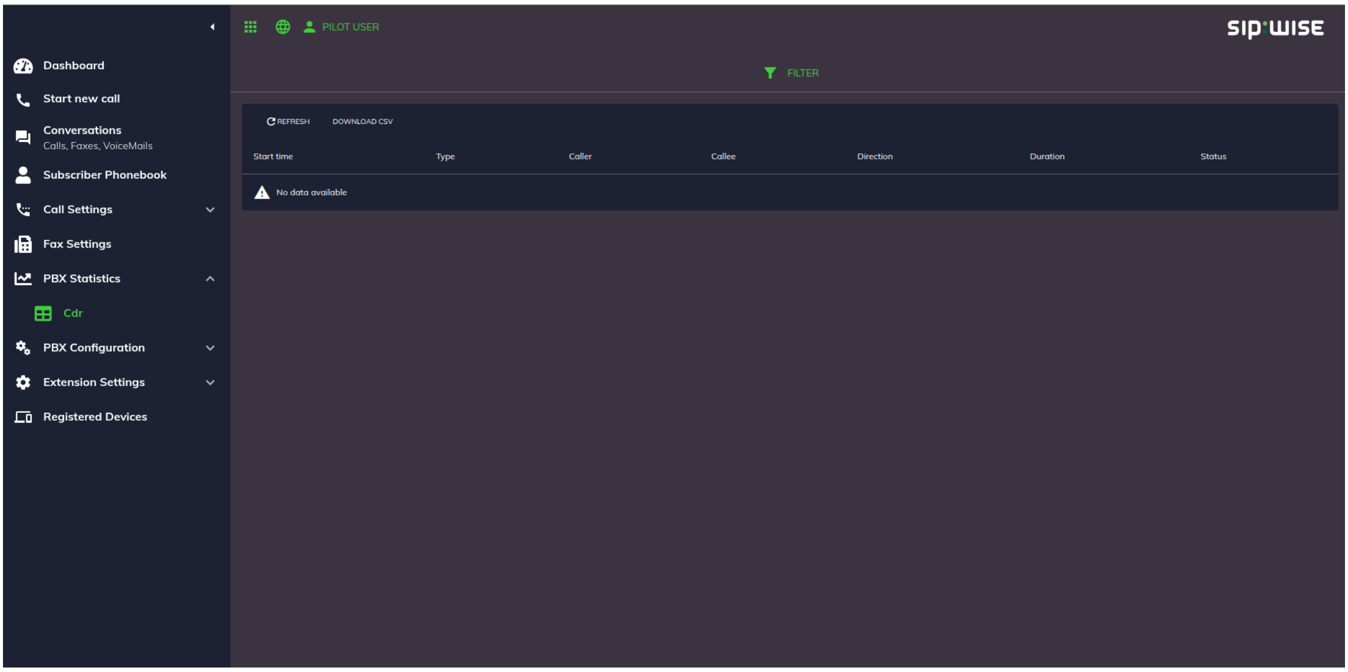

Figure 46. Company-wide call history

A **Filter** narrows the list down — by date, for example — and **Download CSV** exports it as a spreadsheet-friendly file, which is useful if you need to review usage or costs outside the portal, for instance in a regular spreadsheet program.

4.3. Seats: Managing Colleagues' Extensions

4.3.1. What a Seat Is

A **Seat** is simply a colleague’s individual extension within your company’s phone system — one seat per person, each with its own extension number. **PBX Configuration > Seats** lists every seat in the company, and is where you create a new one whenever someone joins.

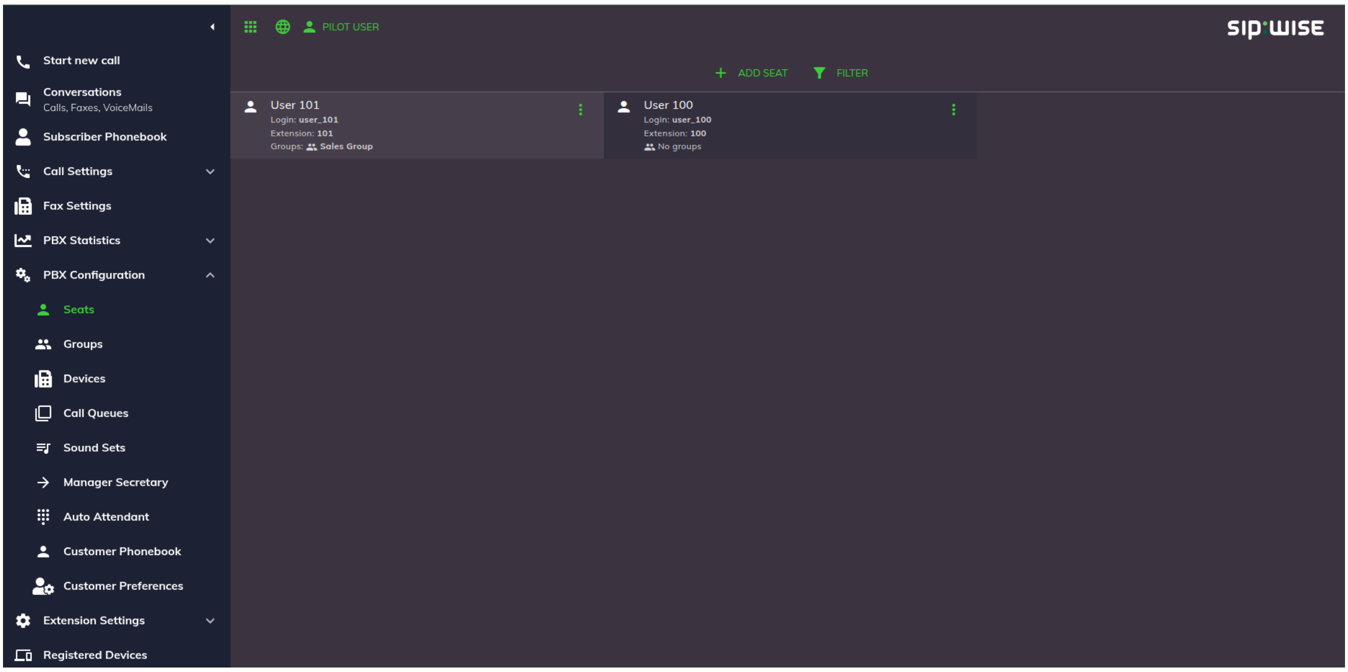

Figure 47. Seats in your company

4.3.2. Creating a New Seat

Add Seat asks for a display name and an extension number, and lets you assign the seat to one or more Groups straight away. On the same form, a web username and password are generated for that colleague to sign in with, and a separate SIP username and password are set for whichever phone or app they’ll use to make calls.

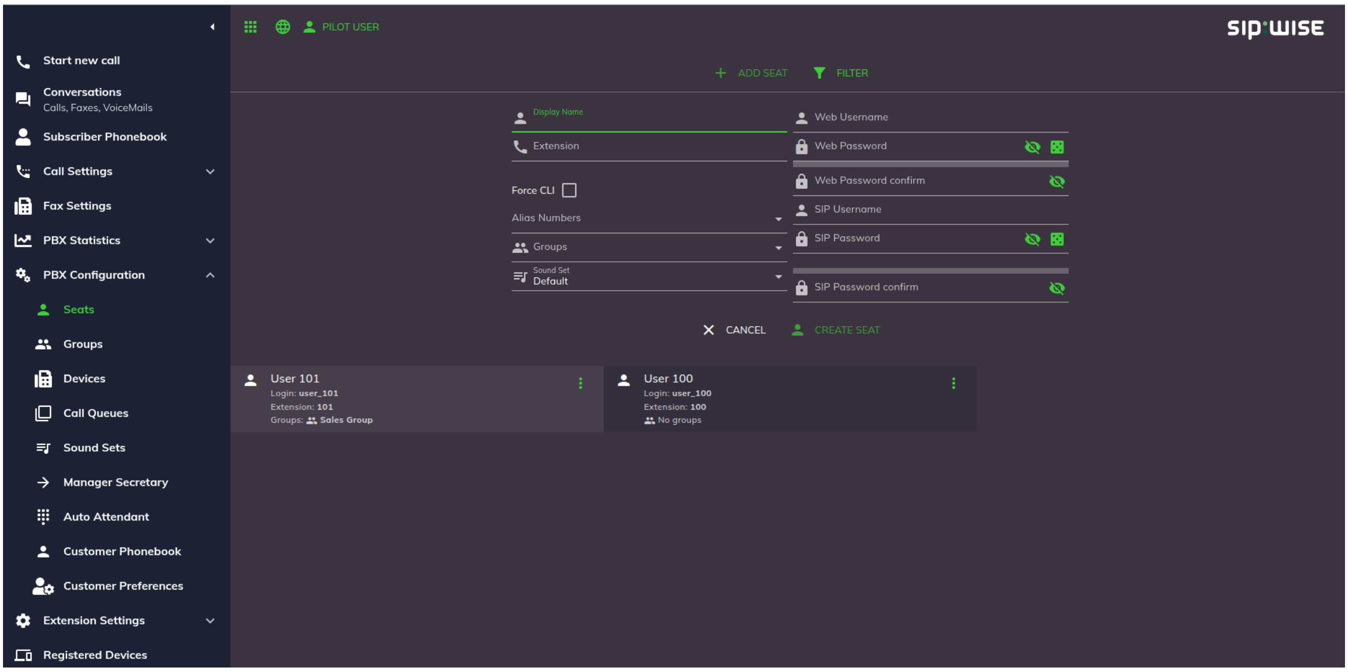

Figure 48. Creating a new seat

4.3.3. Managing an Existing Seat

Opening any seat gives you the same set of tabs a colleague would see for themselves if they signed in — Preferences, Call Forwards, Voicebox, and the two fax tabs — described in earlier chapters of this handbook. This lets you set things up on a colleague's behalf, or help them out, without needing to know their personal sign-in details.

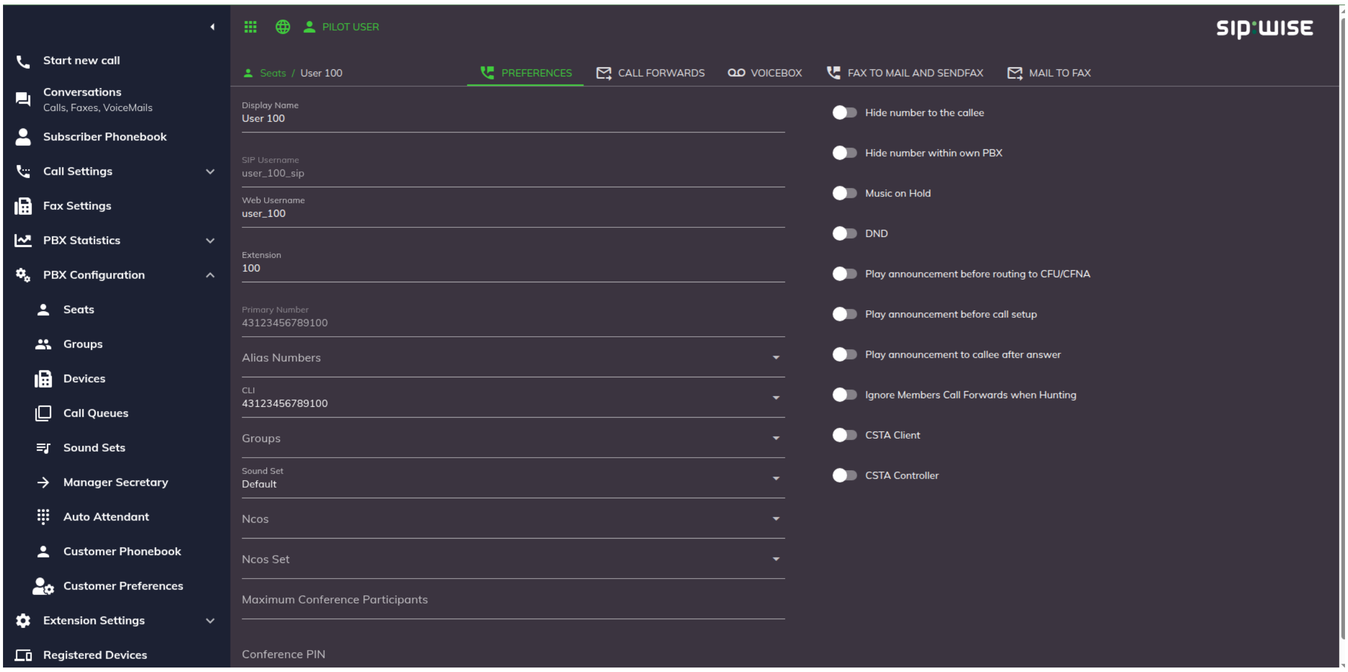

Figure 49. A colleague's seat settings

If a colleague ever needs a password reset, or leaves the company, the three-dot menu next to their seat lets you change either of their passwords or remove the seat entirely.

4.4. Groups: Sharing a Number Between Colleagues

4.4.1. What a Group Is

A **Group** — sometimes called a ring group or hunt group — lets several colleagues share one number. Whenever that number is called, the system rings some or all of the group's members according to a pattern you choose, until one of them answers. This is a natural fit for a sales team or a general reception line, where any available colleague should be able to pick up the call.

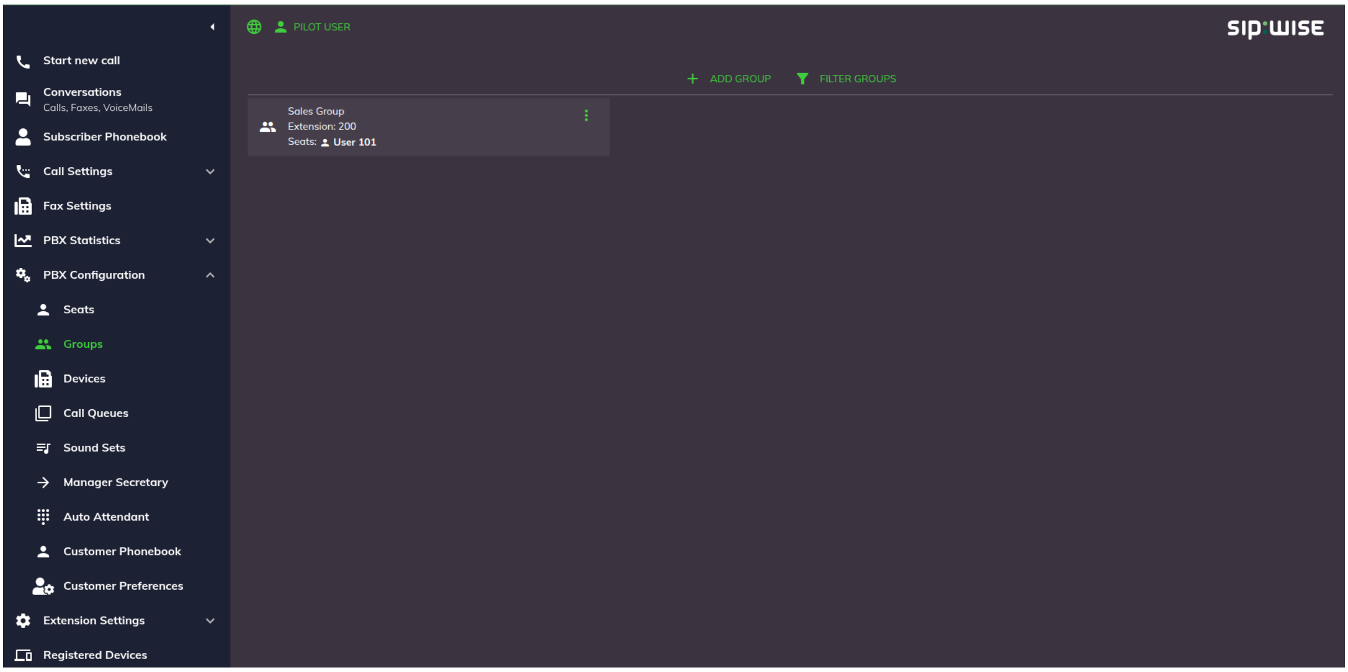

Figure 50. Groups in your company

4.4.2. Creating a Group

Add Group asks for a name and an extension number for the group itself, the colleagues (seats) who belong to it, and a **Hunt Policy** that decides how they're rung: **Serial** rings them one at a time in a fixed order, **Parallel** rings everyone at once, **Random** picks a different starting member each time, and **Circular** rotates the starting point on each call so the same person isn't always rung first. A **Hunt Timeout** sets how long the system waits before giving up on a member and, depending on the policy, moving to the next one or ending the search.

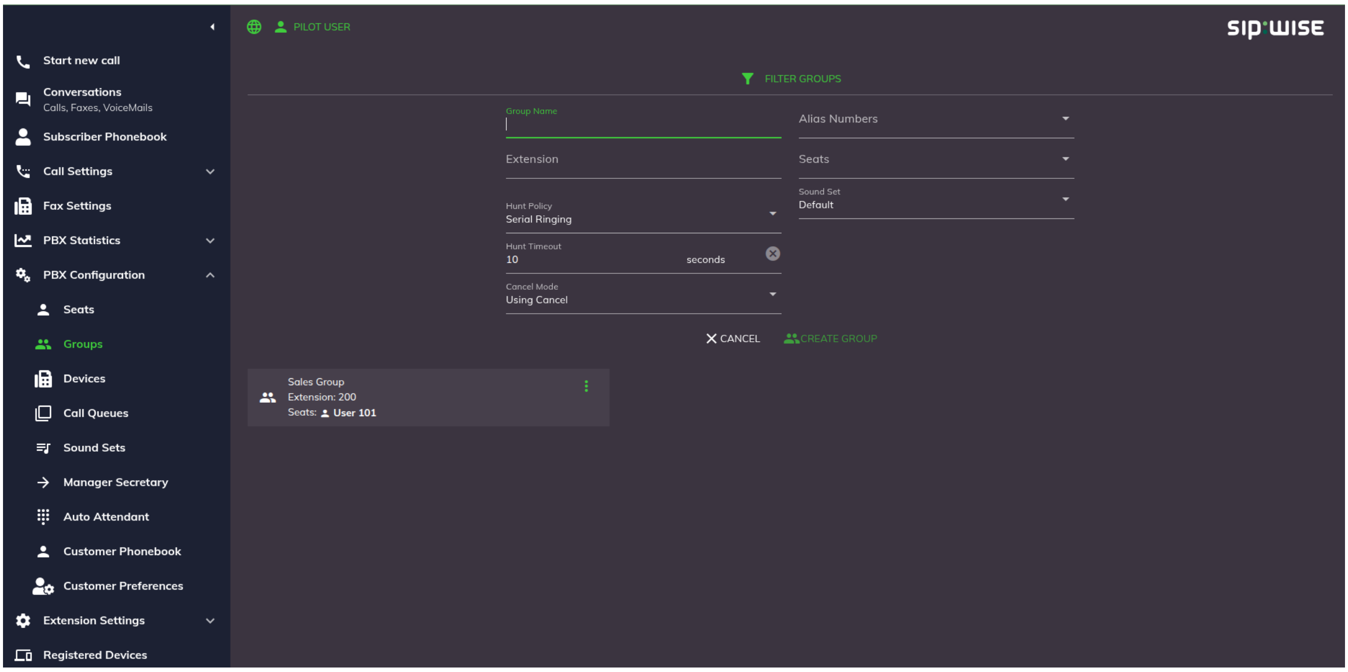

Figure 51. Creating a group

A **Cancel Mode** setting further down is a technical detail about how the system tells the other, still-ringing members' phones to stop once someone has answered — the default works correctly for virtually everyone, so there's no need to change it unless your operator specifically advises otherwise.

4.4.3. Managing a Group

Just like a seat, opening a group gives you Preferences, Call Forwards, Voicebox and fax tabs that behave the same way described earlier in this handbook — except here, they apply to the group as a whole, for example letting all missed calls to the group fall back to one shared voicemail box rather than each member's own.

4.5. Devices: Setting Up Office Phones

4.5.1. Registering a New Phone

PBX Configuration > Devices is where physical desk phones get connected to the company's phone system. Until at least one has been added, the list is empty.

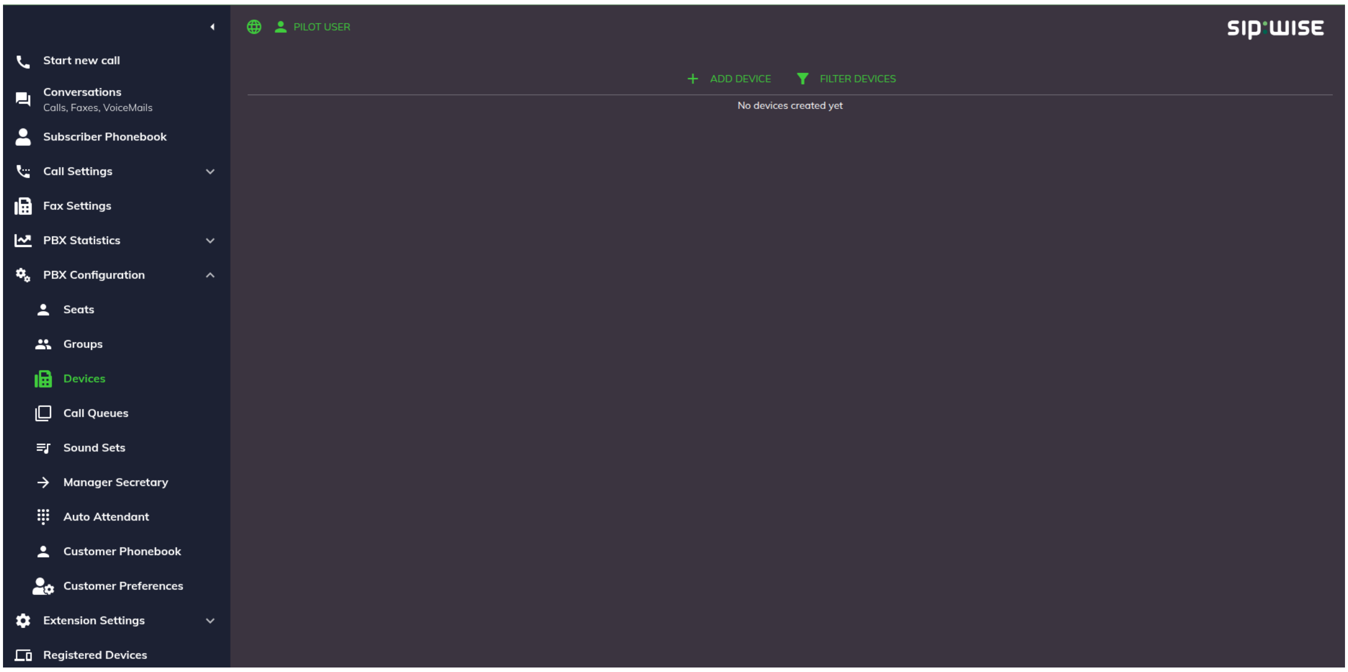

Figure 52. Devices in your company

Add Device asks for a name for the phone, its **MAC address** — a unique code printed somewhere on the device or its box, often on a small label underneath — and its exact **phone model**, chosen from a list. The system uses the model to automatically prepare the right configuration for that specific phone, so it's worth taking a moment to pick the correct one.

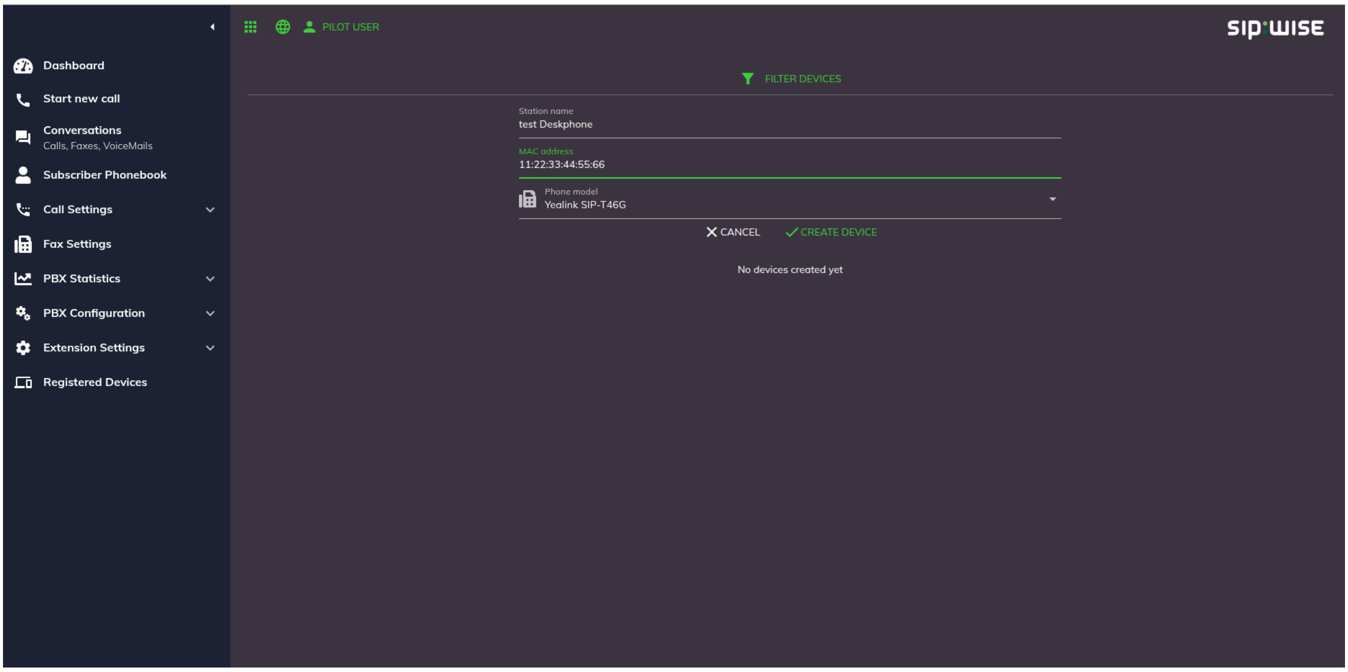

Figure 53. Registering a new phone

4.5.2. Programming the Phone’s Buttons

Once a device is registered, its Preferences page shows an interactive diagram of that exact phone model, letting you configure the programmable keys many office desk phones have alongside their number pad.

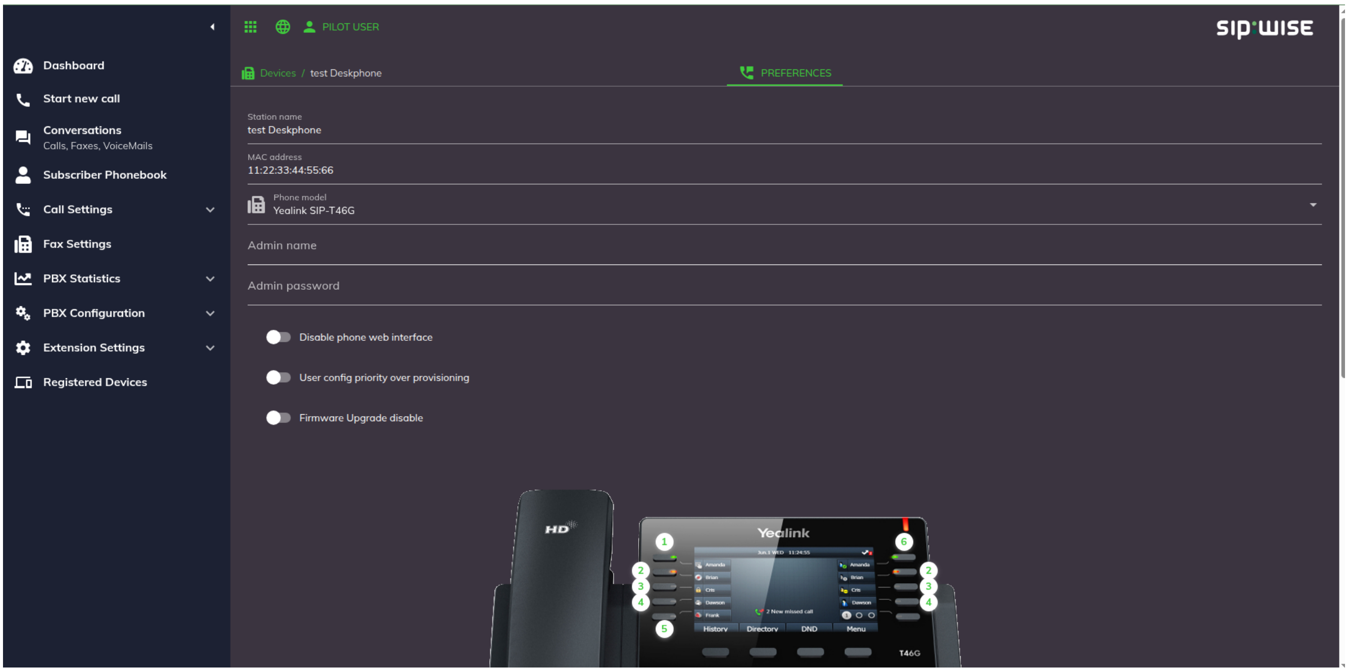

Figure 54. A registered phone’s settings

Selecting a key lets you decide what it does. A **Busy Lamp Field** key — BLF for short — keeps an eye on one colleague’s line, lighting up when they’re on a call and letting you reach them with a single press. Other keys can be set up as a private line, a speed dial, or a one-touch call-transfer button.

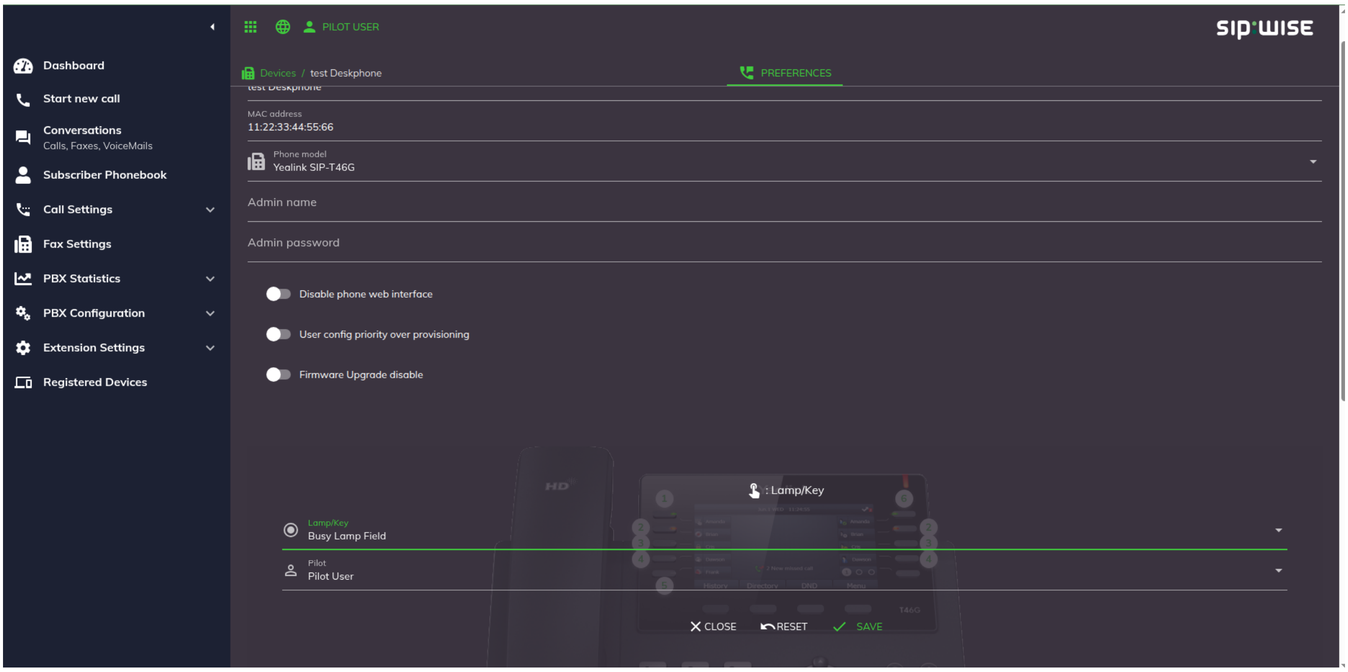

Figure 55. Setting up a Busy Lamp Field key

4.6. Company-Wide Call Queues

4.6.1. Setting Up a Shared Queue

PBX Configuration > Call Queues lets you create the same kind of queue described in Your Own Call Queue, but for any colleague, or for a whole group of colleagues, rather than just your own line. This is what makes it possible to set up, for example, a shared sales queue that several team members can pick up calls from together.

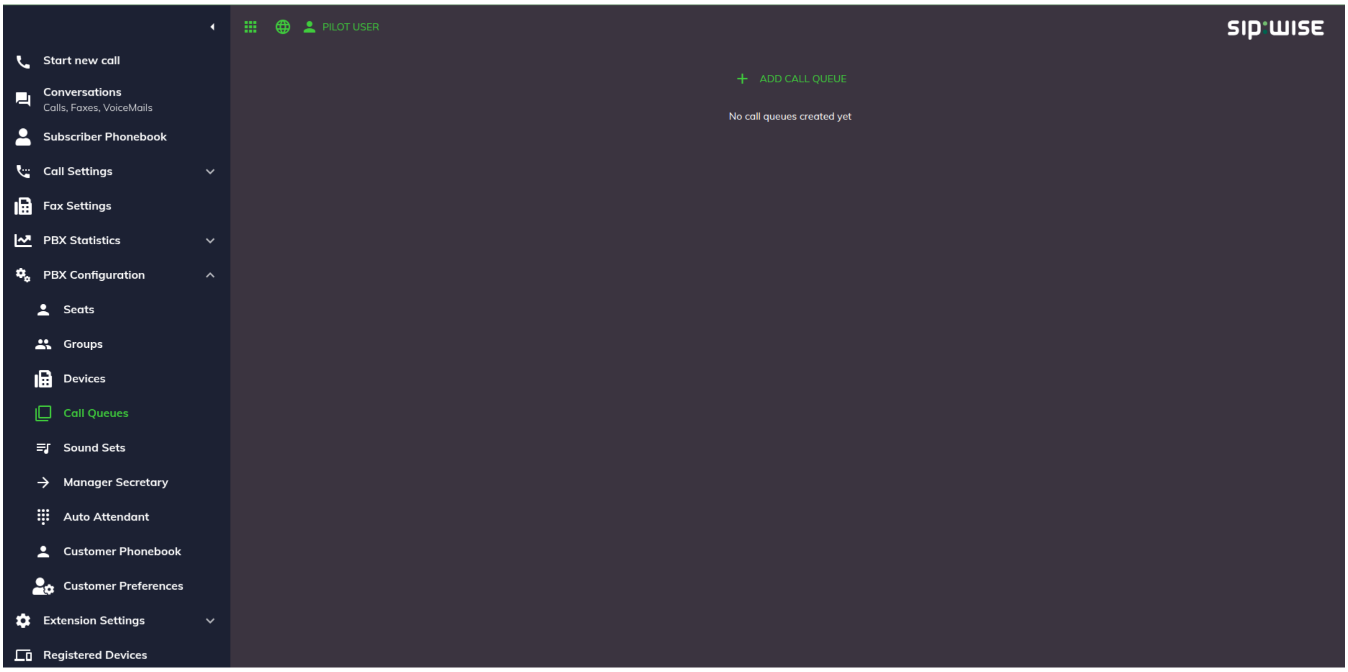

Figure 56. Company-wide call queues

Add Call Queue asks you to choose who the queue belongs to — an individual colleague's extension, an entire Group, or the main company line itself — followed by the same **Queue Length** and **Wrap up time** settings already familiar from the personal version of this feature.

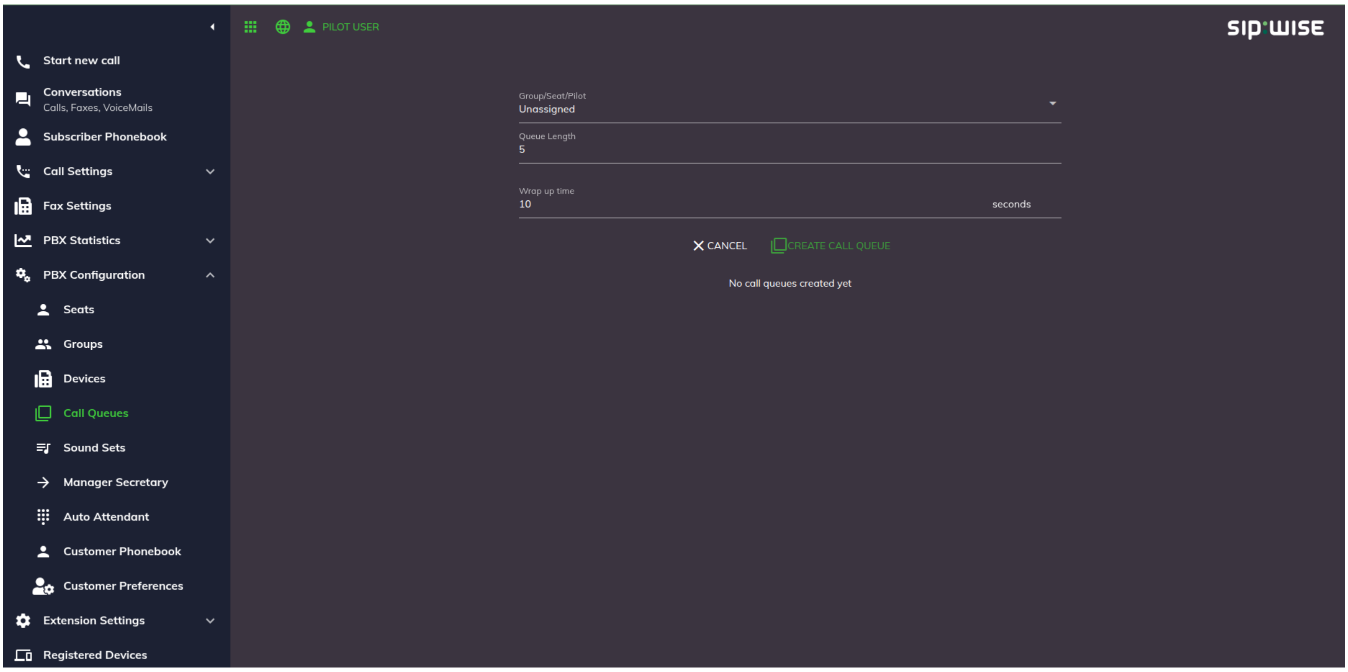

Figure 57. Creating a shared call queue

4.7. Custom Sounds and Announcements

4.7.1. Replacing the Standard Prompts

Every announcement and piece of hold music your callers hear — the music played while someone waits on hold, the message played when a call is blocked, the tones heard while dialing, and many others — starts out using a generic default recording. A **Sound Set** lets you replace any of these with your own recordings, all grouped together under one name so you can switch the whole set at once.

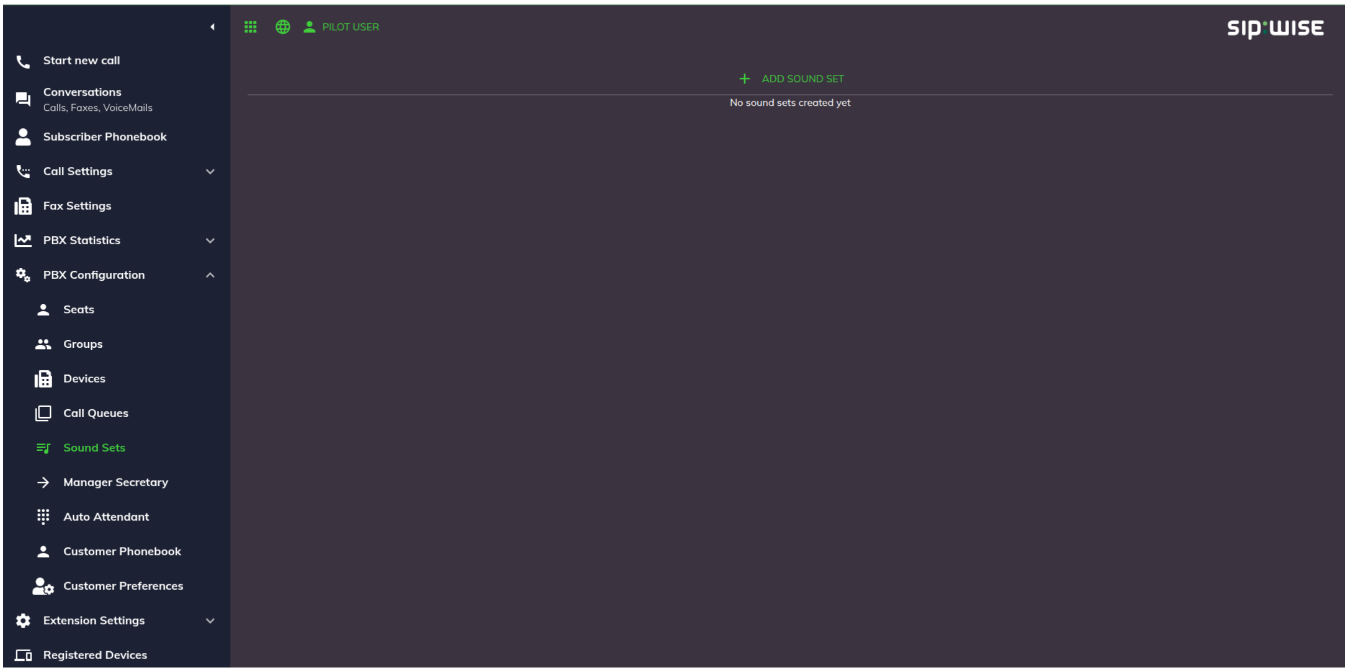

Figure 58. Company sound sets

After creating a sound set with a name and description, you can mark it as the default used for the whole company, or set it up for one specific language only, so callers hear prompts in their own language automatically.

4.7.2. Uploading Your Own Recordings

Inside a sound set, the available prompts are grouped into categories — for example, prompts related to blocked calls, to music-on-hold, or to conference calls. Expanding a category lists each individual prompt inside it, where you can upload your own audio file to replace the default, or switch it back with **Reset**.

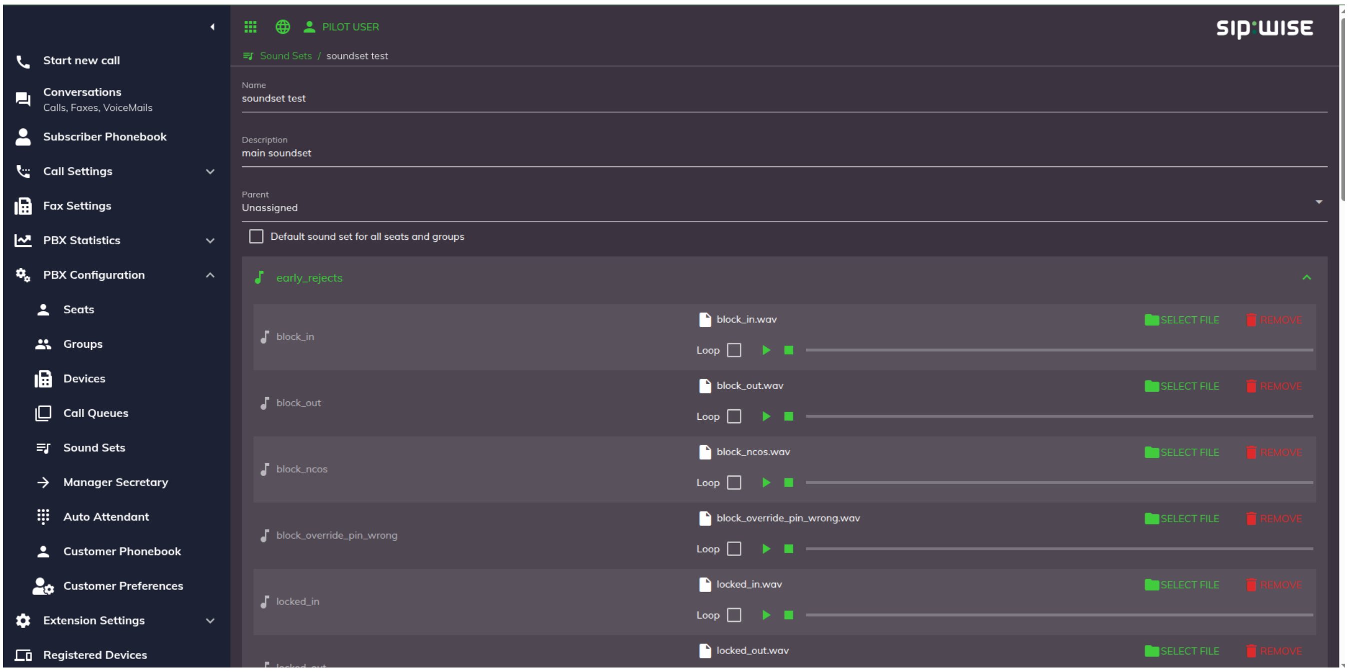

Figure 59. Uploading a custom recording

4.8. Company-Wide Call Screening

4.8.1. Setting Up Manager-Secretary Pairs for Anyone

PBX Configuration > Manager Secretary is the administrator's view of the call-screening feature introduced in Letting Someone Screen Your Calls — here, you can set it up on behalf of any colleague, rather than each person having to configure it for themselves.

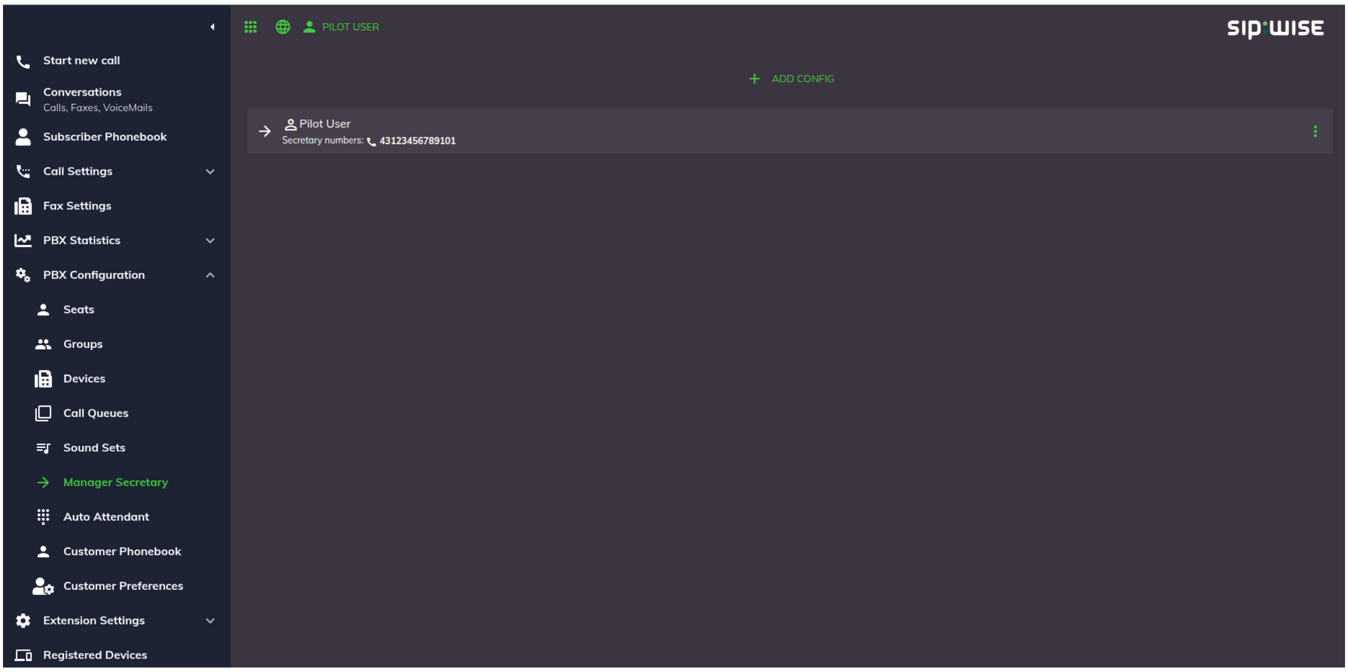

Figure 60. Manager-secretary pairs across the company

Add Config lets you pick which colleague (the "manager") should have their calls screened, and which colleague or colleagues (the "secretary") should be able to screen or answer on their behalf.

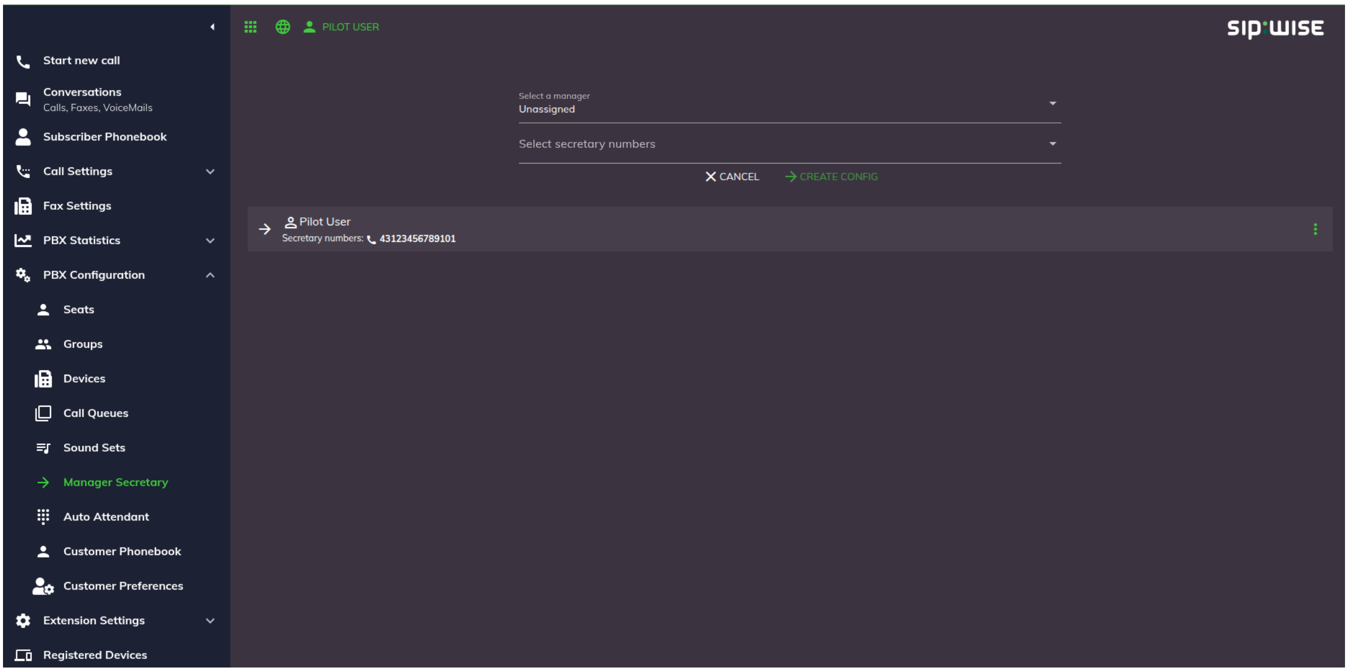

Figure 61. Setting up call screening for a colleague

4.9. Company-Wide Automated Menus

4.9.1. Setting Up Menus for Any Extension

PBX Configuration > Auto Attendant is the administrator's view of the same automated-menu feature described for a single line in Your Own Automated Menu — except here you can see and configure it for every extension in the company from one place, rather than only your own.

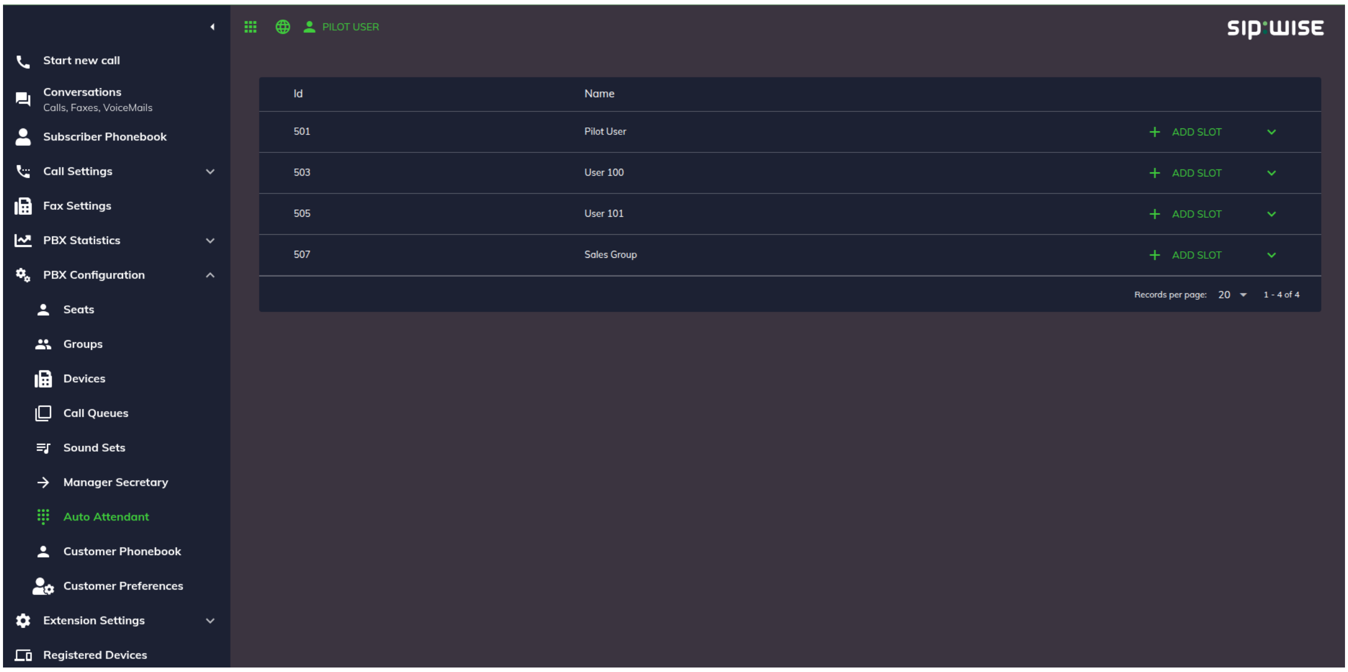

Figure 62. Automated menus across the company

Expanding any extension shows the digit slots already configured for it, and **Add Slot** lets you add another, exactly as described earlier.

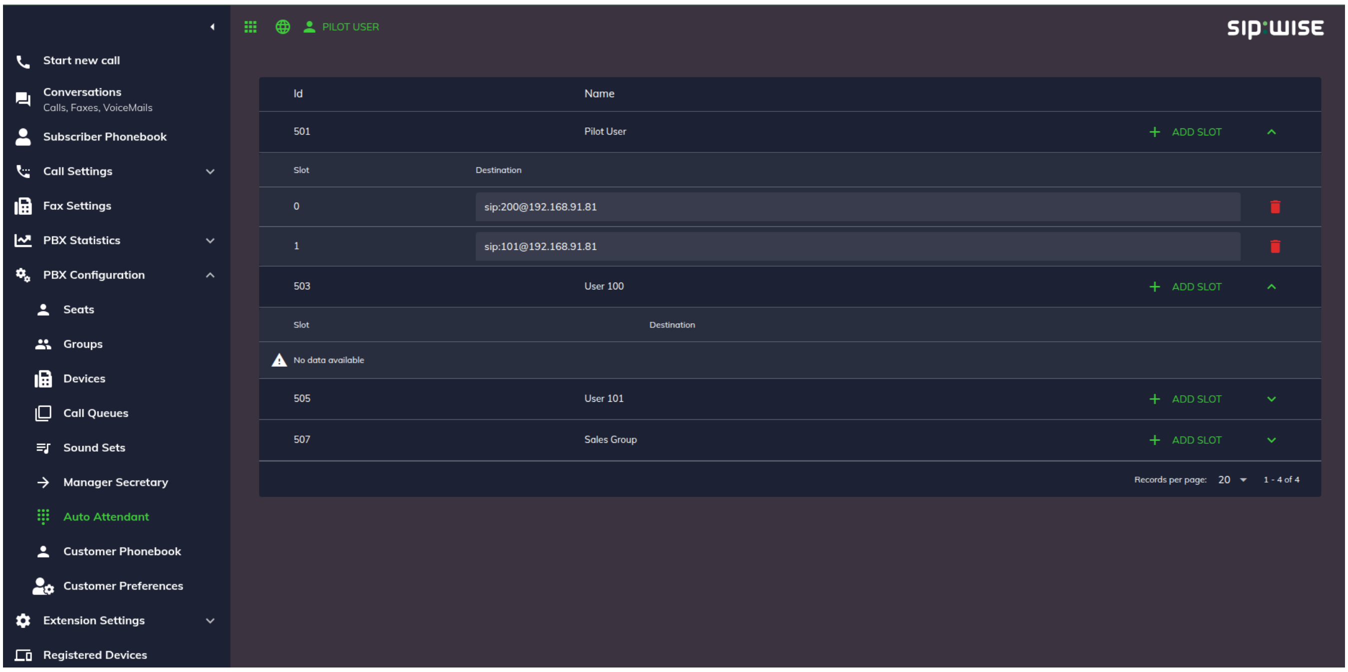

Figure 63. Viewing an extension's menu slots

This is typically how a company builds its main "digital receptionist" — the menu callers hear when they dial the company's published number, before being routed to the right person or team.

4.10. Company Phonebook

4.10.1. A Shared Address Book for Everyone

PBX Configuration > Customer Phonebook is a shared address book visible to everyone in the company, unlike the personal phonebook from Phonebook, which only you can see unless you individually mark an entry as shared. This is the right place to add contacts your whole team should have — suppliers, partners, or frequently called outside numbers.

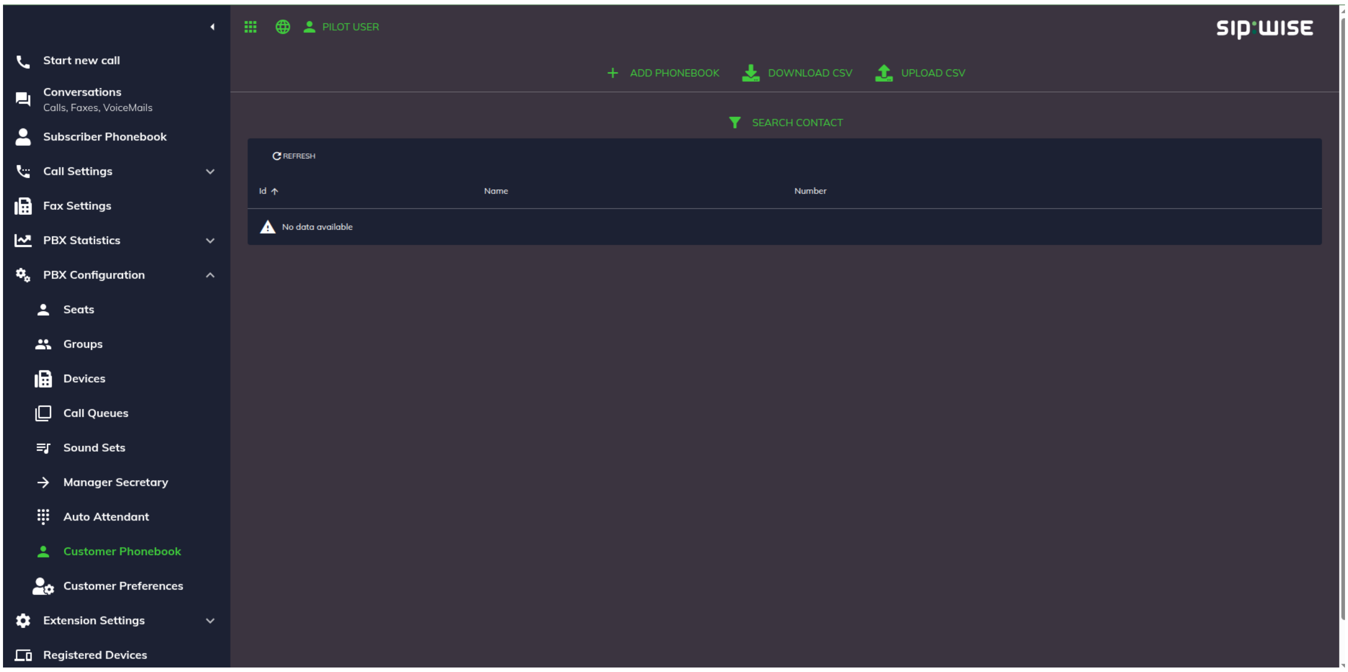

Figure 64. The company-wide phonebook

Search Contact helps you find an entry by name or number once the list grows, and **Add Phonebook** adds one contact at a time.

4.10.2. Importing Many Contacts at Once

If you already have a list of contacts elsewhere, typing them in one by one isn't necessary: **Upload CSV** lets you import a whole list in one step, using a simple text file format — a "CSV file" is just a spreadsheet saved as plain text, with each contact's name and number on its own line, separated by a comma.

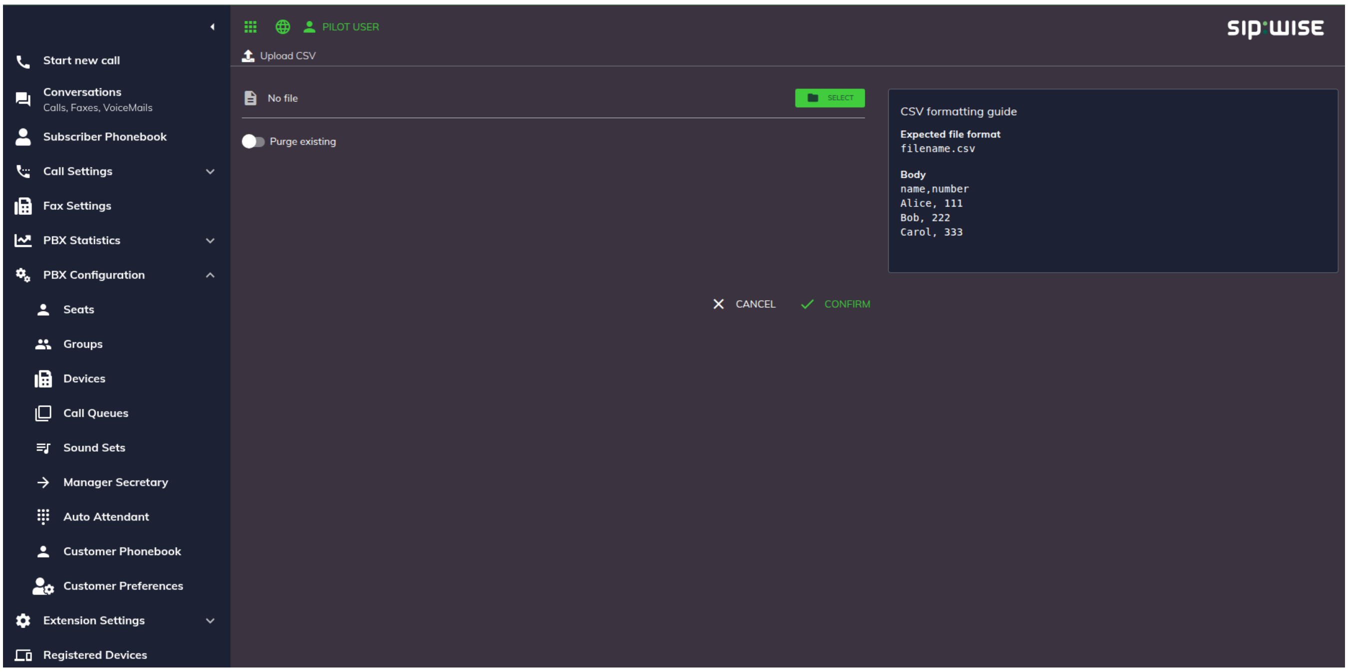

Figure 65. Importing contacts from a file

The **Purge existing** switch decides whether the imported list is added to what's already there, or replaces it entirely — worth double-checking before you upload, since a replacement can't be undone from within the portal. **Download CSV** does the reverse, letting you export the current list to keep as a backup or edit in a spreadsheet program before re-importing it.

4.11. Company Call Rules

4.11.1. Rules That Apply to Everyone

PBX Configuration > Customer Preferences holds call-handling rules that apply company-wide, on top of whatever each individual colleague sets for their own extension in Blocking Numbers. Here you can block anonymous calls for the whole company, block or allow calls from a shared company-wide list of numbers — for both incoming and outgoing calls — and set a PIN that lets a colleague temporarily bypass the outbound block list when they genuinely need to call a normally-restricted number.

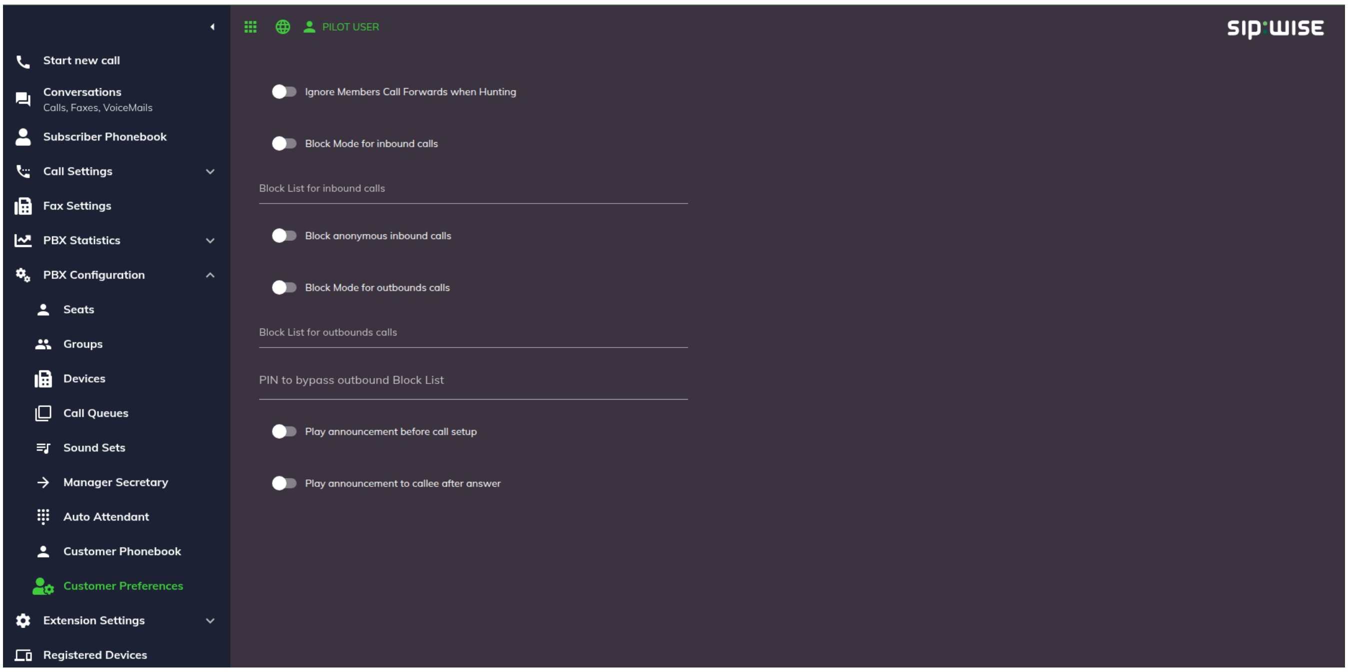

Figure 66. Company-wide call rules

Two further switches let you play a short recorded announcement to callers before a call connects, or to the person answering right after they pick up — for example, a notice that the call may be recorded.

4.11.2. Interaction With Ring Groups

If your company also uses ring groups — covered later in Groups — one setting here, **Ignore Members Call Forwards when Hunting**, decides what happens when a call is being routed through the group to find an available colleague, but that colleague has their own personal forwarding switched on. Leaving this switched on keeps the call moving through the group as intended, rather than letting it be diverted away by one member's personal settings.

