Contents

SECTION 1: Introduction........................................................................................................................................... 5
  1.1 Before You Get Started.................................................................................................................................. 5
SECTION 2: Logging In To The Web Portal........................................................................................................... 6
SECTION 3: Control Panel Icon Overview........................................................................................................... 7
SECTION 4: Mailbox Administration....................................................................................................................... 8
  4.1 Entering a Mailbox in Subscriber Mode from an outside phone:................................................................. 8
  4.2 Entering a Mailbox in Subscriber Mode from a VoIP Phone for your own Messages:................................. 8
SECTION 5: Greetings................................................................................................................................................ 9
  5.1 Upload Greetings through the Web Portal:................................................................................................. 9
  5.2 Record Greetings over the phone:............................................................................................................. 10
  5.3 Main (Auto-Attendant) Greeting (for Administrators only):........................................................................ 10
SECTION 6: Notifications For Voicemails, Faxes and SMS Messages:............................................................... 11
  6.1 Setup Email Notification:......................................................................................................................... 11
  6.2 Additional Email Notification Settings:...................................................................................................... 12
SECTION 7: Call Routing/FollowMe Setup.......................................................................................................... 12
  7.1 Understanding Call Routing:................................................................................................................... 13
  7.2 To Create/Add a New Call Route:............................................................................................................... 14
  7.3 FollowMe Settings & the Options DropDown Menus:.................................................................................. 14
  7.4 Additional Call Routing Settings:............................................................................................................ 16
  7.5 Profiles:...................................................................................................................................................... 19
  7.6 Mailbox Settings:........................................................................................................................................ 23
SECTION 8: Ring Group Setup.............................................................................................................................. 24
SECTION 9: Changing Access Codes.................................................................................................................... 25
  9.1 Changing Access Codes through the Web Portal:....................................................................................... 25
  9.2 By VoIP Phone:.......................................................................................................................................... 25
SECTION 10: Transferring, Hold & Conference and Park from VoIP Phones......................................................... 26
  10.1 Transfers, Hold and Conference From your VoIP phone:......................................................................... 26
  10.2 Parking and Valet Parking From your VoIP phone:................................................................................... 27
SECTION 11: Using Quick Codes with a VoIP Phone............................................................................................ 28
SECTION 12: Listening and Viewing Voicemail Messages, Faxes and SMS Texts.............................................. 29
  12.1 Using Email for Notification:.................................................................................................................. 29
  12.2 Listening to Messages on the Phone:......................................................................................................... 29
  Use these instructions to listen to messages that are in your voice mailbox:................................................... 29
  12.3 Options while listening to your messages over the phone:....................................................................... 29
  Use this as a quick reference for actions that you may take while listening to a message:........................... 29
  Options at end of message.............................................................................................................................. 29
  Options during message play:......................................................................................................................... 29
SECTION 13: Dial by Name

13.1 Setup Dial-By-Name using Extension Manager: .............................................................. 33
13.2 Setup Dial-By-Name Options: .................................................................................... 33

SECTION 14: Auto Attendant Options

15.1 Setting Up Call Recording(s): .................................................................................. 34
15.2 Locating & Listening To Call Recording(s): ............................................................. 37

SECTION 15: Call Recording

16.1 Setting Office Hours: ................................................................................................. 39
16.2 After-Hours: ............................................................................................................. 40
16.3 Office Hours Advanced Settings: ............................................................................. 40
16.4 Holidays: .................................................................................................................. 41
   Select the Holiday tab to setup specific days that your company will be closed in advance of the holiday. You may also record specific greetings for these Holidays. The setting works for the one day you selected (24 hours) and then expires. If you do not record a specific greeting, then the standard After-Hours Greeting is played.
16.5 Vacations/Extended Absences: ............................................................................... 42
   This feature only works at the extension level, not at the main account level-this is meant to effect individual extensions only........................................................................ 42
   In the Web Portal, from Extension Manager choose the extension you want to set up an Extended Absence for, then go to Control Panel>Mailbox Settings. Click on the Forwarding tab. This is where you can set up rules for when you will be unavailable to accept calls for more than one day. It takes effect as soon as you set it up and will expire on the date/time you have selected. You can choose from several options to customize it to your needs. There will be no specific extended absence greeting if you choose to set it up on the Web Portal..... 42

SECTION 17: Call Reporting

SECTION 18: Inbound Faxing

SECTION 19: Call Monitoring & the Heads-Up-Display (HUD)

19.1 Setting Up Call Monitoring: ..................................................................................... 44
19.2 Setting HUD Permissions: ....................................................................................... 45
19.3 Setting HUD Groups: ............................................................................................. 46
19.4 Instant Messaging in the HUD: ............................................................................... 47
19.5 Setting Status/Presence: ........................................................................................ 48
   You can set a status on the HUD for everyone to see. You can select Available, Away, Busy or At Lunch, then click Save. This setting does not affect call routes, or any changes to your phone. It is meant to just be an informational alert to everyone logged in on to the HUD........................................................................................................................................ 48
19.6 Valet Parking on the HUD: ........................................................................................................... 49
19.7 On Demand recording in the HUD: .................................................................................................. 49

SECTION 20: Chat ................................................................................................................................. 50
SECTION 21: Hotdesking ....................................................................................................................... 51
SECTION 22: Call Center ....................................................................................................................... 51
  22.1 Call Center Setup......................................................................................................................... 52
  22.1.1 Agents ..................................................................................................................................... 52
  22.1.2 Queues ..................................................................................................................................... 52
  22.1.3 Routes ..................................................................................................................................... 52
  22.1.4 Tiers: ....................................................................................................................................... 52
  22.2 Call Center Monitoring and Reporting: ...................................................................................... 53
    22.2.1 Queue Summary: ................................................................................................................... 53
    22.2.2 Call Center Reports: ............................................................................................................ 53
SECTION 24: Distinctive Rings ............................................................................................................. 54
SECTION 25: Optional Conference Bridge ............................................................................................ 54
  Conference Bridge Controls ............................................................................................................... 54
SECTION 26: Support ............................................................................................................................. 55
SECTION 1: Introduction

Welcome and thank you for selecting the most powerful VoIP phone service available for the business user. The best way to setup and maintain your service is through our powerful Web Portal. In addition, basic functions such as recording greetings or listening to voicemail messages may be done over the phone, or through the Portal. You may also select to receive all of your voicemail messages via email, and/or have a text sent to your cell letting you know a message is waiting for you.

This guide is organized by functions and in each section we will describe how to use the functions over a phone, through our Web Portal or using email notification.

Please also refer to our Quick-Start guide for setup of the commonly used features, and quick-codes for your VoIP phone. As always, please don’t hesitate to call us at 800-743-1208 with any questions.

1.1 Before You Get Started

Make a note of the following items for your reference. Keep in a handy location.

Administrative access code: 4 to 8-digit number sent in email. __________  
   {CHANGE AFTER SET-UP}

Extension’s access code: same 4 to 8-digit number sent in email. __________  
   {CHANGE AFTER SET-UP}

• Your assigned 10-digit phone number: __________________________  
   (enter with no dashes or dots, e.g. 7325551234)
• Your extension number: __________________________ (leave blank if you are the administrator)
SECTION 2: Logging In To The Web Portal

Use our powerful Web Portal to administer all of your ConnectMe system settings, route your calls, listen to messages, set up notifications, and upload greetings and much more.

In a browser window, go to https://login.connectmevoice.com or go to www.connectmevoice.com and click on the red login box on the top right.

- **Logging in as an Admin** is especially important if you have multiple phone numbers and/or extensions you need to manage. When you log in as an Administrator, you will have access to the complete account and can see everything and make changes as needed, you can listen to all messages and recordings. To give an employee access to their voicemail or other functions, you can allow them to securely access the Portal at the extension level without seeing anyone else’s information or listening to someone else’s recordings or messages; as the Admin, you can still access their extension.

- If you only have one phone number, by default you log in as the Admin.

- When you log in at the extension level, you will only see information relevant to the extension, and can only make changes relevant to that extension.

- To login into the Portal as an Admin, log in with the main phone number of the account, do not enter an extension, and enter the access code.

- To login into the Portal at the Extension level, log in with the main phone number of the account, enter the extension, and enter the access code for that extension.
SECTION 3: Control Panel Icon Overview

The Control Panel on the Web Portal is a section that you will visit quite frequently and become very familiar with. Here is a listing of what function you will find on the Control Panel, with a brief explanation for each. For more detail, see the section that covers that topic in-depth. Depending on what features you have with ConnectMe Voice, your Control Panel selection may vary.

A. **Billing** – Update your billing address
B. **Branches** – This controls groups within the account for login purposes if you have several admins
C. **Call Monitor** – Adjust Call Monitoring settings
D. **Call Recording** – Adjust Call Recording settings
E. **Call Recording Download** – This is a feature for an additional fee where you can batch download recordings
F. **CallerID** – If turned on, you can control outbound callerid number
G. **Caller ID Blocking** - To block a specific callerid
H. **Conference Bridge** – Adjust Conference Bridge settings
I. **Distinctive Ring** - Set different style rings for different dial-in numbers, or inter-office calls
J. **Distribution Lists** – Go here to send a voicemail to several people at once
K. **Emergency Mode** – This is where you set up Emergency Call Routing (see 7.4.3)
L. **E911 Address/E911 Address (All Phones)** – Update your physical address here in case you need to dial 911 from your VoIP Phone
M. **Greeting Manager** – Upload and manage greetings and music.
N. **HUD** – Heads-Up-Display (See Section 19).
O. **Invoice** – Go here to look at past bills
P. **Message Drop** – Manage Voice Drop messages. If you need to record Voice Drop Messages, contact ConnectMeVoice.
Q. **Notifications** – Create and manage voicemail, SMS and fax notifications
R. **Office Hours** – Manage office hours and holidays
S. **Payment Method** – Update the credit card on the account
T. **Pointers** – If the account has pointers, or Smart Caller ID numbers, view and manage them here. The icon for Smart Caller ID icon is related to Pointers/Smart Caller ID.
U. **Registrations** – Lists all VoIP phones on the account and their registration status
V. **Ring Group** - Create and manage Ring Groups
W. **Scheduled Reports** – Set up and manage call reports
X. **Speed Dial** – Set up speed dial numbers for the account at the corporate or extension level
Y. **Smart Caller ID Routing** - Smart Caller ID Routing is an addon to the Smart Caller ID feature. This feature must be turned on for your account and you must already have the Smart Caller ID Feature. When this feature is added to an account, the system will log phone calls made using the smart caller id phone number. When a call is returned from the phone number that was dialed on the original call, the system will route the call to the last extension that dialed the number in the last seven days.

**SECTION 4: Mailbox Administration**

*(please note, you will be prompted to record your name when you first time you dial into the system).*

4.1 **Entering a Mailbox in Subscriber Mode from an outside phone:**

1. Dial 848-207-2737
2. When prompted, dial the 10-digit main phone number followed by [#]
3. When prompted, enter the extension followed by [#] or for the main mailbox just press [#]
4. When prompted, enter the 4 to 8-digit access code for main phone number or for the extension

4.2 **Entering a Mailbox in Subscriber Mode from a ConnectMe VoIP Phone for your own Messages:**

1. Dial *99
2. When prompted, enter your 4 to 8-digit access code for your extension
3. Please see the Star Codes Reference Section for special functions for Mailboxes in Subscriber mode while using your ConnectMe VoIP Phone
   3a. To dial into the main mailbox from your VoIP Phone, dial *93
   3b. To dial into another extension on your account from your VOIP Phone, dial *94+ext
SECTION 5: Greetings

When we refer to “Greetings”, we are talking about what the caller hears when they dial your service. Some greetings, such as the main (auto-attendant) greetings are setup by the administrator, others are setup by each individual user. You may record your greetings over the phone. You may also upload a greeting using the web portal.

5.1 Upload Greetings through the Web Portal:

1. Log in as either the Administrator or at the Extension Level
   
   **Note:** to load greetings for an Auto-Attendant, you must be logged in at the Admin level.

2. If logged as the Administrator, choose the extension you are loading greetings for.

3. Click on Control Panel on the right-hand side, then Greetings

4. Choose the appropriate greeting you are loading from the drop-down menu, when the file finishes loading, click “Upload Greeting”
   
   **Note:** to load a greeting on the Web Portal, it must be in .wav or .mp3 format only.

5. You may also upload Music On-Hold and specify where to use it, at the main level and/or at the account level; and if you have several Music On-Hold files you can set them in rotation.

Control Panel > Global > Add Mailbox Greetings

**Add / Edit Mailbox Greetings**

**Directions:** The Greeting Manager allows users to upload new or updated greeting files to your extension.

- **Greeting Type** dropdown (Auto Attendant)
- **Select The File To Upload:** Choose File

**Please Note:** It may be a few minutes before a newly uploaded greeting is available for use.
5.2 Record Greetings over the phone:

1. Enter your mailbox in Subscriber Mode (*99) or dial 848-207-2737
2. Enter your pin, etc.
3. From the main menu, Press [4] for the Greetings Options. You will now hear a menu with the various greeting types. (Please see the below list for details with the number of the prompt). After recording any of the greetings, you will be presented with another prompt which gives you the option to save, review, or re-record your greeting. You must save your greeting in order to the system to accept it.

4. **Individual Extension Greeting Types:**
   
   [1] Voicemail – This is the greeting a caller will hear if you cannot be located and the caller wants to leave you a message.
   
   [2] Name - This is the name that is used for Dial-By-Name, and also, the name used when someone hears the message, “your call is being connected to [Name]”
   
   [3] After-Hours, Extended Absence & Holiday – Follow the prompts to a record a voicemail greeting that is played after-hours, or for specific holidays. You can setup the times and days for each by following the prompts. You may also select to use the Web Portal to select days and hours of operation. The After-Hours greeting is played when you are outside of your normal operating hours; Holiday greetings are played only during the specific date of the holiday; Extended Absence Greetings are played for an extended time period you specify.
   
   [4] Follow-Me Introduction Greeting - When a caller dials your extension, they will hear a system-prompt introduction, followed by your recorded name, then music while the call is being connected. (“Please hold on while your call is being connected to... [Follow-Me Introduction Greeting]). If you prefer, instead of music, they will hear only rings (see follow-me settings). If you decide to record a follow-me introduction greeting, then they will hear that greeting instead of the system greeting. Chose this option if you want the custom greeting to be played instead of the system greeting.

5.3 **Main (Auto-Attendant) Greeting (for Administrators only):**

The Auto-Attendant (IVR) or “Main Mailbox” greeting is what callers will hear when they first dial the system.

**Main Greeting Example:** “Thank you for calling ABC Company. If you know your party’s extension, please enter it now. For Sales press 101, for Service press 102, for a company directory press 9. If you would like to hear about our new products press 7...."
You may upload using the web portal, or record it over the phone by dialing into the main mailbox (or the extension of the auto-attendant) over the phone using the following steps:

1. Dial 848-207-2737 or *99
2. When prompted, dial your 10-digit main phone number followed by [#]
3. When prompted enter your extension followed by [#] (for the main mailbox just press [#])
4. When prompted, enter your 4 to 8-digit access code.
5. From the main menu, press [4] to manage your greetings
6. Press [1] to record your main greeting, then follow the prompts.

Please contact for assistance to setup your IVR options and mapping to work hand and hand with your greeting.

SECTION 6: Notifications For Voicemails, Faxes & Text Messages

Anytime a caller leaves a voicemail message in a mailbox, an email will be sent to as many email addressees of your choice. You decide if you want the original voice message attached to the email, or if you want just a link to the message-the link will bring you to the Web Portal to listen to the message. You can also have a Text Message Notification sent to any cell phone by entering the cell number and selecting the appropriate type. Email and text notifications can also be setup to notify you of faxes or to deliver faxes to you for any mailbox that is setup with fax capabilities. Email notifications can be used to make you aware of SMS messages in your inbox.

6.1 To Setup Email Notifications:

Use the following steps and the illustration below to setup email notifications:

1. Login to the Web Portal
2. Click on the “Control Panel” tab on the left side.
3. Select Notifications
4. Select + Add New Notification
5. The default settings will send an email each time you receive a voicemail, a fax or an SMS message, and will contain a link to listen to the message, to view the fax or view the SMS message. We recommend using the default settings for voicemail notification. Other options will be listed for you to select from. If you are setting up Fax Notification, then you would instead select Fax Email on the options drop down. For SMS Messaging, you would choose SMS Email.
6. Enter your email address in the space provided.
7. If you would like the voicemail attached as an MP3 to your email, check off “Send Attachment”. If you would like the fax attached to your email, check off “Send Attachment”.
8. Click on the Insert button when finished.

6.2 Additional Email Notification Settings:
When the system sends out a notification for a voicemail, fax or SMS message, the default is to keep the message as new. You can change this setting by clicking on this tab, and instruct the system to save (which marks it as read), or to delete the messages once delivered by email.

SECTION 7: Call Routing/FollowMe Setup
Call Routes will determine how a call is routed. In addition, the FollowMe settings will determine what the caller hears when they are routed (music on-hold or just rings) and how caller-id will be presented to you when you receive a call. Advanced options will allow you to route a caller to another extension if you do not answer (the default is to send a caller to voicemail). There are no limits on how many FollowMe entries can be created, and they can be disabled/enabled as needed.

If you have a VoIP Phone, you MUST have at least one FollowMe to your VoIP Phone in order for your VoIP Phone to ring. (If you want your VoIP Phone to always ring first, make it priority 1). If you want your calls to not ring your VoIP Phone, uncheck the FollowMe for the VoIP Phone, the call will then be directed next based on what rules you have set up in Call Routing.
In the above example, there is no Profile selected. The first phone that rings when a call comes into extension 600 is the Sales Rep VoIP Phone. If that phone is not answered, the NE Sales Ring Group will ring all phones in that Ring Group. If there is no answer there, the last step is to call the Sales Rep’s cell phone with the Call Announce feature turned on but only Monday through Friday from 9 a.m. to 5 p.m. Finally, if all options are exhausted the call will be routed to extension 600’s voicemail box. This is just one scenario and you can customize Call Routing to your specific needs.

7.1 Understanding Call Routing:

As the default, when a caller is routed they will hear a message “Please hold on while we connect your call to” [Name File (if a name file is recorded)], then the call will hear music on-hold while they are waiting to be connected. The callerid that is displayed as a default is the caller’s callerid.

- **Priority (P):** The priority number of the FollowMe entry. This is the order that the system will use to forward incoming calls.
- **Enbl:** Enable/Disable the FollowMe entry.- Check this box to enable this FollowMe entry. You can have as many FollowMe’s enabled as needed.
- **Em:** if checked, this number is designated to be used when Emergency Routing is turned on (see Section 7.4.3)
- **RM (Routing Method):** Tells you whether the route is going to an external phone number (PN), a VoIP Phone Extension (VP), a ring group (RG), or if it is being transferred away to another extension or phone number on the account (TRN).
- **Destination:** The external phone number or VoIP phone the call will be forwarded to.

You can enable/disable routes as needed. You can also change the priority of the Routes if needed. To edit a Route, click on the edit pencil at the end of the row that the Route is on.
7.2 To Create/Add a New Call Route:
1. Click on the Call Routing and from the drop menu select list routes.
2. Click on + Add New Route on top in blue.

7.3 FollowMe Settings & the Options DropDown Menus:
Menu options will change slightly depending on which routing option you select: External Number, VoIP Phone or Ring Group.

- **Route to:** Choose one of the following:
  - **External Number** – this could be a cell phone or another office number. If you choose External, enter the phone number.
  - **VoIP Phone** – Use the drop down to select an extension that has a VoIP phone associated with it.
  - **Ring Group** - If configured by the administrator, the Ring Group feature allows a group of VoIP phones to be rung at the same time. The Ring Group must be created prior in order to select it from the RouteTo Drop Down list.
  - Ring Groups are created in Control Panel > Ring Groups. (See Section 8 for Ring Groups).
• **Transfer** – Customizable select date / time of the week for call to be transferred.

• **Options**
  
  o **Call Screening Off** - used for a normal incoming phone call. When you answer, the caller will be put through directly. *Please note, if you are using a cell phone or other standard phone with a voicemail, then this option will cause the caller to go to your cell phone (or other) voicemail, and not your ConnectMe voicemail if unanswered. If you always want to use ConnectMe Voicemail, then we recommend using Call Announce or Call Screening.*
  
  o **Call Screening On** – The system prompts the caller to record their name. When a call is received, you must press 1 to accept the call, press 2 to route the call to voicemail, or press 3 to listen to the caller-ID digits. If you press 2 to send the caller to ConnectMe voicemail, then the system will send the caller to voicemail (unless you use the advanced settings to have them routed to another extension or to the voicemail of the phone that the call is being forwarded to).
  
  o **Call Announce** - Announces the call – use this option when forwarding to cell phones. When a call is received, you can press 1 to accept the call or press 2 to route the call to voicemail. If you press 2 to send the caller to ConnectMe voicemail, then the system will send the caller to voicemail (unless you use the advanced settings to have them routed to another extension or to the voicemail of the phone that the call is being forwarded to). Call Announce is the recommended setting to use when you are routing calls to a cell phone. If you have a Ring Group with mixed phone types (VoIP plus cell for example), you must use Call Announce.

• **Start Time/End Time**: The start time and end time of the call routing.

• **Days**- Select the days in which you want the FollowMe to be actively routing calls.

• **Timeout Seconds** - This is the number of seconds the phone will ring before trying the next number or going to voicemail. The default is 20 seconds and can be a maximum of 360 seconds.
7.4 **Additional Call Routing Settings:**
Additional settings allow you to further customize the way in which callers will be routed and handled.

7.4.1 **Under the Call Settings Tab:**
- **Routing**: On/Off – used to turn all FollowMes completely off
- **Inbound Caller Id Settings**: Caller’s Number is the default setting. This determines if you will see the
  1. caller’s callerid
  2. the phone number that was dialed as the callerid, or
  3. the main phone number on the account as the callerid.
- **Play Name** – The default is yes. If you select no, then the caller will not hear your name played back to them when using the system FollowMe greeting.
- **Play Rings Only** – The default setting is no. If yes, this will tell the Service to simply play a standard telephone ring while you are being located. If selected, callers will not hear any pre-announcement or music; they will just hear rings until you are located. Even if you have Play Mailbox Name set to “Yes”, the name will not be played.
- **Prefix** – This is used for VoIP phone users only. The prefix will be prepended to the phone number for an incoming call. For example, “CUSTSVC”
- **On Fail**: After all call routing options have been exhausted and there has been not an answer, the system will either transfer the call to voicemail, transfer the call to another extension, or hang-up. The default is voicemail for that extension/mailbox.
- **Fail Extension**: If you want the calls to be transferred to another extension, or voicemails left in another extension then your own, select it here. This would be a 24/7 Fail Route. (If you want to control days/times when calls are transferred, this would be set up in the call routing section, use TRN and specify the days/times)
- **Profile**: The profile that has been selected. See 7.5.4
- **Profile Expires**: The day the Profile will expire and go back to the default Profile. See Section 7.5.4
7.4.2 Transferring A Call That Has Been Routed Out To A Cell Phone:
- While on a call that has been routed out to a cell, while on your cell press *1. Follow the prompts to transfer the call back to extension on your account
- You can only transfer calls back to a number (a DID), or an extension that has a VoIP phone on it.

7.4.2 Under the Priority Caller Ids Tab:
Priority Caller Id’s override any call screening (Call Screening On or Call Announce) settings. Please contact our Customer Service department for assistance with these settings to make sure you understand the impact to your setup.

Call Routing  >  Add Priority Callers

Add New Priority Caller

Phone Number

Save   Cancel
7.4.3 Emergency Mode Tab:

Emergency Mode can be turned on and off on the “Admin Settings” tab on the Routing/Follow-Me page. This can only be accessed by an administrator login. This functionality works hand in hand with the Emergency Routing you set up in your call routes (see 7.2).

In order to use Emergency Mode, your Emergency Routing must be set up prior, similar to setting up a Profile. Emergency Mode is an easy way to enable Call Routing in the event that your phones are not working due to power or internet outages, or bad weather for instance, and you can continue to receive calls. If you do not have a way to turn on Emergency Mode, contact ConnectMe and we will be glad to turn it on for you.

Emergency Mode

*Directions:* Emergency Mode allows you to turn on an emergency routing setting for individual or groups of phones in the event that there is a loss of internet or power that is affecting calls.

*Ungrouped or Individual Phones:* If there are no groups listed in the Group Status table below, use this section to set your Emergency Mode.

- Normal Routes Only
- All Routes
- Emergency Routes Only

Create An Emergency Route

*Grouped Phones Status:* Use this section to set your Emergency Mode for entire groups of phones.

- **Normal Routes Only** - the system will route to followme’s with the emergency mode unchecked. This is the normal default.
- **All Routes** - the system will route to all followme’s, both Normal and Emergency
- **Emergency Routes Only** - the system will route to followme’s with emergency
7.5 Profiles:
Profiles are an easy way to set or change Call Routing quickly without having to always recreate a sequence of Call Routes over and over, or disabling/enabling individual FollowMe settings. This is especially helpful when your Call Routes have more than one step. You also do not have to remember to log in and change the profile, you can set a date and time for the profile to expire and go back to your default settings. Note: You don’t have to use Profiles if you don’t want to.

Once the Profile is created, you can log in to the Web Portal, choose the appropriate Profile that you need at that time, set an expiration time if needed, and you are done. You may also select a Profile and set it while you are logged into the HUD. A Profile can always be edited if it needs to be changed over time. See Section 7.5.4

You can see here below that the VoIP phone is the first in the Call Route in order to make the phone ring before moving on to the next step.
7.5.1 Creating Profiles:
1. Go to the left navigation menu, click on add Profiles
2. In the Profiles dialog box enter the profile name, and click save.
3. To edit Profile names, click on the to delete Profiles, click on the on
7.5.2 Adding Routes in a Profile:

1. To Add Routes to a Profile, click **view/edit routes** on profile name you choose to edit from the list of profiles.
2. Click on **Add New Routes**
3. In the Route Profile dialog box, select External Phone Number, VoIP Phone or Ring Group, then fill in the related fields, then click **insert**

   Enter as many routes as needed to create that Profile. If you want your VoIP Phone to ring during any portion of the route, please be sure to add your VoIP Phone as one of the route segments.

Select a default Profile for future use.
7.5.3 To Edit the Route in a Profile:
1. To edit a Profile, find the row containing the profile you choose to edit and click on view/edit routes.

7.5.4 Using Profiles:
1. Go to Call Routing and select list routes from the drop down menu.
2. Under routing settings select the profile you choose to use.
3. If needed, set a date & time for that Profile to expire. You must have a default Profile selected in order to use the expiration time and date. If there is no default Profile selected, the system will just leave the current Profile in place.
4. Click Save. Select any other Routing options if needed (see Section 7.4), then click Save.

Note: You can also set your profile using the HUD.
7.6 Mailbox Settings:
7.6.1 When necessary, you can forward messages, set up vacation forwarding/copying rules and change access codes. Select mailbox settings from left navigation menu and select message forwarding.

7.6.2 Time Zone
To update your timezone, change it in Mailbox Settings. If your timezone is incorrect, the timestamps on your messages and on call reporting will be off. Mailbox Settings>Settings Tab> TimeZone.

7.6.2: Access Code Retrieval
As a proactive preventative measure, take a moment and add your email address under Mailbox>Settings. At the login page, you can have the system send you your access code.
SECTION 8: Ring Group Setup
As an Administrator, you can setup a group of your VoIP phone extensions to all ring at the same time. You can also have a group mixed of VoIP Phones and outside phone numbers, like a cell phone. The group can also be named for easy reference (e.g. “Customer Service”). After the Ring Group has been created you can select in call routing, (see Routing instructions). There are no limits on how many Ring Groups that can be created, and they can be used as needed.

8.1 To Setup a Ring Group:
1. Select Control Panel and from the drop down menu click on administrative
2. Click Add New Ring Group
3. Assign a name to the Ring Group and click save.
4. Add members to group by selecting add group member.

5. While adding members, you can specify a CallerID prefix to the members of a Ring Group (such as CS for Customer Service or HR for Human Resources). When a call comes in through that Ring Group, the prefix will be displayed on the phones. This option is very useful if when the same phone is used in multiple Ring Groups to differentiate the different calls coming in.
SECTION 9: Changing Access Codes

All subscribers are encouraged to change their personal access code often. Please do not use simple codes like 1234, etc.

9.1 Changing Access Codes through the Web Portal:
1. Log into the account at Extension or Admin Level.
1a. If you are logged in as an Admin, choose the extension you need to change the access code for.
2. Go to left navigation menu and select Mailbox Settings and click on settings from the drop down menu. Enter the new 4 to 8-digit code twice, then click Save. For security purposes, neither the old or new access codes will be displayed on the screen.
3. Be sure to enter an email address so that in the event that the pin is forgotten, at the login page, you can ask the system to remind you of the pin you have.

9.2 By VoIP Phone:
1. Enter your Mailbox in Subscriber Mode.
4. Follow prompts to change your Personal Access Code.
SECTION 10: Transferring, Hold & Conference and Park from VoIP Phones

10.1 Transfers, Hold and Conference From your ConnectMe VoIP phone:

During any call you may select to transfer, place on hold, park, or start a 3 way call. For specific instructions, please refer to the manufacturer instructions for your specific phone. Please note that music you have selected will play during a hold, transfer or conference function.

As a general guide, you may use the following instructions:

- **Blind Transfer** – Allows you to instantly transfer to another extension or outside number. Transferring the call is a combination of dialing the extension along with the transfer button, and then hanging up the phone—the sequence will differ depending on what model phone you have – please refer to the manufacturer instructions.
- **Supervised transfer** – Allows you to wait and speak to the party you are transferring to before completing the transfer. To do this:
  - Hit transfer(Your caller will be put on hold)
  - Wait until your party answers
  - Hit transfer again to complete the transfer, or re-select the line that has the original call in order to return to that caller.
- **Hold** – Puts the caller on hold until you press resume.
- **Conference** – Allows you to add a 3rd party to the call (please note, some phone models may support more parties).
  - Hit conference
  - Call the new party (either an extension or an outside number)
  - Hit conference
10.2 Parking:

10.2.1 Valet Parking:
If Valet Parking has been turned on for your account, you can park a caller on an extension as defined for the account, and the caller will remain parked with music on-hold until you dial into the park extension to retrieve the call. It is also possible to setup a timeout that will send the caller to voicemail or another extension once they have been on park for a given amount of time. This is the only parking feature that works with the HUD (BLF/Button Parking does not work on the HUD).

The default extension for parking is 500. When you park the caller on 500, it will assign a valet park extension of 501 to 505.
1. Do a supervised transfer to extension 500
2. Wait until the system tells you which extension the caller is parked on (e.g. 501)
3. For someone to retrieve the parked call, dial the parking spot number (e.g. 501)

If you have the HUD open while on a call, just click the blue car icon to park the call. The screen will refresh and you will see the call parked in a parking spot. Whoever else has the HUD open can click the “Take” button. The caller will hear “Please hold on while I connect your call to ________” and it will ring the phone of the person retrieving the parked call.

10.2.2 Park On The Fly:
If you want to park someone on the fly, blind transfer the call to *30. Transfer, *30[parking lot number you choose], transfer. Then whoever wants to pick up on the parked call, dial *30[parking lot number]. This does not work on the HUD.
SECTION 11: Using Quick Codes with a VoIP Phone

Each of these codes require you to press [*] followed by the code. Not all features are supported on all phones, and some require advance setup by an administrator. The following codes can be entered from your ConnectMe VoIP phone. Some features must be specifically enabled by the administrator. Please contact ConnectMeVoice customer service for assistance on enabled or disabling these functions.

[*30 +extension] – Parking on the fly
[*33] – Barge in to a call. Same as *97+extension then pressing 2.
[*51] – Toggle Night Mode for the Main Mailbox
[*51 + extension] – Toggle Night mode for the specified extension or use a DID for a DID Mailbox.
[*55] – Login/Logout call center agent
[*67 +Phone Number] – Outbound call with caller id blocking
[*72] – Activate call forwarding
[*73] – Deactivate call forwarding
[*072/*073] – Toggle Hotdesking activate/deactivate
[*87 + extension] – Spy on an outbound call: 0=listen only, 1=speak with other half, 2=speak with user, 3=three way call
[*88 + extension] – Intercepts a call on the specified extension only if there is a call ringing on the extensions.
[*93] – Call into Subscriber Mode for the Main Mailbox
[*94 + extension] – Call into another Extension’s Subscriber Mode
[*95] – Intercepts the last call ringing.
[*97 + extension] – Eavesdrop- Allows an administrator to listen in on a call with various options as listed below– Note: This feature is available to administrators only, and must be setup in advance. Please contact customer service for more information.

2 to speak with the user
1 to speak with the other half
3 to engage a three way
0 to restore eavesdrop
* to next channel

[*98 + extension] – call an extension’s voicemail – Use this code to dial into another extension’s voicemail. You can use this feature to transfer a caller to another subscriber’s voicemail, rather than transferring to them live. For example, to transfer a caller to extension 101’s voicemail, hit [Transfer], then *98101 [send] then hit transfer again. The caller will be sent to extension 101 voicemail.

[*99] – Enter subscriber mode - use this to check voicemail or to record greetings. You will be prompted for your access code.
SECTION 12: Listening and Viewing Voicemail Messages, Faxes and SMS Texts

**Note:** There is a monthly fee for sending/receiving SMS texts, and this is a feature that ConnectMe must turn on for your account. There is also a limit to the amount of SMS texts monthly. Contact ConnectMe for details on this feature.

12.1 **Using Email for Notification:**
Most users will choose to setup email notification, and then have all voicemail messages or faxes sent to their email—the voicemail message (or fax) is attached to the email notification. This allows for easy review on a computer, Smartphone or tablet. You can set up a notification to let you know that there is an SMS text waiting for you in the portal—you must view and reply through the portal or mobile app. Please see Section 6 on setting up email notification for more detail.

 Messages/faxes/SMS texts remain in your mailbox for 60 days.

12.2 **Listening to Messages on the Phone:**

1. Enter your mailbox in subscriber mode ([*99*] from your VoIP phone), enter your access code when prompted.
   1a. To dial into the main mailbox on the account from your VoIP Phone, dial *93
   1b. To dial into another extension on the account from your VOIP Phone, dial *94+ext
   1c. If you are not on a VoIP phone, you can dial 848-207-2737 from an outside phone to retrieve your messages and follow the prompts

2. You will be presented with the Main menu. Press [1] from this menu to play messages. (Refer to “Options While Playing Messages” in 12.3 to see what choices you may select while listening to messages)

12.3 **Options while listening to your messages over the phone:**
Use this as a quick reference for actions that you may take while listening to a message

**Options at end of message:**

**Erase Message:** Press [7]

**Save Message:** Press [9]

**Replay:** Press [4]

**Forward (Copy) Message:** Press [6]
Envelop and Caller ID Information: Skip and save as new:

Options during message play:
 Rewind Message: Fast
 Forward Message:
 Decrease Speed:
 Increase Speed:
 Go to end of message:

12.4 Options available after listening to messages:
Use this as a quick reference for all options that you have after listening to messages over the phone.

Press [1] Listen to all saved messages
Press [2] Review messages that you just marked as deleted. You may now delete them or choose to save them. (Note: You only have one chance to listen to a message marked as deleted, and re-save it.)
Press [3] Return to the main menu

12.5 Listen to Messages/View Faxes using the Web Portal:

1. Login to the Web Portal at the Admin Level or the Extension Level
2. If logged in at the Admin Level, choose the Mailbox/Extension you want to listen message or view faxes for
3. Click on the mailbox tab
4. You will now see the inbox. You can listen, save, delete, forward and rename messages or folders. Please click on the help icon on the web site for more detailed instructions.
5. To make a note/comments about the call or fax, click on the Notes Icon . This is helpful if there is more than one person checking the box for messages, information can be noted that the caller was contacted for example, or you can assign a code of some sort, etc. You can also search through the notes to find a specific call.

Note: Please refer to Section 16.5 for instructions about forwarding/copying messages and to set up Vacation Forwarding/Copying rules for messages.
12.6 Viewing SMS Texts and Replying Using the Web Portal:

1. Login to the Web Portal at the Admin Level or the Extension Level
2. Click on text messages from the left navigation menu
3. From the drop down menu select list text messages
4. To view messages click on the name of the list of contacts you choose to view.

5. You will now see the list of text messages sent or received under that contact.
6. When you are viewing a message, you can enter a reply in the text box and click on the send button.

7. To send a new text message, click on send text from the top navigation. If there are more than one SMS capable phone numbers pointed to the extension, select the number you want the SMS to come from. Enter the phone number you want to send the SMS to. Enter the message in the text box and press the “Send” button to send your message.

Text Messages > Send Text

Send Text

From
14693179200

To

Message

Rules: No spaces or special characters e.g. 7325551234

Send Cancel

< Return to List Text Messages
SECTION 13: Dial By Name

13.1 Setup Dial-By-Name using Extension Manager:
Administrators only – Through the Web Portal, on the Extension Manager page, insert all of the first and last names in the appropriate extension. To insert the names, click on the edit icon on the far right for each extension. Confirm that Dial-By-Name is checked for each extension.

Note: Each extension must have a Name Greeting recorded before this feature will function. You may also specifically exclude extensions from Dial-By-Name by deselecting them on the Extension Manager.

13.2 Setup Dial-By-Name Options:
By default, Dial-By-Name will ask for last name. If you prefer, you can choose first name, last name, or either name. You can also customize how many characters the caller is prompted to enter before the name can be found in the directory.

1. Login to the Web Portal, and select the Dial-By-Name Extension (the default is extension 9) from Extension Manager or from the switch-extension drop down.
2. Click on Mailbox Settings, then the Advanced tab.
3. Choose your Dial-By-Name preferences from the drop-down list.
SECTION 14: Auto Attendant Options

If you have an Auto-Attendant setup for your service, it is your option to first allow callers to attempt to get a live person directly. If there is no answer, then we can use the Auto Attendant to rout the caller to their destination. Alternatively you can choose to setup any of your phone numbers on your account as Auto Attendants.

To set this up, please notify Customer Service in order to be sure that your Call Routing is set in the most optimal manner. See Section 5 to learn how to set up the greeting for your Auto-Attendant.

SECTION 15: Call Recording

15.1 Setting Up Call Recording(s):

Call Recording for each Mailbox/Extension must be turned on by the Administrator. If you have asked ConnectMe to enable this feature, you may setup extensions to record all calls. You can also set up “recording on demand” in the HUD.

Call Recordings are only kept for 60 days. If you need to archive them, save them/download them to your computer or another storage device.

Note: Turning on Call Recording for each Mailbox/Extension will not turn on Call Recording for the Call Center!
To enable full-time recording:

1. Login as Admin. Click on Control Panel>Administrative
2. Select Manage Call Recording from drop down menu
3. Check either the extensions option for individual extensions, or all to set for all extensions in the account.
4. Use the Save Call Recording to drop-down to select to save the recordings in the main mailbox, or in each individual extension. Note: You can choose to have a notification set up for Call Recordings, when the recording is in the mailbox of your choice – go to Control Panel>Notifications, choose Call Recording Confirmation Email.
5. A new folder will be created (after the first recorded call) titled “Call Recordings”. This is where your recordings will be stored. They are stored for 60 days.
Above see an example of several different combinations of features:

- you can turn recording on or off for any mailbox/extension;
- you can have call recordings go to the main phone number (blank) or to another extension if preferred;
- you can choose to have a beep tone playing every so many seconds during the conversation so the person on the other end knows the call is being recorded;
- you can turn the PLAY ANNOUNCEMENT on or off – check what the laws are for your state. This is the recording that the person called will hear: “this call may be recorded…”

If you want to be notified by email when a Call Recording has been created and stored and is available to be listened to, set up a notification in Control Panel>Notifications and choose Call Recording Confirmation Email.

**Note:** While in the user portal, if full-time call recording is turned on for an extension, you can turn it off while on a call via clicking on the “rectangle” icon for your extension on the HUD. Once turned off for a call, you cannot turn it back on for the call. Note, this turns call recording off just for the one call you are on. Once another call is made, call recording will be on again.

**To enable on-demand recording:**

Note: if you have “full-time” call recording turned on, that setting supercedes the on-demand call recording setting. You cannot have both enabled. You must choose one or another, you cannot have both set. If both are set, you will not be able to see the red on-demand call recording button in the HUD.
15.2 Locating & Listening To Call Recording(s):

To Locate a Call Recording: You must know where the Call Recordings are being stored. If you are not sure where the recordings are being stored, log in as an Admin and go to **Control Panel>Administrative>Call Recording**, or contact your Administrator. Usually Call Recordings are deposited in the main box of the account, or stored on an individual extension. Once you know where to go, you will see the folder “Call Recordings”. Click on that folder. You will see the following screen:

![Call Recordings Screen](image)

**Note:** If a call has been parked or transferred, there will be multiple records for that call. If you need to have all the complete set of recordings for a call, you need to know all the details about that call-time, date, extension taking the call, how was it transferred, etc. For a blind transfer, the “from” will be the original callerid. If it was a supervised transfer, the “from” will be the extension of the person transferring it. If a call was parked, the “from” will be the parking slot it was parked on (for example, 5000). Please call ConnectMe Customer Service if you need assistance learning how to find your Call Recordings.

To Search for a Specific Call Recording: Click on the Search button. The following dialog box will appear.

![Search Dialog Box](image)

**Note:** If a call has been parked or transferred, there will be multiple records for that call. If you need to have all the complete set of recordings for a call, you need to know all the details about that call-time, date, extension taking the call, how was it transferred, etc. For a blind transfer, the “from” will be the original callerid. If it was a supervised transfer, the “from” will be the extension of the person transferring it. If a call was parked, the “from” will be the parking slot it was parked on (for example, 5000). Please call ConnectMe Customer Service if you need assistance learning how to find your Call Recordings.
**To Listen to a Specific Call Recording:** Once you see your recording in the results of your search, click the play button. An audio player will pop open and play your recording. You can also make notes to yourself or for someone else about the recording – click on the blue Notes Icon. You can also forward, delete or make notes on call recording.

**Batch Downloading Call Recordings:** There is a monthly fee for this feature and provider has to turn on this feature for your account. Once the feature has been added, a user logged in with the admin password will see the “Call Recording Download” icon.

Enter the criteria for the recordings you want to download. You can specify the starting date, ending date and select the extensions or click on “check all” extensions. The time span cannot be greater than 7 days. Click on “Submit Request” to submit the request to the system. The recordings will be available for download within 30 minutes. In 24 hours, the request will be automatically deleted from the system.
SECTION 16: Office Hours, Vacation (Extended Absence) and Holiday Schedules

Setting Office Hours, Vacation Schedules (Extended Absences), and Holiday Schedules will determine if a standard or night-time greeting is played. In addition, you may also select to have calls routed to another extension when you are closed. Please note that you may also use the VoIP Phone to set this up.

16.1 Setting Office Hours

1. Log into the Main Mailbox in the Web Portal
2. Click on Control Panel, then click on the “Office Hours” icon
3. This will take you to a screen that allows you to set your “Office Hours”. The default setting is Open 24 hours a day. If you wish to change the Open/Closed hours, use the drop down arrow by the “Selected Times” box. If you chose “Open”, you can then select various open hours. If you select “Closed”, it is for a 24 hour period. Click Save to save your changes. If you do not have an After-Hours Greeting in the system, the caller will hear the standard greeting.

### OFFICE HOURS

<table>
<thead>
<tr>
<th>Day</th>
<th>Option</th>
<th>Open</th>
<th>Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Monday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Thursday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Friday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Saturday</td>
<td>Open</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
</tbody>
</table>

Save Upgrades
16.2 After-Hours:
After-Hours offers you the ability to play a different greeting based on hours set in Office Hours.

16.3.1 From The Web Portal:
Set your Office Hours in Control Panel>Global>Office Hours. Make sure your After-Hours Greeting has been loaded into the Portal (Control Panel>Global>Greetings Manager) so that it plays when Office Hours are closed. You also can record your After-Hours Greeting by dialing into Subscriber Mode.

16.3.2 On The Phone:

16.3 Office Hours Advanced Settings:
Use these options to tell the system to transfer to another extension After-Hours, during holidays or extended absences. Please contact Customer Service for assistance with these features to further understand the impact on your setup.

Office Hours Advanced Settings

Directions: Set what happens when your office is closed (after-hours).

Play Greeting Before Transferring Call
Transfer Call To Extension
Night Mode Override

Save  Cancel
16.4 Holidays:
Select the Holiday tab to setup specific days that your company will be closed in advance of the holiday. You may also record specific greetings for these Holidays. The setting works for the one day you selected (24 hours) and then expires. If you do not record a specific greeting, then the standard After-Hours Greeting is played.

16.4.1 From the Web Portal:
Set your Office Hours in Control Panel>Account>Office Hours>Holidays. Click Add New Holiday, and choose the settings you prefer, and upload a custom holiday greeting file if you have one. You need to set up a Holiday in the system in advance of the day.

16.4.2 On The Phone:
Enter your mailbox in Subscriber Mode (*99) or dial 848-207-2737. Press [4] for Greetings, [3] for After Hours/Holiday Greetings, press [2] to record a Holiday greeting. After you record the greeting, the system will prompt you to set up the date.

16.5 Vacations/Extended Absences:
This feature only works at the extension level, not at the main account level – this is meant to effect individual extensions only.
16.5.1 From the Web Portal:
In the Web Portal, from Extension Manager choose the extension you want to set up an Extended Absence for, then go to Control Panel>Mailbox Settings. Click on the Forwarding tab. This is where you can set up rules for when you will be unavailable to accept calls for more than one day. It takes effect as soon as you set it up and will expire on the date/time you have selected. You can choose from several options to customize it to your needs. There will be no specific extended absence greeting if you choose to set it up on the Web Portal.

16.5.2 On the Phone:
1. Enter your mailbox in Subscriber Mode (*99) or dial 848-207-2737
2. Enter your pin, etc.
SECTION 17: Call Reporting
Click on the Call Reporting tab on the left navigation menu while logged into our web portal. Please note, that if you are logged into a main mailbox you will see all calls. If logged into an extension, you see calls for only that extension.

There are various filtering and delivery options available on the site. Please refer to the online help available on the site for details on all of these selections.

Call Center has its own reporting capabilities.

---

SECTION 18: Inbound Faxing
ConnectMe will assign you (upon request) a toll-free number specifically designed for receiving faxes. This number will deliver the faxes directly to your main mailbox, or to any other extension you may specify. Please be sure to setup email notification for the main mailbox (or other fax extension), using the fax to email option.

SECTION 19: Call Monitoring & the Heads-Up-Display (HUD)
The HUD feature is available while logged into the Portal as part of ConnectMe’s suite of features, and will allow you to view phone activity for all the phones that are on the account in a real time manner. The HUD is a powerful “super receptionist” console. It allows you to see everything going on with your company’s phones. The HUD also allows options such as monitoring and transferring of calls with the click of a mouse. If the HUD is associated with a phone that has been selected to Supervise, that Supervisory HUD will display the ear and the spy symbols. Only phones selected as Supervisor can spy on or monitor calls.

Note: Pop-ups must be enabled in the browser from ConnectMe’s site in order to utilize the HUD screen. The HUD screen will be adjusted in accordance to the number of phones setup. Each phone/user will also display the number of new, urgent and old messages in the voicemail box. The default view is Icon View.
Please click on the HUD Help key for a pop-up window with a legend of other options such as blind transfer, supervised transfer, conference, and transfer to outside lines.

19.1 Setting Up Call Monitoring:
An Administrator must set up Call Monitoring for each phone in advance in order to listen to calls on the HUD:
1. Go to Control Panel > Call Monitor.
2. Select which phones can be monitored, and which can act as a Supervisor.
3. If you want the phones you are monitoring to know they are being monitored, check off “Play Tone”. The person being monitored can hear the beep during the call, the person they on a call with will not hear the tone, and the Supervisor will not hear the tone either.
4. When on the HUD screen, a Supervisor can now click on the monitor (ear) button. (Any phone which was selected as monitorable will have both an ear and a spy symbol). The Supervisor’s extension will be called, and the Supervisor will be able to listen to the call.
5. To Spy on an Outbound call – click on the Spy for the phone you want to spy on in advance of any outbound calls being made. While you are waiting for an outbound call, you will hear hold music playing. Once an outbound call has ended, you can choose to stay on the line and wait for another outbound call to be made or you can disconnect yourself; if you choose to wait, you will again hear hold music till the next call.
6. To do On-Demand recording, you click on the red button while the call is in session. (the feature for that extension must be turned on in HUD Permissions).
7. As an option, you may also monitor calls by dialing * 97+extension from your supervisor enabled phone. Please see Section 21 for all special functions.
19.2 Setting HUD Permissions:

The HUD can be set to hide CallerID if needed, or to completely disable the HUD for specific extensions using the following procedure from your Administrative login:
1. Log in as Administrator
2. Click on Control Panel>Administrative>HUD List Permissions
3. Click on the pencil to edit permissions for each extension.
19.3 Setting HUD Groups:
The HUD can either display all extensions in your company, or you can setup specific
groups to be displayed as an option. You can set up your own groups for your own
purposes; you can set up as many groups/groupings as you want. Each extension or
phone on the account has to create their own Groups.

1. Go to Extension Manager, choose the extension or phone that you want to make the
   HUD group for.
2. Click on HUD
3. Click on Groups
4. Add new record
5. Name the group
6. Insert members to the group.

While in the HUD, you select the group you want to view from the dropdown at the top of the
HUD screen.
19.4 Instant Messaging in the HUD:
To chat with someone on the HUD, click their Chat icon. The Chat feature must be turned on for the account.

You may also send out a chat/instant message to all members of a Call Center Queue, as long as they are also logged into the HUD. See Section 20.
19.5 Setting Status/Presence:
You can set a status on the HUD for everyone to see. You can select Available, Away, Busy or At Lunch, then click Save. This setting does not affect call routes, or any changes to your phone. It is meant to just be an informational alert to everyone logged in on to the HUD.
19.6 Valet Parking on the HUD:
If you have Valet Parking turned on for your account, you can park someone on the HUD by using the little blue car icon; you can view which calls are parked on the HUD; and you can pick up parked calls on the HUD by clicking “Take”.

19.7 On Demand Recording in the HUD:
The extension must be set up prior to do on-demand recording.

While on an active call, hit the red “record” button. Hit “stop” when done.
SECTION 20: Chat

The Chat feature can be enabled for you by ConnectMe at no additional cost. Any mailbox/extension that has a VoIP phone on the same account can instant message one another.

If you are in the HUD, and have Call Center enabled, you can also send out an instant message to all members of a Queue. Select a Queue Name from the dropdown “Start Call Center Queue Chat”, click Start Chat and a messaging box will open; you can send a message to everyone in that Queue, as long as they are also logged into the HUD.
SECTION 21: Hotdesking

Hotdesking allows users to log in at another phone in shared office environments. This is useful in companies where colleagues work in shifts or don’t have to be at their desk the whole time. However, unlike using FollowMe or Forwarding which simply redirect a user's calls to another user’s phone, Hotdesking takes total control of another phone. All the Hotdesking user's settings apply to that phone until they log out.

Please request this feature to be turned on for your account. This feature only works with Polycom VVX and Aastra/Mitel phones.

Once this feature has been activated for your account, to use another phone dial *072[ext], you will hear a message and the phone will reboot and become the extension you want it to be. Once that phone is done being used, to log out of the Hotdesking mode dial *073, and the phone will reboot and go back to it’s original extension.

SECTION 22: Call Center

ConnectMeVoice offers an optional suite of inbound Call Center options. If you have purchased the Call Center feature, you will see a Call Center option on the left side bar when you log in to the Web Portal:

<table>
<thead>
<tr>
<th>Queue Name</th>
<th>In Queue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>0</td>
</tr>
<tr>
<td>OEM</td>
<td>0</td>
</tr>
<tr>
<td>CS_ADIDM/VECHS</td>
<td>0</td>
</tr>
<tr>
<td>CS_PORTING</td>
<td>0</td>
</tr>
<tr>
<td>CS_SERVICE/RELATED</td>
<td>0</td>
</tr>
<tr>
<td>SALES</td>
<td>0</td>
</tr>
</tbody>
</table>
The following items can be setup by the administrator in the end user site by selecting the administrative option in the call center. Detailed instructions and descriptions can be found for these items using the online help button.

22.1 Call Center Setup: The following components are included in the call center:

22.1.1 Agents: An Agent represents a person. The Agent can then be assigned one or more phones or phone registrations. This allows you to have an Agent receive more than one call, or to receive calls on different devices.

22.1.2 Queues: A Queue represents a calling strategy. For example, you may have all agents ring at the same time (ring-all), or have them ring sequentially or in a round robin). Options to announce the caller position, allow an escape to voicemail, or display specific information on your phone when the call comes in are all available. Call Recording must be turned on inside the Call Center Queue. If you do not enable recording in the Queue, any call routed to the Call Center will not be recorded. To review all available options, please click on the Queue option, and then select help.

22.1.3 Routes:

A route assigns a queue to an extension. For example, you may assign the sales queue to extension 2. You also have options to route to more than one queue, or to a standard follow-me or voicemail extension. Routes are also time and date based. Please select routes and help for details on options and setup.

22.1.4 Tiers:

A Tier defines the way you can attach Agents to Queues.

For example, you may have Agents Mary, Sue and John tied to the Sales Queue. In addition, the Tier allows you to prioritize some Agents over others in a ring-all group. So, if you want Mary and Sue to be the first to get a call, and then have John called only after 30 seconds of ringing, this is easily accomplished.
22.2 Call Center Monitoring and Reporting:

22.2.1 Queue Summary:
This is a quick view of the current call center status. Each queue is represented.

<table>
<thead>
<tr>
<th>Queue Name</th>
<th>Total Inbound</th>
<th>Abandoned</th>
<th>Waiting</th>
<th>On Calls</th>
<th>Logged In</th>
<th>Average Wait Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS_ACCTLOCKED</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>00:00:00</td>
</tr>
<tr>
<td>CS_ALLOTH</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>11</td>
<td>00:00:00</td>
</tr>
<tr>
<td>CS_UPDATECC</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>00:00:00</td>
</tr>
<tr>
<td>OUTAGE</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>11</td>
<td>00:00:00</td>
</tr>
<tr>
<td>CSEM</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>00:00:00</td>
</tr>
</tbody>
</table>

23.2.2 Call Center Reports:
All reports are available on demand under the call center section. (In addition, under Control Panel>Scheduled Reports, there are some Call Center applicable scheduled reports you can choose. You may select daily, weekly or monthly reports). The following reports are available:

- Agent Report: A report on all activity by agent
- Queue Report: A report on all activity by queue. For example, all calls to the sales queue. Reports are then broken down by agent.
- Route Report: A report on a route. For example, you may have a route for extension 2 that goes to 2 different sales queues. Both queues are represented in this report.
- Call Report: A report on all call center calls. The report can be filtered to a specific agent, or a specific queue.
SECTION 24: Distinctive Rings
Under the Control Panel, there is an option for Distinctive Rings. This allows you to set a different style ring for different dial-in numbers. This option is very useful if you are supporting multiple companies on a single group of phones. It will be able to ring differently depending upon the company phone number dialed. Please note, that not all phones support this option, use the online help to determine which phones and options are available.

Another way to use Distinctive Rings is to have External Calls with one ring tone, and inter-office calls use another.

SECTION 25: Optional Conference Bridge
ConnectMeVoice offers an optional meet-me conference bridge. If you have purchased this feature from ConnectMe, you may access the bridge from a VoIP Phone with a direct dial extension, and from an outside line using a phone number supplied by ConnectMeVoice customer service. The bridge comes with call recording, access code protection and an optional caller announce.

If you have a conference bridge set up on your account, any user on the account can dial in internally to the conference call to the extension assigned to that bridge (for example ext 3000) and use the member pin. When you invite outside callers to a conference call, have them dial into the Conference Bridge phone number, and give them the member pin. As each member joins, they will not be able to hear each other until the moderator joins with their moderator pin. If you want everyone to hear each other and talk to each other as they join in to the call, then the moderator pin should be the same as the member pin.

If you have more than one Conference Bridge, then you will have an extension/phone number for each; and each bridge will have it’s own member pin and moderator pin.

Once in the conference, the following options are available:

Conference Bridge Controls

0 Mute
1 Volume Talk Down
2 Volume Talk Zero
3 Volume Talk Up
4 Volume Listen Down
5 Volume Listen Zero
6 Volume Listen Up
*2 Start call recording
*3 Stop call recording

You can also view who is on the call and also make
SECTION 26: Support
See our Support Page on the Web Portal (Left Navigation Menu>Support) for relevant numbers or to send us an email.

As always, you can call us at 800-743-1208, ext 2 or send an email to customerservice@connectmevoice.com.