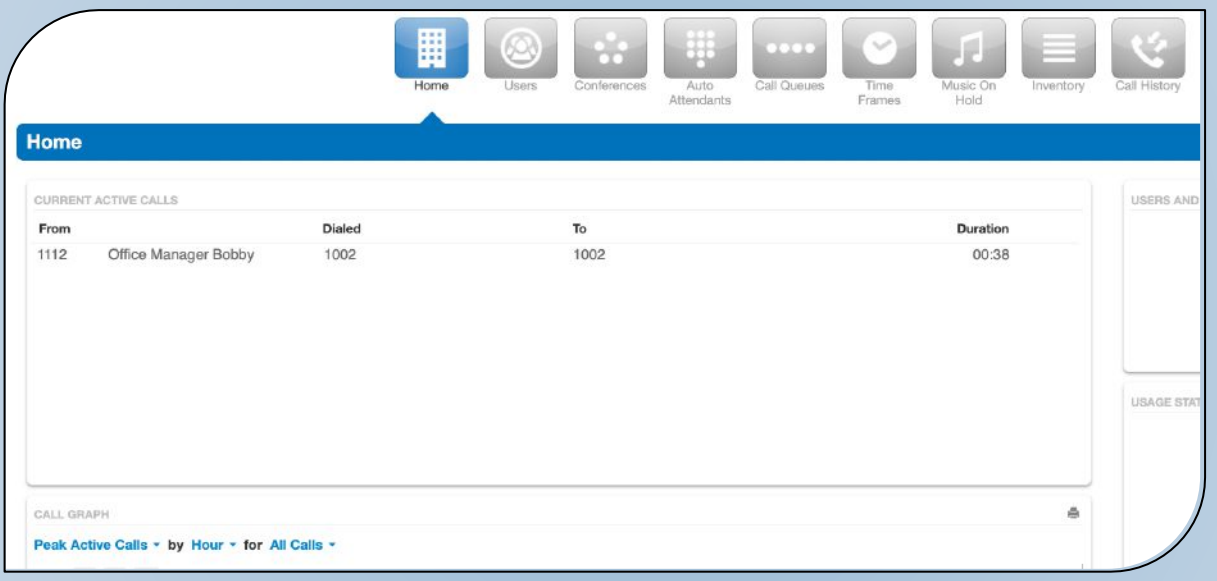
Ringaro Telecom

2025

Office Manager Manual



Ringaro Telecom

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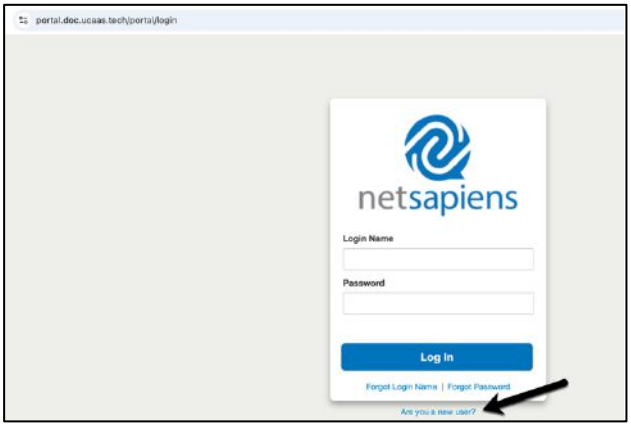
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1 The Manager Portal

The Manager Portal is a web-based interface that allows you to manage your organization and account, as well as communicate with others.

1.1 Log into the Manager Portal



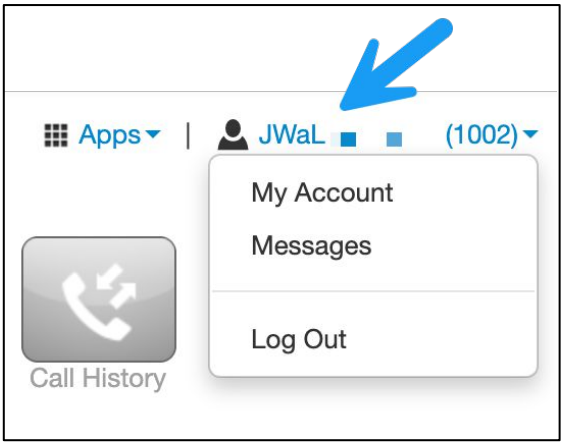
1. Navigate to the Manager Portal URL provided by your administrator.
2. Do you have a password?

   Yes! Log in using your provided “Login Name” and “Password”.

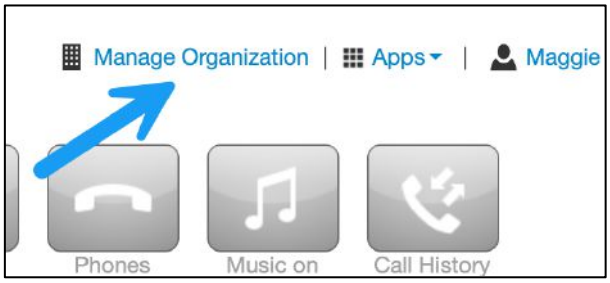
   No. Click the “Are you a new user?” button. Provide your email and extension, and we’ll email you your credentials.

2 Top Menu Bar

The landing page for an Office Manager scope is the Manager Portal. The top menu bar includes buttons to access "Apps" and view your profile name (followed by your extension).



Click on the dropdown arrow in the profile menu to navigate to "My Account". This takes you to the User Portal and allows you to manage your messages, contacts, phones, and more.



On this page, an additional top menu button will now be visible. It's called "Manage Organization" and will return you to your landing page where you can manage your organization's users, call queues, inventory, and more. Please refer to the “Basic User Manual” for further details.

3 Account Levels

As an Office Manager, your account operates on two levels: the individual account level and the organization level (also called the domain level).

3.1 My Account Level

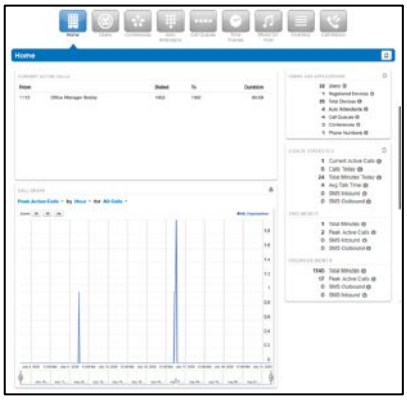
Click “My Account” to navigate to the account level **Home** page. This page provides quick access to your voicemail messages, recent Call History, your active Answering Rule, and a summary of your active phones. For information on your individual account, please view the “Basic User Manual.”

3.2 Organization Level

The organization level is the default view when you log into the Manager Portal and serves as the main administrative dashboard for managing your entire organization. If you navigate to the account level (see section 3.1), you can return to the organization level using the “Manage Organization” link in the top menu bar.

From the organization level, you can manage users, configure Auto Attendants and call queues, set up Time Frames, control inventory, and access Call History. The remainder of this manual explains these pages and features in detail.

4 The Home Page



The organization level **Home** page consists of several widgets that display information regarding the domain’s activity (as shown to the right).

4.1 Current Active Calls

The **Current Active Call** widget displays all ongoing calls within your organization. Each entry shows the caller’s name and phone number, the dialed number, the call's destination (e.g., user, Auto Attendant, voicemail), and the call duration.

Call Monitoring: Click the megaphone icon on the right side of the call table to open the **Audio Monitoring** widget, where you can choose from various audio monitoring options:



- **Join Call**: Allows the Office Manager to join the call and speak to all participants.
- **Whisper To**: The "Whisper To" feature allows the Office Manager to speak only to the Agent (the on-net user). The off-net caller cannot hear the Office Manager and the Manager's volume is also lower than the other participants'.
- **Listen Only**: The Office Manager may listen to or monitor the call without anyone being able to hear them.

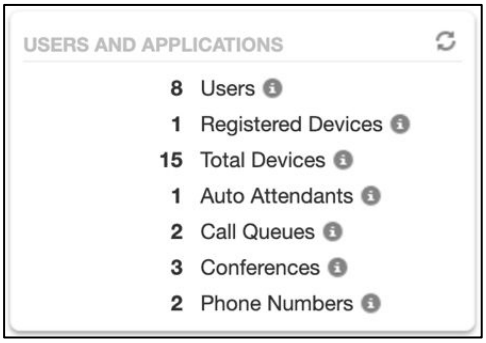
4.2 Call Graph

The **Call Graph** widget provides a visual representation of call activity over time, allowing users to identify peak calling periods and trends. Use the "Peak Active Calls" dropdown menu to view specific metrics. The available metrics are described below.

- **Peak Active Calls**: The highest number of concurrent (simultaneous) calls that are connected and ongoing at any given time.
- **Call Volume**: Includes answered calls, abandoned calls, forwards, and voicemail.
- **Total Minutes**: Shows the total minutes consumed by your organization.

4.3 Users and Applications

The organization level **Home** page contains the **Users and Applications** widget, which provides a comprehensive overview of your organization's resources and configurations. These numbers represent the total count in your organization at the time the widget was refreshed:

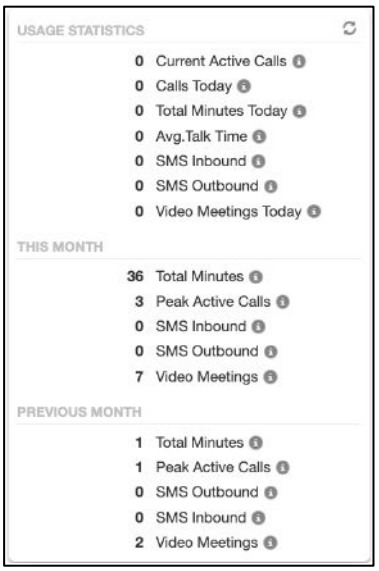


- Total number of users in the organization.
- Total number of devices currently registered in the organization.
- Total number of devices registered and unregistered in the organization.
- Total number of Auto Attendants configured for call routing.
- Total number of call queues configured in the organization.
- Total number of Conference Bridges in the organization, including owned and dedicated.
- Total number of phone numbers assigned to the organization.

4.4 Usage Statistics

The organization level **Home** page also contains a **Usage Statistics** widget that provides a comprehensive overview of your organization's activity, including:

- Current active calls in progress.
- Total calls made today. Excludes active calls.
- Total minutes used today. Excludes any active calls.
- Total Inbound and outbound SMS message counts.
- Total amount of video meeting happening today.
- Monthly usage statistics with comparisons to previous months.

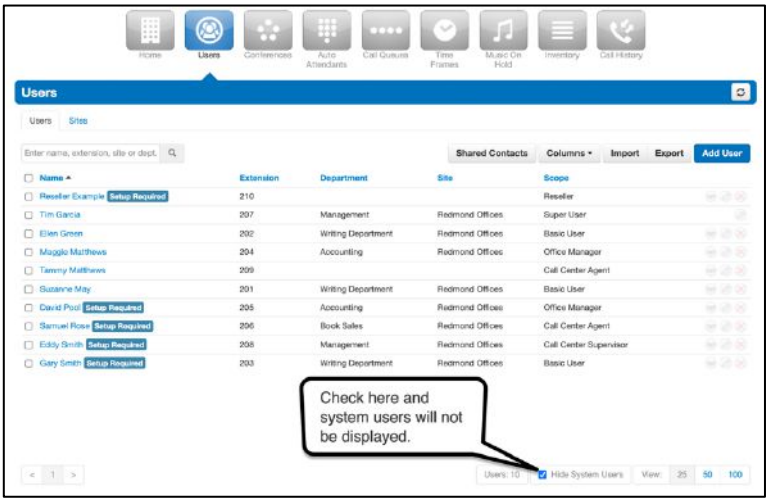


5 The Users Page

The "Users" button navigates to the **Users** page, where you create and manage all users within your organization. Users are those within an organization (such as those with Portal access).

System users are non-human users automatically created alongside the applications and serve as destinations for your organization's incoming calls. Some examples of system users are call queues, Auto Attendants, and Conference Bridges. To exclude system users from the displayed list of users, check the "Hide System Users" box near the bottom of the page.

The **Users** Page (shown below) consists of two tabs: the **Users** tab and **Sites** tab.



5.1 Users Tab

The following table describes the clickable items on the **Users** tab.

	View organization-wide contacts.
	Manage page columns.
	Add a user.
	Click a user's name to edit their profile or select multiple users' checkboxes for bulk edits/actions. The following is a list of user tags and their definitions: •  A new user has been created. This label serves as a reminder that the user needs to set their password. The label will remain until they do. •  An extension has been recycled and is missing a password, a voicemail PIN, and basic user data. This label is typical after an administrator performs a user reset/recycle for those who've left the company. •  The user is setup with a voicemail PIN or basic user data, but they don't have a password. This label usually appears after administrators perform a password reset.
	Configure users by uploading CSV files. Use this feature to add new users in bulk by importing properly formatted CSV data. Note: For best practice, use a fresh import template or a new export to add your data.
	Search for users by entering their name, extension, title, or department in the search field.
	Click to reveal a dropdown menu containing the following edit user tabs: "Profile," "Answering Rules," "Voicemail," "Phones," and "Advanced."
	Delete user.

5.1.1 Add a User

Clicking the “Add User” button opens the **Add a User** modal shown to the left.



The following table describes the fields within the **Add a User** modal.

Field Name	Description
First Name	Defines the first name within the user’s directory listing and default voicemail greeting.
Last Name	Defines the last name within the user’s directory listing and default voicemail greeting.
Extension	Enter the on-net number and the numeric portion of the login username. Example: For the login username 205@example.domain, simply enter “205.”
Department	Select an existing department from the dropdown or add a new one by typing a new name.
Email Address(es)	Enter the email address where the user will receive their notifications. To add additional email addresses, click the green “**+**” button.
User Scope	Sets the user’s permission level and determines their access to system features and administrative functions. You can only assign scopes equal to or lower than your current level.
Enable Voicemail	Allows callers to leave voicemails for the user.
Add Phone Extension	Automatically create a device for the user.
New Password	Enter it here. Then, re-enter it in the “Confirm Password” field.
Confirm Password	Enter the user’s new password here to confirm it matches the “New Password” field.
Voicemail PIN	Set a new numeric password for the user to check their voicemail messages by phone.

5.1.2 User Options

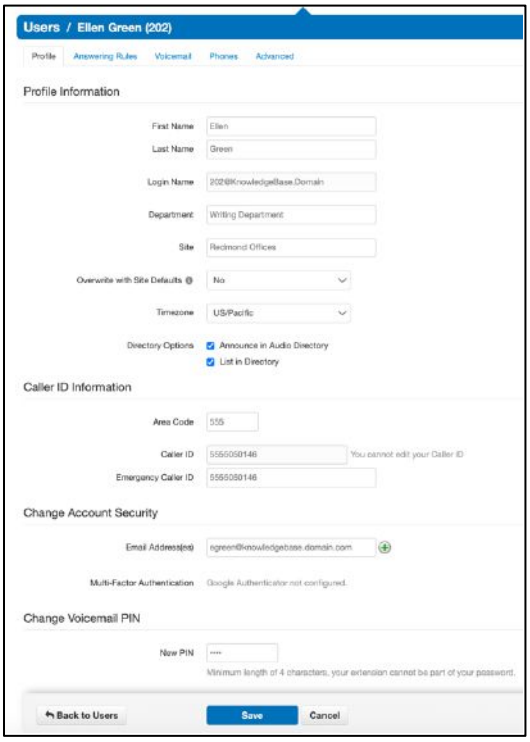


After the user has been created, you can click on the user's name to access the following tabs and options:

- **Profile**: Edit user profile information.
- **Answering Rules**: Set call handling preferences.
- **Voicemail**: Configure voicemail settings.
- **Phones**: Add new devices to the user's account and edit or delete existing phones.
- **Advanced Options**: Reset user settings and send a setup link for password and voicemail PIN configuration.

5.1.3 Edit a User

Click the user's name to navigate to the **Profile** tab on the **Edit User** page shown below.



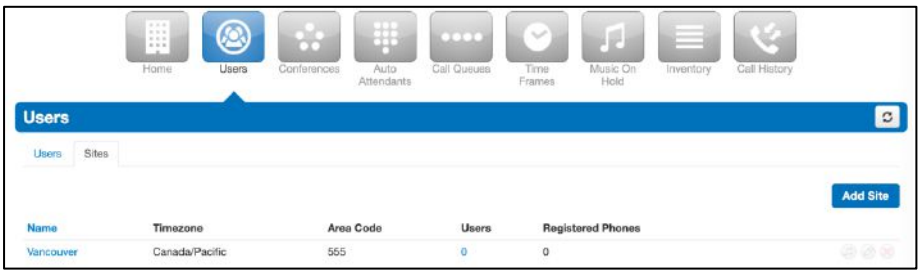
The following table explains the available fields within the **Profile** tab.

Field Name	Description
First Name	Defines the first name within the user's directory listing and default voicemail greeting.
Last Name	Defines the last name within the user's directory listing and default voicemail greeting.

Login Name	The user will log into the Portal using this login name.
Department	Create and/or assign a department to the user.
Site	Create and/or assign a site to the user.
Overwrite with Site Defaults	Set and click “Save” to replace fields with site settings.
Timezone	Accuracy here is very important for seamless inbound call routing.
Announce in Audio Directory	Include the user in the company’s audio directory, allowing callers to be routed to their extension when the feature is implemented for an Auto Attendant.
List in Directory	The system shows the user’s name wherever company contacts exist (such as the Portal, WebPhone, SNAPbuilder, and SNAPmobile).
Area Code	Use this field to define the area code that is automatically added to any 7-digit number dialed from this line. This ensures that a 7-digit local dial is correctly routed as a full 10-digit call. Example: A user dialing 555-1234 will place a call to (505) 555-1234 if “505” is the configured area code.
Caller ID	When the user makes calls outside of the organization, this number is visible to the recipient of their call.
Emergency Caller ID	The 911 caller ID is critically important for routing emergency services to the caller’s location.
Email Addresses	Enter the email address where the user will receive their notifications. To add additional email addresses, click the green “+” button.
Multi-Factor Authentication	Multi-Factor Authentication secures logins by requiring users to enter more than just their username and password. It adds an extra step in case a user’s credentials have been compromised. Note: For MFA-enabled users, logging in requires authentication via email or the Google Authenticator app.
New PIN	Set a new numeric password for checking the user’s voicemail messages by phone.

5.2 Sites Tab

Sites are optional subsets of users within the organization. They provide a level of autonomy while remaining under organization-level oversight. Site Managers can manage their site's users, devices, location, Dial Translations, and Dial Permissions, allowing for localized control within the broader organizational structure.

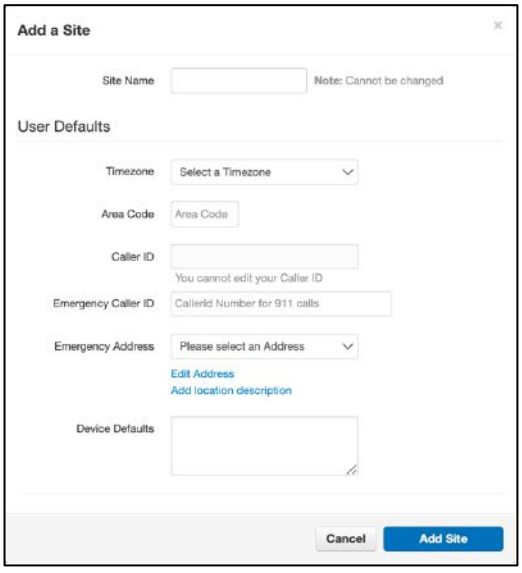


The table below describes the buttons in the rightmost column.

	Edit the site's music on hold options. This button navigates directly to the **Music On Hold** page. These settings will serve as default MOH configurations for users within the site.
	Open the **Edit Site** modal. This modal contains the same fields as the **Add a Site** modal (see section 5.1.2).
	Remove the selected site.

5.2.1 Add a Site

Click "Add Site" to open the **Add a Site** modal shown below. The site settings entered here will be the default settings for all users added to this site.



The following table explains the available fields within the **Add a Site** modal.

Field Name	Field Description
Site Name	Enter the name of the site. This name identifies the site within your organization. Note**:** This name cannot be edited once it is assigned.
Timezone	Select the default timezone for this site. Accurate timezone settings are vital for proper inbound call routing and ensure time-dependent features function correctly. Users can modify this setting for their individual accounts.
Area Code	Define the default area code that is automatically added to any 7-digit number dialed from lines associated with this site. This ensures 7-digit local dials are correctly routed as full 10-digit calls. Users can modify this setting for their individual lines.
Caller ID	The phone number displayed to recipients when users at this site make calls outside the organization. Note: The Caller ID requires a minimum of 10 numbers (no parenthesis).
Emergency Caller ID	The default caller ID number sent to emergency services (911) when users at this site place emergency calls. This is critically important for routing emergency services to the caller's location. Users can modify this setting for their individual lines.
Emergency Address	Select or create an emergency address associated with this site. This address is forwarded to emergency responders during 911 calls. • **Edit Address**: Modify the selected emergency address. • **Add location description**: Add specific location details within the building (e.g., Room 510, 2nd Floor East Wing).
Device Defaults	Enter default configuration settings that will apply to devices associated with this site. This field is optional and can contain information to help with device management and provisioning.

6 The Conferences Page

Conference calls (and Conference Bridges) are managed on the **Conferences** page.



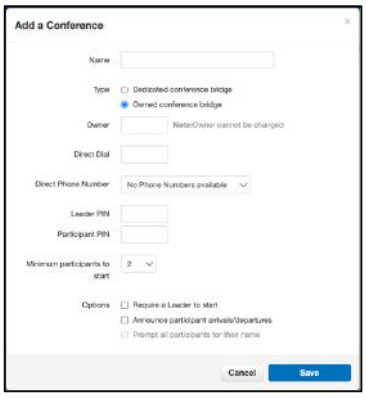
The following is a list of the column titles and their descriptions:

- **Name**: The identifying title assigned to the Conference Bridge.
- **Extension/Owner**: Shows the extension for Dedicated Bridges and the extension of the owner for Owned Bridges.
- **Participants**: The number of participants actively on the call.
- **Minimum to Start**: The minimum number of participants required before the conference call can begin.
- **Leader Required**: Indicates whether a designated leader must be present to start or manage the conference (checkmark = required).
- **Request Name**: Specifies whether participants must announce their name when joining the conference (checkmark = name announcement required).

The buttons in the far right column are described in the table below:

	Modify any Conference Bridge settings except the extension number.
	Delete the Conference Bridge.
	After the Conference Bridge has been created, you will see the option to run reports.

6.1 Add Conference



Click the “Add Conference” button to open the **Add Conference** modal shown to the left.

The following table describes the fields in the **Add Conference** modal:

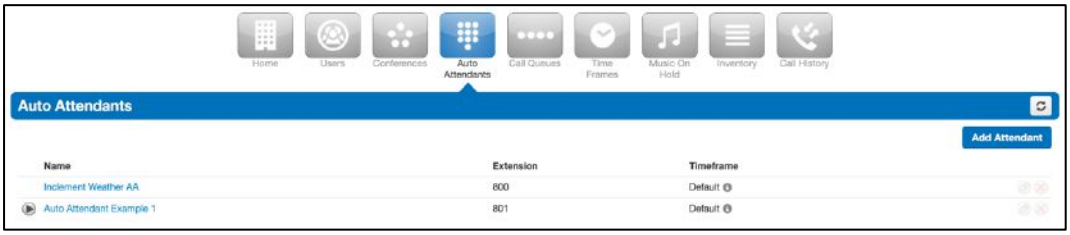
Field Name	Description
Name	Enter the name of the Conference Bridge.
Dedicated conference bridge	No assigned user. Basic Users cannot edit this at the account level.
Owned conference bridge	Assign to a user. The assigned user can edit on the account level.
Extension/Owner	**Dedicated Bridges:** Enter the bridge extension here. **Owned Bridges:** Assign a user to the bridge.
Direct Dial (Owned Bridge Only)	Create an extension for the Conference Bridge. Note: Use the owner's extension as base. For example, user 1002 owns the bridge 6002.
Direct Phone Number	Apply a phone number to the Conference Bridge.
Leader PIN	Add a PIN to enable leaders for the bridge. They enter this when joining the conference.
Participant PIN	Participants are required to enter a PIN when joining. Note: Bypassed when adding via the participant modal.
Minimum Participants	The least number of participants required to begin a conference call.
Require a Leader to start	Keep the music on hold playing for all parties until someone joins the conference and enters the leader pin. This action will begin the conference.
Announce participants' arrivals/departures	Play a recording of the user's name when people enter or exit the Conference Bridge.
Prompt all participants for their name	Prompts the user to record their name and play the recording to people already in the Conference Bridge when joining. Note: "Announce participants' arrivals/departures" must be selected to make this option available.

6.2 Mid-Conference Actions

Mid-conference leader actions may be available in the form of star codes. For example, dialing *71 may start recording and dialing *73 may stop recording. Consult with your Administrator for details.

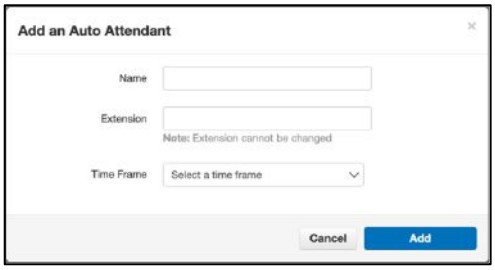
7 Auto Attendants

Auto Attendants handle calls to the main company number by providing callers with automated menu options, such as “Press 5 for more options.” To edit, create, or delete Auto Attendants, click the “Auto Attendants” button. This navigates to the **Auto Attendants** page shown below.



7.1 Add an Auto Attendant

Click “Add Attendant” to open the **Add an Auto Attendant** modal shown below.



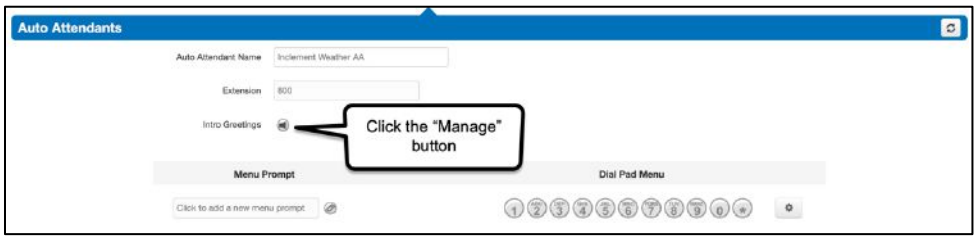
Fill out the following fields and click the “Add” button when complete.

- **Name**: This name is used to distinguish one Auto Attendant from another.
- **Extension:** This must be an unused number. If an existing extension is selected, there will be a warning dialog stating that the extension is already in use.
- **Time Frames:** Time Frames should be configured before adding an Auto Attendant. Typically, the Default Time Frame will be selected. Time Frames determine when Auto Attendants will be active by specifying certain hours, days, or date ranges. For example, a Time Frame could be configured for Monday-Friday from 8AM-5PM (specific days and times) or maybe 01/01/2026 – 02/01/2026 (specific dates).

7.2 Intro Greeting

Once the Auto Attendant’s name, extension, and Time Frame are defined, the configuration page opens. This is where “Intro Greetings” are added. An intro greeting is the audio prompt that plays when a caller reaches the Auto Attendant’s extension. It is an automated answering option that provides callers with an informational greeting. Unlike a menu prompt, this greeting will only be played once and will not be repeated. Follow the steps on the next page to create a new intro greeting:

1. Click the “Manage” button to open the **Manage Greetings** modal.



2. Once in the **Manage Greetings** modal, click “Add Greeting” to reveal the following format options for your new greeting:

- **Text-to-Speech**: This method allows you to create an audio greeting using a TTS engine.
- **Upload**: Choose an MP3 or WAV file to use as your new intro greeting. Be sure to click “Upload” after your entries are complete.
- **Record**: The system will call the device you list here. Answer the call and follow the prompts to record the greeting.

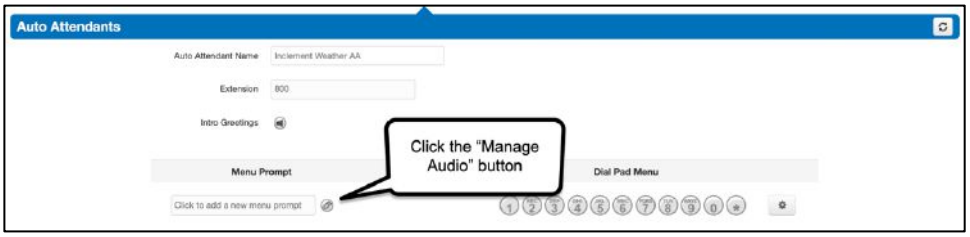


- **Time Frame**: This greeting will play during the Time Frame that is selected here.

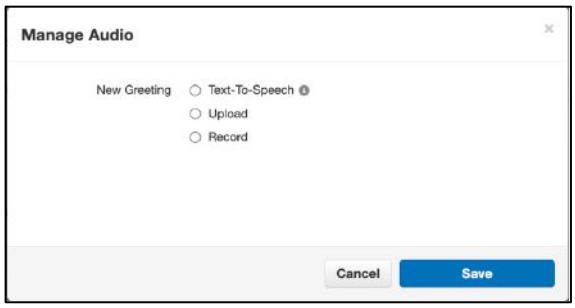
7.3 Menu Prompt

“Menu Prompt” is a feature that describes the options available to callers via the assigned numerical keys (e.g., “For the directory, press 1. For Sales, press 2.”). If no intro greeting is configured, the caller is routed directly to this prompt. Unlike an intro greeting, menu prompts can be configured to repeat if callers do not enter a valid number.

For a smoother process, it is best practice to configure the dial pad menu first and then write the script and record the menu prompt. To manage the menu prompt audio, click the “Manage Audio” button to open the **Manage Audio** modal.



The **Manage Audio** modal (shown to the right) offers the same three options for creating new audio as the **Manage Greetings** modal: “Text-to-Speech,” “Upload,” and “Record.”
Note: The **Manage Greetings** modal includes a Time Frame selection, while the **Manage Audio** modal does not.



7.4 Dial Pad Menu

In the **Dial Pad Menu**, follow these steps to assign applications to keys:

1. Choose a new application from the available choices.
   Note: After selecting an application, the option to “remove” that application is also available.
2. Fill out the information as prompted.
3. After the dial pad menu has been configured, record the menu prompt.



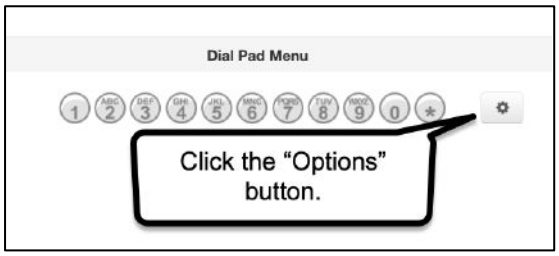
The following table lists the Dial Pad Menu applications and their descriptions:

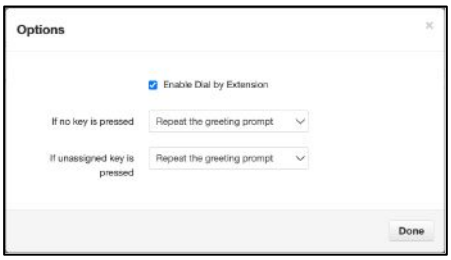
Dial Pad Menu Application	Description
User	Sends the caller to a specific user's extension.
Conference	Sends the caller to a specific Conference Bridge.
Call Queue	Sends the caller to a specific call queue. Here, you may choose whether an announcement is played or not. Note: The call queue option ignores Answering Rules. For Answering Rules to be followed, select the “User” option and enter the queue’s extension.
Directory	Plays the company directory and allows callers to search for and be connected to specific users. Traditionally, this option is assigned to “1”.
Voicemail	Sends the caller to a specific voicemail box.
Voicemail Management	Allows the caller to manage their voicemail inbox and account.

External Number	Sends the caller to a specific external number.
Play Message	Plays a specific message and allows the caller to choose whether they hang up or follow the path of another configured key.
Repeat Prompt	Replays the menu prompt.
Add Tier	Adds another dial pad menu to the Auto Attendant. If more than two tiers are needed, it is possible to chain two Auto Attendants together. Note: This is a more advanced Auto Attendant configuration. If you need assistance, please contact Client Services.

7.5 Dial Pad Options

Click the “Options” button to open the **Options** modal.





The **Options** modal contains the following options:

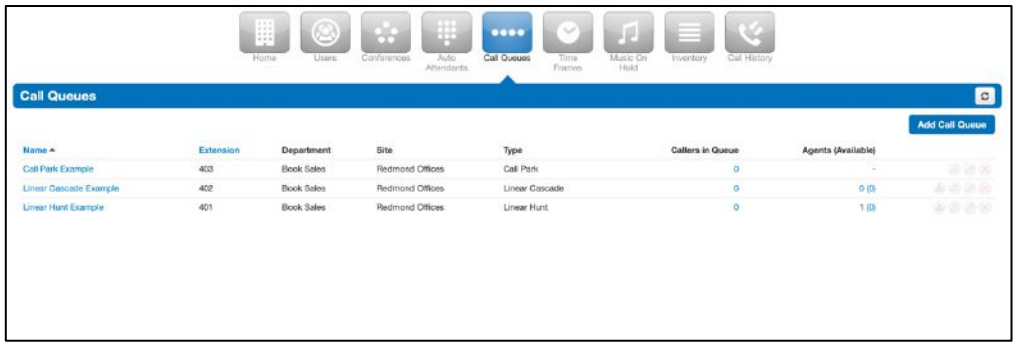
- **Enable Dial by Extension**: This option allows callers to connect directly to a user’s extension by dialing it, without having to navigate through the menu. This is useful if the caller already knows the extension number.
- **If no key is pressed**: This setting controls the system’s behavior if a caller doesn't press any digits while in the Auto Attendant. You can set it to repeat the menu prompt, hang up the call, or transfer them to a different menu option.
- **If an unassigned key is pressed**: This option lets you choose what the system should do if a caller presses a key that isn't configured in the dial pad menu.

8 Call Queues

Call queues create configurable waiting lines for incoming calls, typically used by support, sales, and service groups.

From the customer’s view, the queue manages their waiting experience, handling where they wait until an agent becomes available. From the agent’s view, the queue is a dispatch tool that can be configured to ring multiple devices in a specific order, or function as a parking lot where agents actively retrieve waiting calls.

Click the "Call Queues" button to navigate to the **Call Queues** page shown below.

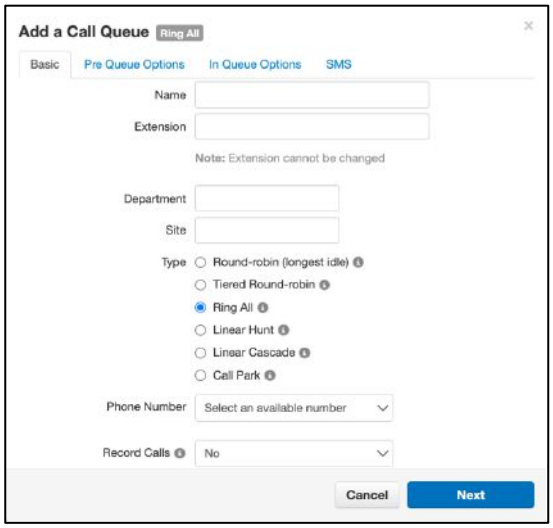


The following table describes the buttons in the far right column of the **Call Queues** page:

Add Call Queue	Opens the **Add a Call Queue** modal (see section 8.1).
	Opens the **Edit Agents** modal (see section 8.2).
	Click to edit the call queue's hold music by navigating to the **Music on Hold** page (see section 8.3).
	Opens the **Edit Call Queue** modal (see section 8.1).
	Deletes the selected queue.

8.1 Add a Call Queue

The **Edit Call Queue** modal and **Add a Call Queue** modal (shown below) both contain four possible tabs: **Basic**, **Pre Queue Options**, **In Queue Options**, and **SMS**. The visibility of these tabs and the options within them will vary based on the call queue's type. Click **"Next"** to move to the next available tab.



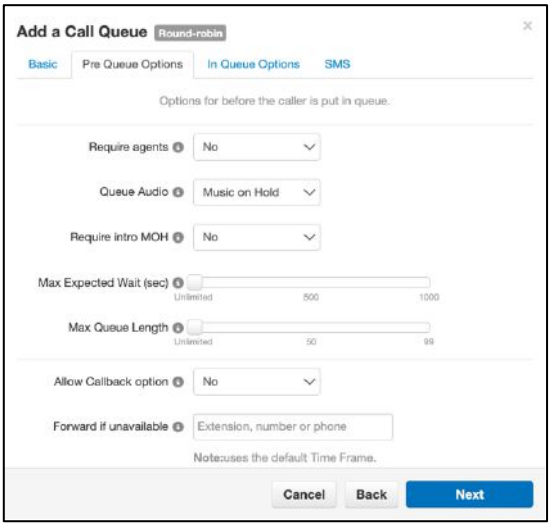
8.1.1 Basic Call Queue Options

The following table describes the fields and options within the **Basic** tab:

Field Name	Description
Name	Enter the name of the call queue.
Extension	Enter the call queue's extension.
Department	Create a department or select the call queue's department from a list of available departments.
Site	Select or create the call queue's site from a list of available sites.
Type Choose the queue type to create.	
Round-robin (longest idle)	Rings one agent at a time, starting with the longest idle available agent.
Tiered Round-robin	Rings one agent at a time, starting with the lowest order number group. Proceeds to the longest idle agent, then the second longest idle, and so on. After ringing all available agents in the current group, priority moves to the longest idle agent in the second group.
Ring All	Rings all agents at the same time.
Linear Hunt	Rings one agent at a time, starting with the lowest order available agent.
Linear Cascade	Rings groups of agents simultaneously, then adds another group, and so on. Groups are based on queue configuration and agent order.
Call Park	No dispatch method. This option leaves a parked call in a hold state. Agents may call the Call Park extension to retrieve the caller.
Phone Number	If available phone numbers exist within the organization, one can be selected to route directly to the call queue.
Record Calls	When "Record Calls" is set to "Yes," all calls routed through the queue will be recorded.
Statistics	This option enables the system to record and display Call Center data for the call queue.

8.1.2 Pre Queue Options

The image below shows the **Pre Queue Options** tab for all queue types excluding the "Call Park" queue type.

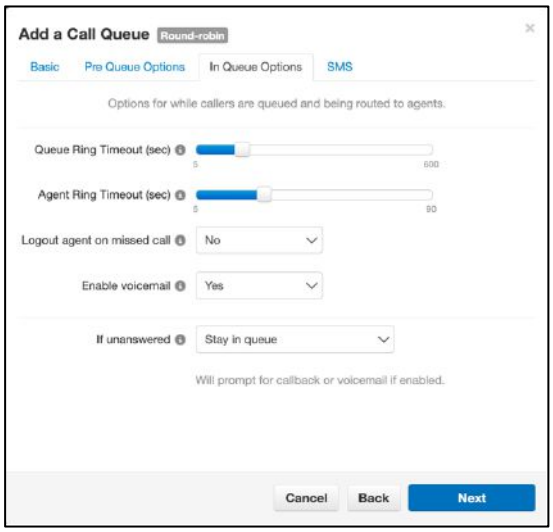


The following table describes the fields and options within the **Pre Queue Options** tab.

Field Name	Description
Require Agents	If set to "Yes" and no agents are logged into the queue, calls route to the "Forward if unavailable" option.
Queue Audio	Determines what callers hear while waiting. Options include "Ringback" or "music on hold (MOH)".
Require intro MOH	Forces callers to listen to the full MOH intro before being dispatched to an agent.
Max Expected Wait (sec)	Sets the maximum expected wait time in seconds. Once this limit is reached, new calls will go to the "Forward if unavailable" option.
Max Queue Length	Limits the number of callers that can wait in the queue simultaneously. When the limit is reached, new calls go to the "Forward if unavailable" option.
Allow Callback Option	Enables callers to remain in the queue and receive a callback. This feature only works if the "If unanswered" rule is activated in the **In Queue Options** tab.
Forward if unavailable	Specifies where to route calls when the queue is unavailable. Options include users, devices, off-net numbers, or overflow queues. If not set, the system uses the "If unanswered" setting from the **In Queue Options** tab.

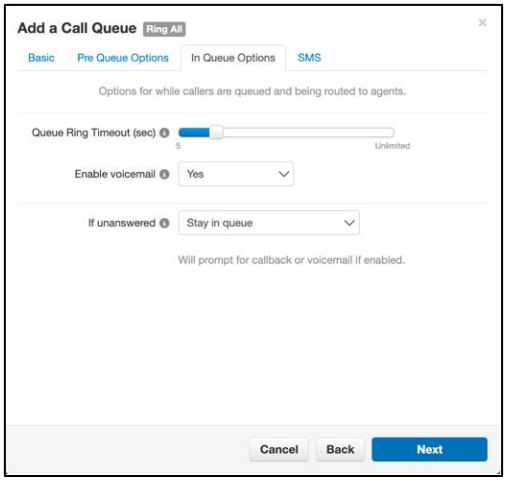
8.1.3 In Queue Options

The image to the right shows the **In Queue Options** tab for the “Round-robin” queue type. This is the same **In Queue Options** tab for “Tiered Round-robin” and “Linear Hunt” queue types.



The following table describes the fields and options within the **In Queue Options** tab for queue types: “Round-robin,” “Tiered Round-robin,” and “Linear Hunt.”

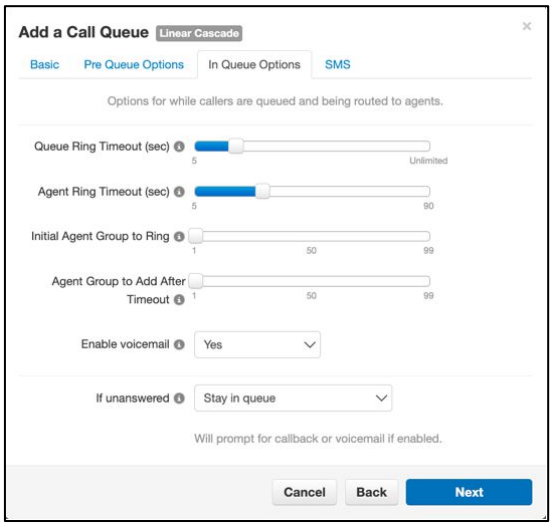
Field Name	Description
Queue Ring Timeout (sec)	Sets the maximum time the queue will attempt to dispatch calls to agents. After this timeout, calls proceed to the “If unanswered” setting.
Agent Ring Timeout (sec)	Determines the maximum time agents will ring before moving to the next agent in the queue sequence.
Logout agent on missed call	Automatically logs out agents from the queue when they miss a call, requiring them to log back in manually.
Enable voicemail	Enables the voicemail option in the “If unanswered” settings. This option is available if no agent picks up before the Queue Ring Timeout expires.
If unanswered	Determines call handling when no agent answers within the timeout period. Selecting “Stay in queue” provides options for callback and voicemail if enabled, while other routing options do not offer these features.



The **In Queue Options** tab for a “Ring All” queue are displayed in the image to the left.

The following table describes the fields and options within the **In Queue Options** tab for a “Ring All” queue.

Field Name	Description
Queue Ring Timeout (sec)	Sets the maximum time agents will ring before the call proceeds to the “If unanswered” action.
Enable voicemail	Controls whether voicemail is available as an option in the “If unanswered” setting.
If unanswered	Determines what happens when no agent answers before the Queue Ring Timeout expires.

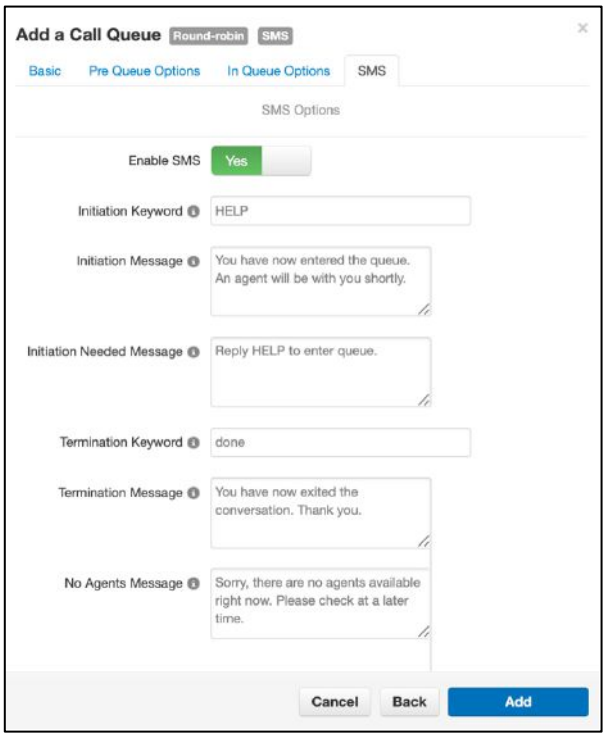


The **In Queue Options** tab for a “Linear Cascade” queue is displayed in the image to the left.

The following table describes the fields and options within the **In Queue Options** tab for a “Linear Cascade” queue.

Field Name	Description
Queue Ring Timeout (sec)	Total time a call will try to reach an agent before following the “If unanswered” setting.
Agent Ring Timeout (sec)	Maximum time an agent group rings before the call escalates to the next group.
Initial Agent Group to Ring	Defines which agent to ring based on their predefined order.
Agent Group to Add After Timeout	Adds the next agent group to the ringing cycle after each timeout. For example, if agents with orders 5 and below are tried first, then setting the second bar to 5 as well will now try agents with orders 6 through 10 (5+5=10).
Enable voicemail	Makes voicemail available as a destination in the “If unanswered” settings.
If unanswered	Determines call handling when no agent answers within the timeout period. Selecting “Stay in queue” provides options for callback and voicemail if enabled, while other routing options do not offer these features.

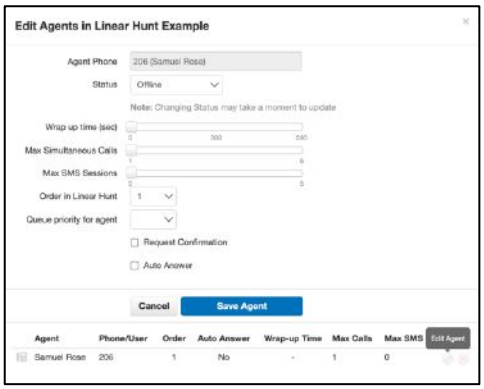
8.1.4 Enable SMS



The following table describes the fields and options within the **SMS** tab. After completing the fields in the **SMS** tab, click the “Add” button to save the call queue.

Field Name	Description
Initiation Keyword	Type this word to enter the queue.
Initiation Message	The system sends this message once the user enters the queue.
Initiation Needed Message	The system sends this response if a message other than the “Initiation Keyword” is sent.
Termination Keyword	Type this word to end conversation.
Termination Message	This message is sent in response to the “Termination Keyword”.
No Agents Message	The system sends this message if the caller is in a queue and no agents are available.

8.2 Edit Agents



Click the “Edit Agent” button to open the **Edit Agents** modal, where you can modify the agent’s configuration for the selected queue. This includes changing their status, setting a limit for simultaneous calls, and determining their queue priority.

The following table describes the fields and options within the **Edit Agents** modal. After completing the fields in the **Edit Agents** modal, click the “Save Agent” button to save the changes.

Field Name	Description
Agent Phone	Enter the extension or name of the agent(s) being added.
Status	Sets the agent’s initial availability and changes agent status in the system.

Wrap up time (sec)	The delay in seconds (0-595) after an agent finishes a call before they can receive the next one.
Max Simultaneous Calls	This setting allows an agent to manage multiple calls simultaneously, such as placing one call on hold to answer another.
Max SMS Sessions	The maximum number of concurrent SMS conversations that an agent can handle.
Order in Linear Hunt	Determines the order in which the agent is called (1st, 2nd, etc.) in a linear hunt, linear, or tiered round robin sequence.
Queue priority for agent	When an agent belongs to multiple queues, this determines their highest-priority queue. For example, selecting “1” will prioritize this queue over the agent’s other assigned queues.
Request Confirmation	Allows the agent to confirm/accept calls. Required for “Message to Agent” feature.
Auto Answer	Connects calls automatically with no ringing on the agent’s side.

8.3 Edit Music on Hold

Click the “Edit Music on Hold” button to navigate to the queue’s **Music on Hold** page.



More information regarding music on hold can be found in the “Basic User Manual”.

9 Time Frames

Time Frames configure specific hours of certain days or a span of days when features such as Answering Rules, call queues, or Auto Attendants will be active. The **Time Frames** page is where Office Managers may create, modify, and delete new Time Frames for a specific user, as well as manage organization-wide Time Frames. The “Domain” row allows Office Managers to view and set domain-wide Time Frames.

It is considered a best practice to configure multiple Time Frames before setting up Answering Rules, ensuring that specific hours or days are accounted for in the system's logic.



9.1 Display Time Frames



To narrow the display of Time Frames, you can filter them by the owning user. This filter will display only those Time Frames created for specific users or system users. Users can be filtered through the following tools:

- **Search for a User:** To list a specific user's Time Frames, type their extension into this field. The results of a user search will be a list of Time Frames created by that user as well as any Time Frames configured for that user's domain.
- **Hide Users Without Time Frames:** Select this checkbox to filter out any users who do not have a time frame configured.
- **Hide System Users:** Select this checkbox to filter out users that are designated as system accounts.



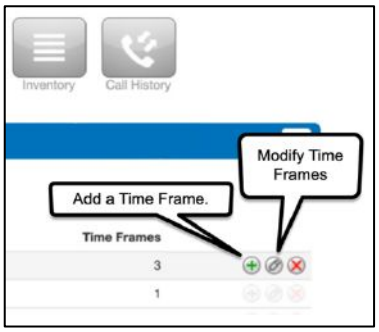
Once a desired user list is displayed, click on a user to reveal their configured Time Frames. Here, you may add a Time Frame or click the edit icon to modify an existing one.



For further instructions on configuring a Time Frame, please see the "Basic User Manual".

9.2 Add or Modify a Time Frame

Before narrowing the displayed list, **Time Frames** can be added and modified using the buttons located in the rightmost column of the corresponding domain or user row.



10 Inventory

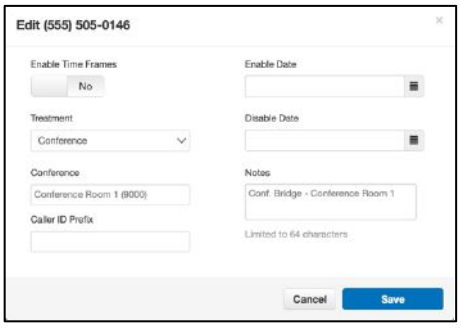
The **Inventory** page stores all phone hardware configurations, emergency number and address configurations. From the Inventory page, you can configure users' devices and control where phone numbers are routed for voice calls and SMS messages.

10.1 Phone Numbers

Click the "Inventory" button to open the Inventory **Phone Numbers** tab shown below.

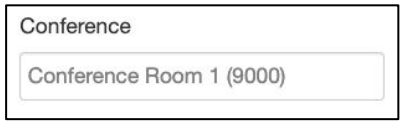
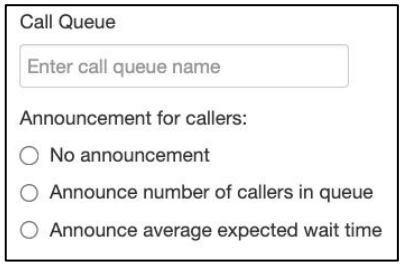


The **Phone Numbers** tab is where all the phone numbers available to your organization are located. Phone numbers are used to direct inbound calling. When a call reaches the system, the phone number is then used to route to the correct user. Click the edit icon to open the **Edit Phone Number** modal shown to the left.



The following table describes the fields within the **Edit Phone Number** modal.

Field Name	Description
Enable Time Frames	Allows you to configure the phone number to route the call to different destinations throughout the day, given the Time Frame selected. After selecting "Yes," the following fields appear. • Selecting the appropriate timezone is vital to proper inbound call routing.  • Select a previously created Time Frame and click the green "**+**" button to add it to the "Time Frame" column below. 

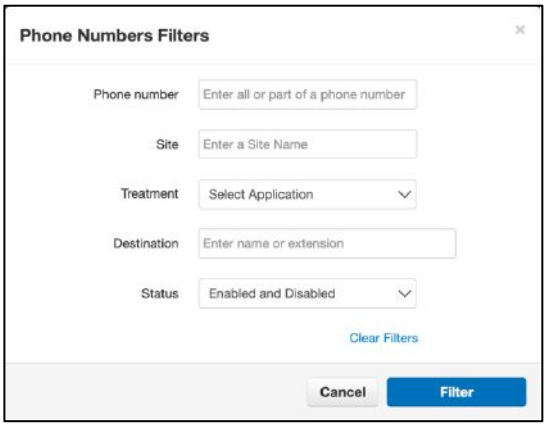
Treatment Determines which application handles incoming calls (user, call queue, Auto Attendant, etc.). Selecting a Treatment reveals additional configuration fields. The additional fields for each Treatment are shown below:	
Available Number	Keeps the number available and displays it in dropdown menus when applications require a direct number selection.
User 	Route calls to a selected user's extension and enable the user's voicemail if desired.
Conference 	Select a Conference Bridge to send the call to. Note: This treatment ignores Answering Rules. If Answering Rules must be followed, select "User" and enter the conference extension there instead.
Call Queue 	Route calls to a selected call queue. Enable the queue's options by selecting one of the following: "No announcement," "Announce number of callers in queue," or "Announce average expected wait time." Note: This treatment ignores Answering Rules. If Answering Rules must be followed, select "User" and enter the call queue extension instead.
Voicemail 	Route the caller to a user's voicemail on the system. This reveals the "Enable enhanced voicemail" option, which allows callers to press 0 to exit the voicemail system.
Auto Attendant 	Route calls to the selected Auto Attendant.
PTSN Number 	Route calls to another phone number. Useful for directing calls to a third-party call center.
Caller ID Prefix	Text displayed before the inbound call number.
Enable Date	Forces the phone number to be active and available for use on the day specified.

Disable Date	Forces the phone number to be deactivated and no longer available for use on the day specified.
Notes	Allows you to add a description to the telephone number that can help you identify what this number is used for in the future.

Click the “Filters” button to open the **Phone Numbers Filter** modal and filter Phone Numbers based on the Phone Number, Site, Treatment, Destination, or Status.



The **Phone Numbers Filter** modal is shown below.



Click the “Export” button to export your phone numbers to a CSV file and save the file to your computer.



10.2 SMS Numbers

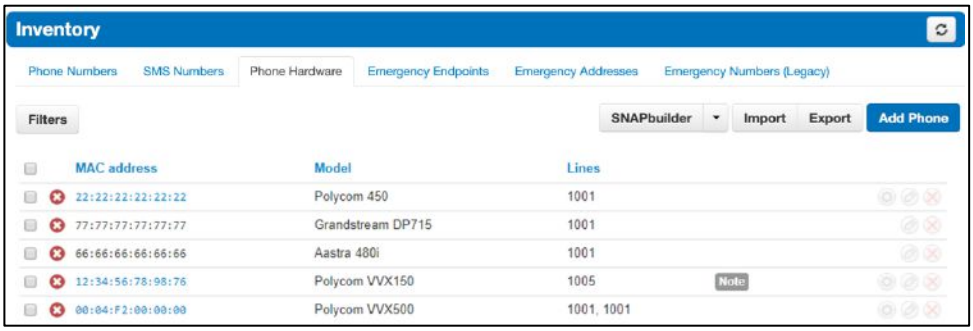


The **SMS Numbers** tab lets you route SMS-enabled numbers to user extensions in the system. Click the edit icon next to any number to open the **Edit SMS Number** modal (shown below) and select where SMS messages should be routed.

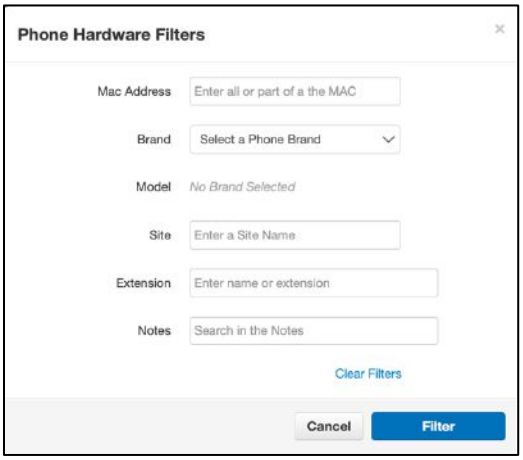


10.3 Phone Hardware

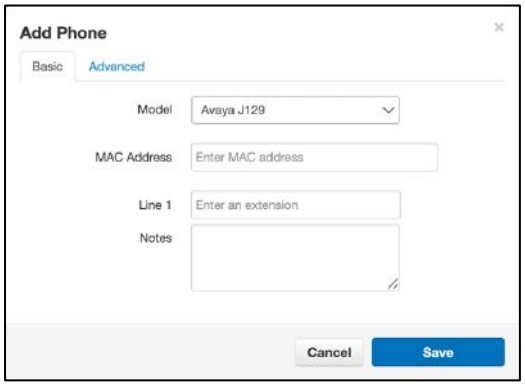
The **Phone Hardware** tab lists all the devices configured in your organization.



The “Filters” button opens the **Phone Hardware Filters** modal shown to the right. Physical devices can be filtered by MAC address, brand, model, site, extension, or notes.

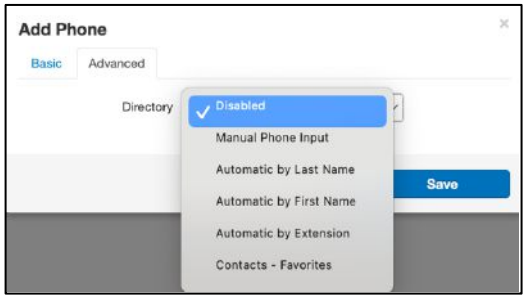


Click the “Add Phone” button to add phones to your organization and assign them to users. The “Add Phone” button opens the **Add Phone** modal shown to the right. Once added in the Portal, an administrator should be able to connect it to the system.



Follow the steps below to add a hardware device to your organization:

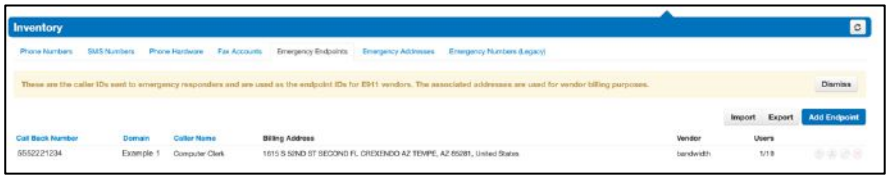
1. Select the device model from the dropdown menu.
   Note: This will reveal the **Advanced** tab.
2. Enter the device's MAC address.
3. Choose a user to associate with the device from the "User" field.
   Note: Multiple lines may be available depending on the device that is selected.
4. Add any helpful information in the "Notes" field (optional).
5. Click the **Advanced** tab. Use the "Directory" dropdown menu to configure how the device displays contacts. Choose between first name or last name (using the company directory), favorite contacts, or extension.

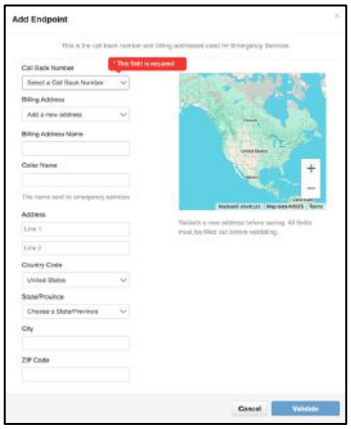


Click the "Export" button to download a list of devices as a CSV file for external use or backup. Click "Import" to upload a CSV file to bulk create multiple devices at once.

10.4 Emergency Endpoints

Open the **Emergency Endpoints** tab to configure the caller ID information sent to emergency responders. This information also serves as endpoint identifiers for E911 vendors and includes associated addresses used for vendor billing.



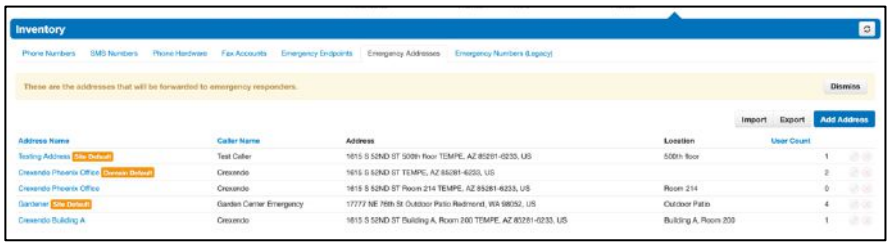


Follow the steps below to add an Endpoint:

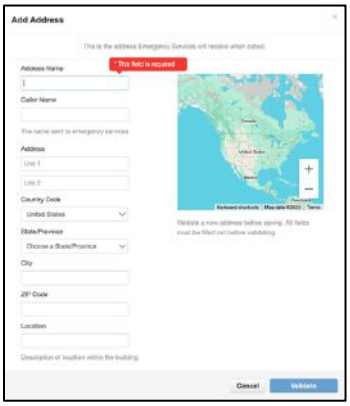
1. Click "Add Endpoint" to open the **Add Endpoint** modal shown to the right.
2. Select an existing call back number from the "Call Back Number" dropdown menu.
3. Add a new address or select an existing address from the "Billing Address" dropdown menu.
4. Complete the "Caller Name" field. This is the name sent to emergency services.
5. Complete all address fields before validation. The system validates addresses to ensure accuracy for the emergency response dispatch.

10.5 Emergency Addresses

The **Emergency Addresses** tab displays the addresses that will be forwarded to the emergency responders.



Follow the steps below to add an Emergency Address:



1. Click “Add Address” to open the **Add Address** modal shown to the right.
2. Enter the name of the address in the “Address Name” field.
3. Complete the “Caller Name” field. This is the name sent to emergency services.
4. Complete all address fields before validation. The system validates addresses to ensure accuracy for emergency response dispatch.
5. In the “Location” field, describe the location within the building (e.g., Room 510).

10.6 Emergency Numbers

The **Emergency Numbers (Legacy)** tab maintains the emergency numbers that are used for the Legacy (Static) method or for Static Failover for 911.



Follow the steps below to add an Emergency Number:



1. Click the “Add 911 Number” button to open the **Add Number** modal shown to the right.
2. Enter the number emergency responders will receive if a user within this domain calls 911.
3. Complete the “Caller Name” field. This is the name sent to emergency services.
4. Complete all address fields before validation. The system validates addresses to ensure accuracy for emergency response dispatch.

11 Call History

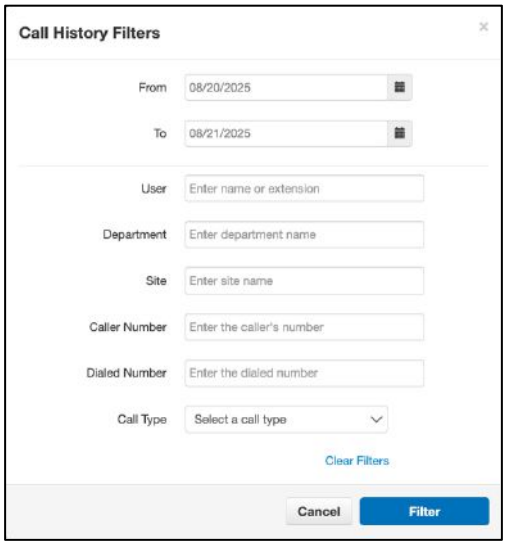
The “Call History” button opens the **Call History** page, which reveals a list of all calls made to and from your organization.



11.1 Call History Filters

Clicking the “Filters” button opens the **Call History Filters** modal shown below:

- **From:** The start date for the Call History data that you want to view. Calls made on or after this date will be included.
- **To:** The end date for the Call History data that you want to view. Calls made on or before this date will be included.
- **User:** Filter calls involving a specific user.
- **Department:** Filter calls containing a specific department name.
- **Site:** Filter calls containing a specific site name.
- **Caller Number:** Enter a specific phone number to filter for calls originating from that number.
- **Dialed Number:** Enter a specific phone number to filter for calls made to that number.
- **Call Type:** Select a category of calls to display, such as inbound, outbound, or missed calls.

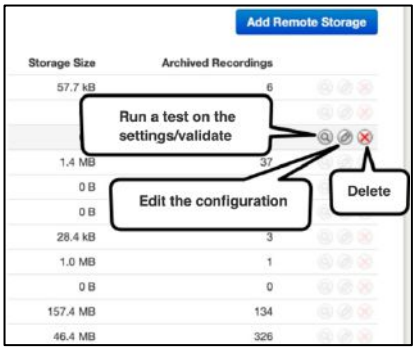


11.2 Recording Storage Settings

Click the “Recording Storage Settings” button to navigate to the **Remote Recording Storage** settings page shown below. Note: The green “Active” tags denote configurations that are currently enabled, and the red “Error” tag denotes a configuration with errors.



Editing and deleting configurations are only available when no archived recordings are linked to them. The Remote Storage configuration is required to playback the linked recordings; without it, recordings are unlinked and unplayable. Click the magnifying glass icon to re-validate settings using the same process as adding a new configuration.



11.2.1 Add Remote Storage

Click “Add Remote Storage” to open the **Add Remote Recording Storage** modal shown below.



11.3 Scheduled Exports

Call history can be exported immediately as a CSV file by clicking the “Export” button or scheduled for automatic export by clicking the "Scheduled Exports". The **Scheduled Exports** page is shown below.



Click the edit icon to open the **Edit Export** modal or click “New Export” to open the **Schedule New Export** modal. The same fields appear in both modals (see the **Edit Export** modal on the next page).





The following table describes the fields and options within the **Edit Export** modal.

Field Name	Description
Name	Custom name to identify the scheduled export.
Type	Export frequency options: • **Monthly**: Select a day of the month. • **Weekly**: Select a day of the week and a time. • **Daily**: Select a time. • **Custom**: Configure a specific time period, timezone, or repeat intervals.
After Completion	Action to take after export completes • **Email attachment:** Attachment will be emailed to the address in the “Email” field. • **Upload via FTP:** File Transfer Protocol. • **Upload via SFTP:** Secure File Transfer Protocol.
Also run this export immediately	Sends export immediately upon creation of the scheduled export.
Email Notification	Sends email notification when scheduled export runs.
Email	Email address to receive export completion notifications.
User	Filter calls pertaining to this user. Leave it blank to include Call History for all users.
Include Inbound Calls	Include/exclude inbound calls in the export.
Include Outbound Calls	Include/exclude outbound calls in the export.
Include Headers	Set to “Yes” to include headers in the export.
Off-net calls only	Set to “Yes” to include only off-net calls in the export.
Format	Select the format of the exported CSV file.

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