

crexendo[®] VIP[™]

The Platform for How
You Work Today



Crexendo[®] Guidebook *for Managers*

Introduction

Whether you are upgrading from our Crexendo Classic software or are brand new to Crexendo, we are excited to welcome you to our VIP platform for business communications and collaboration. The VIP Portal is designed to elevate your experience and provide you with a host of valuable benefits.

Purpose

The Crexendo Guidebook is meant to be a reference guide for you as you utilize or manage your Crexendo phone system.

Several sections are for “Office Managers” or administrators of your Crexendo domain, while other chapters provide instruction for call center agents, call center supervisors, and standard users.

For “Office Managers” or Administrators

If you will be managing your settings for your Crexendo phone system or domain, the table of contents begins with a chapter on each section of the VIP Portal for Managers. Each section displays the steps and options for managing your call flow and many include “how to” videos that can be accessed whenever you need them.

For an overview of the portal, please see the VIP Portal for Managers Overview video at: https://www.youtube.com/watch?v=UuThKDkiRfY&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=1

For Call Center Supervisors

Proceed through the table of contents and select the section you would like to learn about. Please pay special attention to the following sections:

- Call Center for Supervisors
- VIP Analytics
- VIP Call Center Reporting
- Call Recording
- VIP Portal for Users

For Call Center Agents

Proceed through the table of contents and select the section you would like to learn about. Please pay special attention to the following sections:

- VIP Portal for Users
- Voicemail
- Basic Phone Functions
- SNAP Builder

For All Users

Proceed through the table of contents and select the section you would like to learn about. Please pay special attention to the following sections:

- VIP Portal for Users
- Basic Phone Functions
- Voicemail
- VIP Fax
- SNAP Builder
- VIP Mobile Application
- VIP Web Phone

Crexendo Training YouTube Channel

https://www.youtube.com/playlist?list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm

Crexendo Guidebook Link

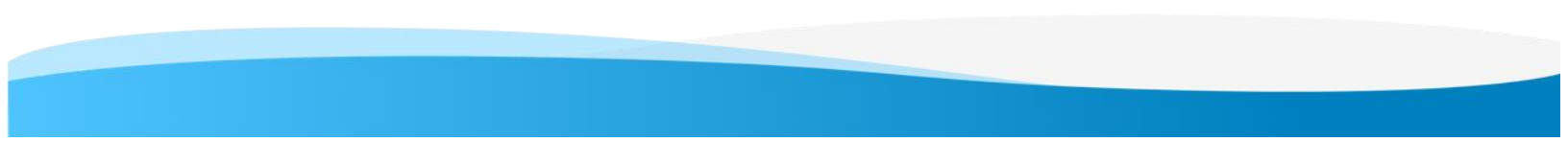
For the most updated version of the Crexendo Guidebook for Managers and the Crexendo Guidebook for Users, go to:

<https://support.crexendo.com/hc/en-us/articles/19945586618775-VIP-Crexendo-Guidebook>

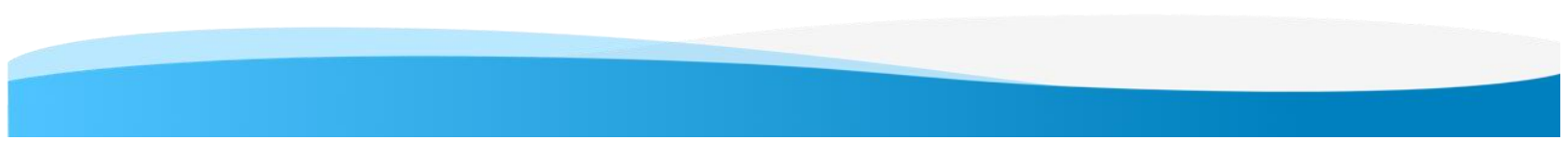
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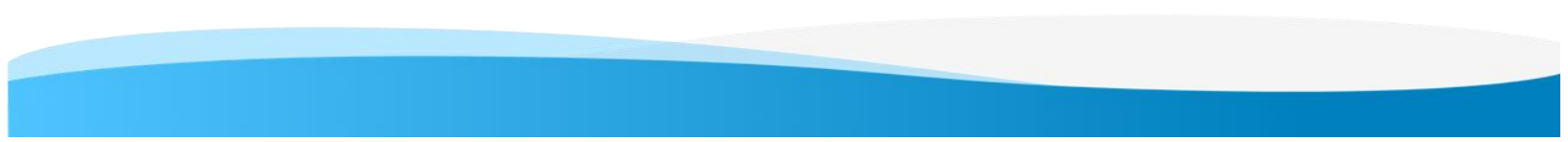


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Introduction:

The **Users** section of the VIP Portal for Managers gives you the ability to manage your users in one place.

This guide contains the procedures to **add, edit, and delete users, add ring groups, and shared contacts.** This action can only be done by an admin or “Office Manager” scope from the VIP Portal for Managers portal.

How to Add a User

For a video demonstration, go to:

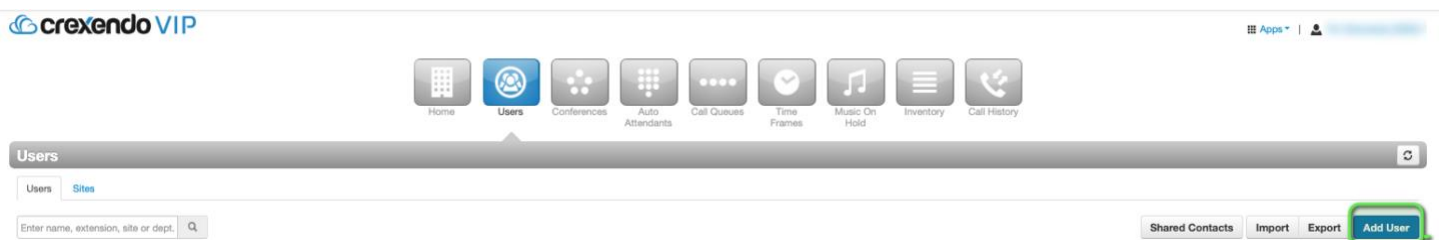
https://www.youtube.com/watch?v=gcSX3uh53ho&list=PLXADOLtuavV9jC_HL7NiOiBoKA9VZIBxm&index=6

Before adding a user in the VIP Portal, the following information will be helpful to have before creating the user:

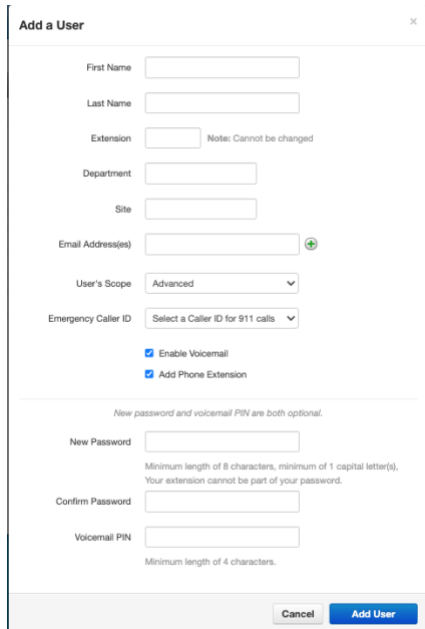
- First and last name of the new user
- Extension number
- The user’s email address
- The MAC address of the phone they will be using (*optional*)
- Their User License

To add a user:

1. Open the Crexendo VIP Portal: <https://portal.crexendovip.com/portal> as the office manager or above.
2. Click the “**Users**” button at the top of the navigation row.
3. On the right side of the screen, select “**Add User.**”



4. In the “**Add a User**” box, fill out the following information:



Note: These extension numbers should **NOT** be used for user extensions:

- 111
- 211
- 311
- 411
- 511
- 611
- 711
- 811
- 833
- 911
- 933
- 999
- 5000 and 5001

- **First Name:** User’s first name
- **Last Name:** User’s last name
- **Extension Number:** This number must be at least three digits and can be any number from 100-8999 **except for those noted above.**
- **Department:** Optional and only for organizational purposes.
- **Site:** Optional and used for multi-location-based businesses.
- **Email Address:** The user’s email address.
- **User’s Scope:** Contact Crexendo to discover what licenses you currently have.
- **Emergency Caller ID:** This is required and is setup by Crexendo. If a user will be at a different location and phone number that is not listed in the drop-down menu, please contact Crexendo to add the number to your emergency caller IDs.
- **Enable Voicemail:** This allows the user to have a personal voicemail box.
- **Add Phone Extension:** This option enables the extension number that you have created and makes it active.
- **Password Option:** You have the option to set a password for the user or leave it blank. Once the user logs in for the first time, they will set a new password.
- **Voicemail PIN:** Unless it is changed, the default voicemail PIN is 1234.

5. Select “**Add User**” and the new user will be added to the Crexendo VIP Platform.

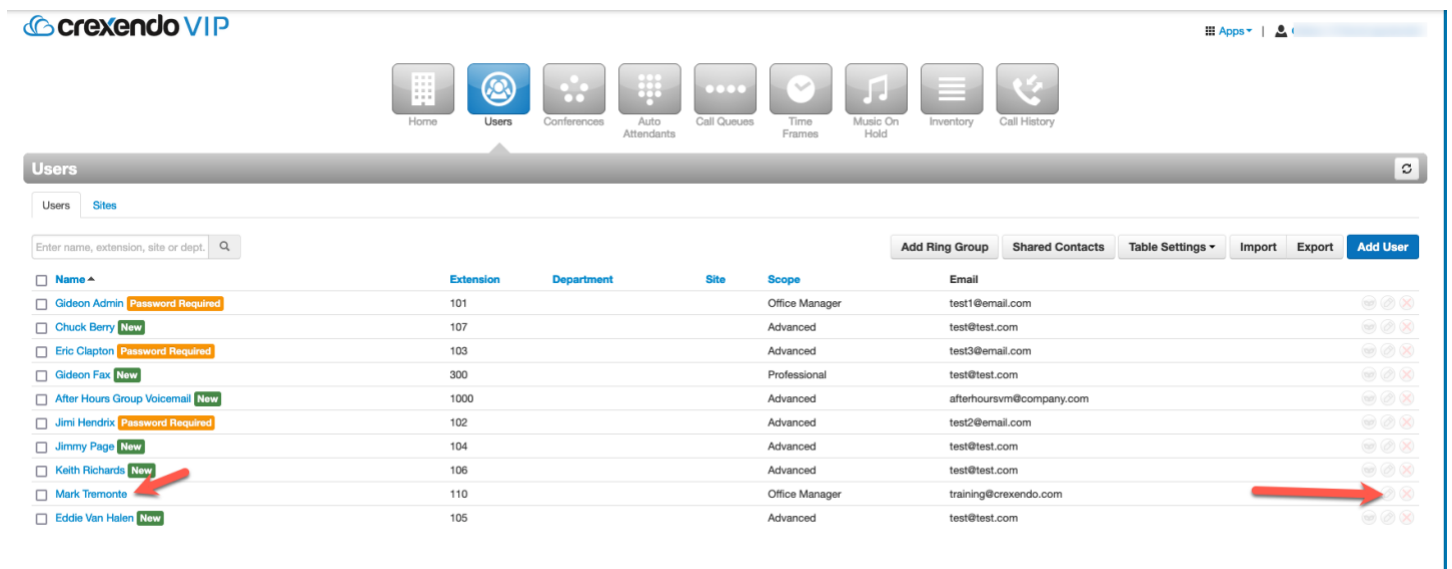
How to Edit an Existing User

For a video demonstration, go to:

https://www.youtube.com/watch?v=LBtbsSTcJow&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZlBxm&index=5&t=20s

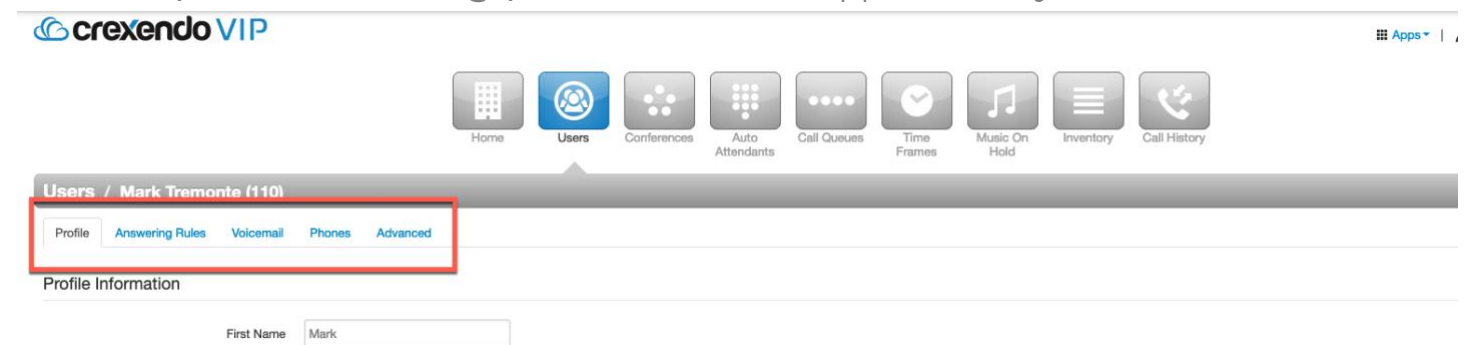
If you would like to edit an existing user in the VIP Portal:

1. Open the Crexendo VIP Portal: <https://portal.crexendovip.com/portal> as the office manager or above.
2. Click the “**Users**” button at the top of the navigation row.
3. Locate the user you would like to edit and either click on the name or click the “**edit**” button to the right of the user’s name.



Name	Extension	Department	Site	Scope	Email	Action
Gideon Admin Password Required	101			Office Manager	test1@email.com	
Chuck Berry New	107			Advanced	test@test.com	
Eric Clapton Password Required	103			Advanced	test3@email.com	
Gideon Fax New	300			Professional	test@test.com	
After Hours Group Voicemail New	1000			Advanced	afterhoursvm@company.com	
Jimi Hendrix Password Required	102			Advanced	test2@email.com	
Jimmy Page New	104			Advanced	test@test.com	
Keith Richards New	106			Advanced	test@test.com	
Mark Tremonte	110			Office Manager	training@crexendo.com	
Eddie Van Halen New	105			Advanced	test@test.com	

4. From here, you can edit the following by selecting the tab: **The user’s profile information, Answering Rules, Voicemail options, Phones associated with the user, Advanced settings, and Call Center** if applicable to your domain.



Users / Mark Tremonte (110)

Profile Answering Rules Voicemail Phones Advanced

Profile Information

First Name

- **Profile Information:** Includes the user’s information that was entered when the user was created. You can also verify or edit the user’s Called ID Information from this tab.

- **Answering Rules:** This tab shows the default answering rule that is active and any other rules that have been created by the user. You can also create a rule for the user from this tab.
- **Voicemail:** This tab allows you to enable/disable the user's voicemail as needed. The rest of the options are also available from the user's voicemail settings which includes Inbox options, Greetings, and Email Notifications options.
- **Phones:** This tab shows any phones associated with the user including web phones, mobile apps, and physical phones. If the user is utilizing a physical desk phone, "**Snap Builder**" can be accessed from this tab to edit the button configurations for the phone.
- **Advanced:** This tab allows the administrator to "**Reset User**" in order to assign the existing extension to a new user. The "**Send Welcome Email**" option is for a new user to receive their login information. If a user needs their password reset, click the "**Force Password Reset**" option and check the box to send the recovery email to the user's email address.

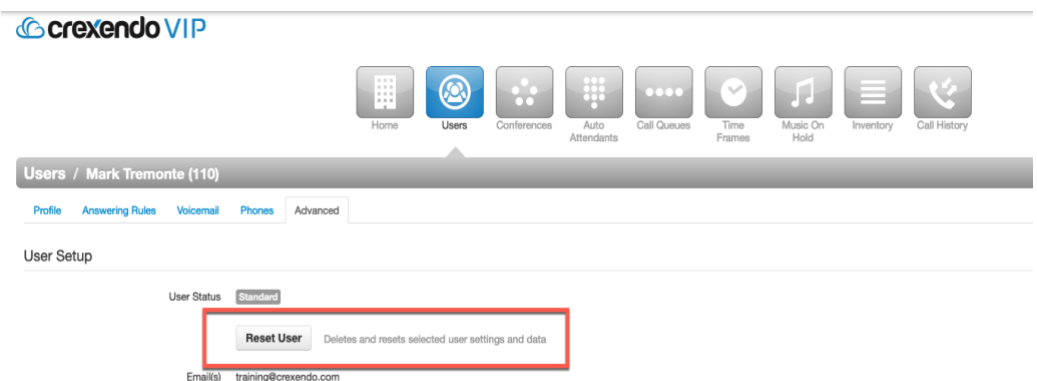
How to Delete or Reset an Existing User

For a video demonstration, go to:

https://www.youtube.com/watch?v=0DtWIOWPazk&list=PLXAD0ltuavV9jC_HL7NiOiBoK A9VZIBxm&index=12&t=19s

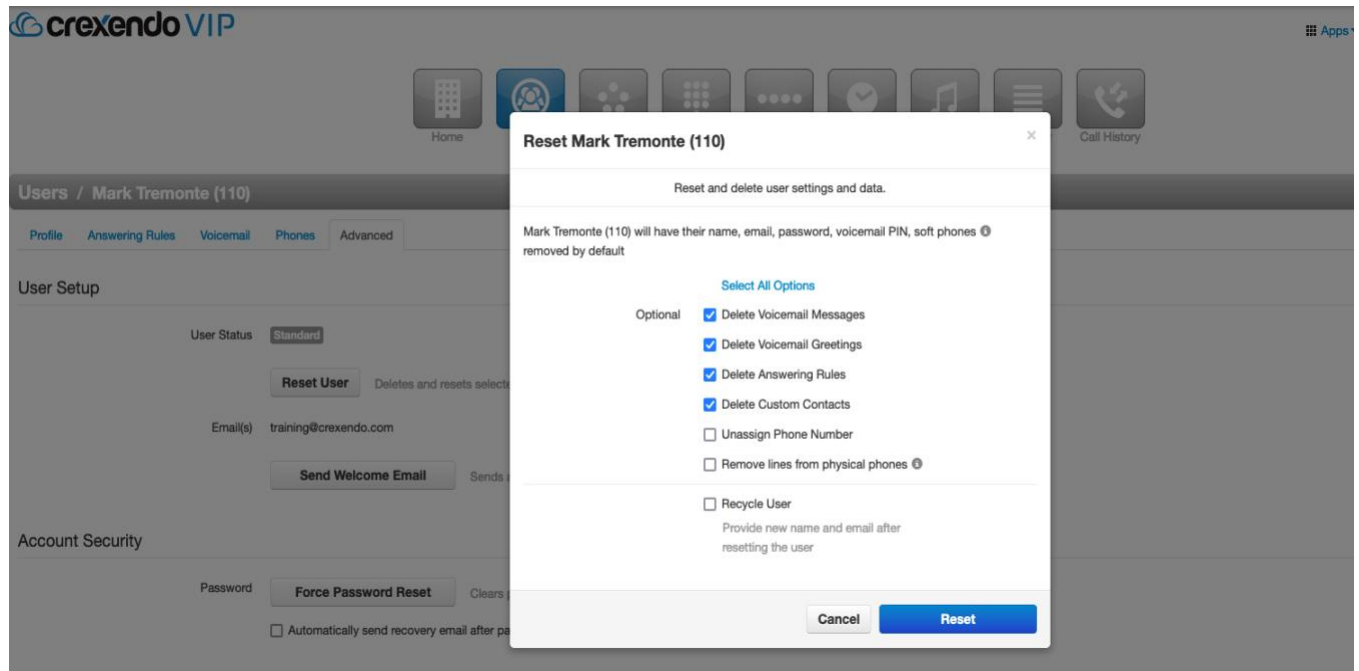
To delete an existing user and assign the extension to another user:

1. Go to Users and click on the user's name.
2. Select the "**Advanced**" tab.
3. Select "**Reset User**"



4. Review the options presented. The power will automatically select to delete the voicemail messages, greetings, answering rules, and custom contacts.
 1. Select "**Unassign Phone Number**" if the user has a direct phone number assigned to them.

2. If you would like to unassign their physical phone from the extension, select **“Remove lines from physical phones.”**
3. If you are ready to assign the existing extension to a new user, select **“Recycle User.”** If not, then leave it unchecked and select **“Reset”**.



- After the user has been reset, the extension will show in the **“Users”** as setup required. You can leave the extension as is until you have a new user to take the extension or delete the extension completely by selecting the red **“X”** on the right of the user.

How to Create a Ring Group

Ring Groups can be created to call specific extensions at the same time. This would be like creating a Ring All Call Queue without all the options that a Call Queue provides.

1. Select the **“Add Ring Group”** button on the upper right side of the page.
2. Give the ring group a **name, extension, department name** (optional), and **site** (optional).
3. Add the users you would like to be included in the ring group. You can edit for how long each user’s phone will ring.
4. Choose how long the caller will wait before the call forwards to its destination by editing the **“Ring Timeout”** length.
5. Choose where the call will go if no one picks up the call by adding an extension of a user, user’s voicemail, group voicemail, auto-attendant, or call queue.
6. Select **“Add Group”** to complete your ring group.

Add a Ring Group ×

Name

Extension Note: Cannot be changed

Department

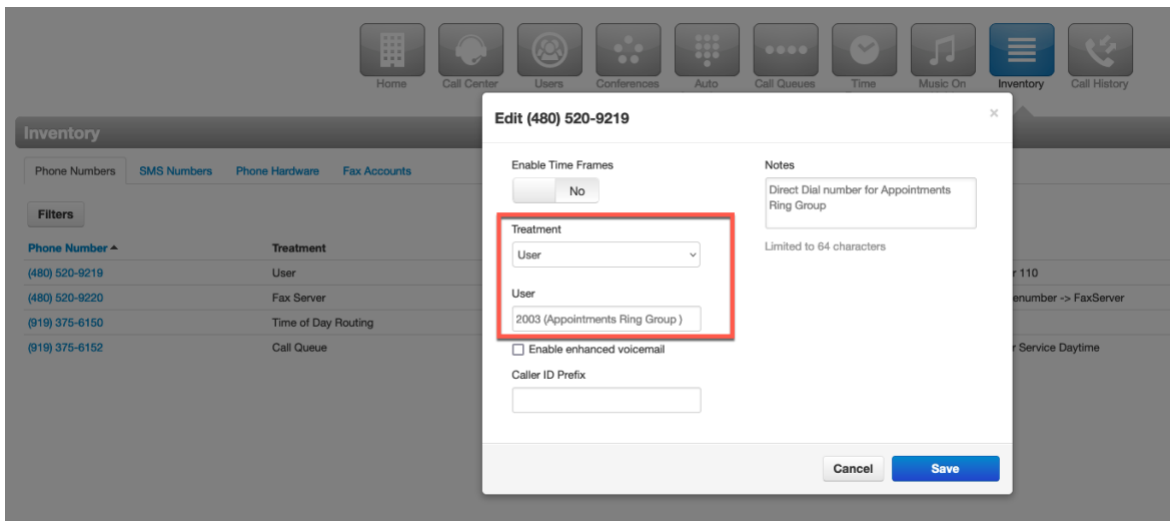
Site

Simultaneous ring

Ring Timeout

When unanswered

- You can add this into your call flow by assigning it to a direct dial number in your **“Inventory”** section of the portal.



Inventory

Phone Numbers | SMS Numbers | Phone Hardware | Fax Accounts

Filters

Phone Number	Treatment
(480) 520-9219	User
(480) 520-9220	Fax Server
(919) 375-6150	Time of Day Routing
(919) 375-6152	Call Queue

Edit (480) 520-9219 ×

Enable Time Frames

Notes
Limited to 64 characters

Treatment

User

Enable enhanced voicemail

Caller ID Prefix

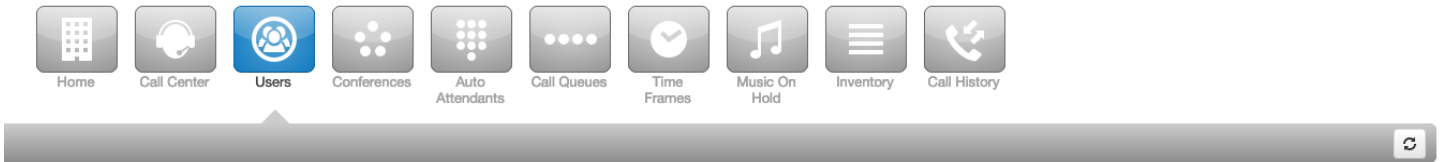
How to Add a Shared Contact

For a video demonstration, go to:

https://www.youtube.com/watch?v=YJ7DjUW3pAU&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=9

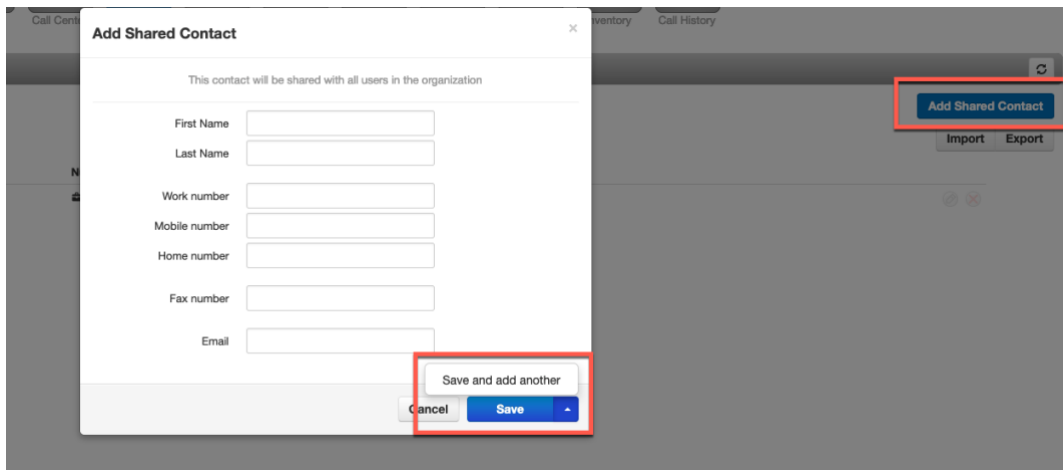
To add a shared contact that will be shared in all user's contact list:

- Select **“Shared Contacts”** on the upper right side of the screen.



[Add Ring Group](#) [Shared Contacts](#) [Table Settings](#) [Import](#) [Add User](#)

2. Select “**Add Shared Contact**” which will open a new dialogue box to add the shared contact information.
3. Fill in the required information and select “**Save**” or click the arrow to “**Save and add another**”.



Add Shared Contact

This contact will be shared with all users in the organization

First Name

Last Name

Work number

Mobile number

Home number

Fax number

Email

Introduction

Conference Bridges are a great way of meeting via telephone. This guide contains all the information necessary to operate your VIP conference audio bridges as a Crexendo Office Manager. Available options include:

- Organizations can have more than one bridge.
- They can be combined with video conferences (VIP HD)
- Each bridge can have a “leader” who can perform moderator duties.

This guide provides the steps to **create and use your conference bridges**.

For a video demonstration, go to:

https://www.youtube.com/watch?v=4QB7wSAqKeA&list=PLXADoltuavV9jC_HL7NiOiBoKA9VZIBxm&index=7&t=1s

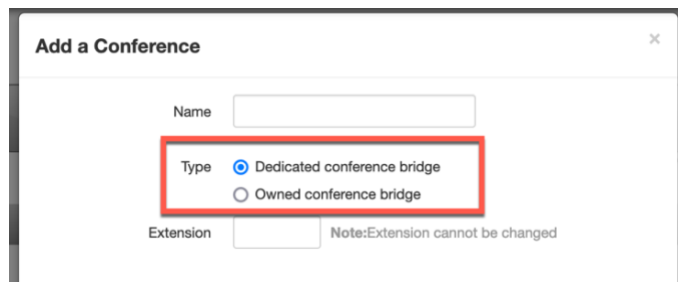
Getting to your Conference Bridge

A conference bridge is assigned to an extension number by your VIP Office Manager. Internal users can call the extension number while outside callers must dial the outside number if one is assigned. If a leader is required to start a conference, all participants will be sent to a “**waiting room**” with hold music.

Types of Bridges

As an Office Manager, you can create two types of bridges:

- **Dedicated:** This type of bridge is intended use by everyone in the company. All office managers will be able to see it in their “**Conferences**” area of the portal and they can manage it. They can also manage any participants during the meeting.
- **Owned:** This type of bridge is intended for use by a specific user which is designated as the “**owner**”. If assigned one, the owner will be able to see the bridge in their portal and moderate the participants at meeting-time.



Add a Conference x

Name

Type Dedicated conference bridge
 Owned conference bridge

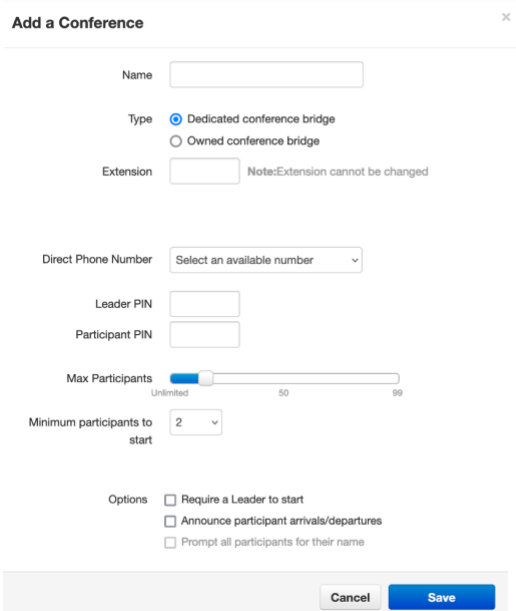
Extension Note: Extension cannot be changed

Creating and Configuring Conference Bridges

Normally, your organization's bridges would have already been created by Crexendo at startup. However, VIP Office Managers can create, edit, and delete conference bridges as needed.

Creating a Conference Bridge:

1. Login to your VIP Portal as an **"Office Manager"** and select the **"Conferences"** icon at the top of the page.
2. From here, you will see any existing bridges that have already been created. To create a new conference bridge, select **"Add Conference"** on the upper right side of the screen.
3. Fill out the fields displayed in the **"Add New Conference Bridge"** window.



Add a Conference [x]

Name

Type Dedicated conference bridge
 Owned conference bridge

Extension Note: Extension cannot be changed

Direct Phone Number

Leader PIN

Participant PIN

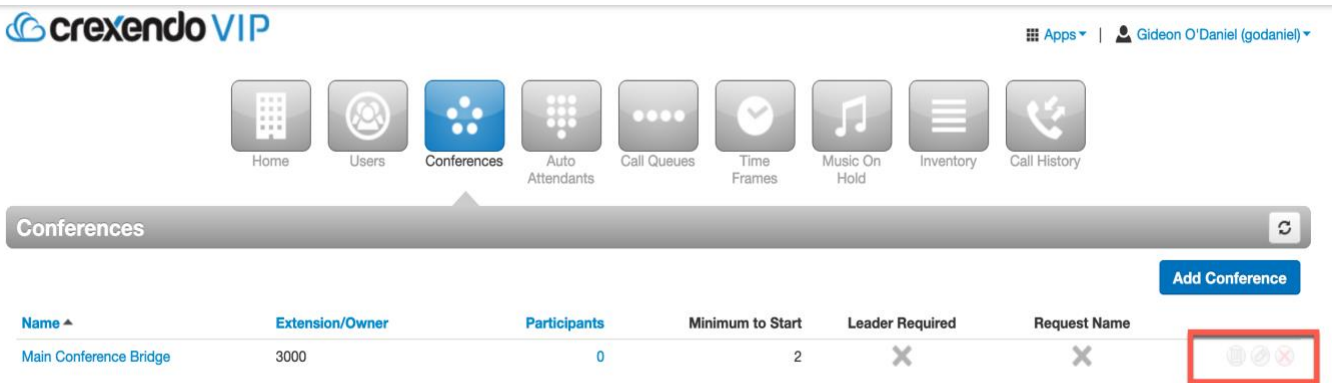
Max Participants

Minimum participants to start

Options Require a Leader to start
 Announce participant arrivals/departures
 Prompt all participants for their name

- **Name:** The name of the conference bridge to distinguish it from any other bridges in your domain.
- **Type:** A **"Dedicated"** bridge is not assigned to any specific user and is intended for use by everyone in the company. An **"Owned"** bridge is assigned to a specific user which makes them the owner of the bridge.
- **Extension/Direct Dial** (for owned): Once this is chosen, it cannot be changed unless it is deleted.
- **Direct Phone Number:** If you have a direct phone number available, it will show up in the drop-down menu.
- **Leader PIN:** A unique code for the leader that will give the user moderator control over the conference call.

- **Participant PIN:** An access code for participants to join the conference that will only allow to listen and speak.
 - **Max Participants:** This number is a maximum of **30**. *If your company needs more, please contact Crexendo Support.*
 - **Minimum Participants to Start:** Until this number is met, the participants will remain on hold listening to hold music.
 - **Options:**
 - Require a Leader to Start: This will keep all participants on hold until the leader joins.
 - Announce participants arrival/departure: This will announce the name of any user that joins or leaves the conference call.
 - Prompt all participants for their name: This will require each participant to record their name before joining the conference call.
4. Click **“Save.”** You will now see your new conference bridge in the Conferences section. Any conference bridges can be edited or deleted from this page. Regardless of the type of bridge, the Office Managers and Owners can make changes to the bridge options.




crexendo VIP

Apps | Gideon O'Daniel (godaniel)

Home Users **Conferences** Auto Attendants Call Queues Time Frames Music On Hold Inventory Call History

Conferences Add Conference

Name ^	Extension/Owner	Participants	Minimum to Start	Leader Required	Request Name	
Main Conference Bridge	3000	0	2	X	X	

Using Your Conference Bridge

As a Participant:

1. If you are calling from a company phone, dial the extension of the conference bridge.
2. If you are calling from a non-company phone, dial the direct dial number of the conference bridge.

3. When prompted, enter your participant PIN.
4. Depending on the settings of the conference bridge, you will either join right away or be put on hold until the leader joins or there is another participant.

As a Leader:

1. If you are calling from a company phone, dial the extension of the conference bridge.
2. If you are calling from a non-company phone, dial the direct dial number of the conference bridge.
3. When prompted, enter your Leader PIN.

All VIP Office Managers and Owners function as bridge leaders. Leaders also have access to star codes during a conference which assist in moderating:

Star Code	Function
*6	Toggle mute for yourself ON/OFF
*71	Recording ON
*73	Recording OFF
*74	Decrease volume of others
*75	Reset volume of others
*76	Increase volume of others
*77	Decrease conference volume
*78	Reset conference volume
*79	Increase conference volume
*91	Announce list of active participants (if names are recorded)
*92	Toggle Announcements ON/OFF
*93	Disconnect all other participants
*94	Toggle Conference Lock ON/OFF
*95	Announce the number of active participants
*96	Mute all other participants
*97	Unmute all other participants

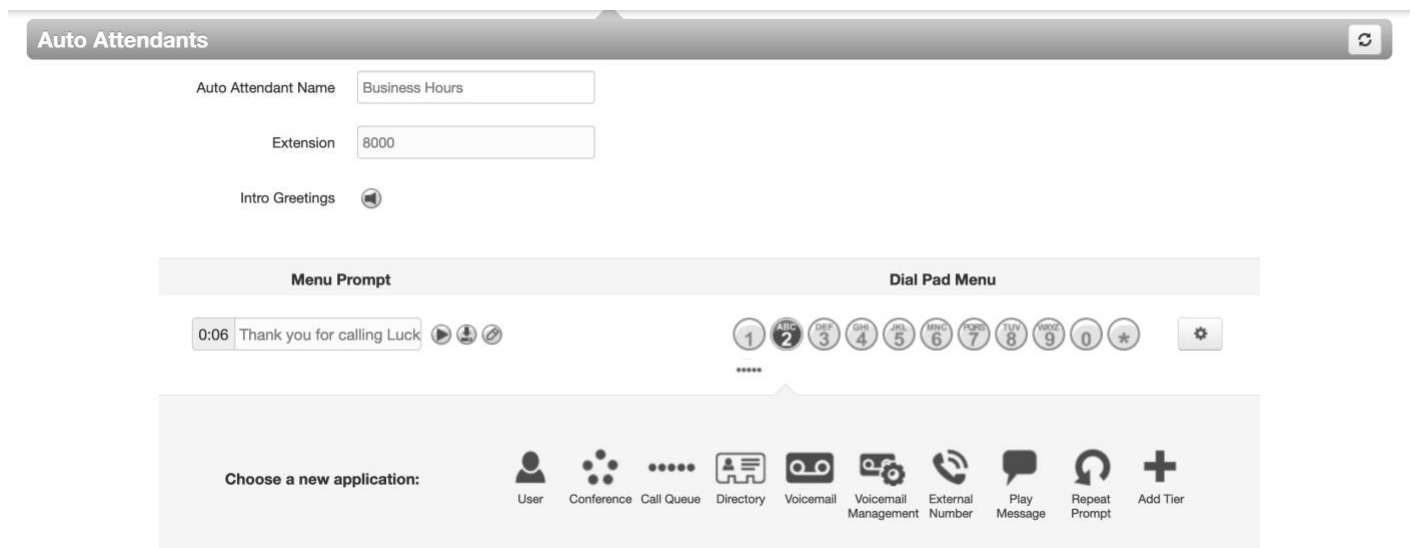
Introduction

Auto Attendants (AA) act as a main menu for callers. The menu can be the first step in your company's call flow, an after-hours solution to give options when a call comes in outside business hours, or a redirect for callers to specific call queues, users, voicemails, and a dial by name directory. Auto Attendants can also be used to play pre-recorded messages.

This guide provides the steps to **create, edit, and place your auto-attendant in your call flow**.

For a video demonstration, go to:

https://www.youtube.com/watch?v=isOpvfVYG2g&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=11



The screenshot shows the 'Auto Attendants' configuration page. At the top, there is a header 'Auto Attendants' with a refresh icon. Below it, there are three input fields: 'Auto Attendant Name' with the value 'Business Hours', 'Extension' with the value '8000', and 'Intro Greetings' with a speaker icon. Below these fields are two tabs: 'Menu Prompt' and 'Dial Pad Menu'. The 'Menu Prompt' tab is active, showing a duration of '0:06' and the text 'Thank you for calling Luck' with play, download, and share icons. The 'Dial Pad Menu' tab shows a numeric keypad with letters assigned to numbers (e.g., 2 for ABC, 3 for DEF) and a settings gear icon. Below the tabs is a section titled 'Choose a new application:' with icons for User, Conference, Call Queue, Directory, Voicemail, Voicemail Management, External Number, Play Message, Repeat Prompt, and Add Tier.

Before we begin:

- You must have Office Manager privileges in the Crexendo VIP Portal.
- Crexendo best practice suggests that for each auto attendant, you should choose an extension number in the 8000 range.

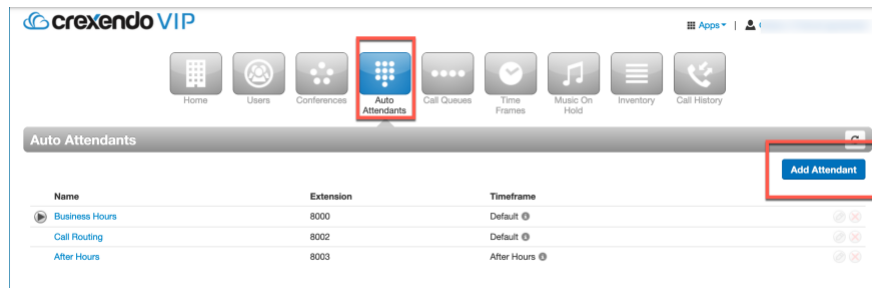
Basic Procedure:

In the portal, the components must be set up in the following order:

1. Create the Auto Attendant and specify the proper extension number.
2. Set the Menu Prompt.
3. Set the Menu to match the menu prompt from step 2.
4. Set the Auto-Attendant Options.

How to Create and Configure a New Auto Attendant:

1. Navigate to the “**Auto Attendants**” section of the VIP Portal.
2. Click the “**Add Attendant**” button (upper right).



3. When the “**Add an Auto Attendant**” dialog box appears, enter the following:
 - a. **Name:** Appropriate name of the AA.
 - b. **Extension:** An extension number in the 8000 range. Avoid 911, or anything in the 5000 or 9000 range.
 - c. **Time Frame:** Select “**default.**” You can control when this auto attendant is active in the Inventory section of the portal.

Add an Auto Attendant ✕

Name


Extension New
Note: Extension cannot be changed

Time Frame default (all the time) ▼


4. Click the “**Add**” button. The Auto Attendant configuration screen will appear where you can set the Menu Prompt. You can set the *optional* “**Intro Greeting**” as well. Usually, the Menu Prompt is sufficient in most cases.

Auto Attendant Name

Extension

Intro Greetings  Greetings created here will always be played before the menu prompt. In most cases this will not be used, however this can be used to place an English greeting before presenting users with a Spanish option.

Menu Prompt



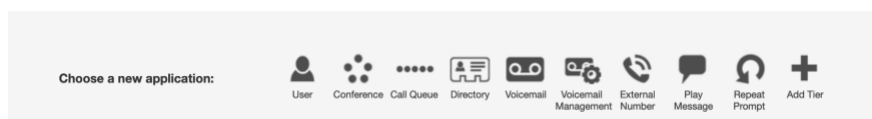
Keypad Options

Dial Pad Menu

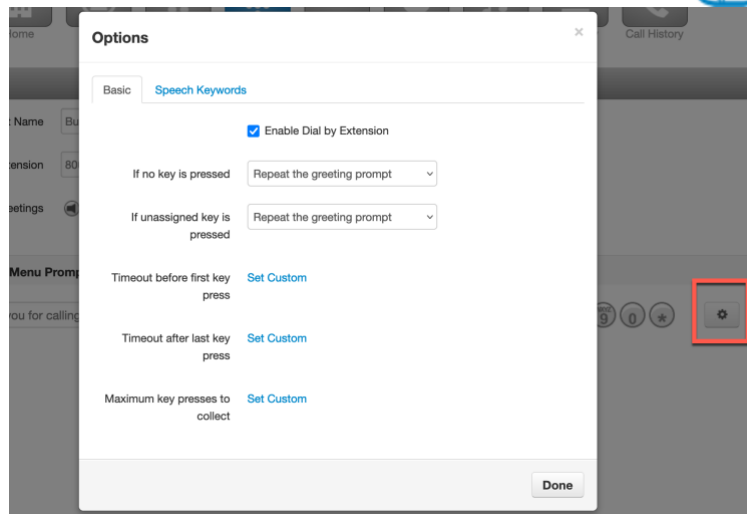
Greetings created here are played after the intro greeting. When combined with an intro greeting, you can place a prompt for Spanish here.

Options

5. To set a menu prompt for your auto attendant, select the pencil icon to add a menu prompt. You have three options to add a greeting:
 - a. **Text-To-Speech:** Type your message in the box and choose the voice you would like to use from the drop-down menu.
 - b. **Upload:** Allows you to use a previously recorded message that you have saved locally.
 - c. **Record:** Allows you to record a greeting by choosing an extension or phone number to call you at to record your message.
6. Set up your menu to match your menu prompt. Your options include:
 - a. **User:** routes the call directly to the user you assign
 - b. **Conference:** routes the call to the specific conference extension that you assign to the number.
 - c. **Call Queue:** routes the call to a call queue for assistance.
 - d. **Directory:** this would be your company's directory and can be made available for callers to contact users.
 - e. **Voicemail:** routes the call to a specific voicemail box (group or individual user.)
 - f. **Voicemail Management:** can be used to allow users to call in and check their voicemail box.
 - g. **External Number:** routes the call to an external phone number.
 - h. **Play Message:** plays a message that you can either upload, record or use text-to-speech.
 - i. **Repeat Prompt:** repeats the original menu prompt again.
 - j. **Add Tier:** creates an additional tier of options and menu prompt. *This can only be done once per auto attendant.*



7. Once your options match the instructions you gave in the menu prompt, review your options by clicking the **"gear"** icon to the right.



These options give you the ability to set an action for if a caller does not make a choice or chooses a button that is not assigned an option. Click **“Done”** to exit the dialogue box.

8. Click **“Save”** to complete your new auto attendant.

You can place your new auto attendant within your company’s call flow by going to the **“Inventory”** section and clicking the phone number you want to associate the auto attendant with.

Edit (919) 375-6
✕

Enable Time Frames

Yes

Timezone

America/New_York

Caller ID Prefix

Notes

ITQ TN

Limited to 64 characters

Select time frame for new rule

Time Frame	Treatment	Destination
↕ After Hours ⓘ	Auto Attendant	After Hours (8003)
↕ Default ⓘ	Auto Attendant	Business Hours (8000)

Introduction:

Call Queues can be used to route calls to specific groups of users in your domain. The queue places the caller on hold and presents the call to pre-defined groups of users. You can specify different types of call queues such as *Round Robin*, *Ring All*, *Linear Hunt*, *Linear Cascade*, or *Call Park*. Users that receive calls from a call queue are called "Agents". Office Managers and Call Center Supervisors can create, modify, and delete call queues.

This guide will cover **creating a new call queue and adding agents to a call queue**.

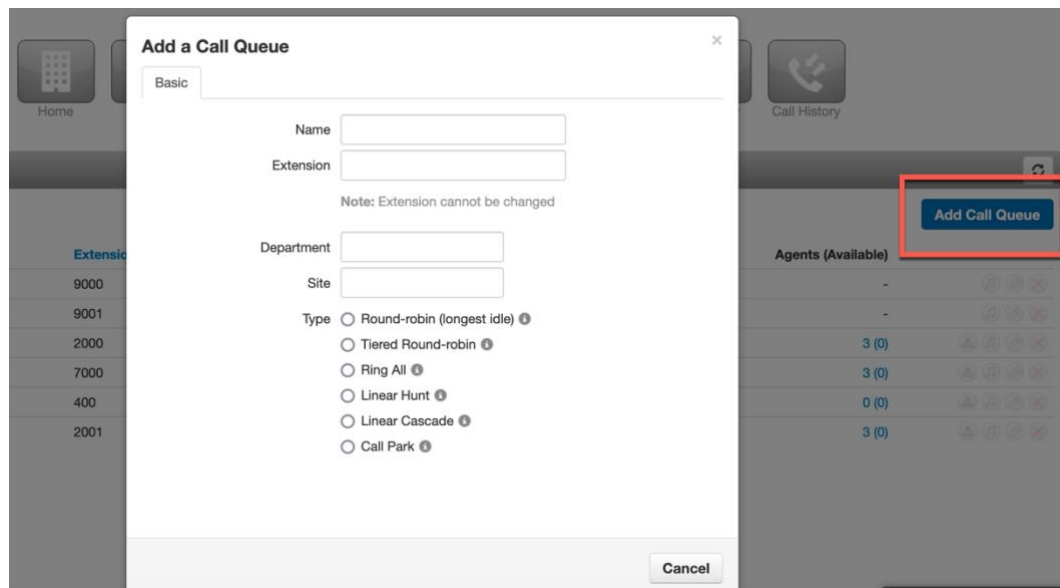
For a video demonstration, go to:

https://www.youtube.com/watch?v=5ReyFC2Kow&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=14



Creating a Call Queue:

1. Login to the VIP Portal as an Office Manager or Call Center Supervisor. Click the **"Call Queues"** button from the options at the top of the page.
2. In the Call Queues section, you can edit any existing Call Queues or create new Call Queues. To create a new Call Queue, click the **"Add Call Queue"** button on the right side of the screen.


 A screenshot of the 'Add a Call Queue' form in the Crexendo VIP portal. The form is titled 'Add a Call Queue' and has a 'Basic' tab selected. It contains the following fields and options:

- Name: [Text Input]
- Extension: [Text Input]
- Note: Extension cannot be changed
- Department: [Text Input]
- Site: [Text Input]
- Type:
 - Round-robin (longest idle) ⓘ
 - Tiered Round-robin ⓘ
 - Ring All ⓘ
 - Linear Hunt ⓘ
 - Linear Cascade ⓘ
 - Call Park ⓘ

 A 'Cancel' button is located at the bottom right of the form. In the background, the 'Add Call Queue' button is highlighted with a red box.

3. Fill in the Call Queue Basic Information as needed:

- a. **Name:** A unique name to distinguish it from other call queues.
- b. **Extension:** Choose a number from **8500-8999**.
- c. **Department:** (Optional) This is for informational purposes.
- d. **Site:** (Optional) This is for informational purposes if you have multiple sites in your domain.
- e. **Type:** This option distinguishes how the call will be presented to the agents assigned to the queue.
 - i. **Round-Robin:** Routes calls to the available agent that has been idle the longest.
 - ii. **Tiered Round-Robin:** Routes calls to the available agent with escalating tiers.
 - iii. **Ring All:** Routes calls to ALL available agents at the same time.
 - iv. **Linear Hunt:** Routes calls to the available agents in a pre-defined order.
 - v. **Linear Cascade:** Routes calls to groups of available agents in a pre-defined order.
 - vi. **Call Park:** Places the caller on hold until an agent manually retrieves the call.

Note: Once you select your type of queue, further options will be available.

- Type
- Round-robin (longest idle) ⓘ
 - Tiered Round-robin ⓘ
 - Ring All ⓘ
 - Linear Hunt ⓘ
 - Linear Cascade ⓘ
 - Call Park ⓘ

- f. **Phone Number:** This option allows a caller to dial directly to the call queue. If you have any available to assign to the queue, it will appear in the drop-down menu.
- g. **Record Calls:** Allows you to record all calls that come through this queue. These recordings can be found in Call Center or in Call History.
- h. **Statistics:** Collects statistics for the call queue. This information can be found in Call Center Reports.

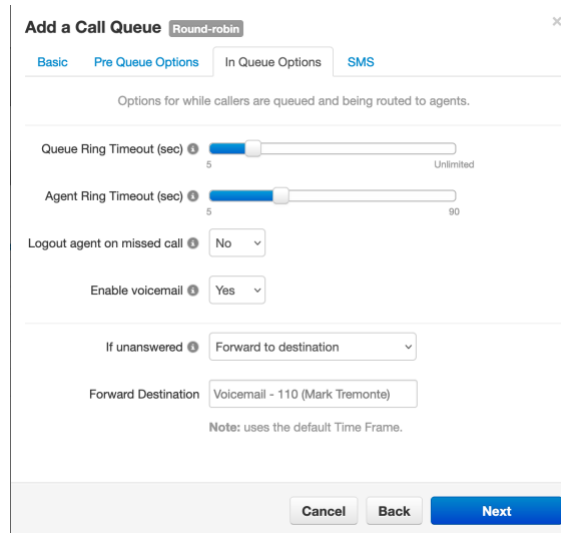
4. Click **“Next”** to continue to the Pre-Queue Options tab.

5. **Pre-Queue Options:** these are a set of conditions that must be met before the queue will accept the call. Fill in the options that you would like to enable in your call queue:
- Require agents:** requires at least one agent to be logged in to the queue before the call will be sent to the queue. This is suggested if you will have agents actively logging in/out of the call queue.
 - Queue Audio:** What you would like your callers to hear when they are in the queue. The options are hold music or a ring tone.
 - Require intro MOH (Music on Hold):** This enables a specific message to be played before the caller is connected to an agent. This can be created in the “**Music On Hold**” section of the VIP Portal.
 - Max Expected Wait (seconds):** The max expected wait time before the queue is unavailable to new callers. This applies when the queue’s average wait time reaches the maximum expected wait. This can be adjusted by sliding the bar to the right.
 - Max Queue Length:** The maximum number of callers allowed in the queue before it is full and unavailable to new callers. This can be adjusted by sliding the bar to the right.



- Allow Callback Option:** Allows the caller to receive a call back instead of waiting in the queue.
 - Forward If Unavailable:** Callers are to be forwarded to this destination if the call queue is full or if no agents are logged in. This can be an overflow queue, voicemail, user, or auto attendant.
6. Click “**Next**” to continue to **In Queue Options**.
7. The **In Queue Options** will change slightly depending on which type of call queue that you are creating. Edit the options based on the needs of your call queue:
- Queue and Agent Ring Timeout (Seconds):** Depending on the type of queue that you have chosen, one or both options will be displayed. These options are for customizing how long the queue will present the call to an agent before moving on to the next agent or how long the queue will keep the call in the queue before sending it somewhere else.
 - Logout Agent on Missed Call:** If an agent misses a call, this will log them out of the queue.

- c. **Enable Voicemail:** Enables an option to leave a voicemail or forced to voicemail if the queue is unavailable.
- d. **If Unanswered:** What the call should do if the call has reached the set Queue Ring Time Out. This can be an overflow queue, voicemail, user, or auto attendant.



Add a Call Queue Round-robin

Basic Pre Queue Options In Queue Options SMS

Options for while callers are queued and being routed to agents.

Queue Ring Timeout (sec) 5 Unlimited

Agent Ring Timeout (sec) 5 90

Logout agent on missed call No

Enable voicemail Yes

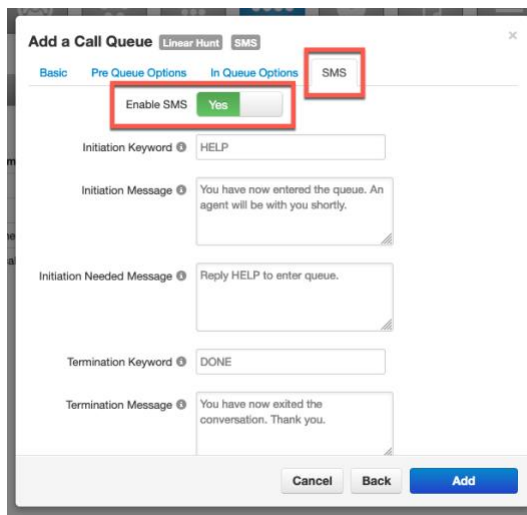
If unanswered Forward to destination

Forward Destination Voicemail - 110 (Mark Tremonte)

Note: uses the default Time Frame.

Cancel Back Next

8. Click **“Next”** to proceed to the SMS tab.
9. If your company has already completed the *“Campaign Registry”* form and have SMS enabled on your domain, then you can provide callers a way to text your call queue.
10. Click **“Enable SMS”** and customize the options for your callers to text your call queue.



Add a Call Queue Linear Hunt SMS

Basic Pre Queue Options In Queue Options SMS

Enable SMS Yes

Initiation Keyword HELP

Initiation Message You have now entered the queue. An agent will be with you shortly.

Initiation Needed Message Reply HELP to enter queue.

Termination Keyword DONE

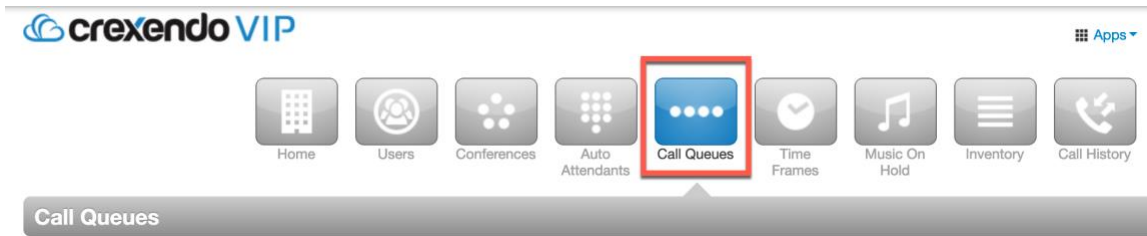
Termination Message You have now exited the conversation. Thank you.

Cancel Back Add

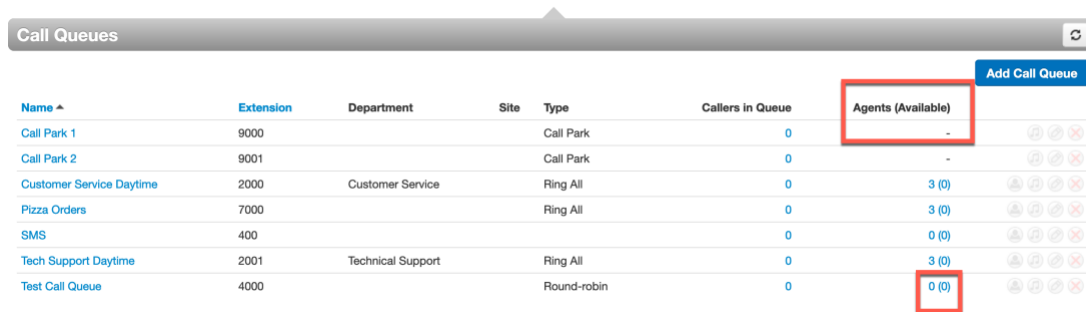
11. Click **“Add”** to complete your new call queue. You will now see it in the Call Queue section of the VIP Portal. Call queues can be edited anytime from this page.

Adding Agents to a Call Queue:






















1. In the VIP Portal for Managers or Call Center Supervisors, click on the “**Call Queues**” button at the top of the page.



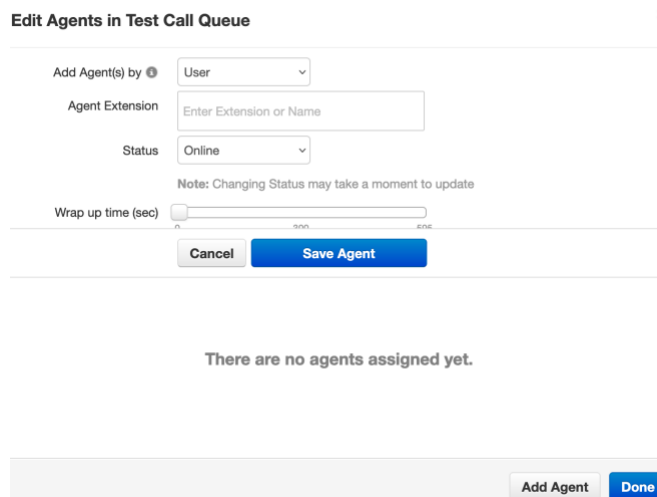
2. Locate the call queue that you would like to add agents to. Under the “**Agents (Available)**” column, click the “**0(0)**” hyperlink to open the add agent menu.



The screenshot shows the 'Call Queues' table in the Crexendo VIP portal. The table has columns for Name, Extension, Department, Site, Type, Callers in Queue, and Agents (Available). The 'Agents (Available)' column is highlighted with a red box. The 'Test Call Queue' row has a '0(0)' link in the 'Agents (Available)' column, which is also highlighted with a red box.

Name	Extension	Department	Site	Type	Callers in Queue	Agents (Available)	
Call Park 1	9000			Call Park	0	-	  
Call Park 2	9001			Call Park	0	-	  
Customer Service Daytime	2000	Customer Service		Ring All	0	3 (0)	  
Pizza Orders	7000			Ring All	0	3 (0)	  
SMS	400				0	0 (0)	  
Tech Support Daytime	2001	Technical Support		Ring All	0	3 (0)	  
Test Call Queue	4000			Round-robin	0	0 (0)	  

3. Click “**Add Agent**”



The screenshot shows the 'Edit Agents in Test Call Queue' dialog box. The 'Add Agent(s) by' dropdown is set to 'User'. The 'Agent Extension' field is empty. The 'Status' dropdown is set to 'Online'. The 'Wrap up time (sec)' field is empty. The 'Save Agent' button is highlighted.













There are no agents assigned yet.

At the bottom of the dialog, there are 'Add Agent' and 'Done' buttons.

4. Proceed through each option:
 - a. **Add Agent(s) by:** Add a user by name or extension or by phone number to add an external phone number to the queue.
 - b. **Agent Extension:** you can add as many users as needed by name or extension.
 - c. **Status:** enables the agent to receive calls and allows for queue supervisors to be added to a queue without being able to receive calls.

- d. **Wrap Up Time (seconds):** gives the agent time before they can receive a new call.
 - e. **Max Simultaneous Calls:** set a limit of how many calls the agent can receive at the same time.
 - f. **Max SMS Sessions:** set a limit of how many SMS conversations that an agent can be on at the same time.
 - g. **Queue Priority for Agent:** this option allows you to set a queue priority for an agent that is assigned to multiple queues.
 - h. **Request Confirmation:** informs the agent that they are receiving a call through the queue and to press 1 if they would like to receive the call.
 - i. **Auto Answer:** this option will automatically answer the call by the available agent.
5. Click “**Save Agent.**” You will now be able to see all agents in the queue. All individual agents can be edited from this screen.

Edit Agents in Test Call Queue ×

Agent	Phone/User	Status	Auto Answer	Wrap-up Time	Max Calls	Max SMS	
 Jimi Hendrix	102	Offline	No	-	1	0	 
 Eric Clapton	103	Offline	No	-	1	0	 
 Jimmy Page	104	Offline	No	-	1	0	 
 Chuck Berry	107	Offline	No	-	1	0	 

Introduction

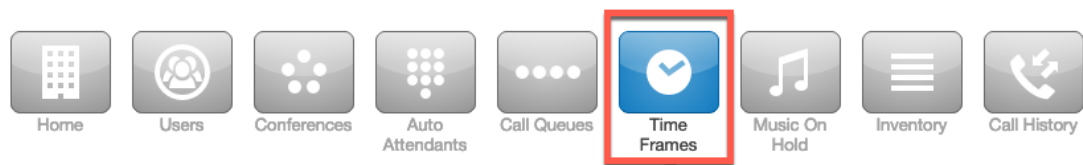
Time Frames are set periods of time that you want your phone system to follow. This could include scenarios such as business hours, after hours, and holidays.

Note: Creating Time Frames only makes the system aware of these periods. A time frame by itself does not cause the system to perform any action during these times. The time frame must be assigned an action in either the “**Inventory**” for the domain or “**Answering Rules**” for the user.

This guide will explain how to set up Time Frames for your inbound call routing as well as for individual users.

For a video demonstration, go to:

https://www.youtube.com/watch?v=GdIOdTjSDS8&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=13



Creating a Time Frame for the Domain

To create a new Time Frame for inbound calls to follow:

1. Login to the VIP Portal for Managers and select “**Time Frames**” from the navigation buttons.
2. Within Time Frames, you will see any Time Frames that have been created by users as well as the name of your domain. Click on your domain name.
3. Click “**Add Time Frame**” on the upper right side of the screen.
4. Give your Time Frame a name. Common names would include *business hours*, *after hours*, and *holidays*. Please note that the name cannot be changed unless you delete it.

Add a Domain Time Frame ×

Type

Name Note: Name cannot be changed

When Always ⓘ

Days of the Week ⓘ

Specific Dates ⓘ

Holidays ⓘ

Custom ⓘ

5. Select when you would like this Time Frame to take place. You are presented with five options:
 1. **Always:** makes this time frame always in affect. This serves as a catch all when no other option applies.
 - Click “**Save**” to complete your new time frame.
 2. **Days of the Week:** makes a weekly schedule such as business hours and after hours.
 - Name the time frame and select “**Days of the Week.**”
 - Select the “**Days of the Week**” tab and select the days you would like to include in the time frame.
 - In each day, select the hours you want the time frame applied to.
 - The drop-down arrow allows you to set an every week recurrence or customize it to a specific schedule.

Add a Domain Time Frame ×

Type Days of the Week

Create a weekly schedule with optional start and end dates.

Days of the week	
<input type="checkbox"/> Sunday	
<input checked="" type="checkbox"/> Monday	8:00 am to 5:00 pm +
<input checked="" type="checkbox"/> Tuesday	8:00 am to 5:00 pm +
<input checked="" type="checkbox"/> Wednesday	8:00 am to 5:00 pm +
<input checked="" type="checkbox"/> Thursday	8:00 am to 5:00 pm +
<input checked="" type="checkbox"/> Friday	8:00 am to 5:00 pm +
<input type="checkbox"/> Saturday	

Recurrence Every week ▼

Cancel
Back
Save

3. **Specific Dates:** makes the time frame only in affect during a specific date range and time such as an office closure with the option for recurrence.
 - Name the time frame and select “**Specific Dates.**” Select “Next” or select the “**Specific Dates**” tab.
 - Enter the date and time you want to add to the time frame and select the + to add it to the time frame. Repeat the process to add additional days.

- Select the drop-down menu next to Recurrence to customize when this will recur if needed.
- Select **“Save”** to complete the time frame.

Edit Office Closures ×

Type Specific Dates

Add specific dates with optional recurrence.

Specific dates

mm/dd/yyyy	hh:mm am	to	mm/dd/yyyy	hh:mm am	+
07/25/2024	12:00 am		07/25/2024	11:59 pm	✕

Recurrence Does not recur ▾

Cancel Back Save

4. **Holidays:** allows you to select from national and international holidays and make them recur each year.

- Name the Time Frame and select **“Holidays.”**
- Search for or click in the **“Search holidays”** box to show all United States holidays.
- Select the holiday or holidays and the times you would like to make this time frame cover. This can be the entire day or just during normal business hours.
- To make these recur annually, select the Recurrence drop-down menu and select **“Yearly on selected holiday.”**

Add a Domain Time Frame ×

Type Holidays Observed Holidays

Choose from a selection of local and international holidays.

Holidays United States ▾ All ▾

Q Search holidays

New Year's Day	Next on Wed, 01/01/2025	✕
Thanksgiving Day	Next on Thu, 11/28/2024	✕
Christmas Eve	Next on Tue, 12/24/2024	✕
Christmas Day	Next on Wed, 12/25/2024	✕
Martin Luther King Jr. Day	Next on Mon, 01/20/2025	✕
Memorial Day	Next on Mon, 05/26/2025	✕
Labor Day	Next on Mon, 09/02/2024	✕

Time 12:00 am to 11:59 pm +

Recurrence Yearly on selected holiday ▾

Ends Never ▾

Cancel Back Next

- Set observation rules for when holidays occur on certain days such as when a holiday falls on a weekend.
- Select “**Save**” to finish the time frame.

Add a Domain Time Frame ✕

[Type](#) [Holidays](#) Observed Holidays

Set observation rules for when holidays occur on certain days

Workweek ⓘ Su M T W Th F Sa

If holiday is on ⓘ

Sun	Observe on next workday	▼
Mon	Observe on holiday only	▼
Tue	Observe on holiday only	▼
Wed	Observe on holiday only	▼
Thu	Observe on holiday only	▼
Fri	Observe on holiday only	▼
Sat	Observe on prior workday	▼

Cancel Back Save



5. **Custom**: creates a time frame that combines days of the week, specific dates, and holidays together.
 - Name your time frame and select “**Custom**” and “**Save.**”
 - Select Add ▼ to add a time frame for days of the week, specific dates, and/or holidays.

← Back Add ▼ ⓘ





Days of the Week (0)

No days of the week have been added.

Specific Dates (1)

Start	End	Recurrence	Next on	
12/23/2024 12:00 am	12/23/2024 11:59 pm	Does not recur	Mon, 12/23/2024	 

Holidays (2)

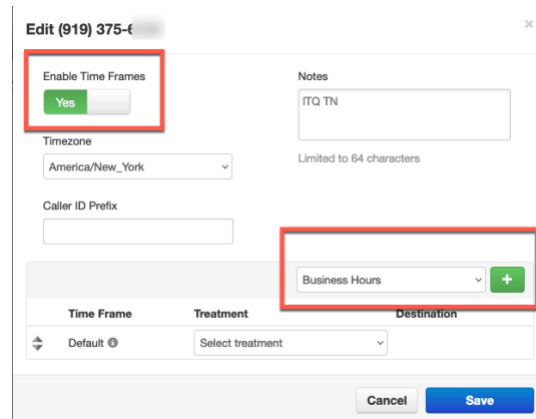
Holiday	Time	Observed Holidays	Recurrence	Next on	
Christmas Eve	12:00 am to 11:59 pm	View Rules	Every year	Tue, 12/24/2024	 
Christmas Day	12:00 am to 11:59 pm	View Rules	Every year	Wed, 12/25/2024	 

Enabling a Time Frame for the Domain

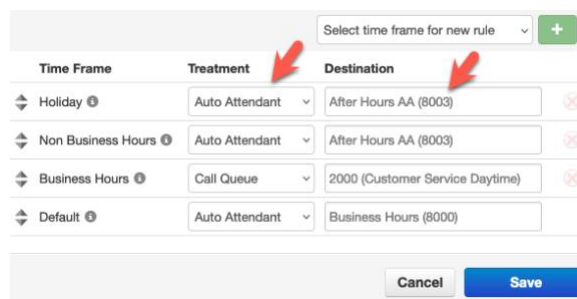
To enable your new time frame in your domain, you will need to associate it with a phone number in the “**Inventory**” section of the portal or with an auto attendant.

To associate the time frame with a phone number:

1. Click on the “**Inventory**” button at the top of your screen.
2. Click on the number that you would like to associate the time frame with. This will open a new dialogue box.
3. Switch the “**Enable Time Frames**” to “**Yes.**”
4. To add the new time frames to your phone number, select the drop-down arrow to add a new rule. Select the new time frame and click the green “+” icon. Repeat this step for any additional time frames that you have created.



5. For each time frame, use the “**Treatment**” drop-down menu for each time frame to choose either a user, call queue, voicemail, auto-attendant, PSTN number, or Fax Server. After you choose the “**Treatment**,” select the destination such as a specific user, auto attendant, call queue, etc. Click “**Save**”

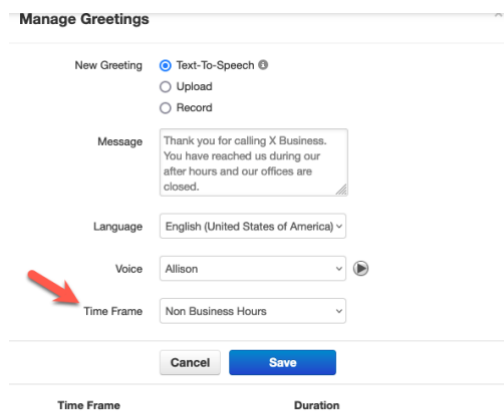
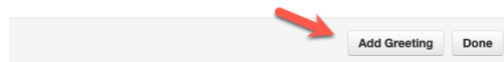


Time Frame	Treatment	Destination
Holiday	Auto Attendant	After Hours AA (8003)
Non Business Hours	Auto Attendant	After Hours AA (8003)
Business Hours	Call Queue	2000 (Customer Service Daytime)
Default	Auto Attendant	Business Hours (8000)

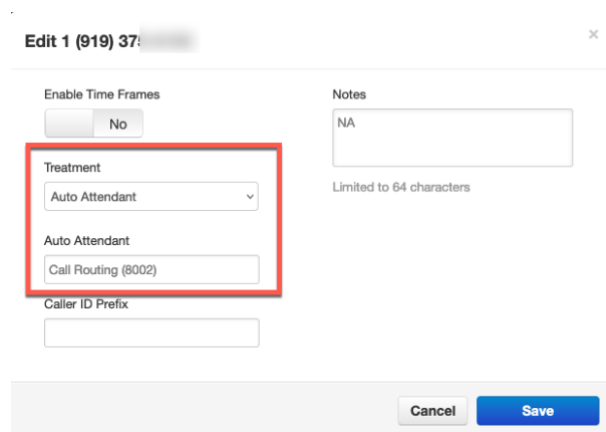
NOTE: When arranging your time frames, make sure your Holiday time frame is at the top of the list and your Default is at the bottom. When a call comes in, it will start at the top of the list and work down to find an applicable time. If “Holiday” is under business hours, it will follow that one first even if it is a holiday. Holidays are the exception to your call flow rules.

If you have an auto attendant that will be offer the same options regardless of which time frame it is associated with, you can assign an auto attendant greeting to play during a specific time frame. To associate the time frame with an auto attendant greeting:

1. Select “**Auto Attendants**” from the buttons at the top of the page.
2. Select the Auto Attendant you would like to edit. Within the auto attendant, select “**Intro Greetings.**”
3. Select “**Add Greeting**” and choose how you would like to add your greeting: Text-To-Speech, Upload, or Record. Once you have created your greeting, select the time frame you would like to have the message play.
4. Add any additional messages by following the same process and click “**Save.**”

5. Click on “**Inventory**” and select the phone number you would like to associate the auto attendant with.
6. Keep **Enable Time Frames** set to “**No.**” In the **Treatment** drop-down menu, select “**Auto Attendant**” and put the extension of the auto attendant in the blank. Click “**Save.**”



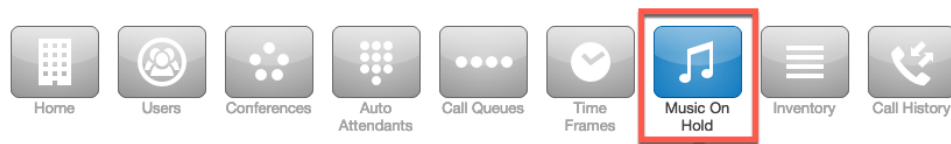
Introduction

Crexendo VIP Portal allows you to add customized hold music and messages to your call queues for your customers.

This guide will walk you through **adding your own music to your call queues and to add your own messages to be played while your callers are waiting for an agent to take their call.**

For a video demonstration, go to:

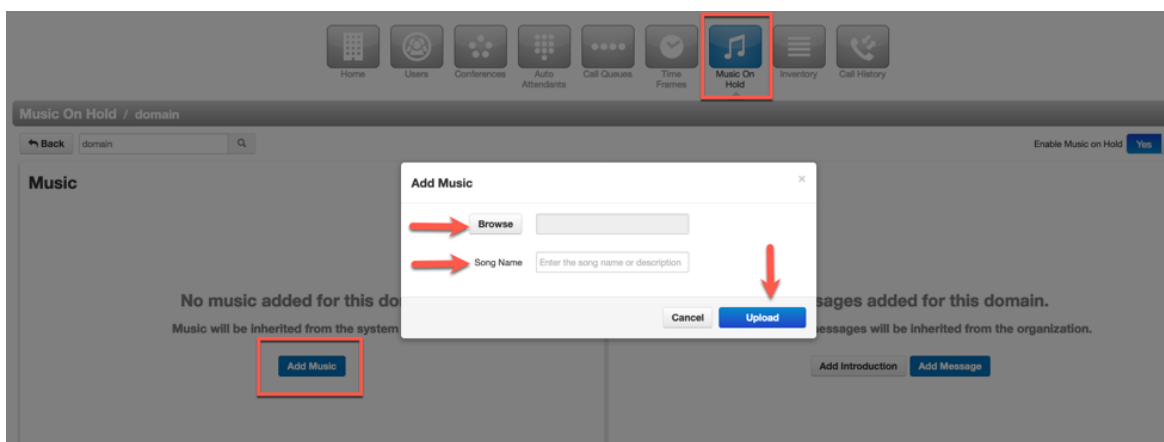
https://www.youtube.com/watch?v=9jqgBDHvkmc&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=8



Adding Music to ALL Call Queues:

If you would like to add your own music to your call queues:

1. Login to the VIP Portal for Managers or Call Center Supervisors and select **“Music On Hold.”**
2. Select your **“Domain”**. If any of your users have added hold music, they will also show in this view. If you add music to the domain, all call queues will inherit the same hold music.
3. In the Music On Hold menu, select **“Add Music.”**
4. Browse to the location of the music file on your computer. THE FILE FORMAT MUST BE IN A **.wav** FORMAT TO USE IT AS HOLD MUSIC. Enter the song name or a description and select **“Upload.”**

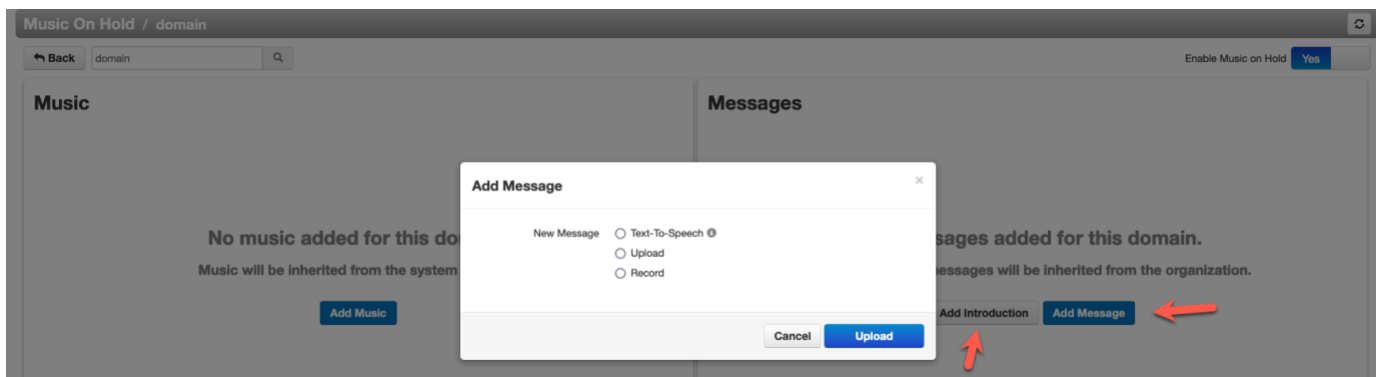


5. Repeat to add any additional music to your hold music library.

Adding Messages to ALL Call Queues:









If you would like to have either an introductory message played at the beginning of the call or messages played periodically when a caller is on hold:

1. Login to the VIP Portal for Managers and select **“Music On Hold.”**
2. Select your Domain. If you add messages to the domain, all call queues will inherit the same hold messages.
3. To add a message that plays at the beginning of the call such as *“This call will be recorded for quality control”*, select **“Add Introduction.”** To add a message to be played while the caller is on hold, click **“Add Message.”**
4. You have three options to add a message: *Text-To-Speech, Upload an existing file, or Record a message.*



5. Click **“Upload”** or **“Save”** depending on which option you chose.
6. After you have saved your messages, you can play, download, edit, and delete them from the Messages section. To edit the intervals of how often the messages will play, click the **“clock icon”** to adjust it to your preference.

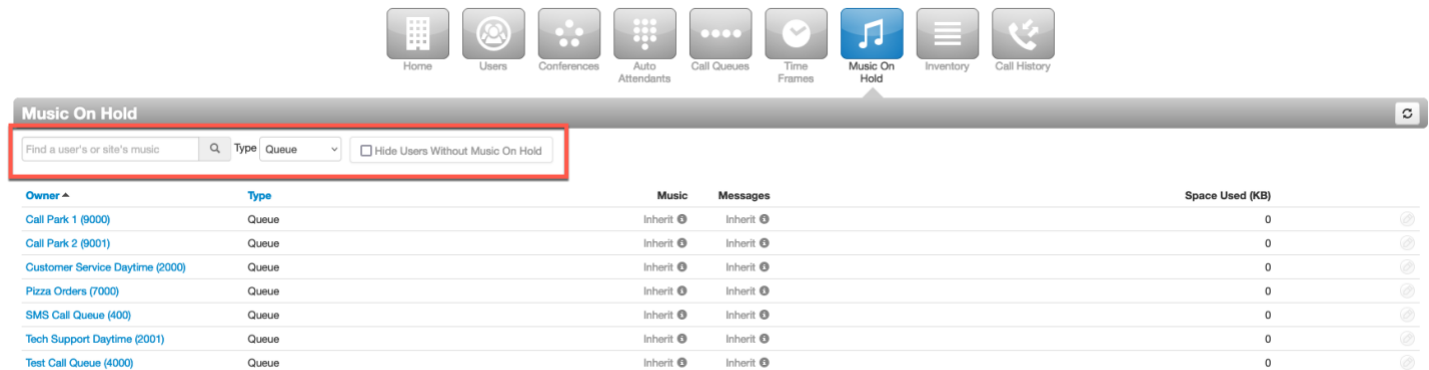
Messages

Messages	Duration	Filesize	
 Introduction	0:03	26.38 KB	 30 
 1 We appreciate your time!	0:02	15.36 KB	   

Adding Music/Messages to SPECIFIC Call Queues:

If you would like to customize the music/messages played during specific call queues:

1. Login to the VIP Portal for Managers or Call Center Supervisors and select “**Music On Hold.**”
2. In the “**Find a user’s or site’s music**” search box, type in the extension of the call queue you would like to add music/messages to or select “**Queue**” in the “**Type**” drop-down menu. Make sure the options to “**Hide Users Without Music On Hold**” box as *unchecked*.



Owner ^	Type	Music	Messages	Space Used (KB)
Call Park 1 (9000)	Queue	Inherit	Inherit	0
Call Park 2 (9001)	Queue	Inherit	Inherit	0
Customer Service Daytime (2000)	Queue	Inherit	Inherit	0
Pizza Orders (7000)	Queue	Inherit	Inherit	0
SMS Call Queue (400)	Queue	Inherit	Inherit	0
Tech Support Daytime (2001)	Queue	Inherit	Inherit	0
Test Call Queue (4000)	Queue	Inherit	Inherit	0

3. Select the call queue you would like to edit and follow the same steps for adding hold music or messages as mentioned in the previous sections.

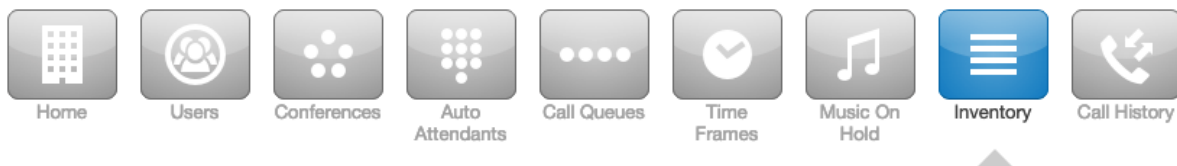
Introduction

The **Inventory** section of your Crexendo Portal provides the **Office Manager** an organized list of your domain's direct dial *Phone Numbers*, *SMS numbers (if applicable)*, *Phone Hardware*, and *Fax Numbers*. The Inventory sections is also where you can assign direct dial numbers to users, assign time frames and call routing to your business numbers, assign SMS numbers to individual users and queues, and configure phones for user's accounts.

This guide will go through each option and will highlight how this section can be a benefit to you as you maintain your Crexendo environment.

For a video demonstration, go to:

https://www.youtube.com/watch?v=YTYJ5dXZYIM&list=PLXADOLtuavV9jC_HL7NiOiBoKA9VZlBxm&index=16&t=25s



To get started, login to the VIP Portal as an “**Office Manager**.” To access each section of the Inventory, select the tab you would like to view.



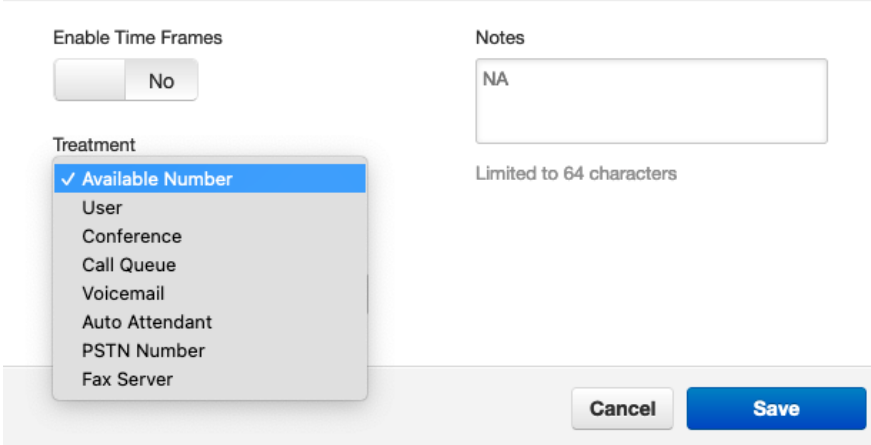
Phone Numbers Tab

You can access, manage, and edit all phone numbers associated with your domain from the phone numbers tab.

1. When you select “**Inventory**,” the “**Phone Numbers**” tab will automatically be seen.
2. From this view, you can see what each number is already programmed to do or if it is available to utilize.

Phone Number	Treatment	Destination	Notes
1 (480) 520-9	User	110 (Mark Tremonte)	Direct dial number for 110
1 (480) 520-9	Fax Server		Portal Created: Phonenumber -> FaxServer
1 (919) 375-6	Time of Day Routing		ITQ TN
1 (919) 375-6	Available Number		NA

3. To edit a number, click the number or the “**edit**” icon to the right of the number.
4. A window will open to allow you to choose what you want the number to do.

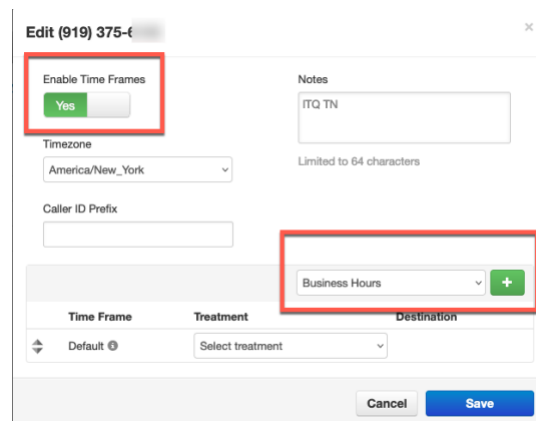


- **User:** Enter the extension or name of the user you would like to assign a direct dial number to. The Caller ID Prefix allows the user to see where the call is being routed from.
- **Conference:** Assign a direct dial number for your previously created conference bridge so that outside callers can call in to the bridge. Enter the name of the conference bridge and assign a “**Caller ID Prefix**” if needed to show where the call is coming from.
- **Call Queue:** This option directly routes the caller to the call queue that you connect to the phone number. Enter the call queue name or extension in the blank. There are “announcement for caller” options that are not required. The “**Caller ID Prefix**” allows the call queue agent to see where the call is coming from.
- **Voicemail:** This option directs the caller to go directly to an extension’s voicemail. Enter the user’s name or the extension of the voicemail that will be connected to the number. If you enable “**Enhanced Voicemail**,” it will allow the caller to dial another extension before or after leaving a voicemail.
- **Auto Attendant:** This option directs the caller to a specific auto attendant. Enter the name or extension of the auto attendant.
- **PSTN Number:** If you need to forward the caller directly to an outside phone number, enter the number in the “**PSTN Number**” blank. If you include a “**Caller ID Prefix**,” it will allow the caller to see that the call is being routed through this number. *A common use would be an after-hours emergency line.*

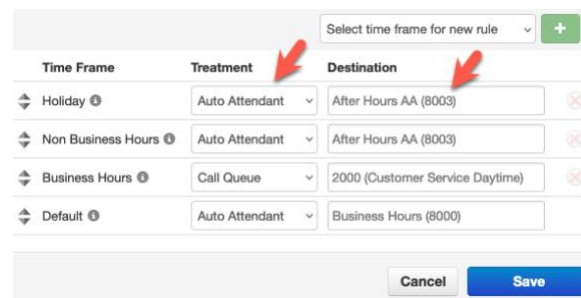
- Fax Server: If an available number will be used for a fax line, choose the “**Fax Server**” treatment, and click “**Save**”. The fax line can be configured in the “**Fax Accounts**” tab.

To allow your phone number to follow several actions depending on the time frames that have been created:

1. Click on the number that you would like to associate the time frame with. This will open a new dialogue box.
2. Switch the “**Enable Time Frames**” to “**Yes.**”
3. To add the new time frames to your phone number, select the drop-down arrow to add a new rule. Select the new time frame and click the green “**+**” icon. Repeat this step for any additional time frames that you have created.



4. For each time frame, use the “**Treatment**” drop-down menu for each time frame to choose either a user, call queue, voicemail, auto-attendant, PSTN number, or Fax Server. After you choose the “**Treatment**,” select the destination such as a specific user, auto attendant, call queue, etc. Click “**Save.**”



Time Frame	Treatment	Destination
Holiday	Auto Attendant	After Hours AA (8003)
Non Business Hours	Auto Attendant	After Hours AA (8003)
Business Hours	Call Queue	2000 (Customer Service Daytime)
Default	Auto Attendant	Business Hours (8000)

NOTE: When arranging your time frames, make sure your Holiday time frame is at the top of the list and your Default is at the bottom. When a call comes in, it will start at the top of the list and work down to find an applicable time. If “Holiday” is under business hours, it will follow that one first even if it is a holiday. Holidays are the exception to your call flow rules.

SMS Numbers Tab

This tab allows an admin to assign a SMS number to either an individual user for inbound/outbound SMS messages or to a call queue for *inbound* messages.

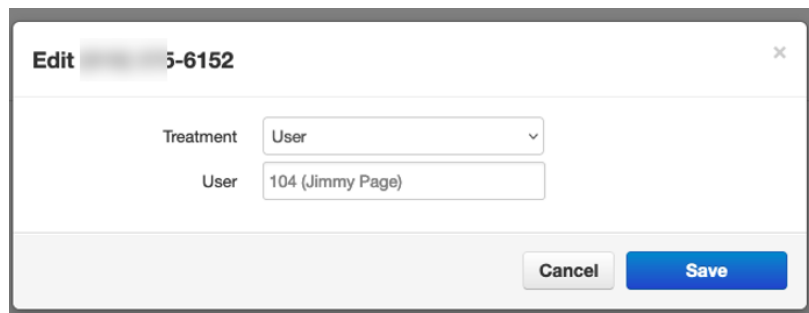
To assign an SMS number to a call queue:

1. Click on the available number in the SMS tab or click the edit icon on the right side of the screen. This will open a dialogue box.
2. In the “**Treatment**” drop down menu, select “**Call Queue.**”
3. In the Call Queue blank, enter the call queue that you would like to add the SMS option to. Click “**Save.**”

Note: For more information on SMS Call Queues, see the [SMS Guide](#).

To assign an SMS number to a user:

1. Click on the available number in the SMS tab or click the edit icon on the right side of the screen. This will open a dialogue box.
2. In the “**Treatment**” drop down menu, select “**User**” and enter the name or extension of the user you would like to associate the number with.
3. Click “**Save.**”



The screenshot shows a dialog box titled "Edit 5-6152". It contains two input fields: "Treatment" with a dropdown menu set to "User", and "User" with the text "104 (Jimmy Page)". At the bottom right, there are two buttons: "Cancel" and "Save".

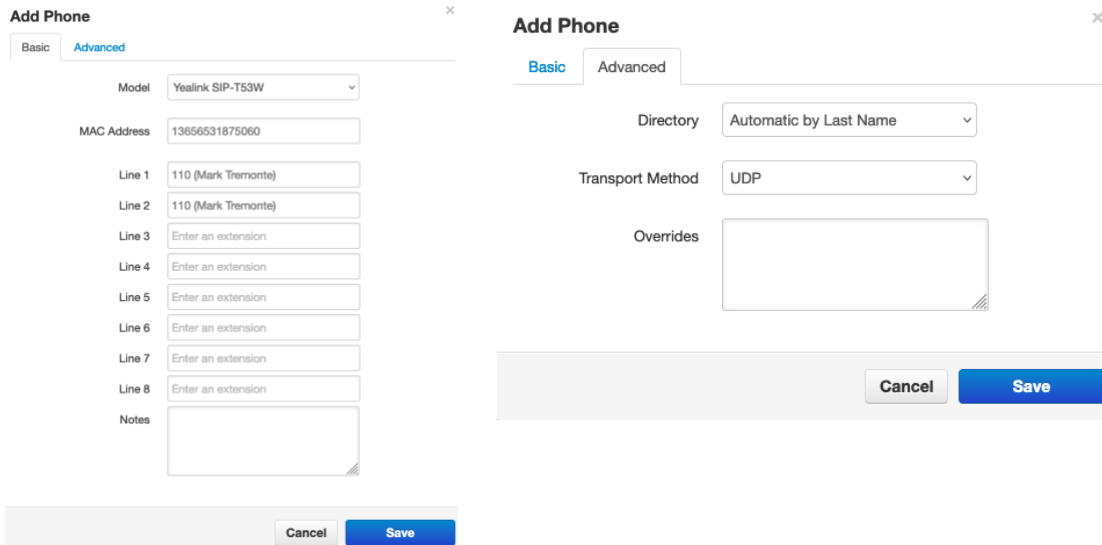
Phone Hardware Tab

This tab shows you all physical devices and phone hardware in your Crexendo domain. From the Hardware tab, you can add new phones to the domain, edit each phone, and assign phones to users.

To Add a New Phone to the Domain:

1. Within the “**Phone Hardware**” tab, click “**Add Phone.**”
2. In the new window which is the “**Basic**” tab, select the model of the phone using the drop-down arrow.
3. Enter the MAC Address of the phone. This is located on the back of the phone.

4. To assign it to a user, enter the user's name or extension in the first two lines.
5. Click the “**Advanced**” tab to enable the company directory.
6. Click “**Save.**” Now you should see your new phone in the “Phone Hardware” section of the Inventory.



The image displays two side-by-side screenshots of the 'Add Phone' configuration interface. The left window is in the 'Advanced' tab, showing fields for Model (Yealink SIP-T53W), MAC Address (13656531875060), and eight lines for extension numbers (Line 1-8). The right window is in the 'Basic' tab, showing fields for Directory (Automatic by Last Name), Transport Method (UDP), and an Overrides section. Both windows have 'Cancel' and 'Save' buttons at the bottom.

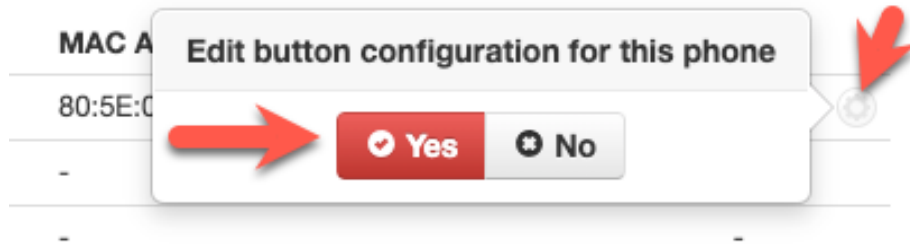
To Edit an Existing Phone:

1. Locate the phone you would like to edit in the “**Phone Hardware**” tab of the Inventory.
2. To edit the phone, select the “**edit**” icon on the right side of the screen. You will have access to the “**Basic**” and “**Advanced**” tabs to make any necessary edits.

To Edit the Feature and Line Buttons on Physical Phones:

If you would like to edit the line buttons for options such as speed dials, status notifications, queue login/logout, and many more, access the phone's SnapBuilder functions.

1. To access SNAPbuilder, click the “**gear**” icon to the right of the phone.
2. Select “**Yes**” to edit button configuration for the phone. This will open SNAPbuilder.
3. For a more complete guide to using SNAPbuilder, please reference the [SNAPbuilder](#) guide.



Fax Accounts Tab

The **Fax Account** tab shows any fax numbers that are currently configured in your domain. To edit the existing number, click the “**edit**” icon or contact Crexendo support.

To create a new fax account, please reference the [VIP Fax](#) guide for complete instructions on setting up your fax number for a physical fax account, faxing from your VIP Portal, or by email.

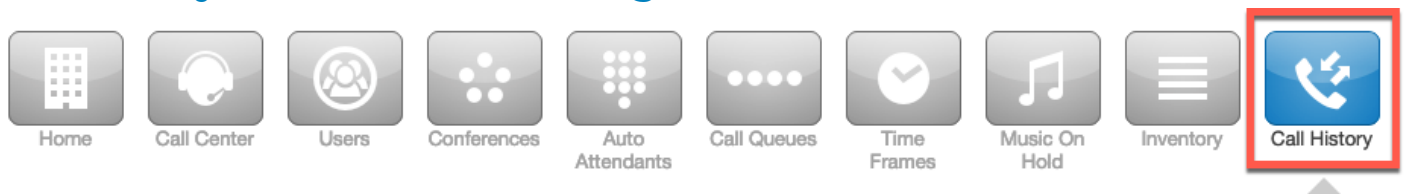
Inventory ⌵				
Phone Numbers SMS Numbers Phone Hardware Fax Accounts				
Phone Number	Treatment	User	MAC Address	Add Fax Number
(480) 520-9-...	Fax (ATA)	110	001fc11f...	⌵ ⌵

Introduction

The **Call History** section of the VIP Portal shows any calls to and from the domain or to and from the individual user.

This guide illustrates how an Office Manager can **run reports, filter calls, and retrieve call recordings from all calls in the domain, and how to block SPAM/ROBO Calls in the VIP Portal.**

Call History for an Office Manager



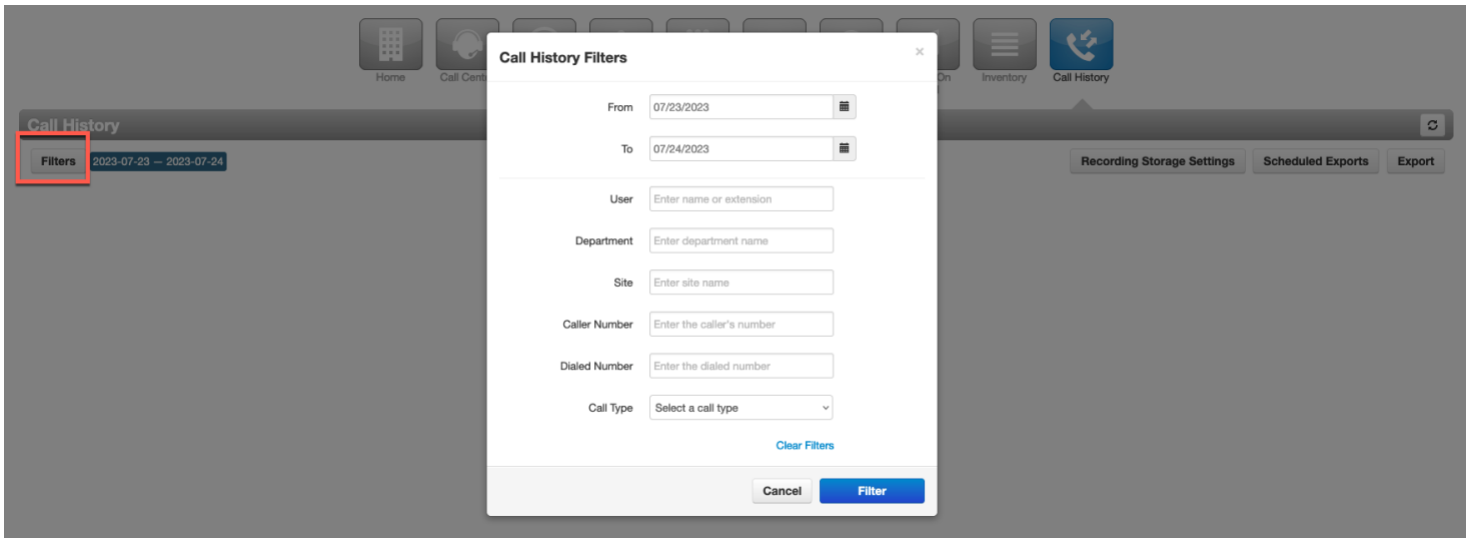
To access the Call History Section of the VIP Portal for Managers or Call Center Supervisor:

1. Login to the VIP Portal as an Office Manager or Call Center Supervisor
2. Click on the “**Call History**” navigation button at the top of the screen.

From the Call History section, all Office Managers can see all calls to and from the domain including inbound, outbound, and internal calls. **NOTE:** *Calls that come through a Call Queue will also show in VIP Call Center Reporting.*

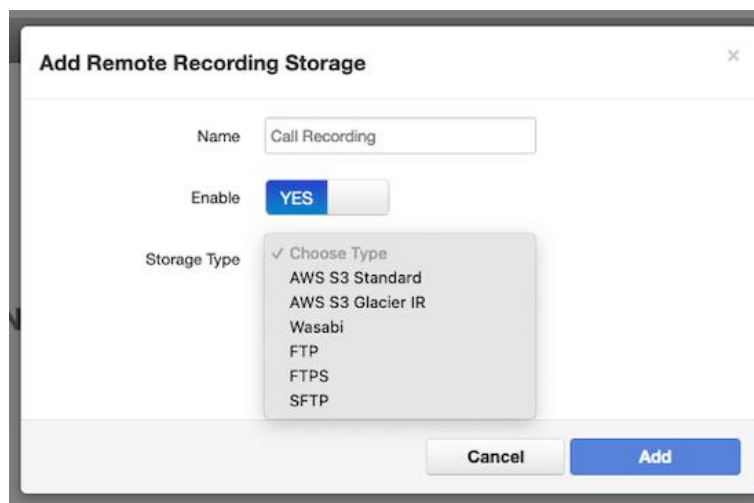
Call Filtering: To filter through calls from specific dates, numbers, call types, etc.:

1. Select the “**Filters**” button at the top left side of your screen.
2. Decide which filters to apply from the choices presented: *Date, User, Department, Site, Caller Number, Dialed Number, and Call Type (Inbound, Outbound, and Missed.)*
3. To reset your choices, select “**Clear Filters**” at the bottom of the window.
4. To search through your call History after you have selected your filters, select “**Filter**” at the bottom of the window.



Recording Storage Settings: You have the option to house all call recordings to external storage options of your choice. To configure your call recordings to be offloaded to external storage:

1. Select the **“Recording Storage Settings”** button on the top right side of the Call History page.
2. Select the **“Add Remote Storage”** button at the right side of the screen to open the options window.
3. Select a name in the blank and select which storage type you will be choosing from the drop-down menu. The available options are AWS S3 Standard, AWS S3 Glacier IR, Wasabi, FTP, and FTPS. Depending on the option you choose, fill out the remainder of the information and click **“Add.”**
4. Your Call Recording protocol will now show in the Remote Recording Storage page for any future needs to edit or delete it.



Scheduled Exports: If you would like setup automated exports of your call history:

1. Click “**Scheduled Reports**” in the upper right side of the screen. If you have any existing schedules, they will be shown here.
2. Click “**New Report**” to open the options to schedule your export.
3. Fill in the information provided in the “**Basic**” tab:
 - **Name:** Add an easily identifiable name for your export.
 - **Type:** Monthly, Weekly, Daily, or Custom (which will open more options.)
 - **After Completion:** select your option to do nothing, email attachment, upload via FTP, or upload via SFTP.
 - **Email Notification:** sends a notification to the recipient of your choice.
4. Click the “**Options**” tab to edit the report to include a specific user.
5. Click “**Add**” to save your scheduled export.

Schedule New Export
×

Basic

Options

Enter basic settings to schedule a call records export.

Name

Type

Monthly ⓘ

Weekly ⓘ

Daily ⓘ

Custom ⓘ

Time of Day to Start ⓘ

Daily schedule will begin on: 07/25/2023 12:00 am US/Pacific

Also run this export immediately
Useful for sampling output from an export

After Completion ⓘ

Email Notification Send an email when the export completes

Email

Cancel
Next
Add

Export: Click “**Export**” to immediately export your call history into a .csv file.

How to Block SPAM and Robocalls

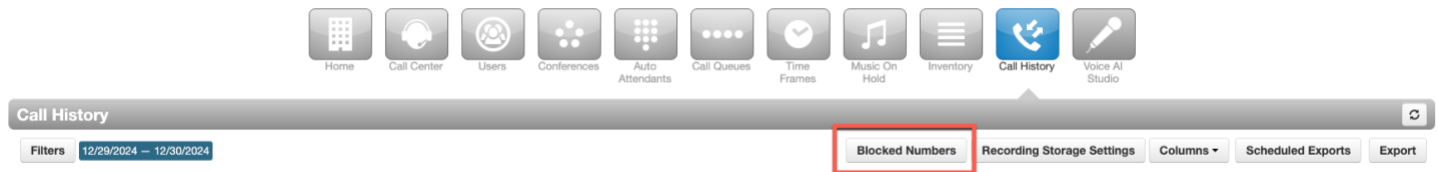
For a video demonstration, go to:

https://www.youtube.com/watch?v=LKZBrCKiHVY&list=PLXADOLtuavV9jC_HL7NiOiBoKA9VZIBxm&index=18&t=2s

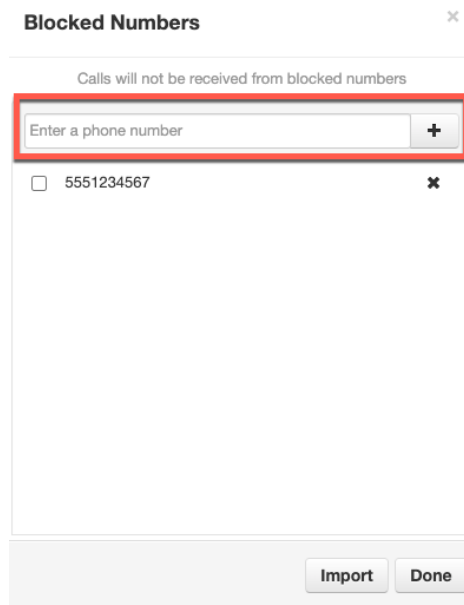
This feature can be activated per user or domain wide.

To Block a Number for the Entire Domain:

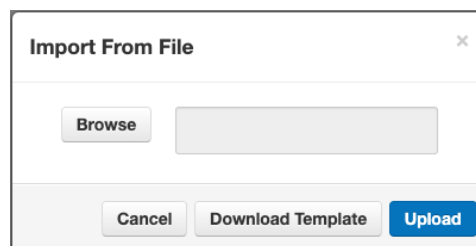
1. In the Call History section, select the “**Blocked Numbers**” button.



2. Enter the number into the blank and press the “+” button to add it to your blocked numbers.



3. If you have a list of numbers to add in all at once, select “**Import**” and download the template to add your numbers to. Once completed, browse to the template and “**Upload**” the file.



How a User Can Block a SPAM or robocall number:

If a user who has received a SPAM call or robocall, they can block it from being able to connect to their extension. Please keep in mind that by blocking a number as a user does NOT block it from the entire domain.

1. From the Call History Section of the VIP Portal for Users, Select the “**Blocked Numbers**” button.



2. Enter the number into the blank and press the “+” button.

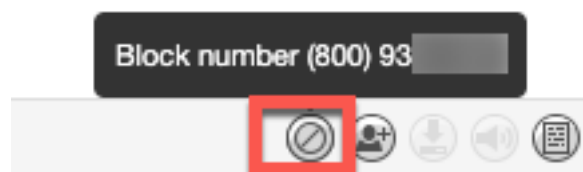
Blocked Numbers ×

Calls will not be received from blocked numbers

+

5551234567 ×

3. You can also block or unblock a number from the Call Details section by selecting the Block Call icon.



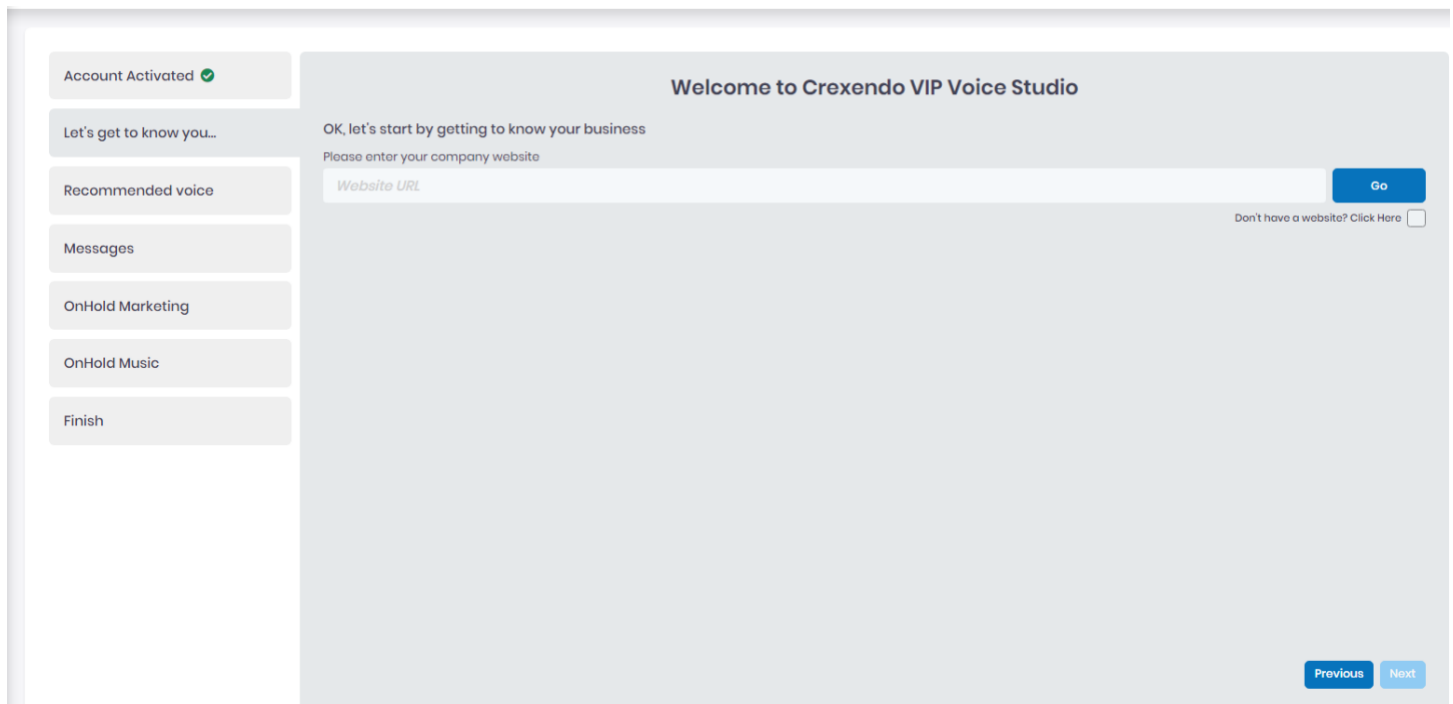
Introduction

Crexendo® VIP™ Voice AI Studio enables you to create professional welcome greetings, auto-attendant, IVR (Interactive Voice Response), and call menu recordings, and mix them with license-free music ready to play to queuing and holding callers. This guide provides the steps to accessing and using Voice AI Studios.

1. To access Voice AI Studios, first sign into your Crexendo VIP Portal as an administrator and click on Voice AI Studios listed on the top of the webpage.



2. Select “**Get Started**” and a new tab will open with a separate URL for Voice AI Studios to fill out the information for your company. You can either enter in your company’s URL and the information will be pulled for you automatically or you can enter in the information manually.



The screenshot shows a web interface for setting up a Voice AI Studio. On the left is a sidebar with the following items: 'Account Activated' with a green checkmark, 'Let's get to know you...', 'Recommended voice', 'Messages', 'OnHold Marketing', 'OnHold Music', and 'Finish'. The main content area is titled 'Welcome to Crexendo VIP Voice Studio' and contains the text 'OK, let's start by getting to know your business'. Below this is a prompt 'Please enter your company website' followed by a text input field containing the placeholder 'Website URL'. To the right of the input field is a blue 'Go' button. Below the input field is a checkbox labeled 'Don't have a website? Click Here'. At the bottom right of the main area are two buttons: 'Previous' and 'Next'.

Account Activated ✔

Let's get to know you...

Recommended voice

Messages

OnHold Marketing

OnHold Music

Finish

Welcome to Crexendo VIP Voice Studio

OK, let's start by getting to know your business

Please enter your company website

Go

Don't have a website? [Click Here](#)

We either cannot find that website or it does not allow our bot to read it. Please enter the following details manually

Your company name, as in 'Welcome to [??]'

Sector (e.g. Hotel, or Engineering and Construction)

Two adjectives that describe your company's Tone of Voice (e.g. Professional and Approachable)

Three key products or services you offer (e.g. Hotel accommodation; venue hire; spa)

Language

Previous
Next

3. Select the voice in which you want your prompts to play. You can preview them by clicking **“Preview”** on the right-hand side of the screen.

Account Activated ✔

Let's get to know you... ✔

Recommended voice

Messages

OnHold Marketing

OnHold Music

Finish

OK, our recommendation for your tone of voice is **Terrance**, but here's some others you might consider. Want more options including real voices, [Click Here](#)

Terrance ♂ Vocal age 40-50	Preview
Cassandra ♀ Vocal age 30 - 40	Preview
Magnolia ♀ Vocal age 30-40	Preview
Danica ♀ Vocal age 30-50	Preview
Sabrina ♀ Vocal age 20-30	Preview
Octavia ♀ Vocal age 25-40	Preview
Adela ♀ Vocal age 20-30	Preview
Christopher ♂ Vocal Age 30-50	Preview
Curtis ♂ Vocal age 15-25	Preview
Rick ♂ Vocal age 30-50	Preview
Benjamin ♂ Vocal age 20-40	Preview
Carl ♂ Vocal age 40-60	Preview

Previous
Next

4. Select the message(s) you want for your welcome greetings, auto-attendant, IVR (Interactive Voice Response), and call menu recordings. Additionally, you can manually enter in the prompt you want in the blank below.

Account Activated ✔

Let's get to know you... ✔

Recommended voice ✔

Messages

OnHold Marketing

OnHold Music

Finish

Here are some suggested messages.
Please preview, edit and select the ones you want.
If you need them, here are some [hints](#) on improving pronunciations.

Welcome (Suggestion 1)	Hi! You're through to Netsapiens. We're excited to assist you. Please leave your message after the beep.	Preview <input type="checkbox"/>
Welcome (Suggestion 2)	Welcome to Netsapiens. We're here to help. Please hold for the next available representative.	Preview <input type="checkbox"/>
Menu Options (Suggestion 1)	An error occurred while sending the request.	Preview <input type="checkbox"/>
Menu Options (Suggestion 2)	Thanks for calling Netsapiens. For sales, please press 1. Accounts are on 2. And for anything else, it's 3.	Preview <input type="checkbox"/>
Closed - (Suggestion 1)	Thanks for calling Netsapiens. I'm afraid we're currently closed. Our normal business hours are Monday through Friday, from 9 am to 5 pm Eastern Standard Time. Please visit our website at crexendo.com for more information or leave a message after the tone and we'll get back to you as soon as possible. We appreciate your understanding and look forward to assisting you during our regular business hours.	Preview <input type="checkbox"/>
Closed - (Suggestion 2)	Thank you for calling Netsapiens. I'm sorry, we're closed and can't answer your call just now. For immediate assistance, please visit crexendo.com where you can access our online support and FAQs. We'll be available to take your calls again from 9am tomorrow. We appreciate your understanding.	Preview <input type="checkbox"/>
Emergency (Suggestion 1)	Thanks for calling Netsapiens. Due to unforeseen circumstances, we can't answer your call at the moment. Please visit our website at crexendo.com for more information. We appreciate your patience and encourage you to call back later when our services should be fully operational again.	Preview <input type="checkbox"/>
Emergency (Suggestion 2)	Thank you for calling Netsapiens. I'm afraid we can't answer you just now. We're sorry for any inconvenience and hope to be able to assist you soon. We're doing everything we can to get back up and running as quickly as possible. Please try again later.	Preview <input checked="" type="checkbox"/>

Create Custom Message Add

Previous Next

5. Select the on-hold marketing prompt(s). This is the prompt that will play to customers when on-hold.

Account Activated ✔

Let's get to know you... ✔

Recommended voice ✔

Messages ✔

OnHold Marketing

OnHold Music

Finish

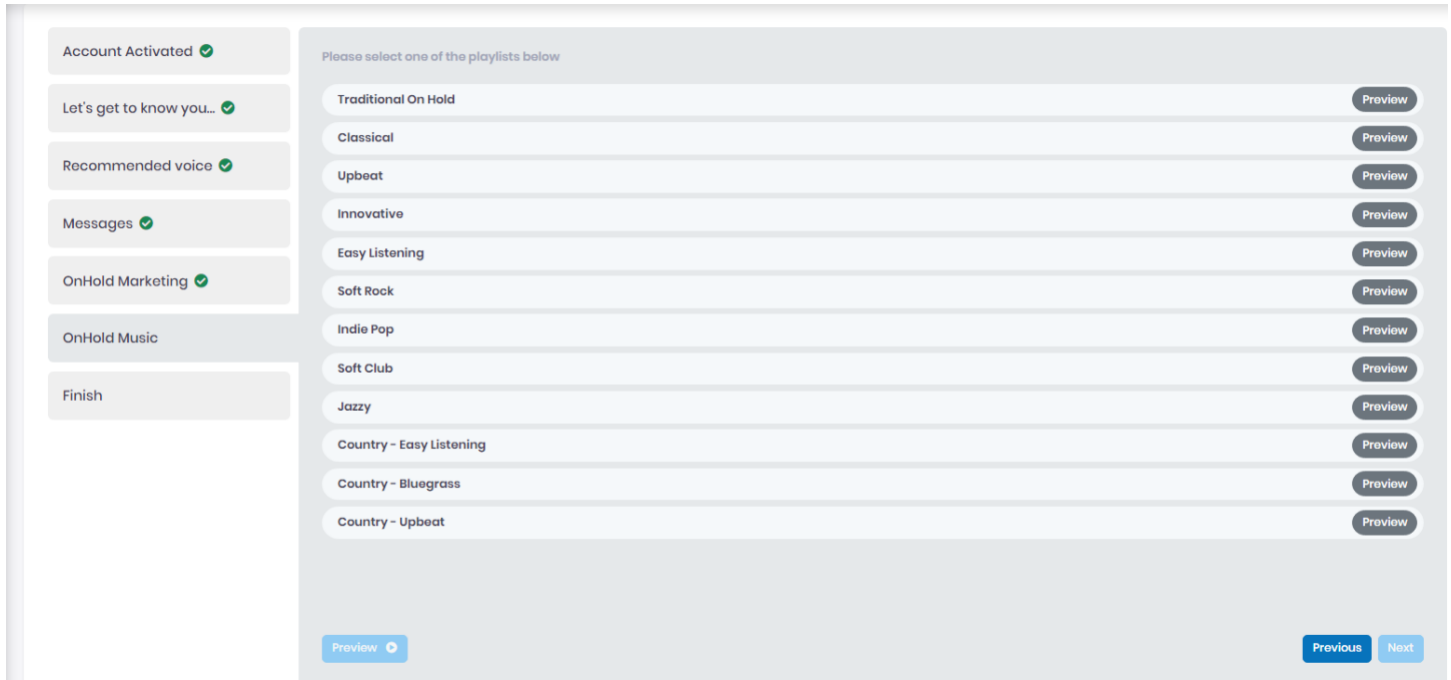
Here are some suggested messages.
Please preview, edit and select the ones you want.
If you need them, here are some [hints](#) on improving pronunciations.

Marketing 1	Discover the power of Unified Communications at crexendo.com . We're revolutionizing business communication, empowering you to connect, collaborate and conquer your day with ease. Experience seamless integration across devices and platforms. It's not just about staying connected, it's about staying ahead!	Preview <input checked="" type="checkbox"/>
Marketing 2	Have you heard? At crexendo.com , we're revolutionizing the way businesses communicate. We empower you with innovative cloud-based solutions that streamline your operations and boost productivity. It's not just technology, it's a game changer!	Preview <input type="checkbox"/>
Marketing 3	Looking to revolutionize your business communication? Crexendo.com is your gateway to innovative cloud solutions. We're empowering businesses with seamless, secure and scalable communication services. Elevate your enterprise today with our cutting-edge technology. Let's shape the future of communication together!	Preview <input type="checkbox"/>
Marketing 4	Did you know our Unified Communications, Contact Center Solutions, and Video Conferencing empower innovation? Boost collaboration with Crexendo.com . Ask for more details when you're connected.	Preview <input type="checkbox"/>
Marketing 5	Unleash your team's potential with our Video Conferencing and Collaboration Solutions. Empower innovation, foster unity, and drive success. Discover more at crexendo.com .	Preview <input type="checkbox"/>
Marketing 6	Our Unified Communications service revolutionizes your business operations, fostering seamless collaboration and boosting productivity. Experience the future of communication with crexendo.com .	Preview <input type="checkbox"/>
Marketing 7	We'll be with you as soon as possible. Sorry to keep you waiting.	Preview <input type="checkbox"/>
Marketing 8	As the summer sun shines bright, it's time to empower your business with our Unified Communications service. Imagine a world where all your communication tools are seamlessly integrated, boosting productivity and fostering innovation. Don't let the heat slow you down, visit crexendo.com and let's make this summer sizzle with success!	Preview <input type="checkbox"/>
Marketing 9	As winter's chill sets in, isn't it time to warm up your business with Crexendo's Unified Communications? We're here to empower your team with seamless collaboration, no matter the weather outside. Stay connected, stay productive, and let's turn this winter into a season of growth. Discover more at crexendo.com .	Preview <input type="checkbox"/>
Marketing 10	As the festive season twinkles upon us, we're excited to offer innovative telecom solutions that empower your connections. Let's make this Christmas merrier with seamless communication. Unwrap the gift of uninterrupted calls and high-speed internet. For a joyous and connected holiday season, ask us for more information or see our website at crexendo.com .	Preview <input type="checkbox"/>

Create Custom Message Add

Previous Next

6. Select the on-hold music you want to play with your on-hold prompt(s).



Account Activated ✓

Let's get to know you... ✓

Recommended voice ✓

Messages ✓

OnHold Marketing ✓

OnHold Music

Finish

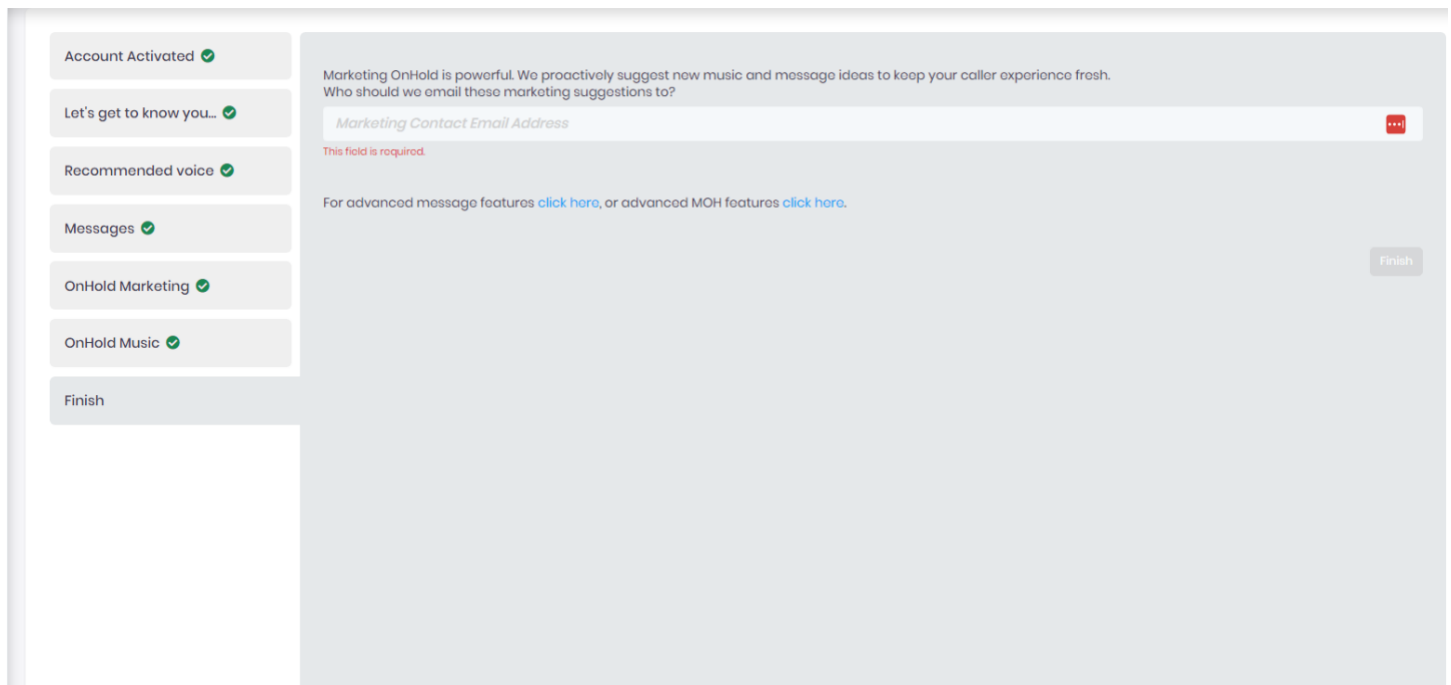
Please select one of the playlists below

Traditional On Hold	Preview
Classical	Preview
Upbeat	Preview
Innovative	Preview
Easy Listening	Preview
Soft Rock	Preview
Indie Pop	Preview
Soft Club	Preview
Jazzy	Preview
Country - Easy Listening	Preview
Country - Bluegrass	Preview
Country - Upbeat	Preview

Preview

Previous Next

7. Once completed, the appropriate files will download onto your local desktop, you can also click the download file link below.



Account Activated ✓

Let's get to know you... ✓

Recommended voice ✓

Messages ✓

OnHold Marketing ✓

OnHold Music ✓

Finish

Marketing OnHold is powerful. We proactively suggest new music and message ideas to keep your caller experience fresh. Who should we email these marketing suggestions to?

Marketing Contact Email Address

This field is required.

For advanced message features [click here](#), or advanced MOH features [click here](#).

Finish

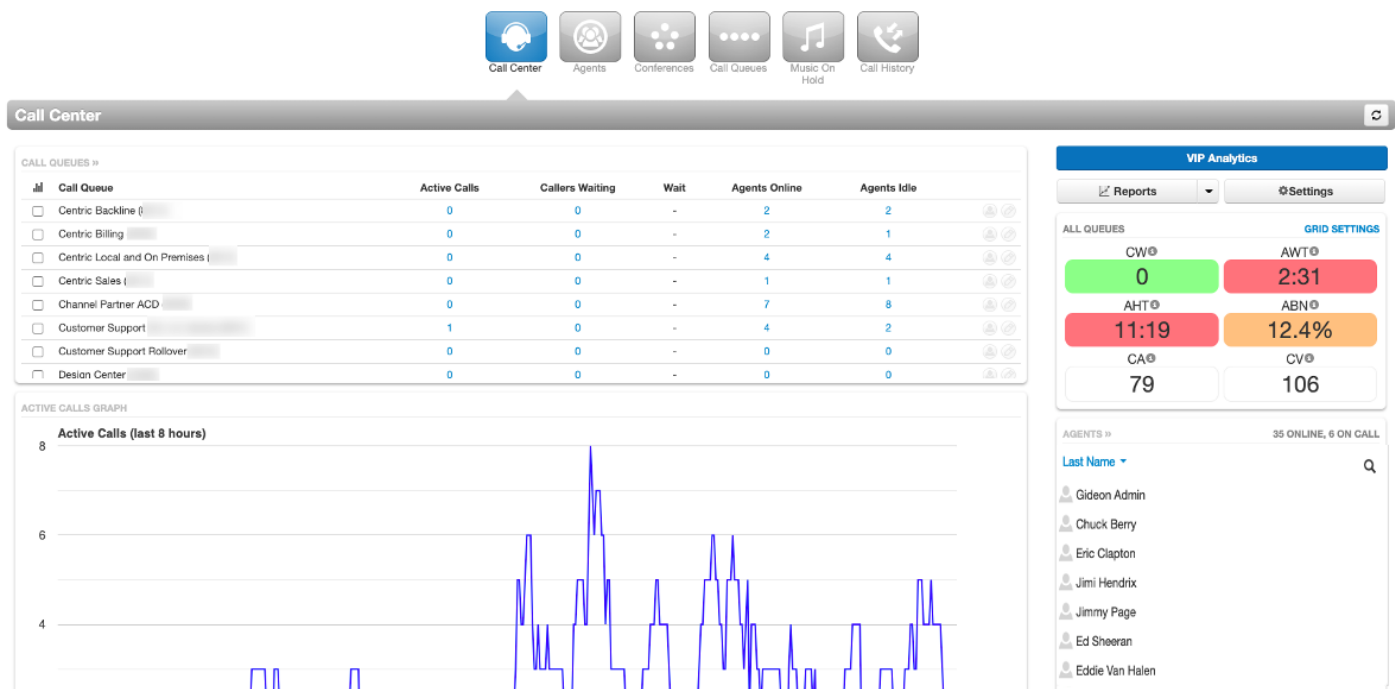
To upload your files to be used in your domain, see [Music on Hold](#).

Introduction

Call Center for Supervisors gives a call queue supervisor the ability to access Call Center for queue analytics, the ability to manage your call queues, and manage your call center agents. **This guide provides an overview of your options within the VIP Portal as a Call Center Supervisor.**

For a video demonstration, go to:

https://www.youtube.com/watch?v=xTvZpBGTI5k&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=3



CALL QUEUES

Call Queue	Active Calls	Callers Waiting	Wait	Agents Online	Agents Idle
Centric Backline ()	0	0	-	2	2
Centric Billing ()	0	0	-	2	1
Centric Local and On Premises ()	0	0	-	4	4
Centric Sales ()	0	0	-	1	1
Channel Partner ACD ()	0	0	-	7	8
Customer Support ()	1	0	-	4	2
Customer Support Rollover ()	0	0	-	0	0
Deasion Center ()	0	0	-	0	0

ACTIVE CALLS GRAPH

Active Calls (last 8 hours)

VIP Analytics

Reports Settings

ALL QUEUES GRID SETTINGS

CW 0 AWT 2:31

AHT 11:19 ABN 12.4%

CA 79 CV 106

AGENTS 35 ONLINE, 6 ON CALL

Last Name

- Gideon Admin
- Chuck Berry
- Eric Clapton
- Jimi Hendrix
- Jimmy Page
- Ed Sheeran
- Eddie Van Halen

Call Center

When you login to VIP Portal as a Supervisor, you will land at the **Call Center** section of the portal. Call Center is a summary of your call queues and agents in real time.

Call Queues: gives you real time updates to your call queues including *active calls, callers currently waiting, wait time, agents online, and agents currently idle.*

Active Calls Graph: gives a visual overview of your call flow for the last 8 hours.

Active Calls: shows all calls currently connected in the queue and provides the number, who is on the call, and the duration of the call.

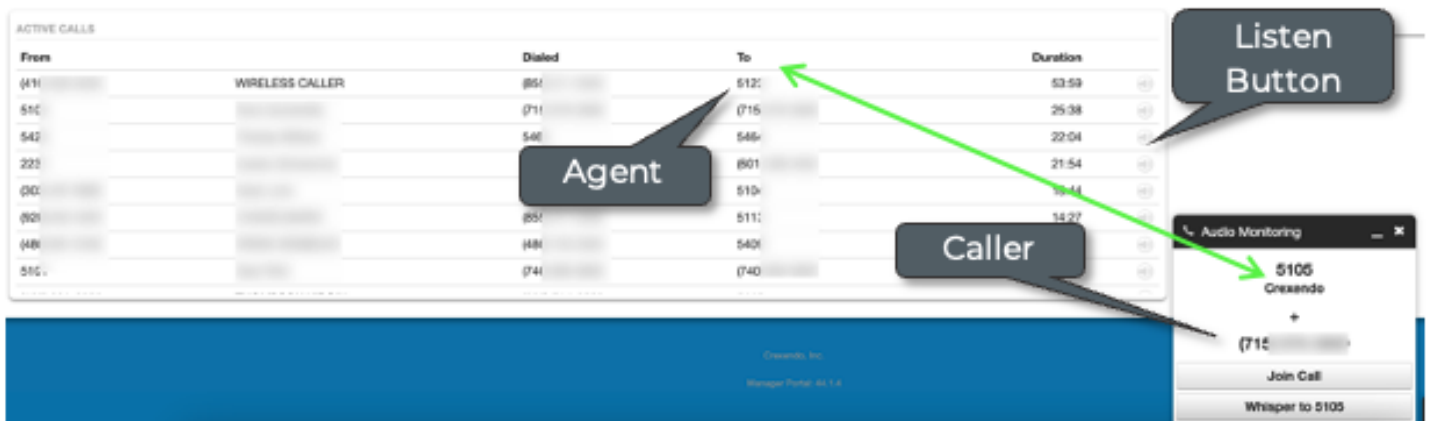
VIP Analytics: gives your access to our reporting and analytic tools which will give you the insight to drive your business. These tools include daily reports and customized real time dashboards. For more detail regarding VIP reporting and call center dashboards, see [VIP Analytics](#).

NOTE: VIP Analytics only provides data for your **call center agents** and **call queues**. It does NOT provide statistics for non-agent users. For non-agent calls, use the CALL HISTORY area of the portal.

Agent Call Monitoring

As a Call Center Supervisor, you can monitor all calls that come through the queue for coaching and for quality assurance. To monitor live calls in the queue:

- In the **ACTIVE CALLS** card (at bottom of the Home screen), locate the call you wish to monitor. The **To** column displays the agent extension number.
- Hover your mouse over this call entry and click the LISTEN button (speaker icon). After a few seconds, the system establishes the conference, and your desk phone will ring. An AUDIO MONITORING card will appear as shown.



From		Dialed	To	Duration
(411)	WIRELESS CALLER	(85)	512	03:59
510		(711)	(715)	25:38
542		545	545	22:04
223			(801)	21:54
(00)			510	19:14
(90)		(80)	511	14:27
(48)		(48)	540	
510		(74)	(740)	

- After you answer the phone, you will hear the conversation, and the participants will not be alerted that you are listening.
- In the AUDIO MONITORING card, click the appropriate button:
 - **Join Call:** Speak with both the agent and caller.
 - **Whisper to [Agent]:** Speak with the agent without the caller hearing.
- When you are finished advising, hang up or press the END CALL softkey on the desk phone. The AUDIO MONITORING card in the portal will close automatically. You can also click the LISTEN button (not shown).

Reports

Call Center Reports allows you to generate reports on the fly or set them to run at certain times. These reports can be displayed, printed, and exported to CSV format for further processing in other applications.

To access the VIP Reporting options, select **“Reports”** which will open the options for what kind of reports you would like to run.

The screenshot displays the VIP Analytics Reports interface. At the top, the 'Reports' menu is highlighted. Below it, a 'GRID SETTINGS' panel shows key performance indicators (KPIs) for all queues: CW (0), AWT (0:00), AHT (0:00), ABN (0%), CA (0), and CV (0). The main content area is titled 'Call Center / Reports' and features several tabs: Queue Stats, Agent Stats, Agent Availability, Dialed Number Stats, and Abandoned Calls. A line chart for 'Call Volume' is displayed, showing data from 03/14/2023 12:00 am to 03/15/2023 11:00 pm. Below the chart is a table with columns for Queue, Name, Call Volume, Calls Handled, and Service Level. The 'Table Settings' panel on the right allows users to customize the columns shown in the table, with options like Name, Call Volume (VOL), Calls Handled (CH), and Average Talk Time (ATT) selected.

To create your customized reports:

1. Select which report you would like to run from the tabs above: **Queue Stats, Agent Stats, Agent Availability, Dialed Number Stats, and Abandoned Calls**. Each tab creates a different table below with several options already pre-populated.
2. To change the information included in the tables, select **“Table Settings”** on the right side of the screen. From here, you can customize your reports to only include the information that is important to you and your business.

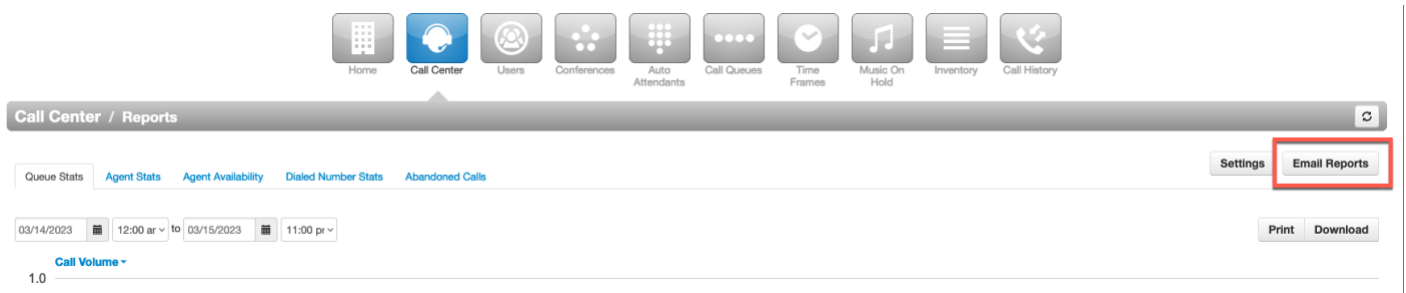
The 'Table Settings' panel allows users to customize the columns shown in the report. The 'Choose table columns to show:' section includes the following options:

- Name
- Call Volume (VOL)
- Calls Handled (CH)
- Calls Offered (CO)
- Adjusted Calls Offered (ACO)
- Voicemail (VM)
- Forward (FWD)
- Average Talk Time (ATT)
- Assisted Calls Handled (AST)
- Average ACW Time (ACW)
- Callbacks (CB)
- Average Hold Time (AH)
- Service Level (SL)
- Percent Dial Transfers (DT)
- Abandoned Calls (AC)
- Adjusted Abandoned Calls (AAC)
- Abandon Rate (AR)
- Adjusted Abandon Rate (AAR)
- Average Handle Time (AHT)
- Average Wait Time (AWT)
- SMS Volume (SMS_VOL)
- SMS Average Handle Time (SMS_AHT)

General Settings:

- Hide rows with no data
- Hide totals on table

To export and automate your custom reports:



1. Select the **“Email Reports”** button on the top right side of the screen.
2. In the options, select the **“Type”** and **“Frequency”** of the reports you want to run. Customize the day of the week and time of day for your reports to be run. Once selected, the **“Advanced”** tab will appear.
3. In the **“Advanced”** tab, select the statistics you would like to include in the report. To select multiple statistics, hold *Ctrl (Windows) or ⌘ (Mac) or Shift*.
4. If you would like the reports to be sent to multiple people, add the email address below the statistics.
5. Select **“Save”** to generate the automated report.

Agents

The **Agents** section of the portal shows all Call Center Agents and Supervisors in your company. As a supervisor, you can edit an agent’s profile information, answering rules, voicemail options, phones, and access advanced settings which include sending the welcome email for the first time logging in, forcing a password reset, or resetting the user. For more information regarding editing Users, see the [Users](#) guide.

Name	Extension	Department	Site	Scope	Email
Chuck Berry Password Required	107			Call Center Agent	test@test.com
Eric Clapton Password Required	103			Call Center Agent	test3@email.com
Ed Sheeran New	112			Call Center Agent	fake@fake.com
Mark Tremonte New	111			Call Center Supervisor	fake@fake.com
Eddie Van Halen Password Required	105			Call Center Agent	test@test.com

Conferences

The **Conferences** sections allows you to create and edit conference bridges for you to utilize. For more information on how to create, edit, and use your conference bridges, see the [Conference Bridges](#) guide.

Call Queues

Call Queues can be used to route calls to specific groups of users in your domain. The queue places the caller on hold and presents the call to pre-defined groups of users. You can specify different types of call queues such as *Round Robin*, *Ring All*, *Linear Hunt*, *Linear Cascade*, or *Call Park*. Users that receive calls from a call queue are called "Agents". Office Managers and Call Center Supervisors can create, modify, and delete call queues.

For more details on editing your call queues, see [VIP Call Queues](#).

Music On Hold

As a call center supervisor, you have the option to add customized hold music and messages to be played while your customers are waiting in the queue. To find more details including step by step instructions to add or edit hold music and messages, please see the [Music on Hold](#) guide.

Call History

The **Call History** section of the VIP Portal for Call Center supervisors gives you quick access to filter through all incoming/outgoing calls by either an agent or call queue. To access the Call History Section of the VIP Portal:

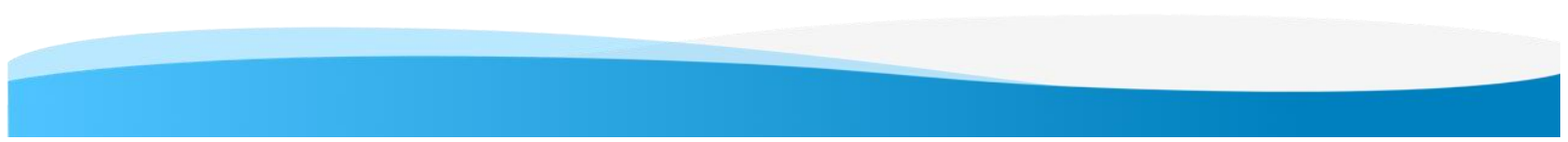
1. Login to the VIP Portal as an Office Manager or Call Center Supervisor
2. Click on the "**Call History**" navigation button at the top of the screen.

From the Call History section, all Office Managers can see all calls to and from the domain including inbound, outbound, and internal calls. **NOTE:** *Calls that come through a Call Queue will also show in VIP Call Center Reporting.*

Call Filtering: To filter through calls from specific dates, numbers, call types, etc.:

1. Select the "**Filters**" button at the top left side of your screen.
2. Decide which filters to apply from the choices presented: *Date*, *User*, *Queue*, *Caller Number*, *Dialed Number*, and *Call Type (Inbound, Outbound, and Missed.)*
3. To reset your choices, select "**Clear Filters**" at the bottom of the window.
4. To search through your call History after you have selected your filters, select "**Filter**" at the bottom of the window.

The screenshot shows the Crexendo VIP interface. At the top left is the 'crexendo VIP' logo. At the top right, there are navigation elements: 'Apps', a user profile icon for 'Mark Tremonte (111)', and a refresh icon. Below the header is a toolbar with icons for headset, mute, call transfer, call log, music, and call. The main area is titled 'Call History' and contains a 'Filters' section with a date range '09/19/2023 - 09/20/2023' and a 'My Calls' button. An 'Export' button is on the right. A 'Call History Filters' modal is open in the center, featuring a close button (X) in the top right. The modal has two date input fields: 'From' (09/19/2023) and 'To' (09/20/2023). Below these are filter categories: 'Calls for', 'Caller Number', 'Dialed Number', and 'Call Type'. The 'Calls for' dropdown is open, showing a list of options: 'My Calls' (checked), 'Queue 2000 - Customer Service Daytime' (highlighted), 'Queue 7000 - Pizza Orders', 'Queue 400 - SMS', 'Queue 2001 - Tech Support Daytime', 'Queue 4000 - Test Call Queue', 'Agent 101 - Gideon Admin', 'Agent 102 - Jimi Hendrix', 'Agent 103 - Eric Clapton', 'Agent 104 - Jimmy Page', 'Agent 105 - Eddie Van Halen', 'Agent 107 - Chuck Berry', and 'Agent 112 - Ed Sheeran'. At the bottom of the modal are 'Cancel' and 'Filter' buttons.



Introduction

VIP Analytics is a tool designed for Office Managers and Call Center Supervisors to keep your team up to date on real time queue statistics displayed on a TV, monitor, or individual PC in your call center. These VIP Boards allow you to create “cards” that display all the information that is important for you to see in real time.

This guide will provide the steps to **access the VIP Analytics section** in the VIP Portal for Managers or Call Center Supervisors and **how to create your own boards and cards** to display.

How to Access VIP Analytics

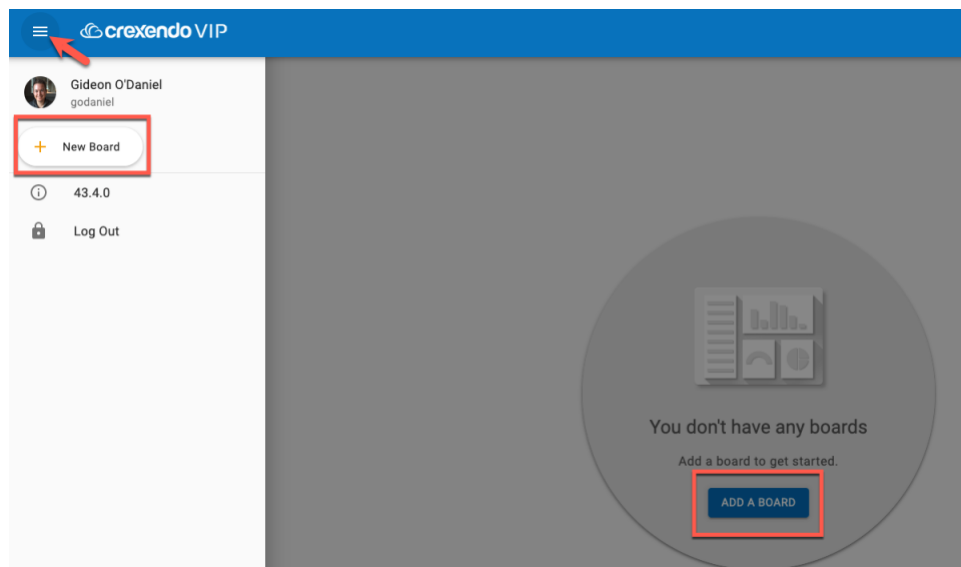
1. Login to the VIP Portal as an Office Manager or Call Center Supervisor.
2. Select the “**Call Center**” navigation button at the top of the page.
3. Select “**VIP Analytics**” which will open a new tab in your browser.



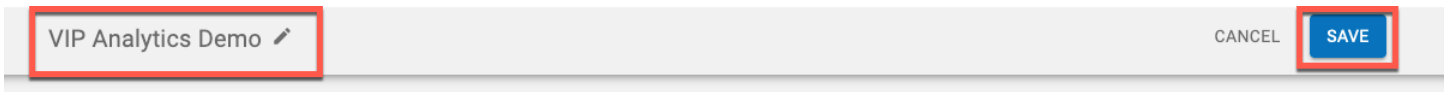
If you have any previously created boards, they will appear here.

How to Create a Board

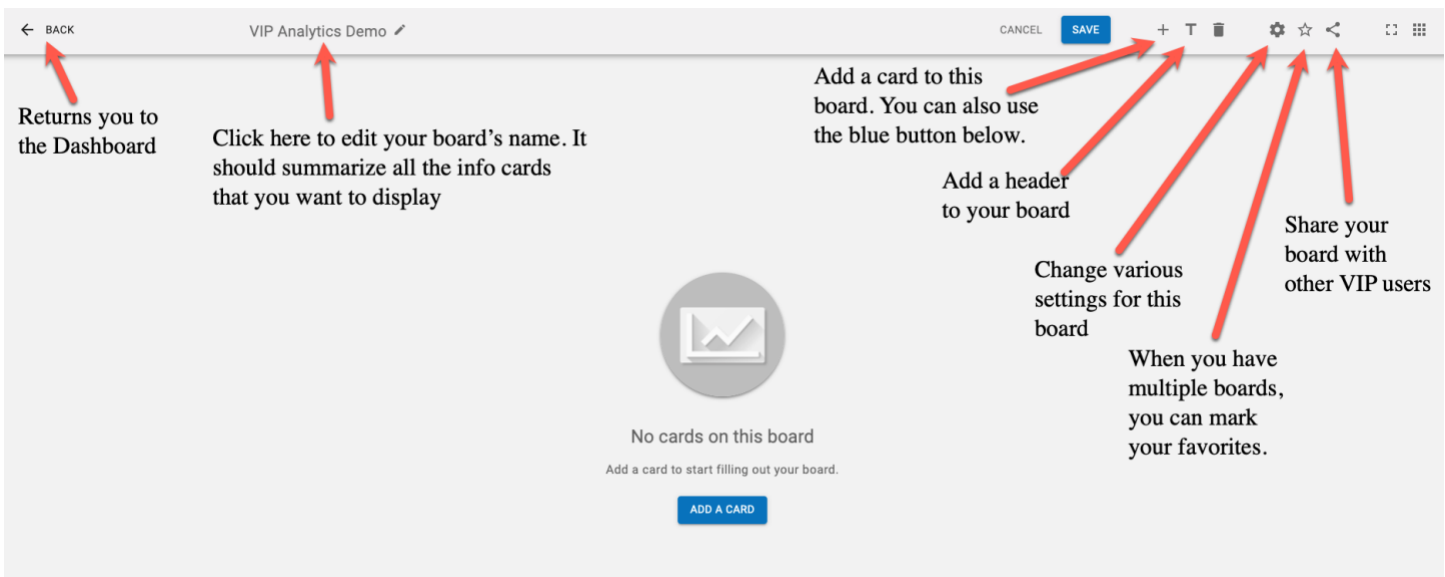
1. Select “**ADD A BOARD**” to get started. You can also select the “**hamburger**” button in the upper left corner to display the main menu, then select “**New Board**”.



2. Give your new board a name at the top of the page and select “**Save**”.



3. You have a toolbar for each board you create located at the top of the board.

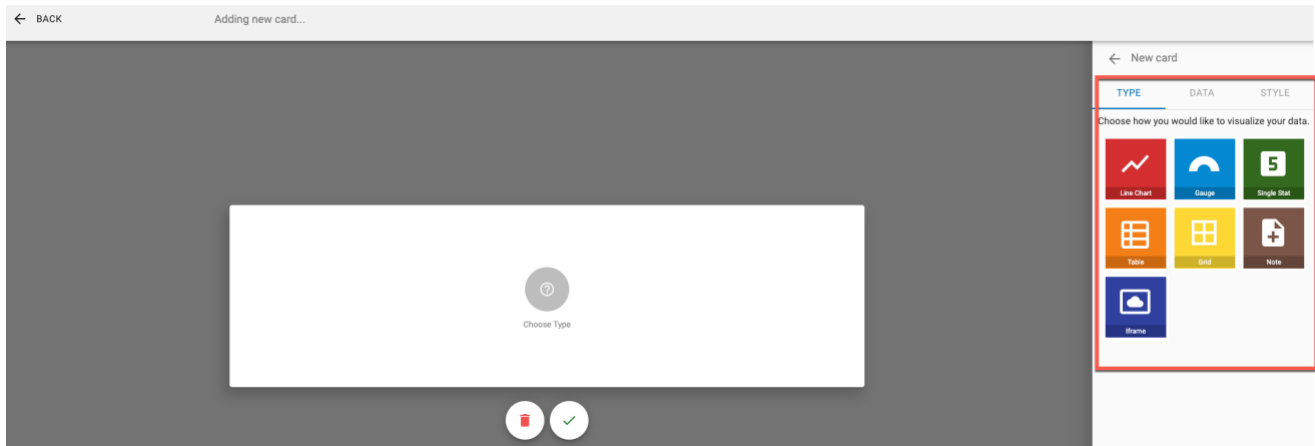


How to Add a Card to Your Board

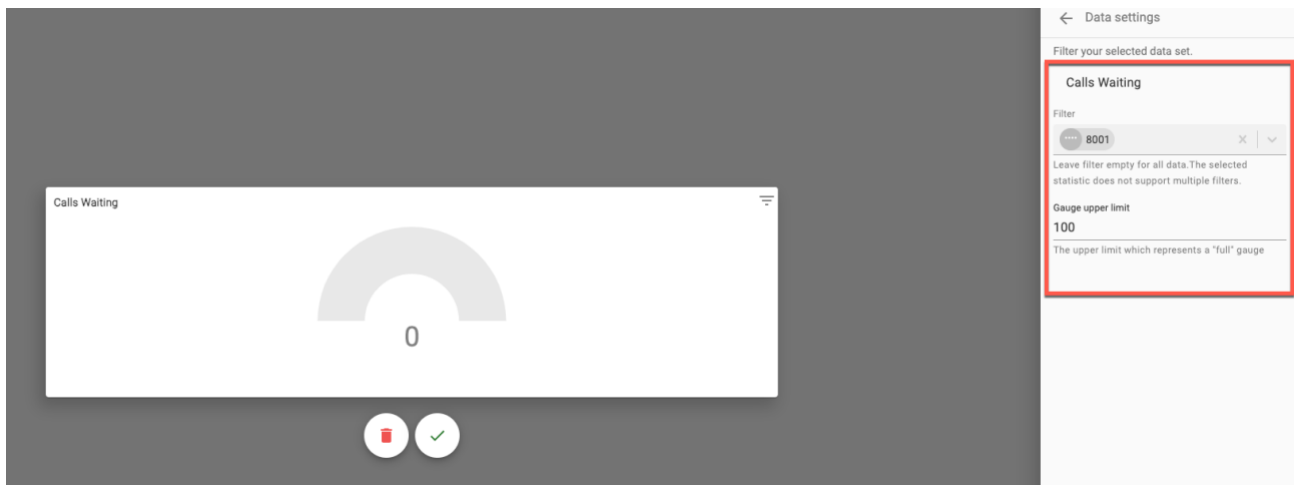
After you create and name your board, you can start adding information cards. Each type of card will have a “gauge” which displays the data you want.

1. Select “**ADD A CARD**” which will display an empty card.
2. Select “**CHOOSE TYPE**” to add the data you want to display. You have several choices in how you want to display your data:
 - a. **Line Chart**: Displays a line graph which is useful to show trends.
 - b. **Gauge**: Displays your data on a gauge for rapidly changing data.
 - c. **Single Stat**: Displays a number. This is useful for benchmarks and thresholds.
 - d. **Table**: For multiple rows of data.
 - e. **Grid**: To display data in a matrix.
 - f. **Note**: Add a miscellaneous note for your audience.
 - g. **Iframe**: Add data from other websites.

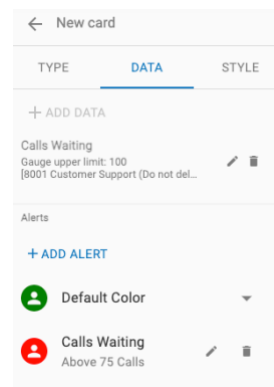
In this example, the Gauge option has been selected.



3. Select “**NEXT**” to select which data you would like to display.
4. Select “**+ ADD DATA**” to choose the data you would like displayed in real time. For this example, “**Calls Waiting**” has been selected.
5. If you would like to choose which queue the gauge will track, select the drop-down for “Filter” and select the queue from the options.
6. Adjust the “**Gauge upper limit**” to be a visual representation of whatever limit you would like.

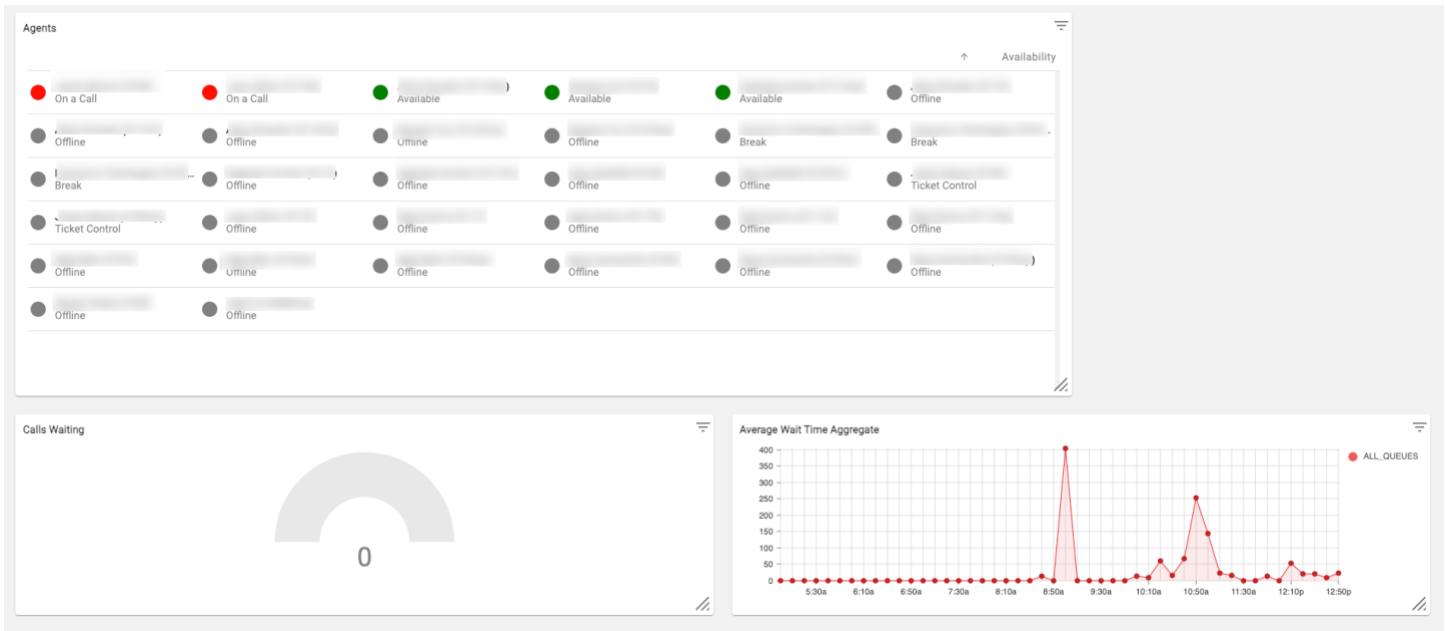


7. If you would like to set an alert for when the levels get to a certain level, select “**Add Alert**”. Select the threshold and color that you want the alert to present and select “**Add**” at the bottom right side of the screen.



- Select “**Next**” to proceed to the **STYLE** section of the card. Here, you can select any aesthetics, fonts, and other customizable options. Select “**DONE**” to add this card to your board.

Repeat the process to add more cards to your board. You can also rearrange the boards so they appear on your screen in the way you would like them to be displayed. These boards can be displayed on TVs, monitors, etc around your call center or on your personal monitor for real time updates.



NOTE: When you create or edit a card, it may take up to a minute for data to be reflected in the card.

Introduction:

VIP Call Center gives you the ability to gather data on queues and agents in your Crexendo VIP environment. In addition to the default Call Center Dashboard, supervisors can:

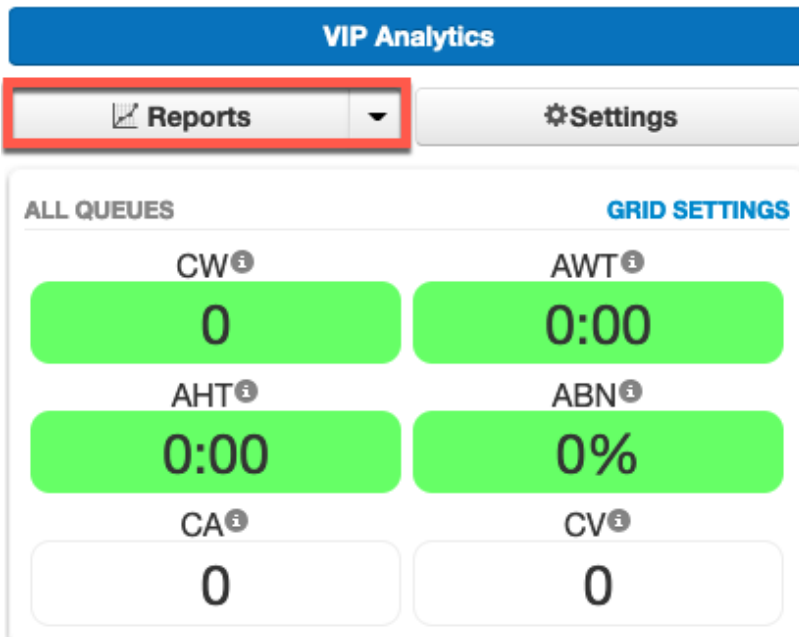
- **Create customized dashboards** with "gauges" that monitor the health of your queues and agents. These gauges come in many shapes and sizes and can be customized with color and alerts thresholds.
- **Generate reports** on the fly or set them to run at certain times. These reports can be displayed, printed, and exported to CSV format for further processing in other applications.

This guide contains the steps to **access VIP Call Center Reports and a brief overview of the reporting options.**

For a video demonstration, go to:

https://www.youtube.com/watch?v=kJxYoAVHL30&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=15

To access the VIP Reporting options, login to the VIP Portal and select **"Call Center."**

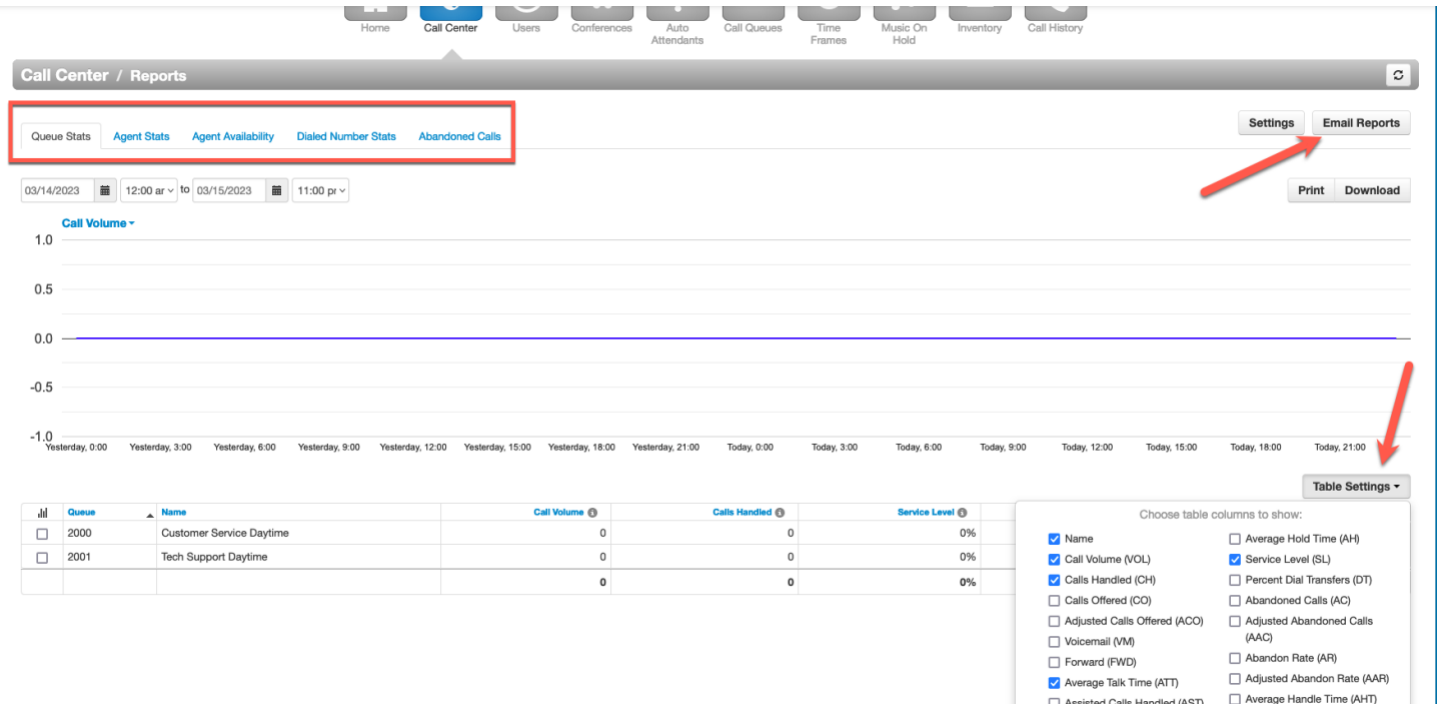


The screenshot shows the VIP Analytics dashboard. At the top is a blue header with the text "VIP Analytics". Below the header are two buttons: "Reports" (with a document icon) and "Settings" (with a gear icon). The "Reports" button is highlighted with a red border. Below the buttons is a grid of performance metrics. The grid is divided into two columns: "ALL QUEUES" and "GRID SETTINGS". The metrics are displayed in green and white boxes. The values are: CW (0), AWT (0:00), AHT (0:00), ABN (0%), CA (0), and CV (0).

ALL QUEUES	GRID SETTINGS
CW ⁱ 0	AWT ⁱ 0:00
AHT ⁱ 0:00	ABN ⁱ 0%
CA ⁱ 0	CV ⁱ 0

Select **"Reports"** which will open the options for what kind of reports you would like to run.

Call Center Reports Builder:



Call Center / Reports

Queue Stats Agent Stats Agent Availability Dialed Number Stats Abandoned Calls

Settings Email Reports

Print Download

Call Volume

Yesterday, 0:00 Yesterday, 3:00 Yesterday, 6:00 Yesterday, 9:00 Yesterday, 12:00 Yesterday, 15:00 Yesterday, 18:00 Yesterday, 21:00 Today, 0:00 Today, 3:00 Today, 6:00 Today, 9:00 Today, 12:00 Today, 15:00 Today, 18:00 Today, 21:00

Queue	Name	Call Volume	Calls Handled	Service Level
2000	Customer Service Daytime	0	0	0%
2001	Tech Support Daytime	0	0	0%
		0	0	0%

Table Settings

Choose table columns to show:

- Name
- Call Volume (VOL)
- Calls Handled (CH)
- Calls Offered (CO)
- Adjusted Calls Offered (ACO)
- Voicemail (VM)
- Forward (FWD)
- Average Talk Time (ATT)
- Assisted Calls Handled (AST)
- Average Hold Time (AH)
- Service Level (SL)
- Percent Dial Transfers (DT)
- Abandoned Calls (AC)
- Adjusted Abandoned Calls (AAC)
- Abandon Rate (AR)
- Adjusted Abandon Rate (AAR)
- Average Handle Time (AHT)
- Average Wait Time (AWT)
- SMS Volume (SMS_VOL)
- SMS Average Handle Time (SMS_AHT)

General Settings:

- Hide rows with no data
- Hide totals on table

To create your customized reports:

1. Select which report you would like to run from the tabs above: **Queue Stats, Agent Stats, Agent Availability, Dialed Number Stats, and Abandoned Calls**. Each tab creates a different table below with several options already pre-populated.
2. To change the information included in the tables, select **"Table Settings"** on the right side of the screen. From here, you can customize your reports to only include the information that is important to you and your business.

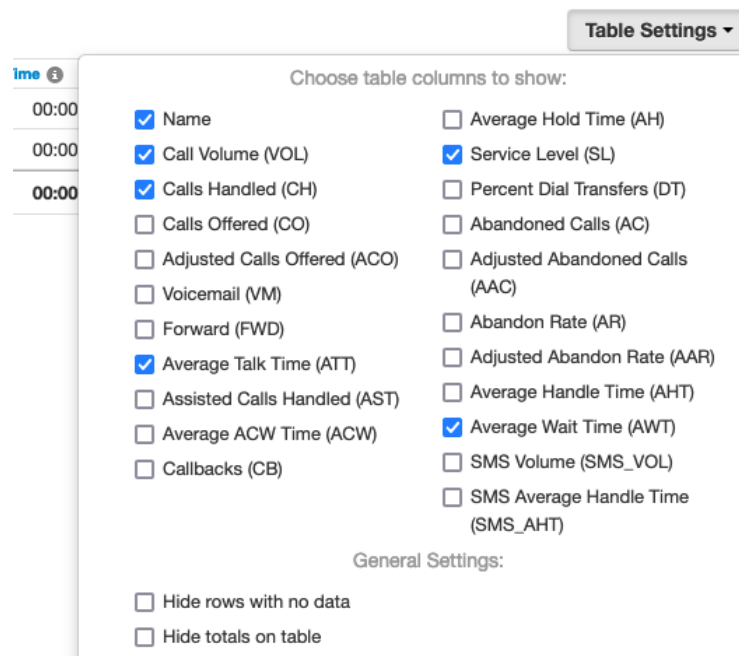


Table Settings

Choose table columns to show:

- Name
- Call Volume (VOL)
- Calls Handled (CH)
- Calls Offered (CO)
- Adjusted Calls Offered (ACO)
- Voicemail (VM)
- Forward (FWD)
- Average Talk Time (ATT)
- Assisted Calls Handled (AST)
- Average ACW Time (ACW)
- Callbacks (CB)
- Average Hold Time (AH)
- Service Level (SL)
- Percent Dial Transfers (DT)
- Abandoned Calls (AC)
- Adjusted Abandoned Calls (AAC)
- Abandon Rate (AR)
- Adjusted Abandon Rate (AAR)
- Average Handle Time (AHT)
- Average Wait Time (AWT)
- SMS Volume (SMS_VOL)
- SMS Average Handle Time (SMS_AHT)

General Settings:

- Hide rows with no data
- Hide totals on table

Queue Stats Table Settings: The following information can be displayed in your report

- **Call Volume (VOL):** the number of calls originating through a queue including answered calls, abandoned calls, forwards, and voicemail.
- **Calls Handled (CH):** number of calls answered by an agent originating through a call queue.
- **Calls Offered (CO):** Number of calls that reached the queue to be dispatched to agents. Includes abandoned calls and excludes forwards and voicemail.
- **Adjusted Calls Offered (ACO):** adjusted number of calls that reached the queue. Excludes calls abandoned in less than 10 seconds.
- **Voicemail (VM):** number of calls handled by the automated voicemail system.
- **Forward (FWD):** number of calls to another queue or offnet phone number for handling. Includes forwarded calls to voicemail.
- **Average Talk Time (ACW):** average number of minutes spent by agent talking per answered call on calls originating through a Call Queue.
- **Calls Assisted (AST):** number of calls answered and passed onto a different agent for further handling.
- **Average ACW Time (ACW):** average time an agent spends between the end of a call and submitting a call disposition.
- **Callbacks (CB):** number of calls where the caller requested a callback instead of waiting in the queue.
- **Average Hold Time (AH):** average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
- **Service Level (SL):** the ratio of calls meeting the configurable service level agreement.
- **Percent Dial Transfers (DT):** Percentage of calls that landed in the queue and were offered to an agent.
- **Abandoned Calls (AC):** number of calls that abandoned the queue before being offered to an agent.
- **Adjusted Abandoned Calls (AAC):** adjusted number of calls that abandoned the queue. Excludes calls abandoned in less than 10 seconds.
- **Abandon Rate (AR):** Percentage of calls offered that were abandoned.
- **Adjusted Abandon Rate (AAR):** Percentage of calls offered that were abandoned in under 10 seconds.

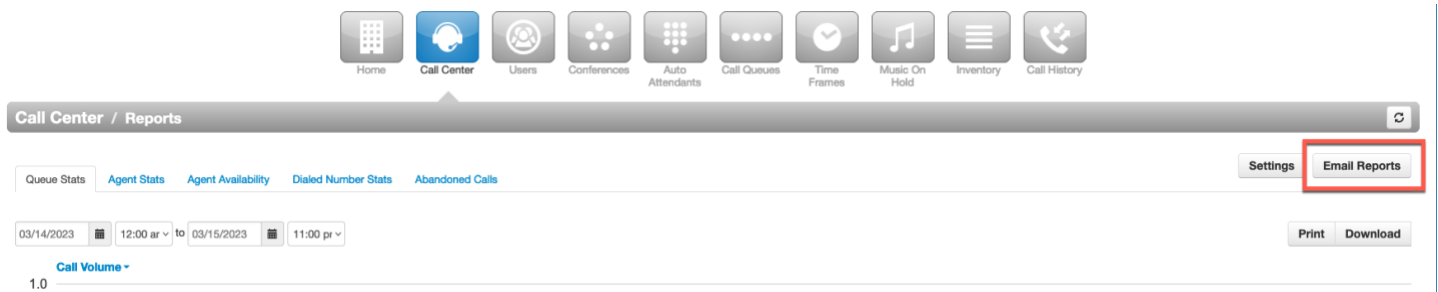
- **Average Handle Time (AHT):** Average time an agent spent on a call. Includes Talk Time, Hold Time, and Disposition Time.
- **Average Wait Time (AWT):** average number of seconds a caller spent in the selected queue before being dispatched to an agent. If none selected, total for all queues will be displayed.
- **SMS Volume (SMS_VOL):** number of SMS messages originating through a Call Queue.
- **SMS Average Handle Time (SMS_AHT):** average time an agent spent handling an SMS session.

Agent Stats Table Settings: The following information can be displayed in your report

- **Calls Handled (CH):** number of calls answered by agent originating through a call queue.
- **Time Talking (TT):** number of minutes spent by agent on answered calls originating through a call queue.
- **Average Talk Time ATT):** average number of minutes spent by agent talking per answered call on calls originating through a call queue.
- **Calls Assisted (AST):** number of calls answered and passed onto a different agent for further handling.
- **Average ACW Time (ACW):** average time an agent spends between the end of a call and submitting a call disposition.
- **Average Hold Time (AH):** average time a caller spends on hold with an agent. Excludes waiting time in the call queue.
- **Average Handling Time (AHT):** average time an agent spent on a call. Includes Talk Time, Hold Time, and Disposition Time.
- **Outbound Calls Today (OATT):** number of outbound call attempts by agent. Excludes on-net calls and conference calls.
- **Outbound Calls Answered Today (OANS):** number of outbound calls by agent answered by remote party. Includes calls answered by voicemail. Excludes on-net calls and conference calls.
- **Outbound Talk Time (OM):** number of minutes spent by agent on outbound calls. Includes talk and hold time. Excludes call center calls, on-net calls, and conference calls.
- **Outbound Average Talk (OAvg):** average length of time spent by agent on outbound calls. Excludes call center calls, on-net calls, and conference calls.

- **Inbound Calls Today (IA):** number of attempted calls inbound to agent. Includes call center calls. Excludes on-net calls and conference calls.
- **Inbound Calls Answered Today (IANS):** number of inbound answered calls to an agent. Includes call center calls. Excludes on-net calls and conference calls.
- **Inbound Talk Time (IM):** number of minutes spent by an agent on inbound calls. Includes call center calls. Includes talk and hold time. Excludes on-net calls and conference calls.
- **Inbound Average Talk (IAVG):** average length of time spent by an agent on inbound calls. Includes call center calls. Excludes on-net calls and conference calls.

To export and automate your custom reports:




The screenshot shows the 'Call Center / Reports' dashboard. At the top, there is a navigation bar with icons for Home, Call Center, Users, Conferences, Auto Attendants, Call Queues, Time Frames, Music On Hold, Inventory, and Call History. Below this, there is a sub-navigation bar with tabs for Queue Stats, Agent Stats, Agent Availability, Dialed Number Stats, and Abandoned Calls. On the right side of this bar, there are buttons for Settings and Email Reports, with the Email Reports button highlighted by a red box. Below the navigation bars, there is a date and time filter set to 03/14/2023 from 12:00 ar to 03/15/2023 at 11:00 pr. At the bottom left, there is a 'Call Volume' section showing a value of 1.0.


1. Select the **“Email Reports”** button on the top right side of the screen.
2. In the options, select the **“Type”** and **“Frequency”** of the reports you want to run. Customize the day of the week and time of day for your reports to be run. Once selected, the **“Advanced”** tab will appear.
3. In the **“Advanced”** tab, select the statistics you would like to include in the report. To select multiple statistics, hold *Ctrl (Windows) or ⌘ (Mac) or Shift*.
4. If you would like the reports to be sent to multiple people, add the email address below the statistics.
5. Select **“Save”** to generate the automated report.

Email Reports


Basic **Advanced**


Select your report types and the frequency they are sent.

Types 
 Summary
 Call Queue
 Agent
 Dialed Number

Frequency 
 Monthly
 Weekly
 Daily

Reports include data up to the email send time.


Weekly Send Day 


Send Time 


Email Reports

Basic **Advanced**


Customize your reports and add more recipients.

Statistics for Call Queues 
 Call Volume
 Calls Handled
 Calls Assisted
 Calls Offered
 Adjusted Calls Offered
 Voicemail

Statistics for Agents 
 Department
 Calls Handled
 Calls Assisted
 Time Talking
 Average Talk Time
 Average Hold Time

Statistics for Dialed Numbers 
 Call Volume
 Calls Handled
 Calls Assisted
 Calls Offered
 Adjusted Calls Offered
 Voicemail

Hold Ctrl/CMD or Shift to select multiple.

Extra Email Addresses 

Attach CSV data to Email

NOTE: The Call Queue reporting only reports on call center activity and NOT user activity. Example: If a user makes an outbound call that is not through the call center, it will not be reported in Call Center Reports. You would need to use Call History Reporting to include that call.

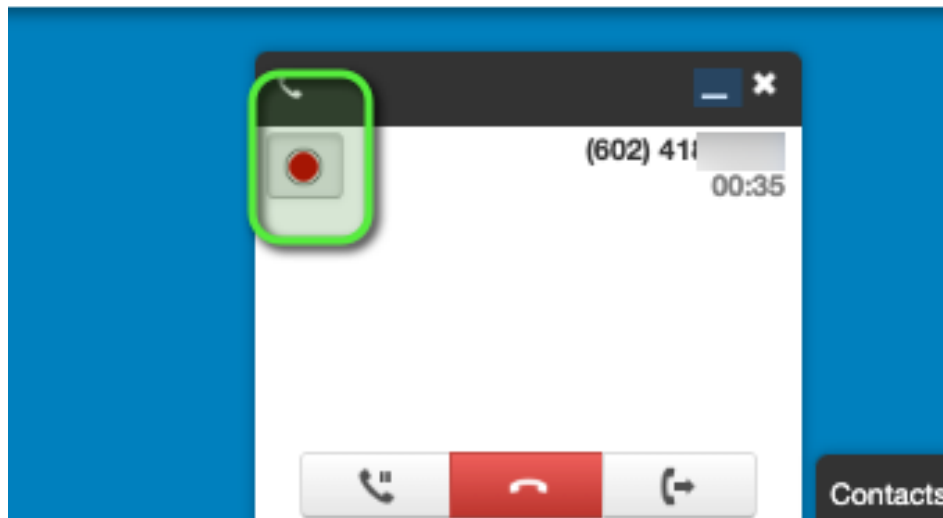
Introduction

The VIP Portal provides the option to record calls that occur in your domain. These recordings can be used for your needs such as training purposes, quality control, etc. Call Recordings can only be turned on/off and listened to by an Office Manager. **All call recordings are stored in the portal for 90 days unless you configure them to be offloaded to an external storage solution.**

This guide will walk you through the steps to **initiate call recordings on demand, record calls for a user, from a call queue, offload your calls to external storage for long-term retention and to access your recordings.**

Recording a Call on Your Desk Phone Using the Portal

1. While you are on an active call, open your Crexendo VIP Portal where you will see the active call you are currently on.
2. Press the record option which will initiate the call recording without alerting the caller.

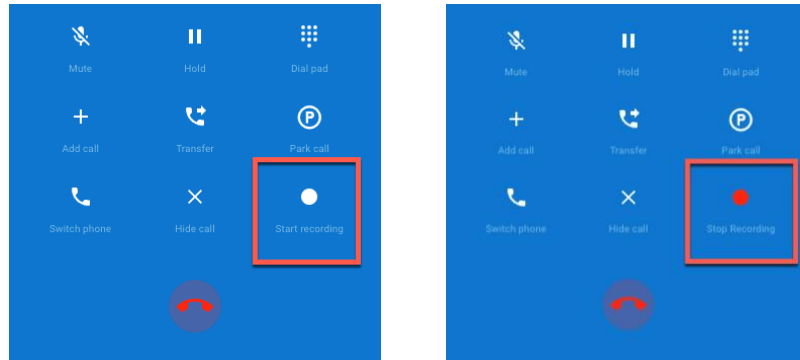


Recording a Call on Your Desk Phone Using *81.

1. While on an active call, place the call on **HOLD**. The caller will hear hold music only.
2. While the call is on **HOLD**, press ***81** to initiate the call recording without alerting the caller that the call is being recorded.
3. Take the caller off **HOLD** and resume the call.
4. To stop the recording, place the caller on **HOLD** and press ***82** to stop the recording.

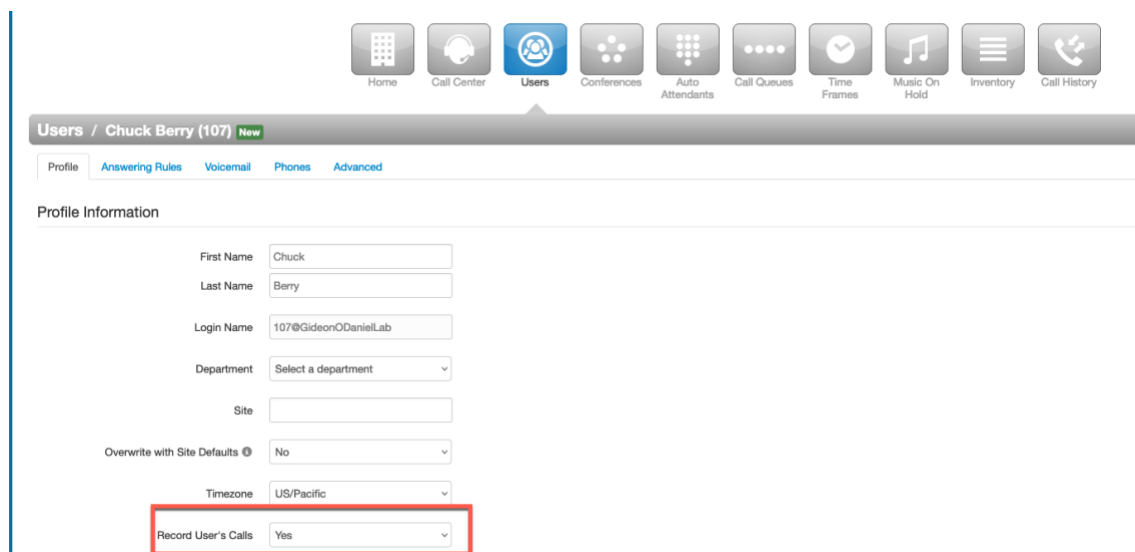
Recording a Call on Your Web Phone

1. While on an active call, select “**Start recording**” on the in-call options. This will NOT alert the caller that you are recording the call.
2. To end the recording, select “**Stop Recording**” in the in-call options.

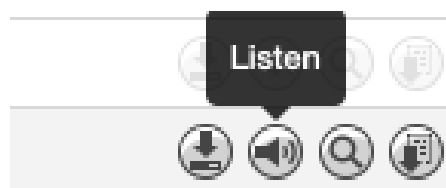


How to Turn on Call Recordings for a User

1. Login to the VIP Portal for Managers.
2. Select the “**Users**” navigation button at the top of the page.
3. Select the user you would like to enable call recordings on.
4. In the user’s “profile Information”, select the drop-down menu for “**Record User’s Calls**”.



5. Select “**Save**”. The user’s call recordings will appear in the **Call History** and can be listened to or downloaded.



How to Turn on Call Recordings for a Call Queue

1. Login to the VIP Portal for Managers.
2. Select the “**Call Queues**” options from the top of the page.
3. Select the call queue that you would like to turn on call recordings.
4. In the “Basic” information tab, select the drop-down arrow for “**Record Calls**” and select “**Yes**”.
5. Select “**Save**”.

Edit Customer Service Daytime Ring All ×

Basic Pre Queue Options In Queue Options SMS

Extension 2000

Note: Extension cannot be changed

Department Customer Service

Site

Type Round-robin (longest idle) ⓘ Tiered Round-robin ⓘ Ring All ⓘ Linear Hunt ⓘ Linear Cascade ⓘ Call Park ⓘ

Direct Phone Number(s)

Record Calls ⓘ No

Statistics ⓘ Yes

Cancel Save

Call Recordings for the queue can be found in **Call History** or in the **Reporting section of Call Center** if Call Center is enabled on your domain.

Call History:

Call ID	Caller Name	Caller Number	DNIS	Time In Queue	Agent Extension	Agent Phone	Agent Name	Agent Time	Agent Release Reason	Queue Release Reason	Actions
103					103	103		Today, 7:02 am	4:47		   
107					107			Yesterday, 4:28 pm	0:00		   
107					107			Yesterday, 4:28 pm	0:00		   

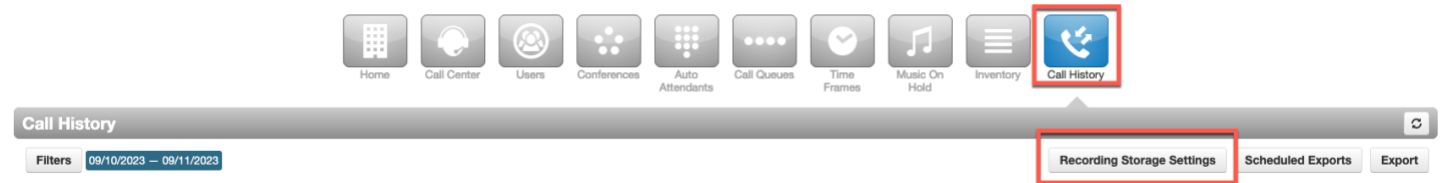
Call Center:

Call Time	Caller Name	Caller Number	DNIS	Time In Queue	Agent Extension	Agent Phone	Agent Name	Agent Time	Agent Release Reason	Queue Release Reason	Actions
09/11/2023 7:02 am				00:09	103	103		04:38	Orig: Bye	Orig: Bye	   

How to Add Remote Storage for Call Recordings

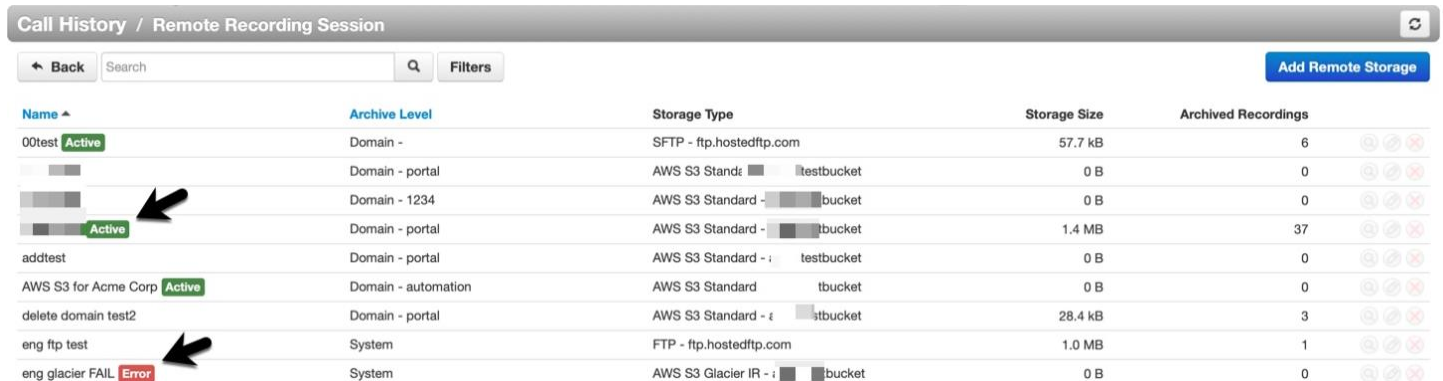
Call Recordings are stored in the VIP Portal for 90 days. If you would like to keep your recordings for longer than 90 days, you will need to configure your calls to offload onto external storage.

1. Navigate to the Portal and the **"Call History"** screen. Select the **"Recording Storage Settings"** button. This opens a **"Remote Recording Session"** page, nested under the **"Call History"** page. These are all remote call recording configurations in your system.



This opens a **"Remote Recording Session"** page, nested under the **"Call History"** page. These are all remote call recording configurations in your system.

Note: the green **"active"** tags below for configurations that are currently enabled, and the red **"error"** tag for a configuration that has configuration errors.



Name	Archive Level	Storage Type	Storage Size	Archived Recordings
00test Active	Domain -	SFTP - ftp.hostedftp.com	57.7 kB	6
	Domain - portal	AWS S3 Standi - testbucket	0 B	0
	Domain - 1234	AWS S3 Standard - bucket	0 B	0
	Domain - portal	AWS S3 Standard - bucket	1.4 MB	37
addtest	Domain - portal	AWS S3 Standard - testbucket	0 B	0
AWS S3 for Acme Corp Active	Domain - automation	AWS S3 Standard - bucket	0 B	0
delete domain test2	Domain - portal	AWS S3 Standard - bucket	28.4 kB	3
eng ftp test	System	FTP - ftp.hostedftp.com	1.0 MB	1
eng glacier FAIL Error	System	AWS S3 Glacier IR - bucket	0 B	0

2. Click **"Add Remote Storage"** and fill out the following fields and then click **"Add."**
 - **"Archive Level"** indicates which calls are retrieved for remote storage.
 - **"System"** is a catch all for calls that do not match the specified Reseller or Domain name.

If either **"Domain"** or **"Reseller"** is selected, then there will be no failover or additional copy sent to the other matching levels. For each recording, it will find the best enabled match and attempt to use that and only that configuration.

Add Remote Recording Storage

Name

Archive Level

Domain

Active NO

Storage Type

Region

Bucket

Access Key

Secret

Email Contacts

System: catch all default if calls do not match anything else

Domain: calls matching the specified domain

Reseller: calls matching the specific reseller

Cancel
Add

Required. Friendly name, at least 6 characters

If the option is greyed out (cannot click it), check your fields again. Every field needs to be filled out.

- After filling out the required fields in the modal, the **"Add"** button should be able to be selected.

Now the system will audit the addition of this configuration. Using the information provided, the Portal will work alongside the API to authenticate the remote side, upload a small .wav file, read it back, and then remove it to test all access requirements for this feature to perform correctly. *This process should take between 2 and 15 seconds.*

Add Remote Recording Storage

Test for "AWS S3 for Acme Corp".

Testing...

Authentication

Testing...

Upload

Testing...

Check

Testing...

Read

Testing...

Delete

Validation in Progress...

Cancel

4. If successful, the prompt will look like this: **"Test passed! Storage settings saved."**

Add Remote Recording Storage ×

Test for "AWS S3 for Acme Corp".

PASS

 Authentication

PASS

 Upload

PASS

 Check

PASS

 Read

PASS

 Delete

Test passed! Storage settings saved.

Back

Close

Now the new configuration will be listed in the table on the **"Remote Recording Session"** page. Each row in this table displays its current configuration as well as its current storage size and archive recording count. The count should start to increment once the configuration is activated and has call recordings to archive.

Call History / Remote Recording Session ↻

← Back

Q
Filters
Add Remote Storage

Name: eng s3 test ×

Name	Archive Level	Storage Type	Storage Size	Archived Recordings	
eng s3 test	System	AWS S3 Standard - aakertestbucket	46.4 MB	326	ⓘ ⚙️ ✖️

To listen to your archived call recordings, use the same process as listening to any recorded call from the **Call History** page. If the file is remote and not local, there will be a small added delay while the recording is fetched. This only happens once the **"Play"** button is pressed and not on the **Call History** page load. If **"Play"** is activated, then a local copy will be left on the Recording Server for several hours to prevent repeated requests for the same file.

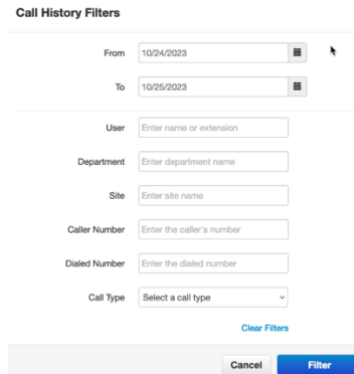
From Name	From	QOS	Dialed	To	QOS	Date	Duration	Reason
netsapiens	(858) 555-0123		(317) 222-2222	(317) 222-2222		Today, 8:18 pm	0:13	

⏸ 0:08 / 0:12🔊 ⋮

How to Listen to Your Call Recordings

From Call History:

1. From the VIP Portal, select “**Call History**” at the top of the page.
2. Select the “**Filters**” button to search for the call or calls that you are looking for.
3. Select “**Filter**” to run the search.



Call History Filters

From: 10/24/2023

To: 10/25/2023

User:

Department:

Site:

Caller Number:

Dialed Number:

Call Type:

Clear Filters

Cancel Filter

4. If there is a call recording available, select the “**play**” or “**download**” buttons to play the recorded call.

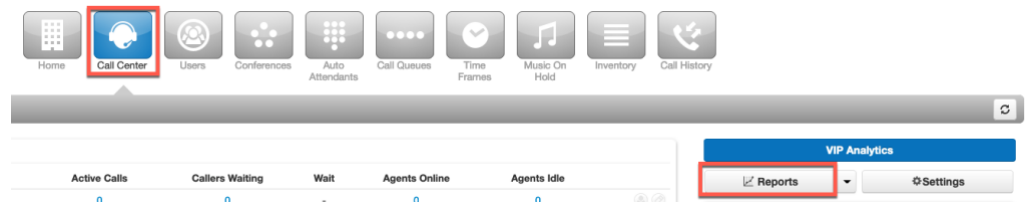


Call ID	Duration	Date/Time	Recording
103	4:47	Today, 7:02 am	
107	0:00	Yesterday, 4:28 pm	
107	0:00	Yesterday, 4:28 pm	

NOTE: There may be more than one recording for the same call depending on how many users were on the call. If “user 1” transfers the call to “user 2”, the recording will show twice in the Call History.

From Call Center

1. From the VIP Portal, select “**Call Center**” at the top of the page.
2. Select “**Reports.**”



Home Call Center Users Conferences Auto Attendants Call Queues Time Frames Music On Hold Inventory Call History

Active Calls Callers Waiting Wait Agents Online Agents Idle

VIP Analytics

Reports Settings

3. From either the “**Queue Stats**” or the “**Agent Stats**” tab, select a number in one of the columns and rows to open a list of all corresponding calls.
4. On the right side of each call, select either the “**play**” or “**download**” buttons for the recording.



Call Time	Caller Name	Caller Number	DNIS	Time in Queue	Agent Extension	Agent Phone	Agent Name	Agent Time	Agent Release Reason	Queue Release Reason	Recording
09/11/2023 7:02 am				00:09	103	103		04:38	Orig: Bye	Orig: Bye	

Introduction

The **VIP Portal for Users** is a web-based tool that is available to be used to access your own settings including *messages (voicemail, SMS, and fax)*, *add personal contacts*, *customize your own answering rules*, *and time frames*, *edit your physical phone settings*, *music on hold options*, and *your call history for your extension*.

This guide will guide you through **navigating the VIP Portal for Users and the options included**.

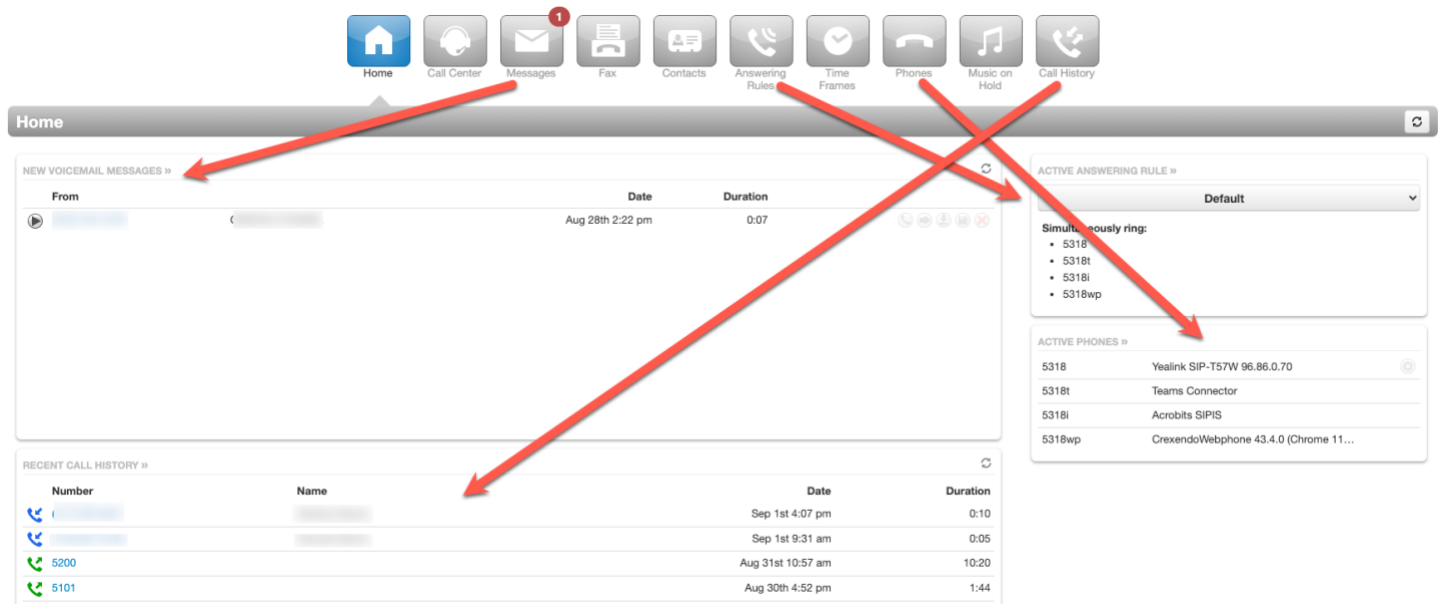
For a video demonstration, go to:

https://www.youtube.com/watch?v=lprw3iYzzHQ&list=PLXAD0ltuavV9jC_HL7NiOiBoKA9VZIBxm&index=4



Home

The **Home** screen displays a quick at-a-glance view of the other areas of the portal including **New Voicemail Messages, Active Answering Rule, Active Phones, and Recent Call History**.



NEW VOICEMAIL MESSAGES »

From	Date	Duration
	Aug 28th 2:22 pm	0:07

ACTIVE ANSWERING RULE »

Default

Simultaneously ring:

- 5318
- 5318t
- 5318i
- 5318wp

ACTIVE PHONES »

5318	Yealink SIP-T57W 96.86.0.70
5318t	Teams Connector
5318i	Acrobats SIPIS
5318wp	CrexendoWebphone 43.4.0 (Chrome 11...

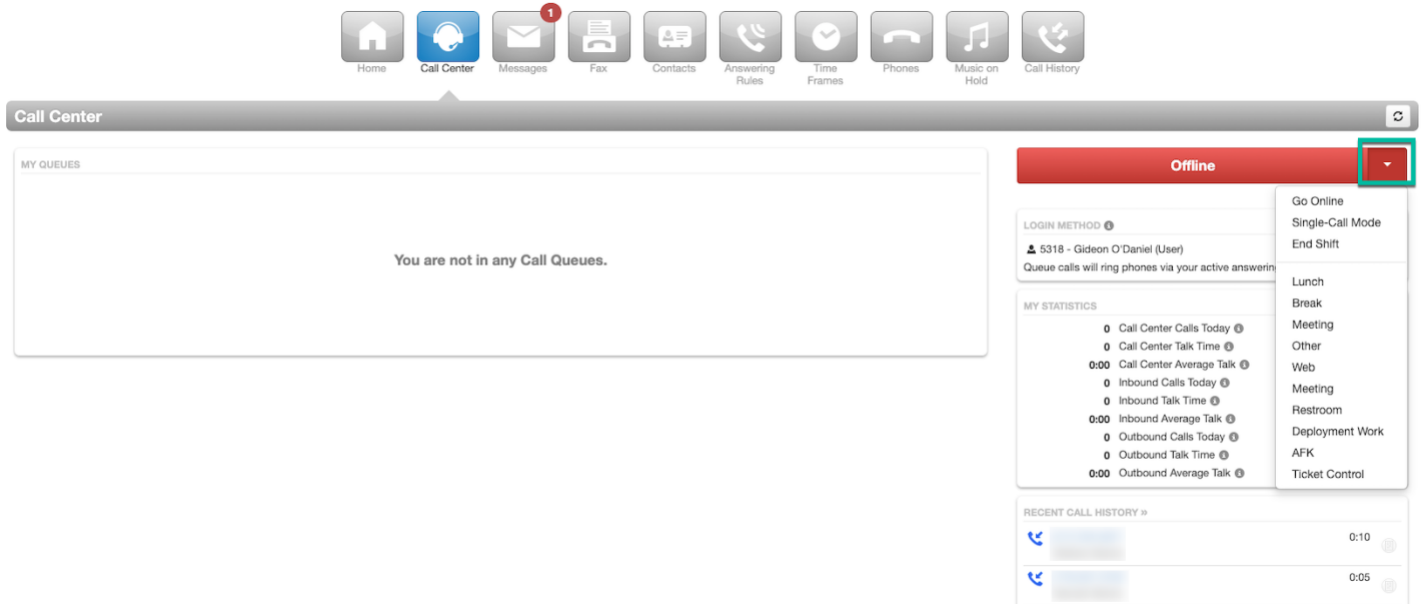
RECENT CALL HISTORY »

Number	Name	Date	Duration
		Sep 1st 4:07 pm	0:10
		Sep 1st 9:31 am	0:05
5200		Aug 31st 10:57 am	10:20
5101		Aug 30th 4:52 pm	1:44

Call Center

This option will only be available if you are listed as a Call Center Agent.

The **Call Center** sections shows your current statistics, call history, and any queues that you are assigned to with the option to login/logout of all queues or specific queues. To logout using a reason, select the arrow next to the status and choose a reason for logging out.



Messages

The Message Center is where you can manage voicemails, chat/SMS messages, and voicemail settings which are grouped into three tabs:

1. **Voicemail Tab:** this tab shows any new voicemail messages that you have received. These messages can be listened to directly from this tab. You can access any saved messages by selecting the drop-down menu.



2. **Chat Tab:** this tab shows any internal messages with other users in your domain. If you have been granted access to send SMS messages to external phone numbers, you can read and send messages from this tab as well. **For more information on SMS, please see [VIP SMS](#).**
3. **Settings Tab:** this tab provides customization options for your voicemail.
 - a. **Enable Voicemail:** Uncheck the box to turn off your voicemail.
 - b. **Options:** Provides options for sorting your voicemail.

- c. **Operator Forward:** You can direct a caller that gets your voicemail to press “0” to be forwarded to another user. Simply enter the extension that they can be forwarded to.
- d. **Copy to extension(s):** If you would like your voicemails to be copied to another user’s voicemail, enter the name or extension you would like this to happen for. **NOTE:** This simply copies the voicemail to another user, but it does NOT mirror the actions that someone takes with that voicemail. If you delete the voicemail, it does NOT delete the voicemail in another user’s voicemail box.
- e. **Voicemail Transcription:** enable this option if you would like your voicemails transcribed so you can read them.
- f. **Options:** You can receive an email when your mailbox is full or if you have missed a call.
- g. **Voicemail Greeting:** To add a new voicemail greeting from the VIP Portal:

- i. Select the “**Manage**” button.



- ii. Select “**Add Greeting**” at the bottom of the window.
- iii. Select the method you would like to use to add your new greeting:

1. **Text-To-Speech:** Allows you to type in your message and select a voice inflection that will read your message.
2. **Upload:** Allows you to upload a recording that you may have from the past.
3. **Record:** Allows you to specify where you would like to be called to record your message.

Manage Greetings

- New Greeting
- Text-To-Speech ⓘ
 - Upload
 - Record

- iv. Select “**Save**” to add your greeting. You can delete any old messages that you do not need.
- h. **Recorded Name:** allows you to use the record, text-to-speech, and upload methods to record your name if you do not want to add a voicemail greeting.
- i. **Email Notifications:** This option sends you an email notification if you receive a new voicemail. This can be set to automatically delete the voicemail from your inbox once it has been sent to your email inbox.

Notifications

Email Notifications Receive an email for new voicemail

Email Type

After Email Notification

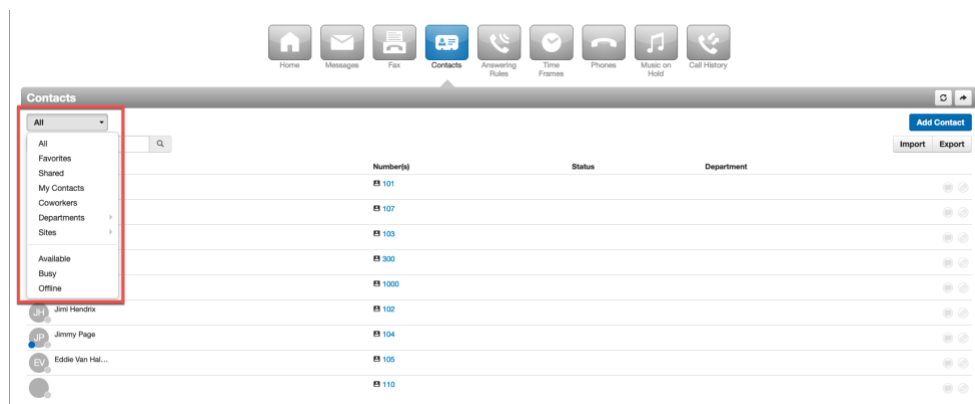
Fax

If your organization utilizes Crexendo for your faxing needs, you can send/receive/read faxes through the VIP Portal and email. For more information on faxing, please see [VIP Fax Guide](#).

Contacts

The Contact section of the portal is a collection of all internal contacts and any personal contacts that you add to your contacts.

To filter through your contacts, simply select the drop-down menu and choose the category you would like to see which includes: **All contacts, Favorites, Shared, My Contacts, Coworkers, Departments, Sites, Available, Busy, or Offline.**



Internal contacts are marked with colored dots:



Green: They are available for a call



Red: They are not available for a call



Blue: They can receive a chat message which means they are logged in to the portal, web phone, or mobile app.

To add a new contact:

1. Select **"Add Contact"** on the upper right side of the screen which will open a new window.

- Enter in as much information as you would like to add and select “Save”.

Add Contact ×

First Name

Last Name

Work number

Mobile number

Home number

Fax number

Email

Time Frames

Time Frames allow you to set periods of time that you want the Crexendo environment to pay attention to such as vacations, recurring meetings, or emergency leave.

NOTE: Specifying time frames only makes the system aware of these periods. **A time frame (by itself) does not cause the system to perform any actions** or respond to certain events (such as phone call) during these periods. Time Frames are closely related to and work together with **Answering Rules** where you direct the system to perform actions.

To Create a new Answering Rule:

- From the VIP Portal, select “**Add Time Frame**”.
- Select “**Add Time Frame**” at the top right side of the screen.
- Name the time frame so that you can recognize it such as *Weekly Team Meeting*.
- Select when you would like this time frame to take place:
 - Always:** this would be always in affect unless you deactivate it.
 - Days of the week and times:** This would be to schedule a recurring weekly schedule such as meetings, personal business hours, half day Fridays, etc. A scheduler will open to set that schedule accordingly.

Add a Timeframe ×

Name Note: Name cannot be changed

When Always Days of the week and times Specific dates or ranges

Sunday Monday Tuesday Wednesday

12:00 am 6:00 am 12:00 pm 6:00 pm 11:59 pm

12:00 am 6:00 am 12:00 pm 6:00 pm 11:59 pm

12:00 am 6:00 am 12:00 pm 6:00 pm 11:59 pm

12:00 am 6:00 am 12:00 pm 6:00 pm 11:59 pm

- c. **Specific dates or ranges:** This option would be for vacations, appointments, etc. When selected, a scheduler option will appear to schedule one or several days to apply to the time frame.

Add a Timeframe ✕

Name **Note:** Name cannot be changed

When Always Days of the week and times Specific dates or ranges

Specific dates or ranges

5. To choose what your calls do when the time frame occurs, add an answering rule for the time frame.

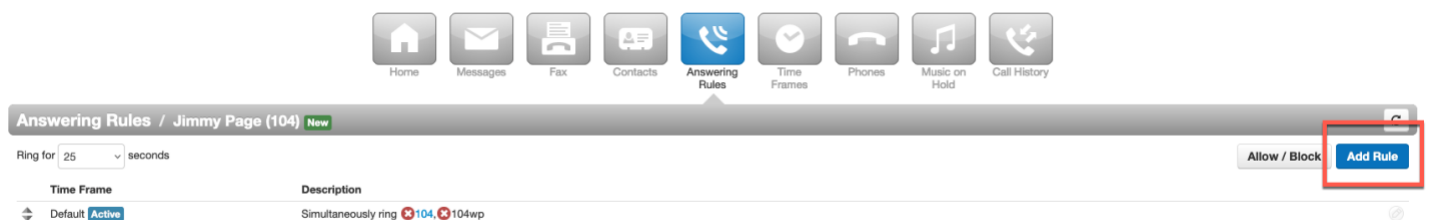
Answering Rules

Answering Rules is where you tell the system what to do during a particular time frame when any of your devices receives a call.

- Answering Rules take on the name of the time frame they are attached to. For example, the “Business Hours” answering rule is based on the “Business Hours” time frame.
- Once the time frame is chosen, you can select what actions should be performed such as go to voicemail, forward to a user, etc.

To Create a new Answering Rule:

1. From the VIP Portal, select “**Answering Rules**”.
2. Select “**Add Rule**” at the top right side of the screen.



3. Select the time frame that you want to apply the rule to from the drop-down menu.

Add an Answering Rule

Time Frame Select a time frame
 Business Hours
Holiday
 My Business Hours
 Non Business Hours

This is when your answering rule will apply

Call screening

Call Forwarding

Always

On Active

When busy

When unanswered

When offline

Simultaneous ring

Include user's extension

Ring all user's phones

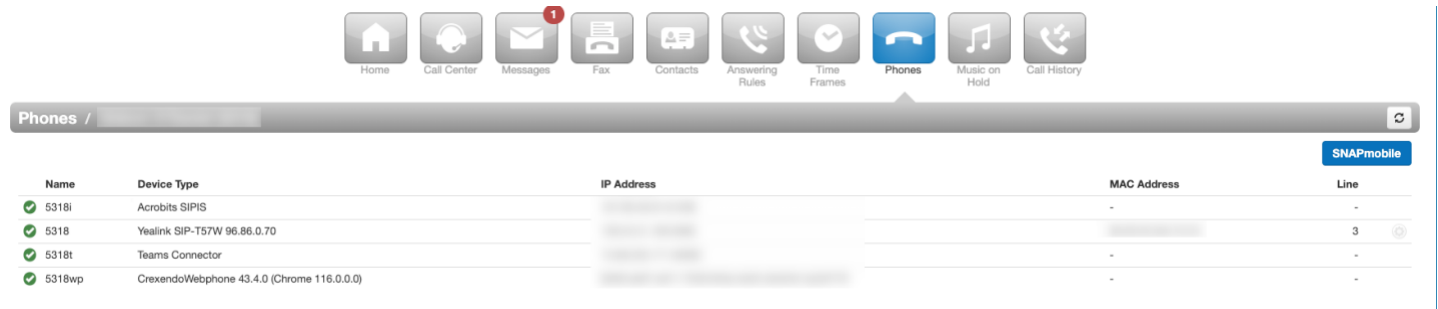
Answer confirmation for offnet numbers

Just ring user's extension

4. Select what you want the call to do when the time frame is active such as: Do Not Disturb, Call Forwarding (to your voicemail, to an outside phone number, or to another user), or which phone to ring such as your mobile app only or desk phone only.
5. Select **“Save”** to complete your answering rule.

Phones

The Phones section is where all devices that are registered to you are displayed.



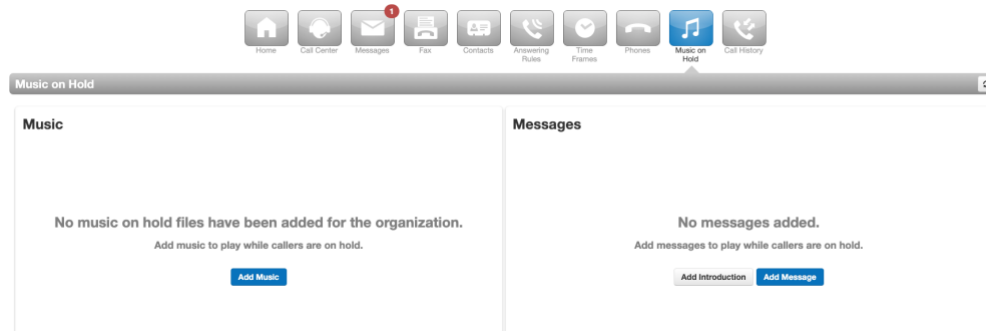
Name	Device Type	IP Address	MAC Address	Line
5318i	Acrobatis SIPIS		-	-
5318	Yealink SIP-T57W 96.86.0.70			3
5318t	Teams Connector		-	-
5318wp	CrexendoWebphone 43.4.0 (Chrome 116.0.0.0)		-	-

If you are using a desk phone, you can edit the line buttons using **“SNAPbuilder”** which can be opened by selecting the **“gear”** icon next to the phone. For more information on editing your phone’s buttons, see the [SNAPbuilder](#) guide.

Music on Hold

This section allows you as a user to set specific music or messages that can be played when you place a caller on hold. Most of the time, music on hold is set at the domain level and all other users use whatever has been set by the Office Manager. If you would like to add your own hold music, please speak with your office manager first.

For instructions on how to add your own hold music or messages, please see the guide for [Music on Hold](#).

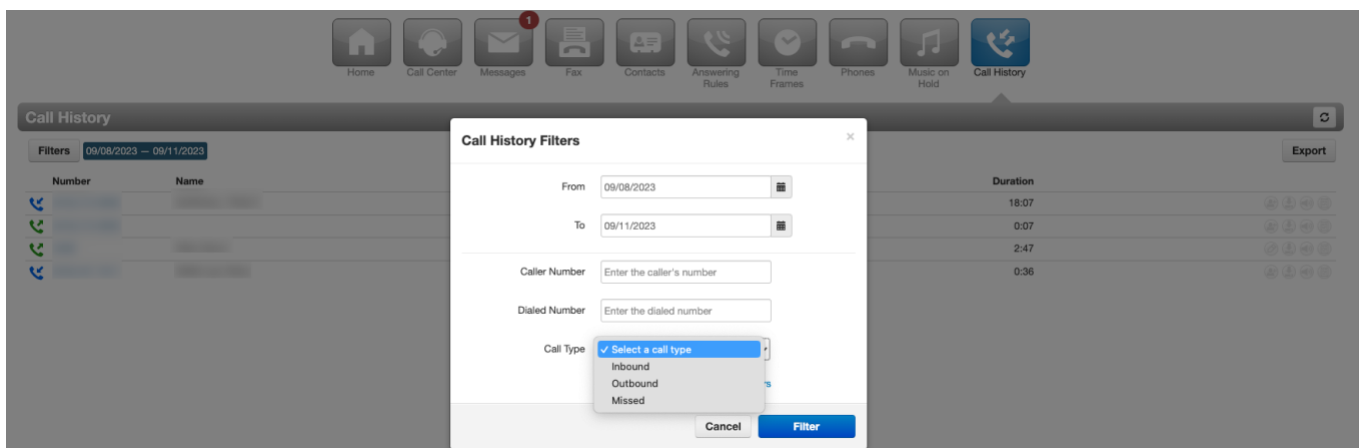


Call History

The Call History section of the portal provides a record of all incoming and outgoing calls associated with your extension. The portal will automatically display the last three days of calls, but you can filter for specific dates, numbers, incoming/outgoing, etc.

To Filter Your Call History:

1. Select “**Filter**” from the top left side of the Call History page.
2. Select the date or dates you would like to see and any other information including Caller Number, Dialed Number, or Call Type.



3. Select “**Filter**” to run the search.

Note: If you are a call center agent that receives calls through a call queue, those calls will NOT appear in your call history. Those calls will show in the supervisor’s call queue report.

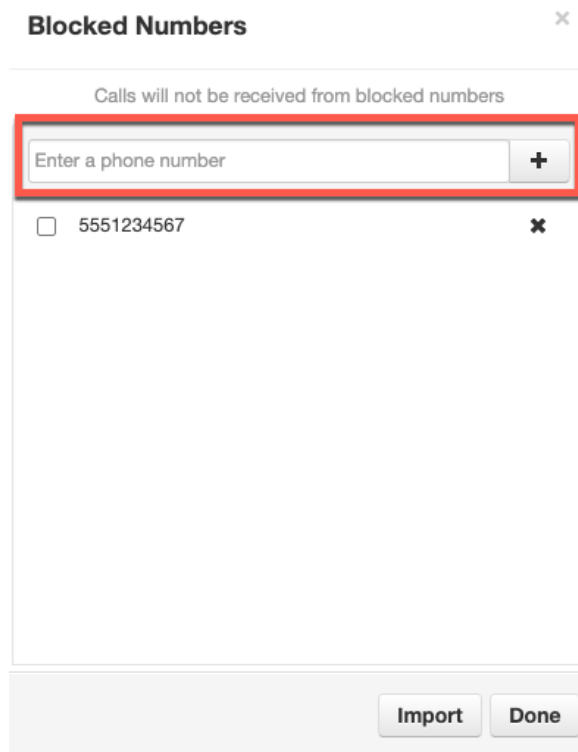
To block SPAM or Robo Calls:

If you would like to block a SPAM or Robocall number from being able to call you:

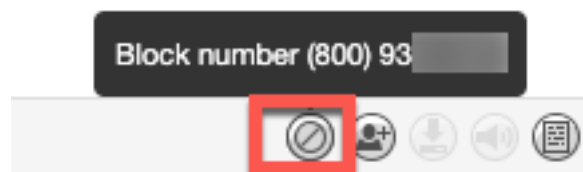
1. Select the “**Blocked Numbers**” button.



2. Enter the number into the blank and press the “+” button.

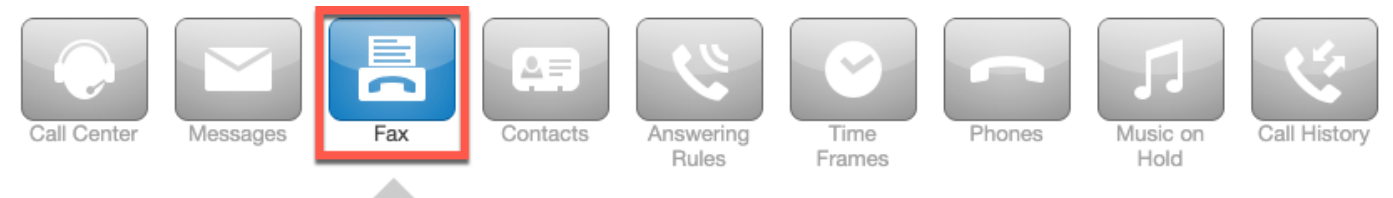


3. You can also block a number from the Call Details section by selecting the Block Call icon.



Introduction

This guide contains the procedures to use the faxing features on the VIP Platform for both inbound and outbound faxes.



Receiving Inbound Faxes

Once the fax feature is enabled by Crexendo, incoming faxes will be delivered to the email address(es) of your choosing. You can have faxes delivered to one or more recipients (email addresses). When a fax is received into your fax number, the fax is delivered to all email addresses attached to that fax number. Please contact Crexendo Customer Support to make changes to your fax services.

Senders have a couple of ways to send faxes to your organization:

- **Physical Fax Machine:** The sender can use their fax machine and send a fax to your organization's fax number as normal.
- **Email:** A sender can send a fax to you as if they are sending an email. The body of the email is considered the cover page and the attachment is the actual faxed document. The sender must send to this email address:
 - **1 + your ten-digit fax number@fax.crexendovip.com**

Sending Outbound Faxes

VIP Faxing allows you to send and receive faxes via your email, the VIP Portal, or through a physical fax machine.

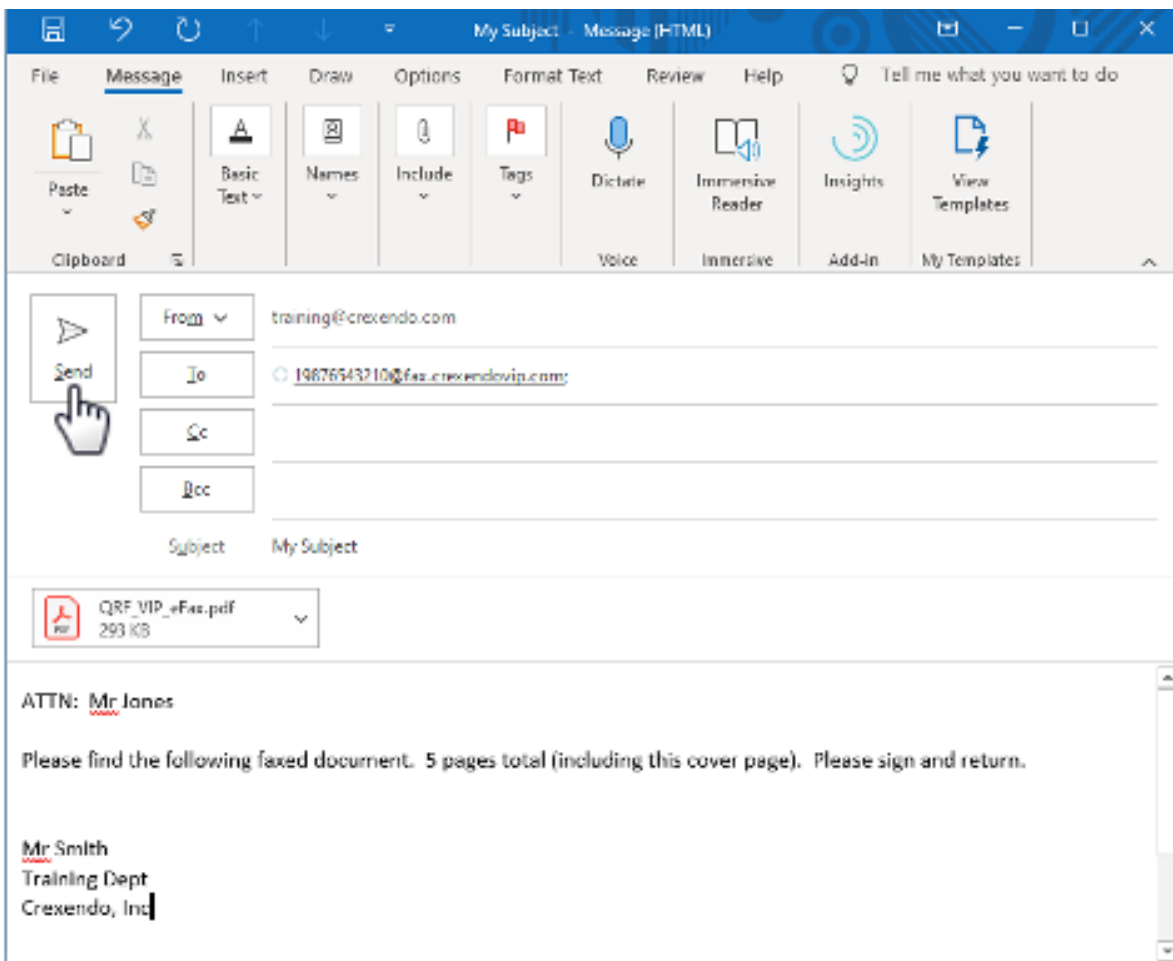
Outbound Faxes – Email

Crexendo configures the fax system so that only **authorized** users can send faxes on behalf of your organization. Customers should provide a list email addresses of authorized fax senders.

After a fax is sent by an authorized user, that user will receive periodic fax-status emails such as when the fax is pending and when it is sent successfully.

To send an outbound fax via email:

- 1) Launch your email client and open a new email, and enter the following:
 - a. **TO:** 1 + outgoing ten-digit fax number@fax.crexendovip.com
 - b. **SUBJECT:** Fax Subject
 - c. **BODY:** Cover Page Content
- 2) Attach the documents you wish to fax (**3 maximum**)
- 3) Click the “**Send**” button.

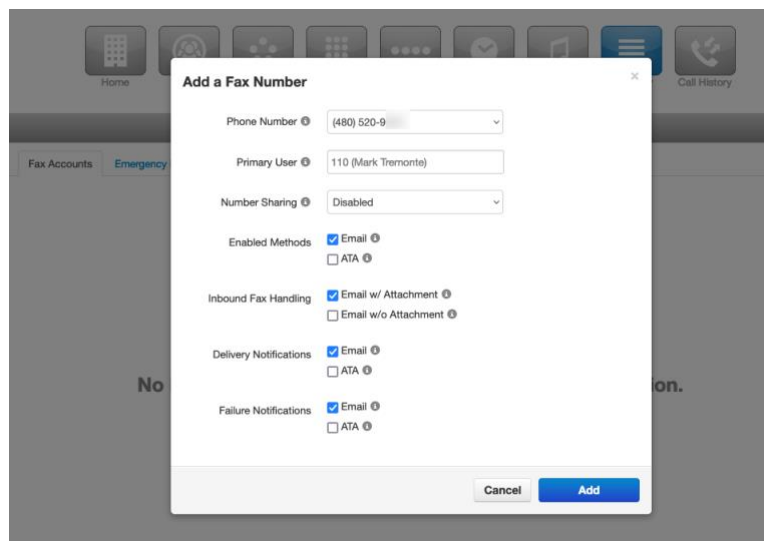


After the email has been sent, you will receive an email with a delivery confirmation.

Outbound Faxes – VIP Portal

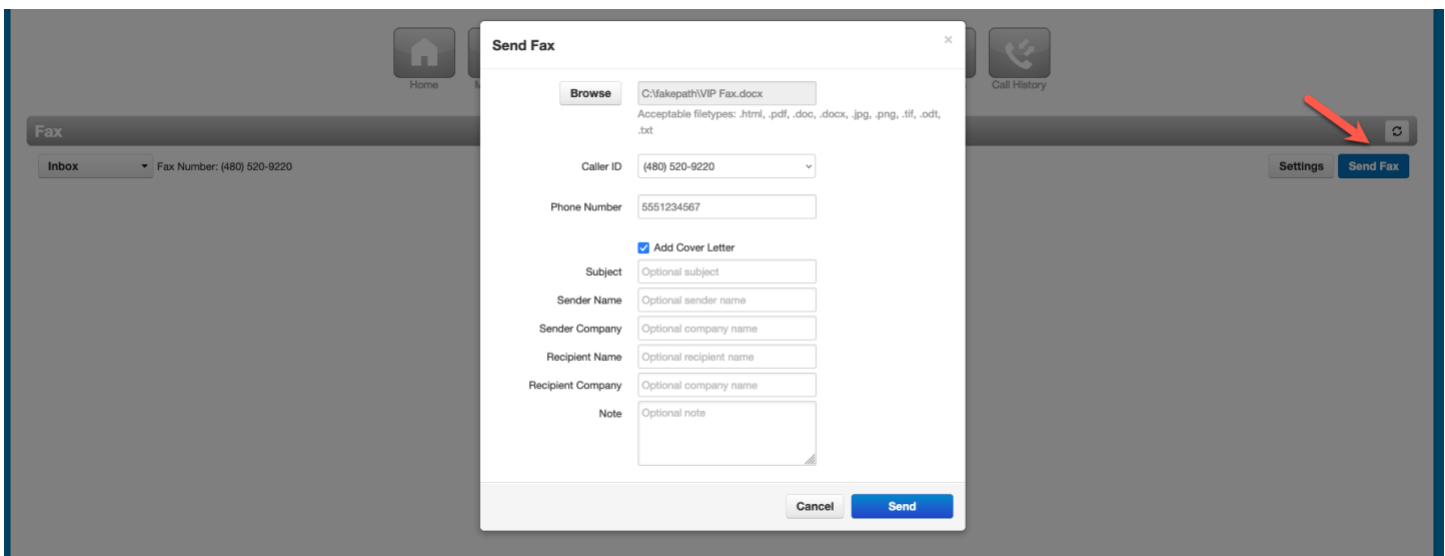
To Setup a User to Fax from the Portal:

1. Login to the VIP Portal as an “**Office Manager**” and click “**Inventory**.”
2. Select the “**Fax Accounts**” tab and click “**Add Fax Number**” on the right side of the screen. This will open a new window.
3. Fill in the blanks:
 - a. **Phone Number**: use the drop-down menu to select the fax number.
 - b. **Primary User**: this will be the primary owner of this fax number.
 - c. **Number Sharing**: LEAVE DISABLED. This feature is not available currently to use in the portal.
 - d. **Enable Methods**: Select Email ONLY
 - e. **Inbound Fax Handling**:
 - i. **Email w/ Attachment**: sends an email with the new inbound fax attached. (Recommended)
 - ii. **Email w/o Attachment**: sends an email without the fax attached.
 - f. **Delivery Notifications**: Select Email ONLY. This will send you an email confirmation upon a successful delivery of outbound fax.
 - g. **Failure Notifications**: Select Email ONLY. This will send you an email confirmation of a failure of the outbound fax being delivered.
4. Click “**Add**”



To Send an Outbound Fax from the Portal:

1. Login to your VIP Portal. If you are an **“Office Manager,”** click on your name on the upper right side of the screen and select **“My Account.”**
2. Select the **“Fax”** Button at the top of the screen. This will open your Fax Inbox. If you have received any new faxes, they will appear here. Click the drop-down arrow to see any sent faxes.
3. To send an outbound fax, select **“Send Fax”** on the right side of the screen. This will open a new dialogue box.
4. Click **“Browse”** to attach the fax you would like to send. The Caller ID displays your fax number.
5. Enter the destination fax phone number.
6. To add a cover sheet (optional) select **“Add Cover Sheet”** and fill in the blanks provided.
7. Click **“Send”**



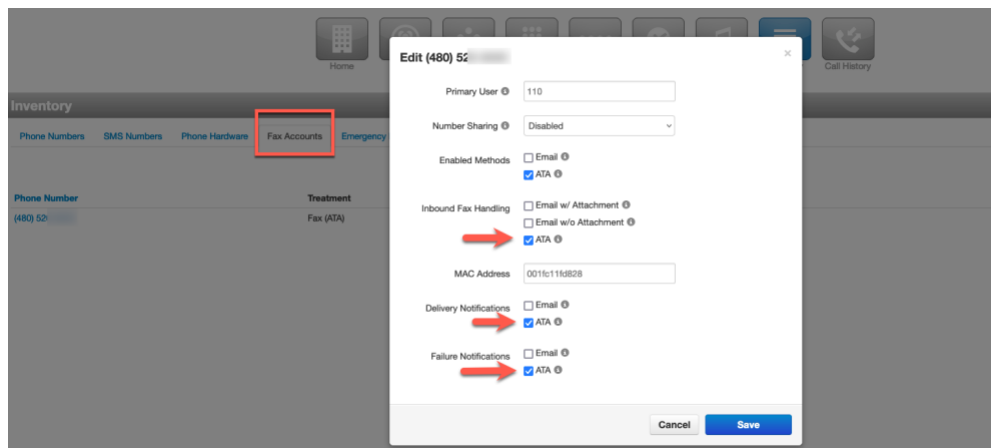
8. To check the status of the fax, either select the drop-down for your **“Sent”** faxes or check your email inbox for the confirmation email.

Outbound Faxes – Fax Machine

If you would like to use your existing fax machine to send and receive faxes, you must contact Crexendo Sales to order an “ATA” that will need to be connected to your fax machine.

To set up your ATA and fax machine:

1. Connect your fax machine to the ATA by connecting the RJ11 ports on the fax machine and the ATA with an RJ11 cable. Then connect the ATA's network access port using a network cable (RJ45) to the customers network port/switch/network wall jack.
2. Login to the VIP Portal as an Office Manager and click “**Inventory.**”
3. Select the “**Fax Accounts**” tab and click “**Add Fax Number**” on the right side of the screen. This will open a new window.
4. Fill in the blanks:
 - a. **Phone Number:** use the drop-down menu to select the fax number.
 - b. **Primary User:** this will be the primary owner of this fax number.
 - c. **Number Sharing:** LEAVE DISABLED. This feature is not available currently to use in the portal.
 - d. **Enable Methods:** select ATA ONLY
 - e. **Inbound Fax Handling:** select ATA ONLY.
 - f. **MAC Address:** enter the MAC address of the ATA.
 - g. **Delivery Notifications:** select ATA ONLY.
 - h. **Failure Notifications:** select ATA ONLY.
5. Click “**Add**”



Introduction

This guide illustrates **how to use SNAPbuilder to change the feature and line buttons on your Crexendo desk phone.**

For a video demonstration, go to:

https://www.youtube.com/watch?v=n0OLkZVWPh4&list=PLXAD0ltuavV9jC_HL7NiOiBoK_A9VZIBxm&index=2

NOTE: *SNAPbuilder is only used for feature buttons (not Soft Keys). Feature/line buttons are located on the left and right side of your desk phone display screen.*

Accessing SNAPbuilder in the VIP Portal

To access SNAPbuilder, login to the VIP Portal. SNAPbuilder works the same for all users and only works on desk phones. **It is not for use for the VIP Mobile App or Web Phone.**

SNAPbuilder is in different places in the VIP portal depending on the permissions that you have in the portal.

Office Manager:

If you have Office Manager permissions in the portal, the SB is in the **INVENTORY** center, under the **“Phone Hardware”** tab. Then find the desk phone entry you are looking for. Click the **“gear”** button on the right side of the phone entry to launch the SNAPbuilder by selecting **“Yes”** to configure button configuration.

User:

If you have user permissions in the portal, SNAPbuilder is in the **“Phones”** center. Then find the desk phone entry you are looking for. Click the **“gear”** icon on the right side of the phone entry to launch the SNAPbuilder by selecting **“Yes”** to configure button configuration.

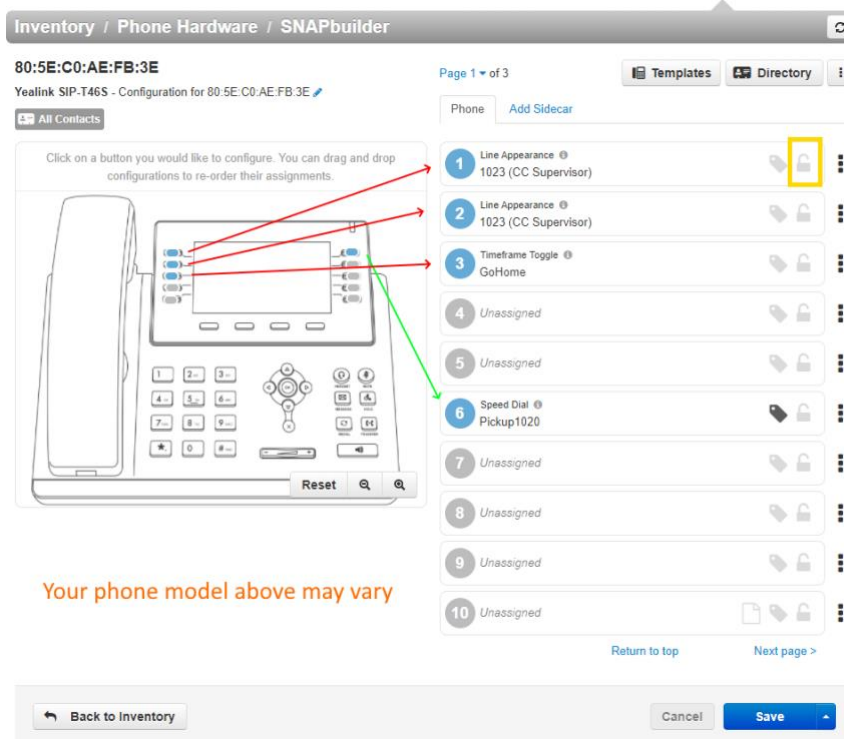


The screenshot shows the Crexendo VIP Portal interface. At the top, there are navigation icons for Home, Messages, Fax, Contacts, Conference, Answering Rules, Time Frames, Inventory, Phones, Music on Hold, and Call History. Below this is a horizontal bar with tabs for Phone Numbers, SMS Numbers, Phone Hardware, Fax Accounts, and 911 Numbers. The 'Phone Hardware' tab is selected. Below the tabs is a table with columns: Name, Device Type, IP Address, MAC Address, and Line. The table contains four rows of phone entries. The gear icon in the 'Line' column of the second row (5306) is highlighted with a red box. Red arrows indicate the navigation path from the 'Inventory' and 'Phones' menu items to the 'Phone Hardware' tab, and from the 'Phone Hardware' tab to the gear icon in the 'Line' column of the table.

Name	Device Type	IP Address	MAC Address	Line
5306m	Acrobits SIPIS	100.66.196.176 (SIPIS)	-	-
5306	Yealink SIP-T41S	66.226.232.243 (SIP)	66:5E:12:8E:4C:36	3 
5306T	Teams Connector	13.88.254.158 (SIP)	-	-
5306wp	CrexendoWebphone	66.226.232.243 (SIP)	-	-

Inside SNAPbuilder

After launching SNAPbuilder, you will see a screen like what is shown below with a diagram of your desk phone on the left and a list of buttons on the right (blue and gray numbered circles).



Inventory / Phone Hardware / SNAPbuilder

80:5E:C0:AE:FB:3E

Yealink SIP-T46S - Configuration for 80:5E:C0:AE:FB:3E

All Contacts

Page 1 of 3

Templates Directory

Phone Add Sidecar

Click on a button you would like to configure. You can drag and drop configurations to re-order their assignments.

1 Line Appearance 1023 (CC Supervisor)

2 Line Appearance 1023 (CC Supervisor)

3 Timeframe Toggle GoHome

4 Unassigned

5 Unassigned

6 Speed Dial Pickup1020

7 Unassigned

8 Unassigned

9 Unassigned

10 Unassigned

Return to top Next page >

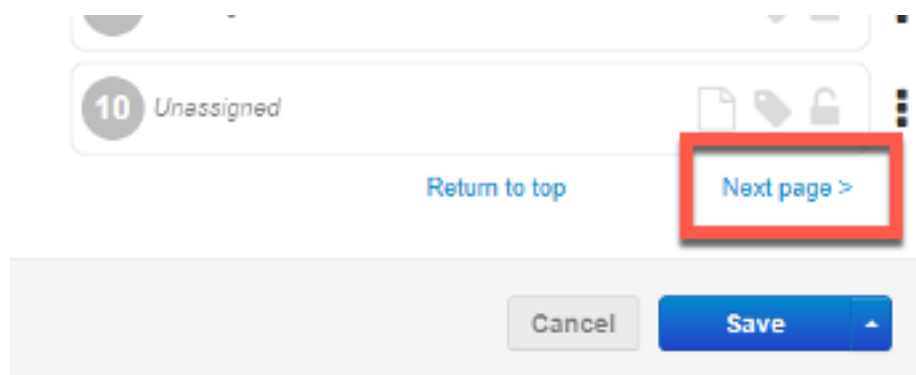
Back to Inventory Cancel Save

Your phone model above may vary

Blue buttons are already assigned a function while gray buttons are not. If the padlock icon (highlighted in gold) is unlocked, then you can edit that button.

Phone Pages

In the example above, you may also notice that that model has 10 buttons, but, it **has 10 buttons on page one**. Most models of Crexendo phones have two, three, or even four pages of buttons. In SNAPbuilder, to view the other pages, click the “**Next Page**” link (bottom right, above the Save button). When viewing the other pages, you will have a new set of unassigned buttons.



10 Unassigned

Return to top

Next page >

Cancel Save

Editing Your Phone

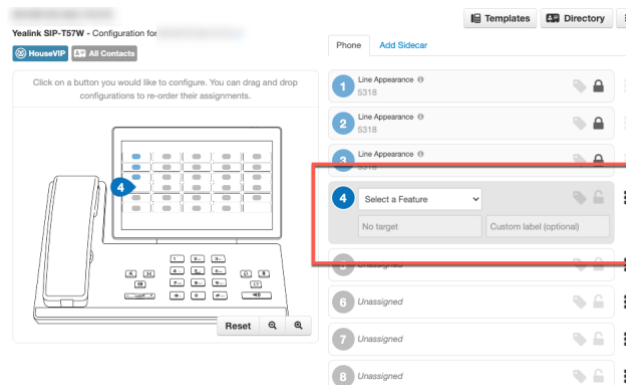
You can either add a new button or change an existing button on any page.

Adding a Button:

On the right, navigate to the desired page and choose a button entry that is marked “**Unassigned**”. Click on the entry and it will expand and allow you to modify it as shown below.

Editing a Button:

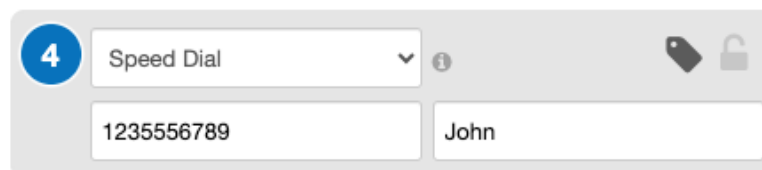
Navigate to the desired page and click on any unlocked button entry. It will expand and allow you to modify it as shown below.



- **Select a Feature:** You can choose from a variety of features.
- **Target:** Choose the target of the feature such as phone number, extension, etc.
- **Custom Label:** Give that button an optional custom name which appears on the phone.

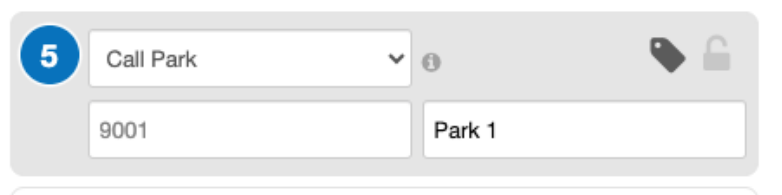
Example #1

Set button #4 to the **Speed Dial** feature. The target will be John’s phone number. The custom label can say: “**John.**” Now you can press that button to call John’s phone number.



Example #2

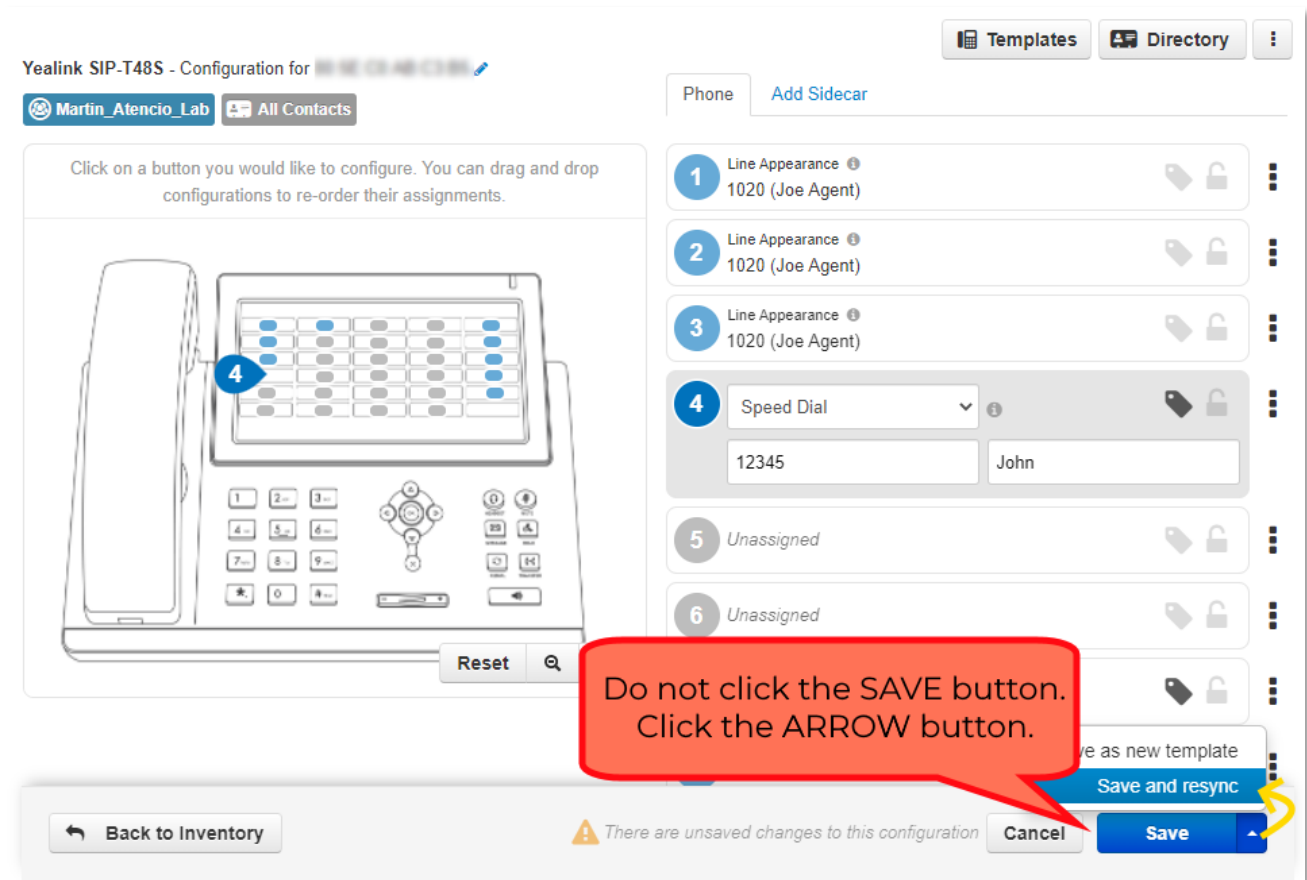
Set button #5 to the **Call Park** feature. The target will be a call park extension number that your organization has already set up. The custom label can say: “**Park 1.**” Now you can park and unpark calls in and out of that parking spot.



Saving the Changes to Your Phone

Once you have selected your desired phone configuration, you must send that configuration to your phone. When this happens, your phone will reboot if it is idle. If it is not idle, it will wait until you end the call and then update the phone.

To send the configuration to your phone, **click the arrow button** next to the “**Save**” button and click the “**Save and Resync**” option as shown below.



Yealink SIP-T48S - Configuration for [Device ID]

Martin_Atencio_Lab All Contacts

Click on a button you would like to configure. You can drag and drop configurations to re-order their assignments.

Phone Add Sidecar

- 1 Line Appearance 1020 (Joe Agent)
- 2 Line Appearance 1020 (Joe Agent)
- 3 Line Appearance 1020 (Joe Agent)
- 4 Speed Dial 12345 John
- 5 Unassigned
- 6 Unassigned

Back to Inventory

There are unsaved changes to this configuration

Cancel Save

Save and resync

Do not click the SAVE button. Click the ARROW button.

Available Features

The VIP Portal offers the following list of features. You can have many buttons with the same feature.

Feature	Description	Target
Line Appearance	Assigns an extension number which creates a phone “line” on which the user can take and receive calls.	Set to your extension.
Shared Line Appearance	Allows you to “see” a phone line for another user. When a call comes into that user, your phone will not ring but it will visually indicate an incoming call.	Set to someone else’s extension.
User (BLF)	Push this button to call the target. The button will also display a red light if the target’s phone is not in use. Green if it is in use.	Set to someone else’s extension.
Call Park	Push this button to send a call that is in-progress to a parking spot. A Call Park call queue must already exist for this to work.	Set to an existing Park Call Queue.
Speed Dial	Push this button to place a call to the target.	Set to an internal/external number.
DTMF	Push this button to dial a set of numbers <u>on an existing phone call</u> .	Set this to any number.
Timeframe Toggle	Push this button to enable/disable the answering rule that is connected to a time frame.	Set this to any existing answering rule.
Queue login	Push this button to log yourself IN to all queues of which you are an agent.	N/A
Queue Logout	Push this button to log yourself OUT of all queues of which you are an agent.	N/A
Move Call	Push this button to move a call from one of <u>your</u> phones to this phone.	N/A

Introduction

VIP Mobile is a mobile app that you log into, using your iPhone or Android device, and it functions as a Crexendo phone. This app has all the features of a regular Crexendo desk phone and allows you to:

- Make internal office calls as if you were at a desk phone.
- Transfer both internal and external calls.
- Internal and external (SMS) texting.
- View the company directory.
- Access your voicemails.

This guide gives guidance on **how to operate the VIP Mobile App**. To use the VIP Mobile App, the following requirements must be met:

- You have an operational Android or iOS based mobile device and have downloaded VIP Mobile from your app store.
- You have been given access to VIP Mobile in the Crexendo phone system.
- You have a VIP username and password (*the same credentials as when you login to the VIP Portal.*)

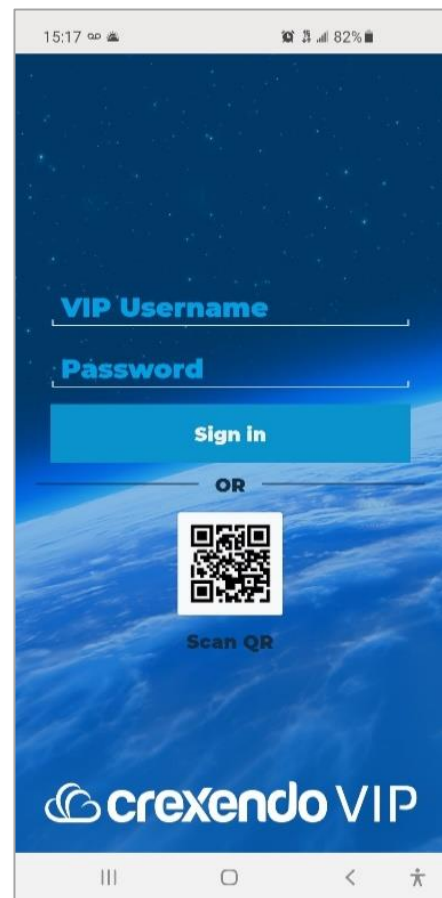
If this is not the case, please contact Crexendo Customer support for help:

- Phone: (855) 211-2255
- Email: support@crexendo.com

Launching VIP Mobile

After downloading and installing VIP Mobile from your app store, you will be able to launch the app and sign in using your VIP username and password.

Whenever the app is launched, the Keypad screen is always displayed as shown in the Quick Tour on the next page.



A Quick Tour



Android

Your name and extension are displayed here. You can also tap here to select "Do Not Disturb."

The white line indicates which screen you're on. On the iPhone (below), the button itself is highlighted white.

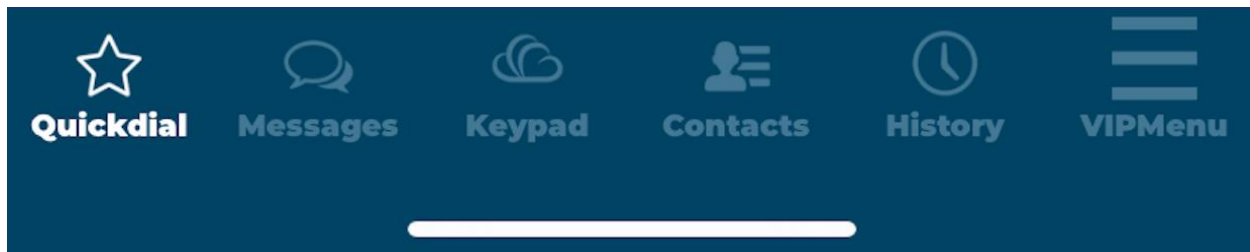
If you have any new voicemails waiting, this blank area will display a voicemail icon. On the iPhone, this button appears here.

On iPhone, the Navigation Bar appears at the bottom. On Android, it appears at the top. You can also swipe left and right to switch screens.

iPhone

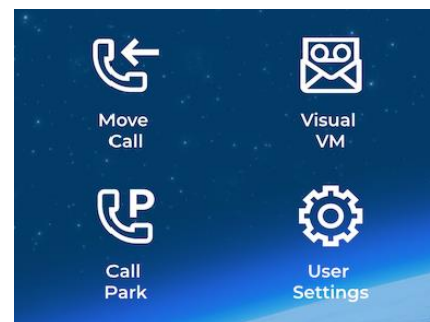


VIP Mobile Navigation Bar



As shown above, the Navigation Bar has icons which you can tap to access the different areas of the app:

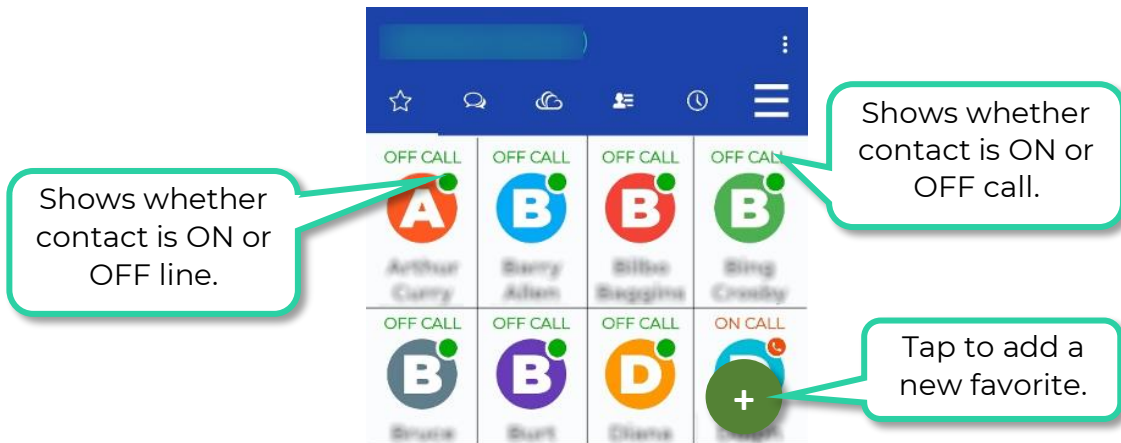
- **Quick Dial:** Indicated by the “**Star**” icon, this is a fully customizable speed dial list.
- **Messages:** Indicated by the “**Chat Bubble**” icon, this is where all text messages and internal conversations are conducted. **This is NOT where voicemails are checked.**
- **Keypad:** Indicated by the “**Cloud**” icon, simply tap in the digits you need to dial internal extensions or external numbers.
- **Contacts:** Indicated by the “**Person**” icon, this displays your smartphone’s contact list (if granted in your phone’s settings) as well as a full listing of your internal company directory.
- **History:** Indicated by the “**Clock**” icon, this area displays any calls placed, received, or missed.
- **VIP Menu:** Indicated by the “**Three Lines**” icon, this area gives you access to other Crexendo features including **Move Call, Visual Voicemail, Call Park, and User Settings.**



Above the Navigation Bar (top right) is the “**Options**” button, indicated by the “**Three Dots**” icon (Android) or GEAR icon (iPhone), where you can change the app settings.

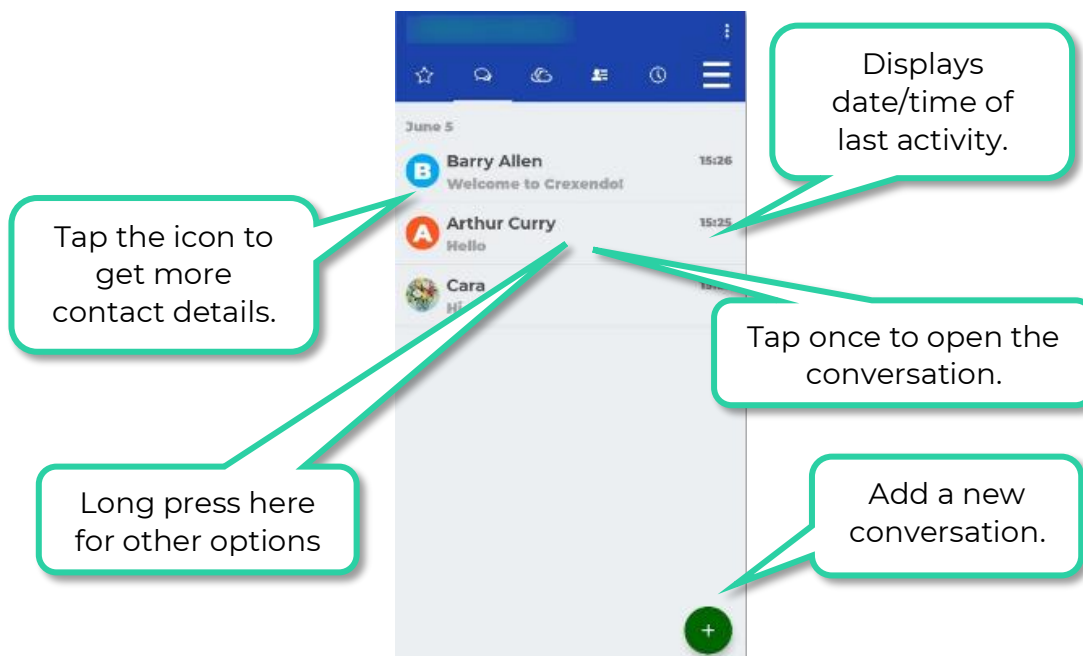
Quick Dial

Your favorite contacts can be added from your internal company directory, your cell phone contact list, or be manually entered. You can see if your colleagues are talking on the phone or if they’re even online at all. You can search, sort, and filter this list. Tap the “**Options**” button to display contacts as a grid (shown below) or list format.



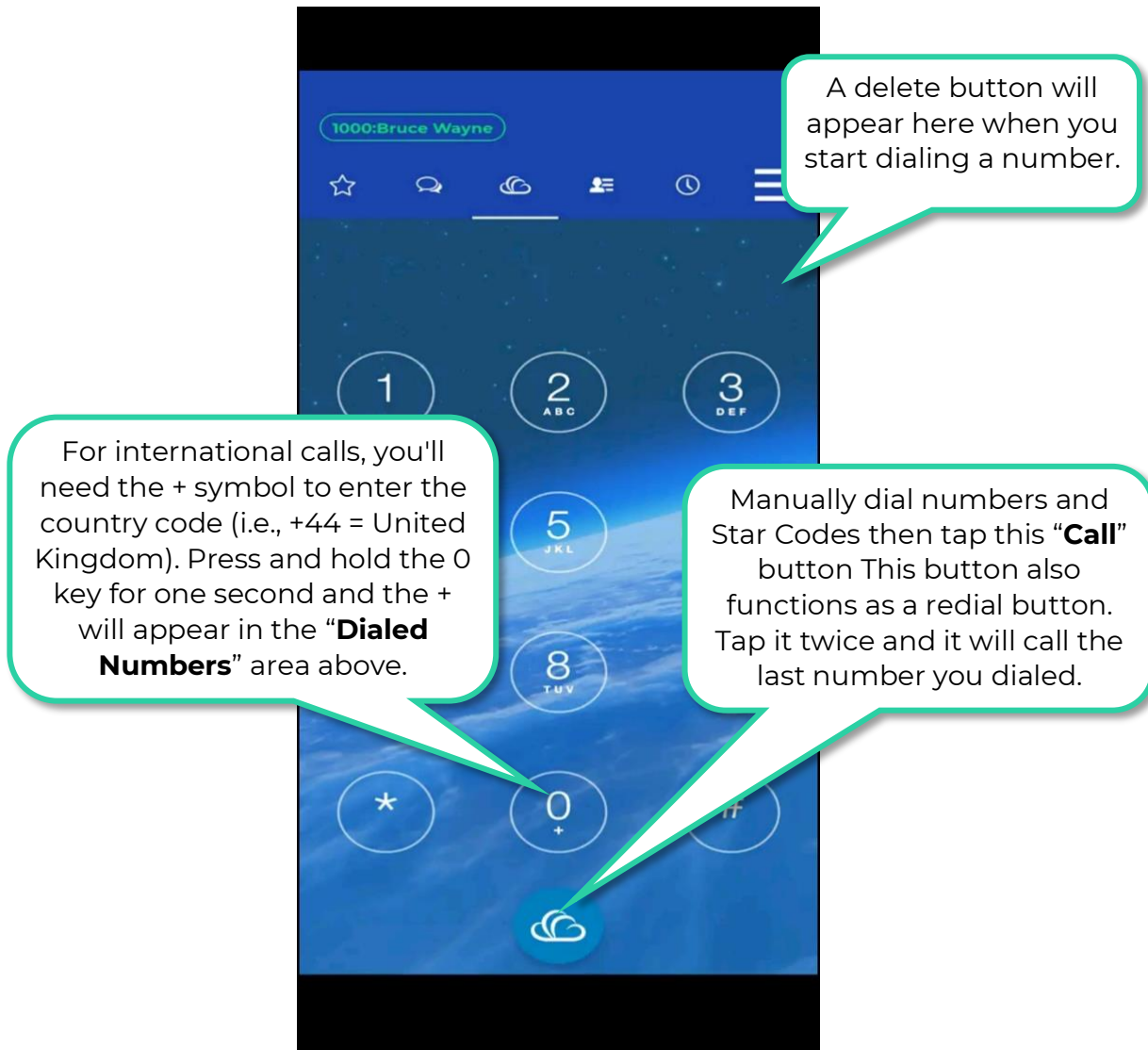
Messages

As stated earlier, the chat area is where all text messages and internal conversations are conducted. Conversations started here carry over onto our other VIP products such as the VIP Web Phone and VIP Portal.



Keypad

This area is where you make all your internal and external calls.

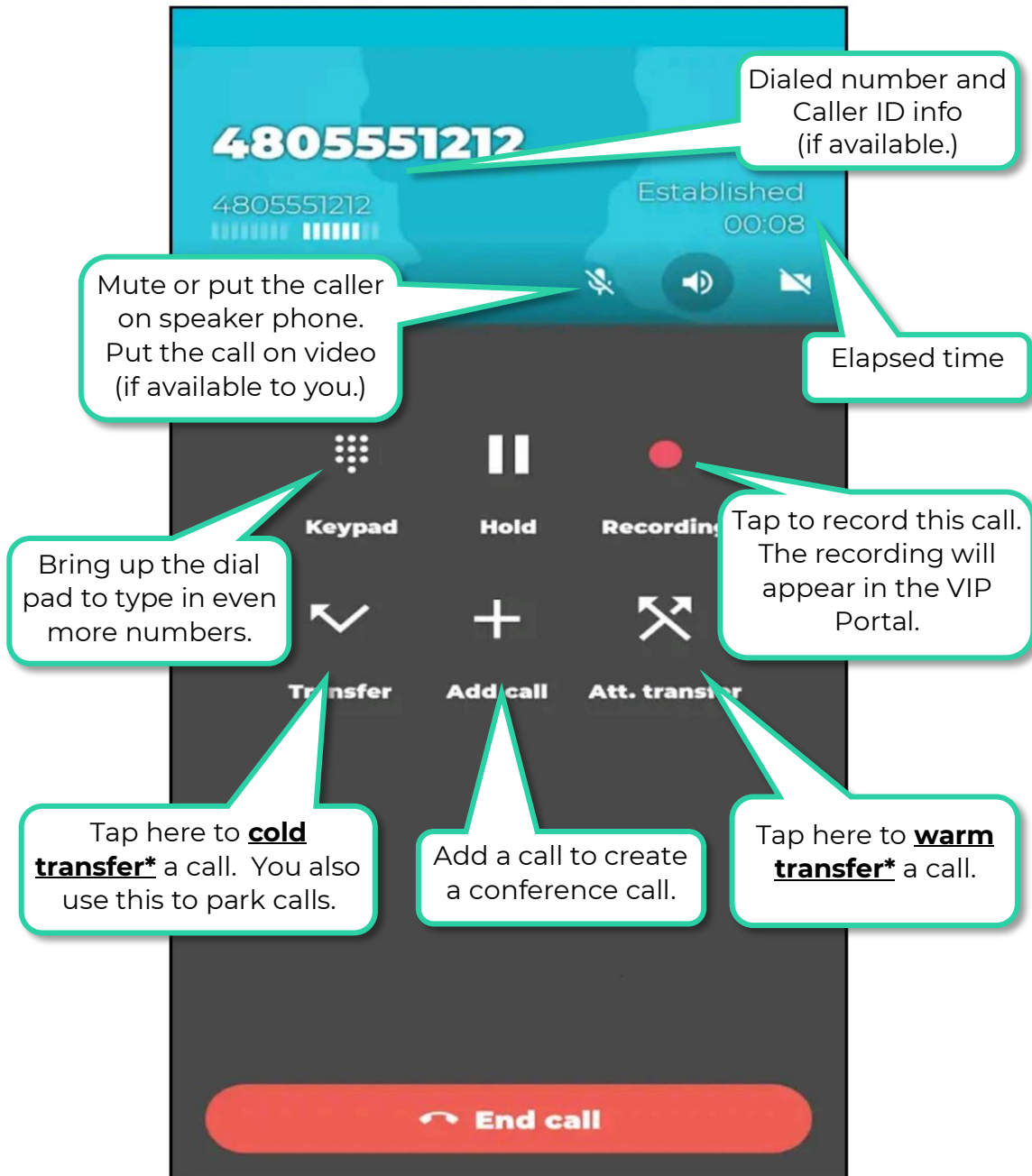


If you have new voicemails waiting, a voicemail button will appear on this screen. Tapping this button will call the Voicemail [audio](#) menu system, or you can access the voicemail through the **“Visual Voicemail”** option in the **“VIP Menu.”**

After the other party picks up the call, this screen will change to the **“On-Call”** screen. See the next page to explore options when you are on a call.

On a Call

The “On Call” screen offers similar options to our desk phones. It also includes a network statistics page for any troubleshooting needs.

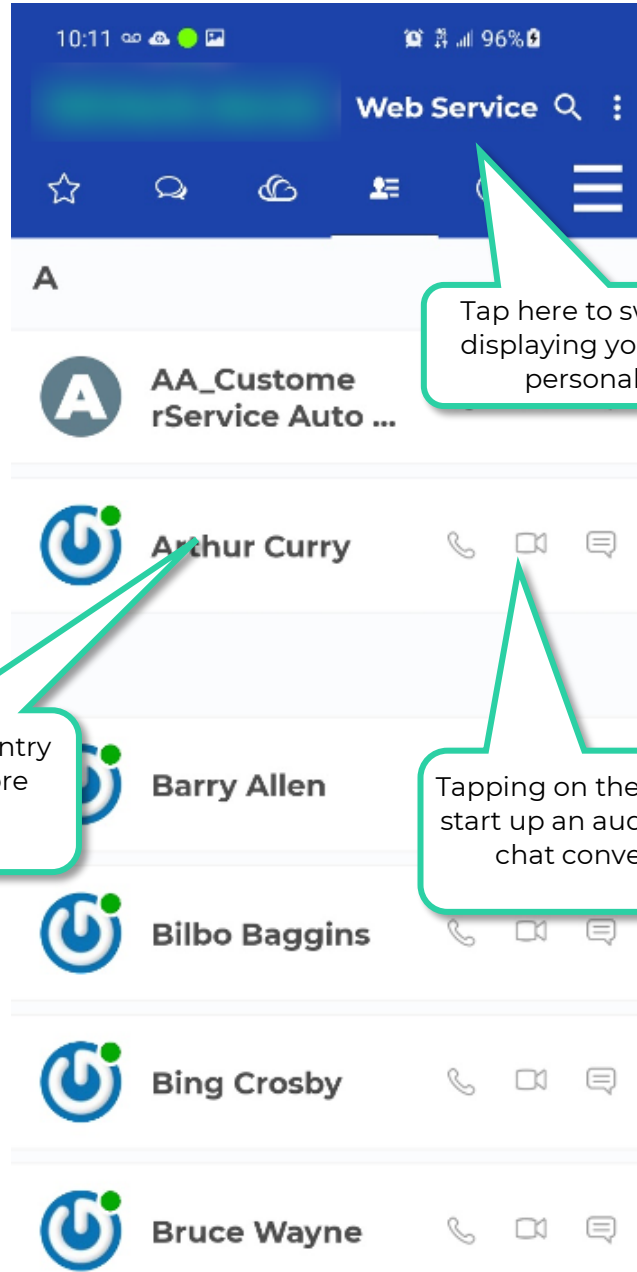


Callers will hear hold music when you put the call on hold by tapping the “**Hold**” button (above).

*=Cold transfers are also called Blind or Unattended Transfers. Warm transfers are also called Attended Transfers

Contacts

This area includes access to your smartphone's contact list (if granted), and a full listing of your internal company directory. It is easy to switch between the two directories (see below). Tap the magnifying glass icon to search your contacts.



Tap here to switch between displaying your company or personal contacts.

Tapping on an entry will display more details.

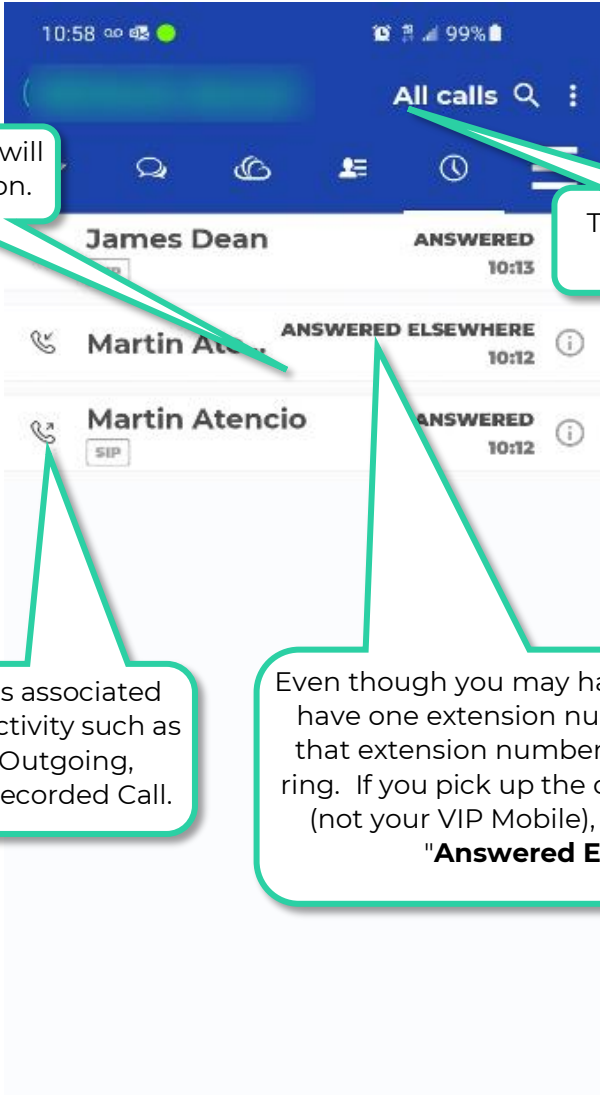
Tapping on these icons will start up an audio, video, or chat conversation.

History

The call history section shows any business calls placed, received, or missed that are sent to your extension.

Note: Your personal cellular number's call history will NOT be shown here.

Tap the magnifying glass icon (upper right) to search your call history. To save space, multiple calls to/from the same user are added into one line and can be viewed individually by tapping on the **i** icon to the right.



The screenshot shows a mobile application interface for call history. At the top, there is a blue header with the text "All calls" and a magnifying glass icon. Below the header is a navigation bar with several icons. The main content area displays a list of call log entries. Each entry includes a contact name, a status, and a time. The status icons are: a telephone handset for incoming calls, a cloud with an arrow for outgoing calls, a telephone handset with a slash for missed calls, and a telephone handset with a checkmark for recorded calls. The entries shown are: "James Dean" (ANSWERED 10:13), "Martin Atencio" (ANSWERED ELSEWHERE 10:12), and "Martin Atencio" (ANSWERED 10:12). Information icons (i) are present to the right of the second and third entries.

Tapping here will call this person.

Tap to filter your history.

Displays icons associated with the last activity such as Incoming, Outgoing, Missed, and Recorded Call.

Even though you may have many devices, you have one extension number. If a caller dials that extension number, all your devices will ring. If you pick up the call on another device (not your VIP Mobile), this entry will show **"Answered Elsewhere"**.

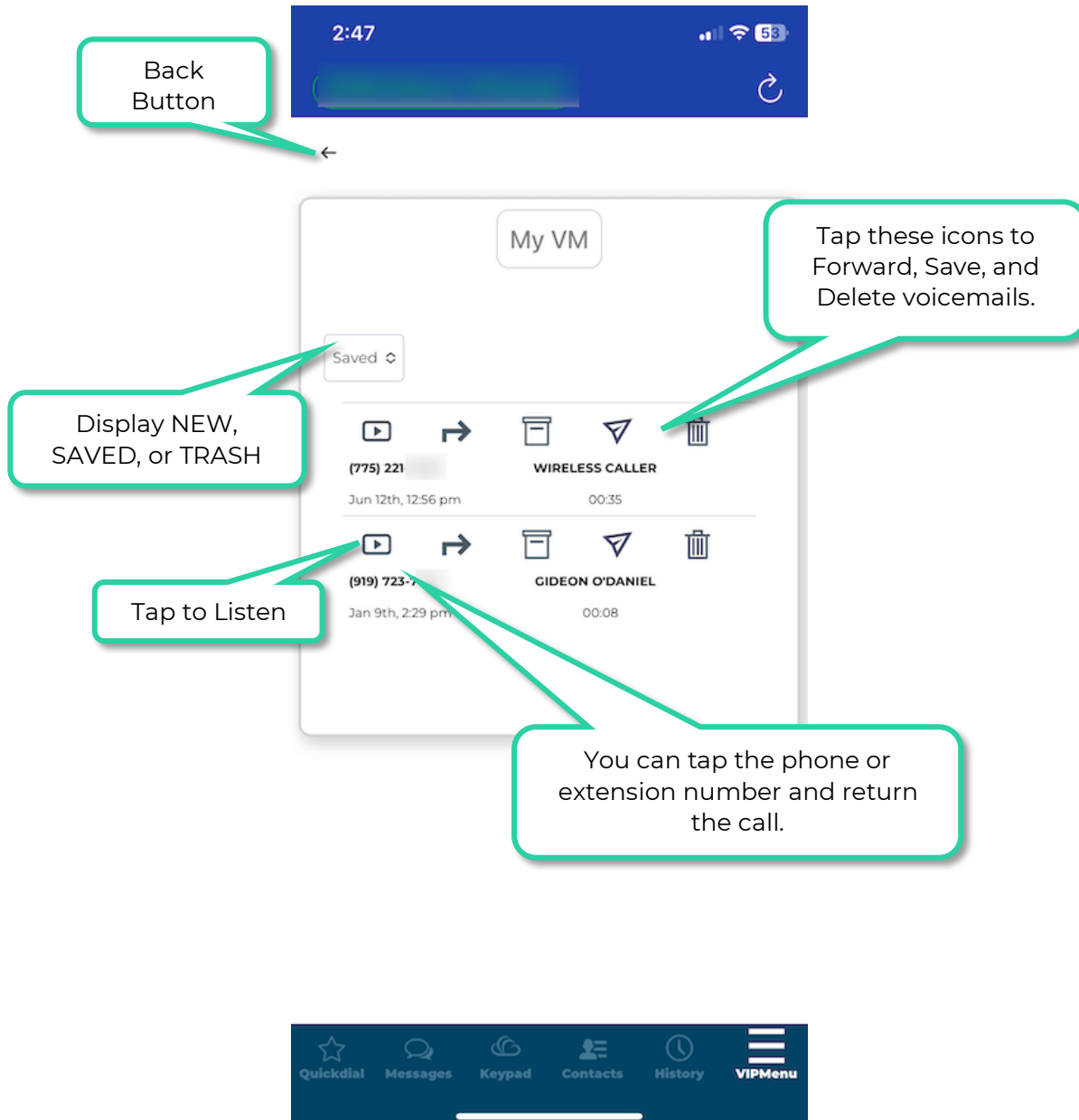
VIPMenu

Tapping here will give you access to additional Crexendo features that you see below.



Visual Voicemail

This area enables you to listen to and manage your voicemails visually. This screen does not call the audio voicemail system. You will be able to read your voicemails if the transcription function enabled.



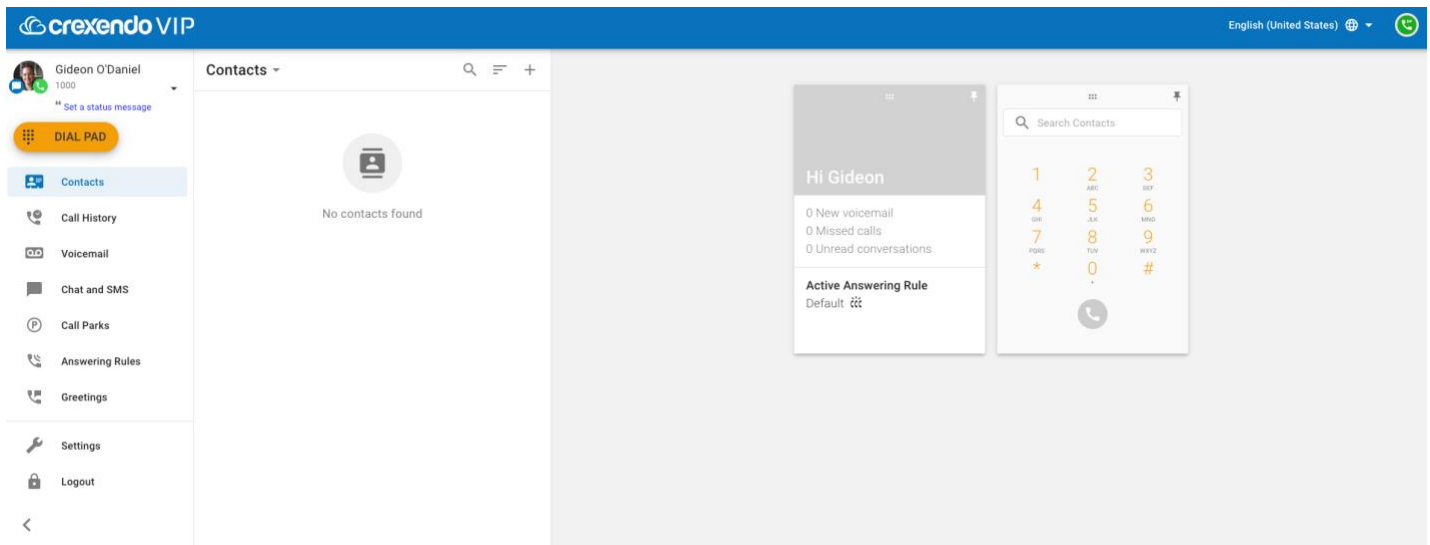
Introduction

The VIP Web Phone allows the user to utilize their computer as a “soft phone” to make and receive calls as if they were using a physical desk phone. The VIP Web Phone has all the features of your physical desk phone or mobile app including:

- Make/Receive calls to your extension.
- Access to your contacts.
- Access to your new and saved voicemails.
- Chat and/or Text with others.
- Change your voicemail greeting.
- Change your “Answering Rules.”
- Login/Logout of your Call Queues for Call Center Agents

This guide will walk you through **logging in to the VIP Web Phone and a tour of the options that the web phone offers.**

For a video demonstration, go to: <https://youtu.be/1BJcep7vRto?si=om-4b5lHe1mfxcEZ>



Accessing the VIP Web Phone

There are three ways to access the VIP Web Phone:

1. Using your web browser
2. From the applications in the VIP Portal
3. Progressive Web Application (PWA)

1. Web Browser

- Using your web browser, navigate to:
<https://portal.crexendovip.com/webphone>
- Enter your VIP username (**extension@domain**) and your password.
- Click “**LOG IN**” to access the web phone.
- If you cannot remember your username or password, you can click the links to recover them.




Login Name *

Password *

LOG IN

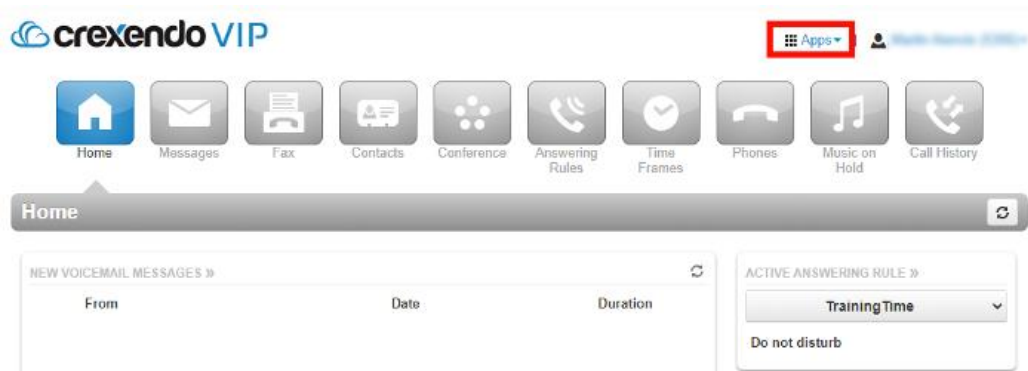
[Forgot login name](#) | [Forgot password](#)

OR

 **LOG IN WITH OFFICE 365**

2. VIP Portal

- Login to the VIP Portal
- Click the “**Apps**” drop-down menu on the upper right side of the screen.
- Select the “**CrexendoWebphone**” option and the web phone will open in a new tab.



crexendo VIP

Apps

Home Messages Fax Contacts Conference Answering Rules Time Frames Phones Music on Hold Call History

Home

NEW VOICEMAIL MESSAGES »

From	Date	Duration

ACTIVE ANSWERING RULE »

Training Time

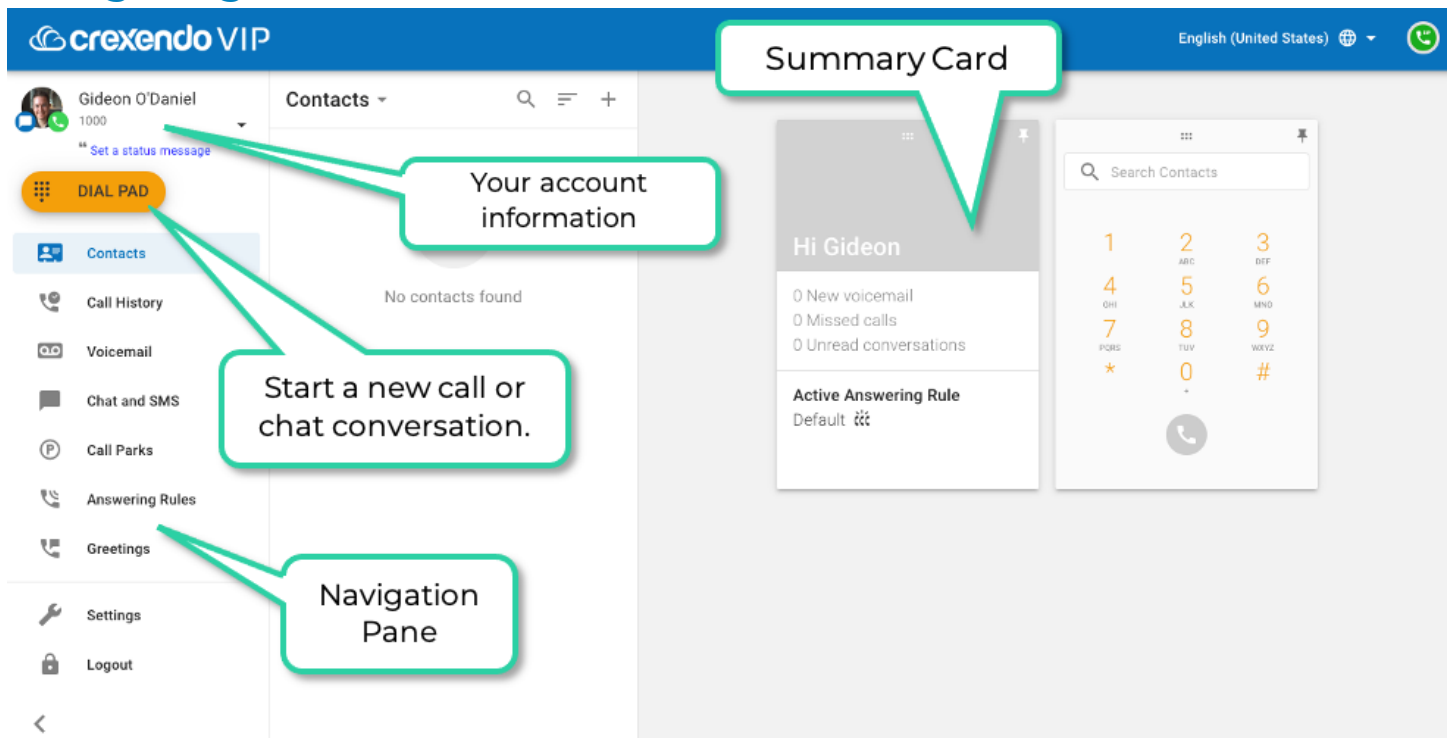
Do not disturb

3. Progressive Web App (PWA)

- **USING GOOGLE CHROME**, login to the Web Phone from the VIP Portal or <https://portal.crexendovip.com/webphone>.
- Click on the “**Settings**” option on the left side of the screen.
- Select “**Install PWA**” to download the web phone as a Chrome application to run in the background.
- Pin the application to your start menu, task bar, or dock.
- Once the download is complete, simply click the icon for the web phone and login with your credentials. The application will run without needing to have a tab open or be logged in to the VIP Portal.

NOTE: *the PWA is only available to download through Google Chrome.*

Navigating the VIP Web Phone



The screenshot displays the Crexendo VIP Web Phone interface. The top navigation bar includes the Crexendo logo, the user's name 'Gideon O'Daniel', and the language setting 'English (United States)'. The main content area shows a 'Summary Card' with the user's name, status, and statistics for voicemail, missed calls, and unread conversations. A 'DIAL PAD' is visible, along with a 'Navigation Pane' on the left side containing options like 'Contacts', 'Call History', 'Voicemail', 'Chat and SMS', 'Call Parks', 'Answering Rules', 'Greetings', 'Settings', and 'Logout'. Callouts highlight the 'DIAL PAD' as a way to 'Start a new call or chat conversation' and the 'Navigation Pane' as the area for 'Your account information'.

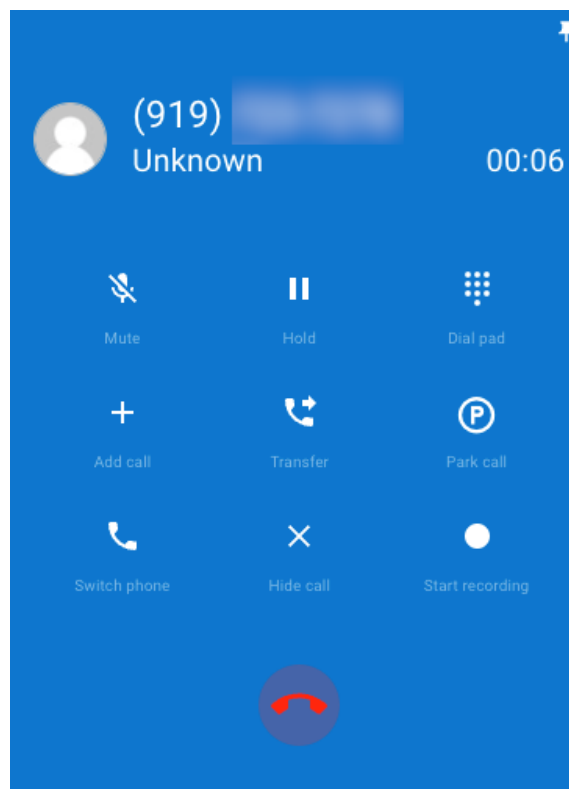
Making a Call

There are a few ways to initiate a phone call:

- **Through Contacts:** Scroll through your contacts, click the desired entry, and click the “**Call button**” (phone icon).
- **Through Call History:** Scroll through the entries, click the desired entry (example John), and click the “Call button” option (phone icon).
- **Through Voicemail:** If you wish to call someone who has left you a voice button, click the “**Call button**” (phone icon) that appears on the voicemail entry.
- **Manual Entry:** Click the red “**Dial Pad**” (top of the navigation pane) and enter the number you wish to dial.

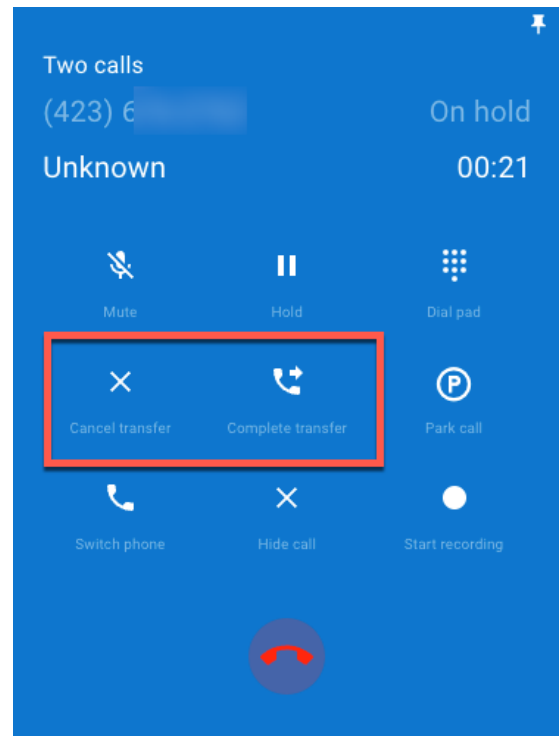
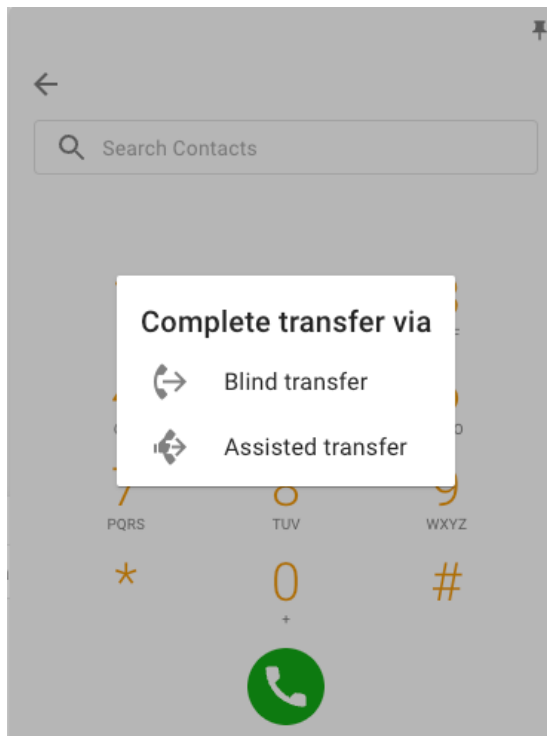
Options During a Call


While a call is in process, a card is placed on the grid, and you have all the usual options open to you.

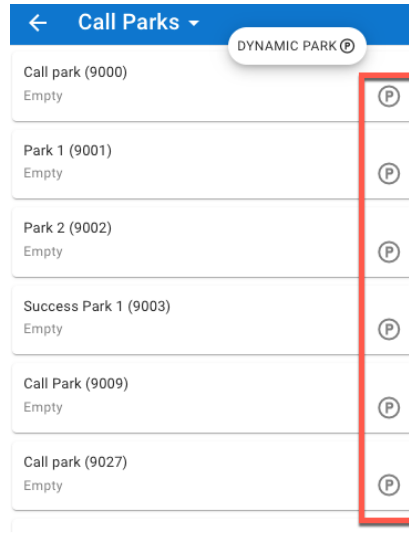



- **Mute:** mutes your microphone so that the caller will not hear you, but you will still be able to hear the caller.
- **Hold:** places the caller on hold. Select the “**Hold**” button again to resume the call.
- **Dial pad:** reveals a dial pad to make selections. Select “Back” to go back to the in-call options.

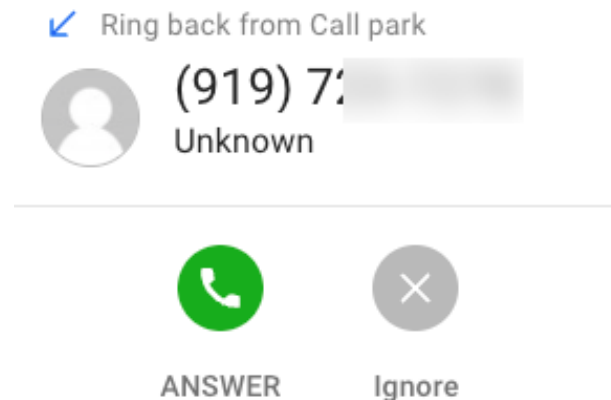
- **Add Call:** allows you to bring in another caller for a conference or three way call.
 - Select “**Add call**” which will place the first caller on hold.
 - Choose the number to add to the call from your contacts or dial a new number.
 - Once you have the second caller on the phone, select “**Merge Calls**” to activate the conference call.
- **Transfer:** to transfer a call to another user or number:
 - Select the “**Transfer**” button
 - Select to either transfer to one of your contacts or dial a new number with the dial pad.
 - Select to transfer by either “**Blind Transfer**” or “**Assisted Transfer.**”
 - **Blind Transfer:** Once you select the number or user to transfer to, the transfer is complete.
 - **Assisted Transfer:** Once you have spoken with the person you are transferring the call to select “**Complete Transfer**” to handoff the call or “**Cancel Transfer**” and take the caller off hold and speak to them again.



- **Park Call:** to park a call in a call park:
 - Select “Park call.”
 - Select an available call park to send the call to by selecting the  icon and the call will be instantly parked.



- To retrieve a parked call, select the “**Call Parks**” option on the side navigation pane.
- Select the  icon and select “**Answer**” to retrieve the call or ignore to send it to voicemail.

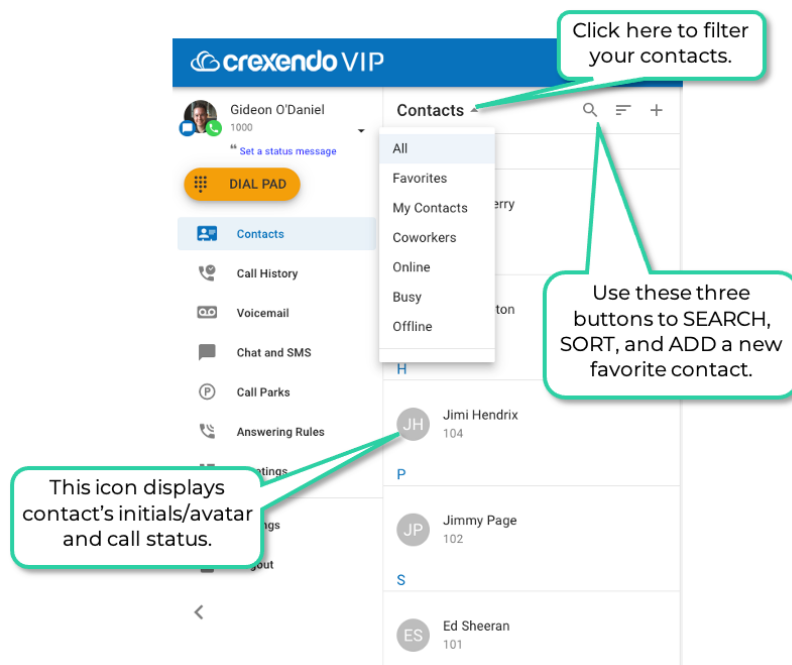


- **Switch Phone:** gives you the option to send this call to one of your other Crexendo phones such as a desk phone or VIP Mobile App.
- **Hide call:** pins the active call to your available workspace to allow you to multi-task.
- **Start recording:** records the active call which will be available for an administrator to listen to. Select “**Stop Recording**” to end the recording.

The VIP Web Phone has many areas which are accessed by the Navigation Pane.

Contacts

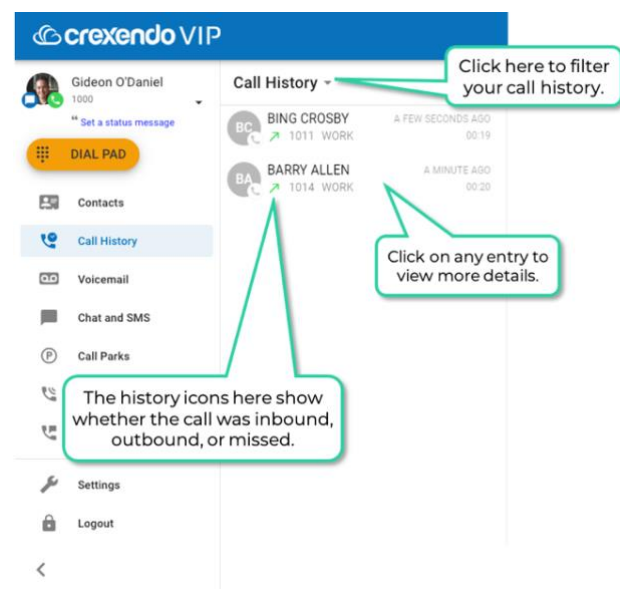
This displays a customizable list of contacts within your organization. You can search, sort, and filter this list. In addition to what is shown below, you can click on any contact entry to display its details and initiate any kind of phone call.



Call History

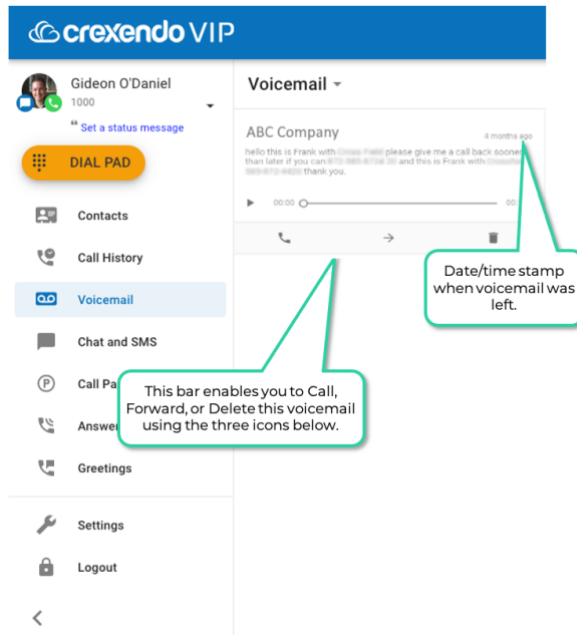
This displays a list of your call activity. In addition to what is shown below, you can click on any entry to display all related history, initiate contact, and add this person as an entry in your “**Contacts**.” Each call entry is shown with history icons:

- **Inbound:** Blue arrow.
- **Outbound:** Green arrow.
- **Missed Call:** Red arrow.



Voicemail

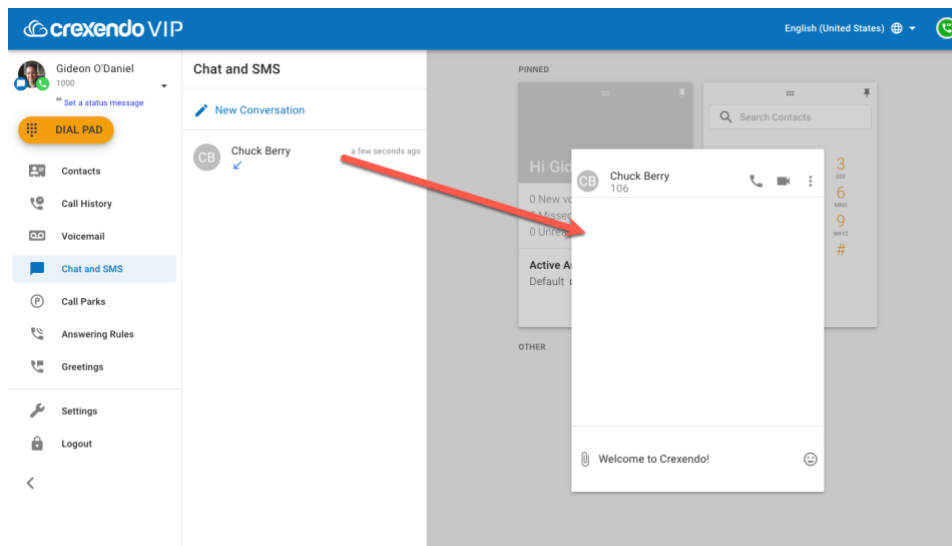
This displays a list of your voicemails. It displays both new and saved voicemails to which you can listen by clicking the Play button. The image below shows voicemail that has been transcribed using our premium transcription feature.



Chat and SMS

This displays all chat conversations and other conversations between you and others. All VIP web phone users can chat with other Web Phone and VIP Mobile users within their organization.

NOTE: *If you want to text outside people using SMS, the SMS feature must be added to your organization's Crexendo account.*

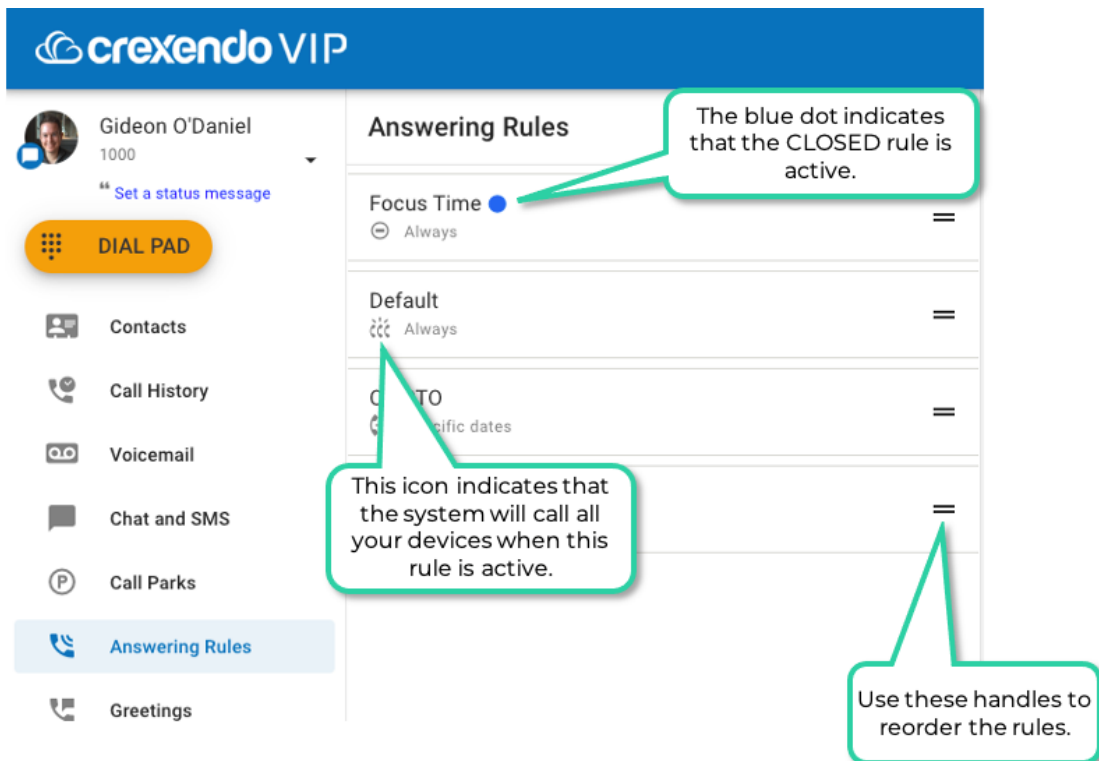


As shown above, for each conversation you have, by default, a conversation card is placed on the grid. You can close any of these cards and delete them. Deleting a card from the grid does not delete the conversation itself.

If you are manually typing a phone number to text (SMS) an outside party, you must type in the entire number, then click the suggestion that pops up. Then click the check mark to start the conversation.

Answering Rules

This area displays the answering rules that you can set which tells the system what to do when someone is calling you. You can have many different answering rules but only one rule can be “active” (depending on the date/time). The active rule is marked by a blue dot and depends on your **Time Frames**:

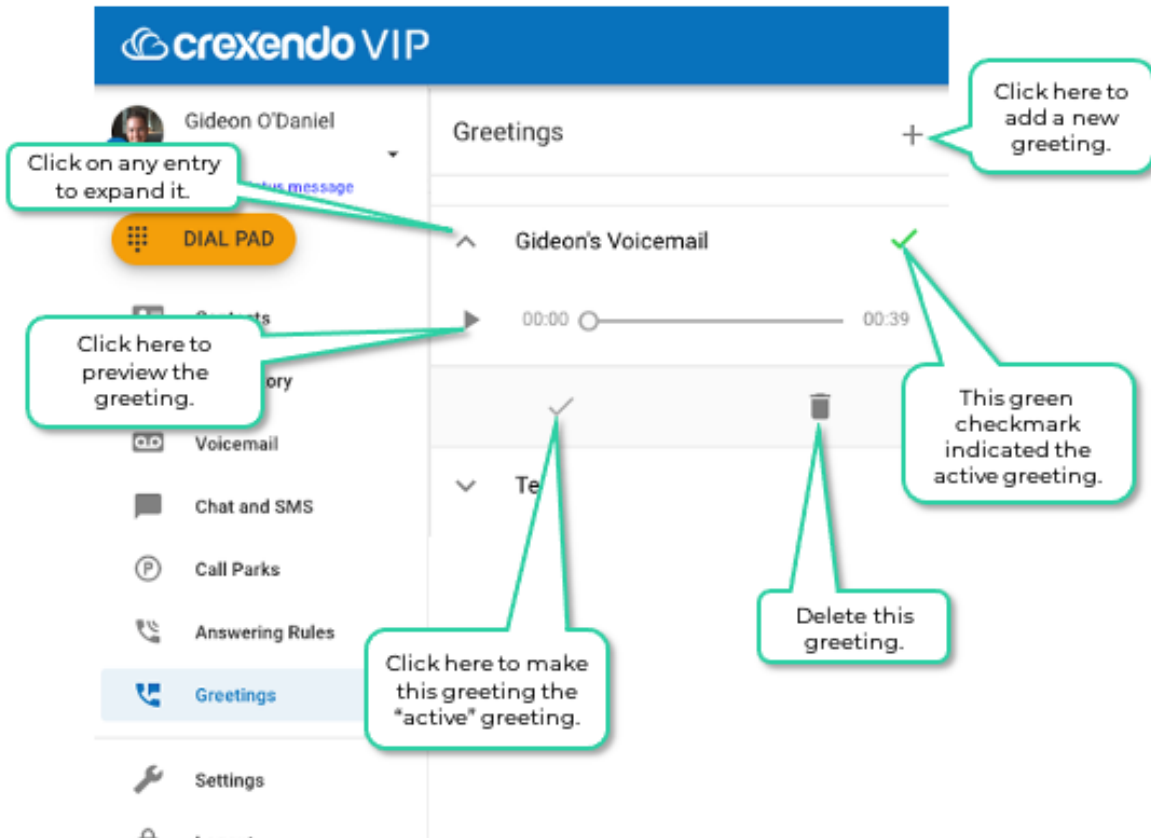


The screenshot shows the 'Answering Rules' section in the Crexendo VIP interface. The sidebar on the left includes options like 'DIAL PAD', 'Contacts', 'Call History', 'Voicemail', 'Chat and SMS', 'Call Parks', 'Answering Rules', and 'Greetings'. The main content area displays a list of rules with their time frames and active status. A blue dot next to the 'Focus Time' rule indicates it is active. Callout boxes provide additional information: 'The blue dot indicates that the CLOSED rule is active.', 'This icon indicates that the system will call all your devices when this rule is active.', and 'Use these handles to reorder the rules.'

- **Time Frames:** Tells the system **when** answering rule is active.
- **Answering Rules:** Tells the system **what** to do during the time frame. Example: Send all calls to voicemail.
- **Priority:** If two answering rules occur at the same time, then you can choose which rule will be active by setting a priority. The web phone is one of the places you can prioritize your rules.

Greetings

This displays a list of your voicemail greetings that you have created. Once the greetings are created, you can make one of them active here. You can also edit and delete them.



The screenshot shows the 'Greetings' section of the Crexendo VIP interface. The left sidebar contains navigation options: DIAL PAD, Contacts, Call History, Voicemail, Chat and SMS, Call Parks, Answering Rules, Greetings (selected), and Settings. The main content area displays 'Greetings' for 'Gideon O'Daniel'. A '+' icon in the top right corner is labeled 'Click here to add a new greeting.' Below this, a card for 'Gideon's Voicemail' is shown with a duration of 00:00 to 00:39. A green checkmark in the top right corner of this card is labeled 'This green checkmark indicated the active greeting.' A trash can icon below the card is labeled 'Delete this greeting.' A play button icon on the left side of the card is labeled 'Click here to preview the greeting.' A checkmark icon in the bottom right corner of the card is labeled 'Click here to make this greeting the "active" greeting.' A callout also points to the 'Gideon's Voicemail' card with the text 'Click on any entry to expand it.'

Call Park

This area displays a list of the call parking spots for your organization (if you have any). You can park/un-park calls using this area. For example, the parking spot (Park1) contains one parked call. It displays CallerID information about the parked call including who parked the call and how long the call has been parked.



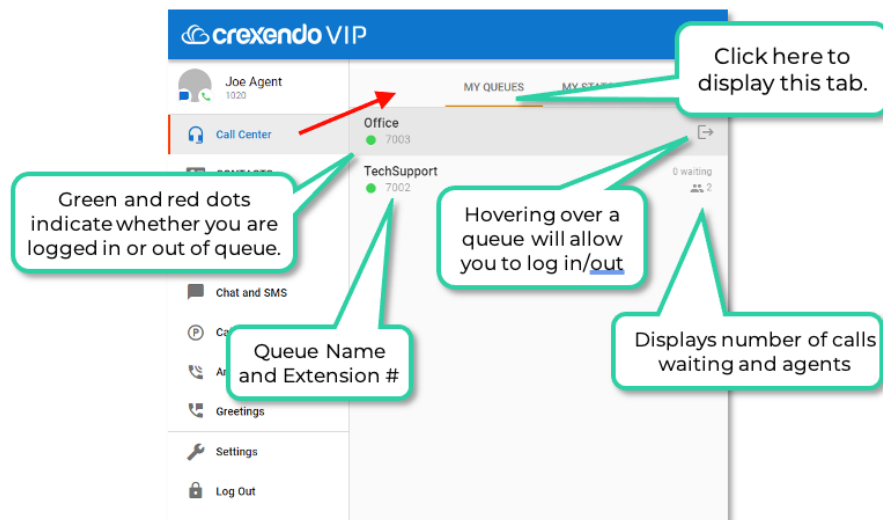
The screenshot shows the 'Call Park' section of the Crexendo VIP interface. The left sidebar contains navigation options: DIAL PAD, Contacts, Call History, Voicemail, Chat and SMS, Call Parks (selected), Answering Rules, Greetings, Settings, and Logout. The main content area displays 'Call Park' for 'Gideon O'Daniel'. A '+' icon in the top right corner is labeled 'Click here to add the Call Park card to the Grid.' Below this, a card for 'Park1 (8001)' is shown with a duration of 0:21 and 'Parked by (8001)'. A play button icon on the right side of the card is labeled 'Click here to unpark this caller or you can just dial the park extension number.'

Call Center

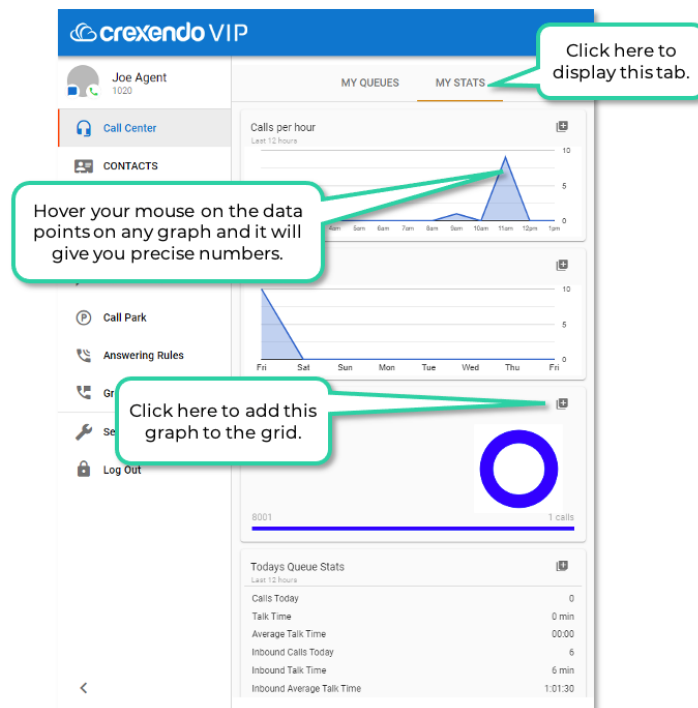
This area displays information for your call center on two tabs:

- **My Queues:** Displays all queues of which you are an agent.
- **My Stats:** Displays common statistics for you across all your queues.

My Queues Tab: Displays all queues of which you are an agent. The example below shows that you are an agent of the Office and the TechSupport queues.

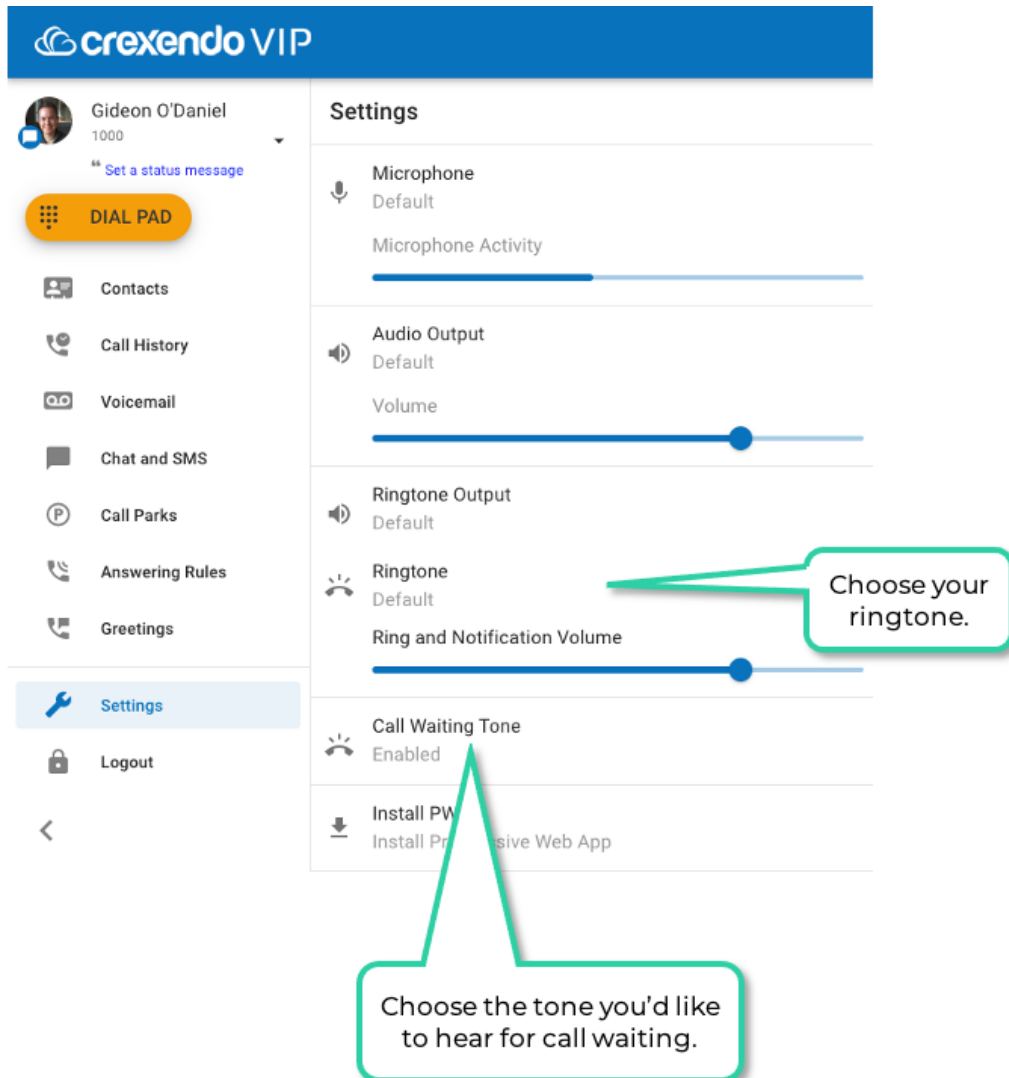


My Stats Tab: This tab displays an assortment of useful statistics for all your queues. The example below shows statistics for today.



Settings

This displays the settings for your Web Phone. In addition to what is called out below, you can edit set your speakers and microphone on which to take calls.



crexendo VIP

Gideon O'Daniel
1000
Set a status message

DIAL PAD

- Contacts
- Call History
- Voicemail
- Chat and SMS
- Call Parks
- Answering Rules
- Greetings
- Settings**
- Logout

Settings

- Microphone**
Default
Microphone Activity
- Audio Output**
Default
Volume
- Ringtone Output**
Default
- Ringtone**
Default
Ring and Notification Volume
- Call Waiting Tone**
Enabled
- Install PW**
Install Progressive Web App

Choose your ringtone.

Choose the tone you'd like to hear for call waiting.

Introduction

This document contains a **brief overview of the VIP SMS or text messaging capabilities in your VIP Crexendo environment.**

VIP SMS allows your business to engage your clients using SMS text messaging. You can do this in two scenarios:

- Creating a SMS queue that allows your clients to send a text to your business that can be answered by your call center agents.
- Enabling inbound and outbound SMS engagement by assigning the SMS function to your individual users.

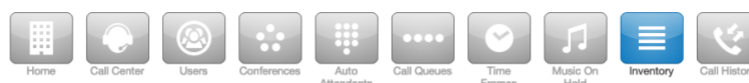
Before the SMS functionality can be used in your Crexendo domain, federal regulations require that each business complete a **“Brand and Campaign Registration Form.”** If you have not received this form from your implementation specialist, please contact cr@crexendo.com to request the form.

SMS Queues

If you would like your clients to have the option to text your business for help, you can create a SMS queue that will allow INBOUND texts to be directed to agents added to the queue.

To Create a SMS Queue:

1. Login to your VIP Portal for Managers
2. Verify that you have an available number to utilize for your SMS queue by clicking **“Inventory”** and the **“SMS Numbers”** tab.



Inventory ↻

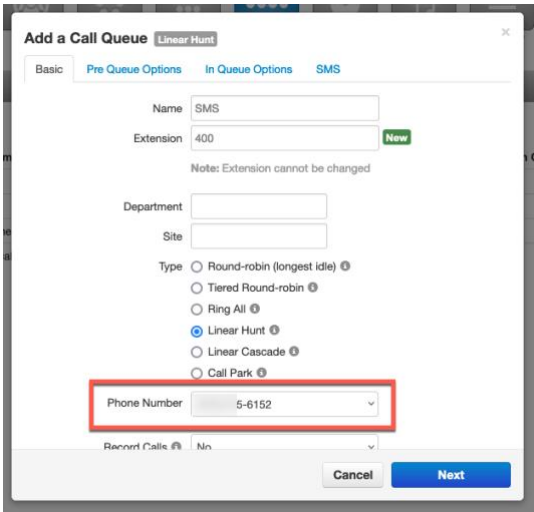
Phone Numbers | SMS Numbers | Phone Hardware | Fax Accounts

Filters Export

SMS Number	Treatment	Destination
1 (919) 375-	Available	

3. Click **“Call Queues”** at the top of the screen. In the **“Call Queues”** section, select **“Add Call Queue.”**
4. Go through the process of building your call queue and assign a name, extension, and type of agent routing that you would like. In the **“Direct Phone Number(s)”** drop down, select your available number for the SMS queue.

Click the **“SMS”** tab and enable SMS. You have the option to customize how the messages will come into the queue.



Add a Call Queue Linear Hunt

Basic Pre Queue Options In Queue Options SMS

Name SMS

Extension 400 New

Note: Extension cannot be changed

Department

Site

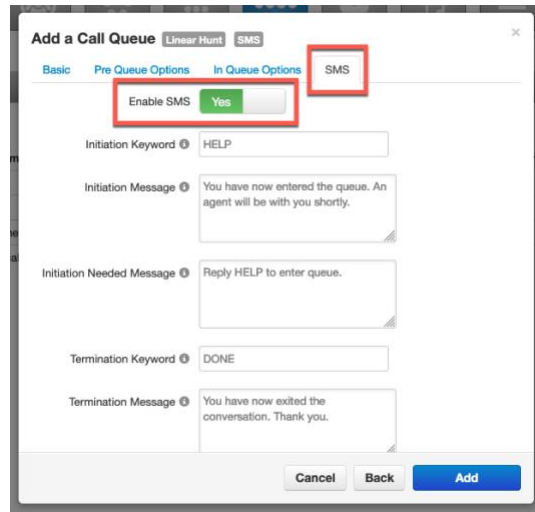
Type

- Round-robin (longest idle)
- Tiered Round-robin
- Ring All
- Linear Hunt
- Linear Cascade
- Call Park

Phone Number 5-6152

Report Calls No

Cancel Next



Add a Call Queue Linear Hunt SMS

Basic Pre Queue Options In Queue Options SMS

Enable SMS Yes

Initiation Keyword HELP

Initiation Message You have now entered the queue. An agent will be with you shortly.

Initiation Needed Message Reply HELP to enter queue.

Termination Keyword DONE

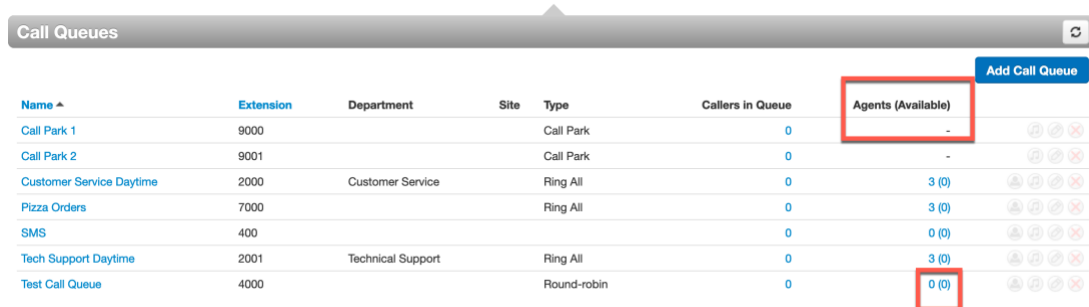
Termination Message You have now exited the conversation. Thank you.

Cancel Back Add

5. Click **“Add”** to complete the queue. Once you have built the queue, you can add your agents who will be responsible to receive the messages through the queue.

To Add Agents to Your SMS Queue:

1. Locate your new SMS call queue that you would like to add agents to. Under the **“Agents (Available)”** column, click the **“0(0)”** hyperlink to open the add agent menu.



Name	Extension	Department	Site	Type	Callers in Queue	Agents (Available)	
Call Park 1	9000			Call Park	0	-	
Call Park 2	9001			Call Park	0	-	
Customer Service Daytime	2000	Customer Service		Ring All	0	3 (0)	
Pizza Orders	7000			Ring All	0	3 (0)	
SMS	400				0	0 (0)	
Tech Support Daytime	2001	Technical Support		Ring All	0	3 (0)	
Test Call Queue	4000			Round-robin	0	0 (0)	

2. Click **“Add Agent”**

Edit Agents in Test Call Queue ✕

Add Agent(s) by User

Agent Extension

Status

Note: Changing Status may take a moment to update

Wrap up time (sec)

There are no agents assigned yet.

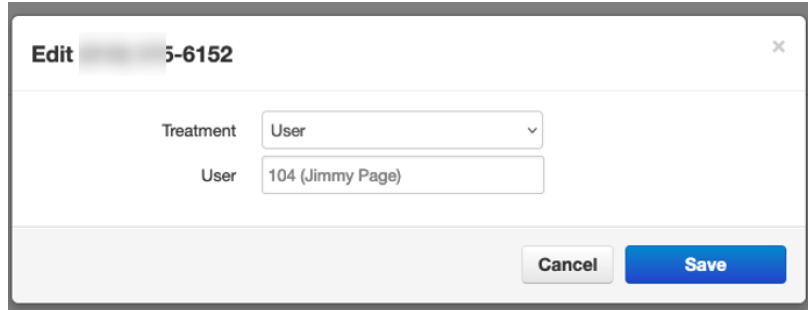
3. Proceed through each option:

- a. **Add Agent(s) by:** Add a user by name or extension or by phone number to add an external phone number to the queue.
- b. **Agent Extension:** you can add as many users as needed by the name or extension.
- c. **Status:** enables the agent to receive calls. Also allows for queue supervisors to be added to a queue without being able to receive calls.
- d. **Wrap Up Time (seconds):** gives the agent time before they can receive a new call.
- e. **Max Simultaneous Calls:** set a limit of how many calls the agent can receive at the same time.
- f. **Max SMS Sessions:** set a limit of how many SMS conversations that an agent can be on at the same time.
- g. **Queue Priority for Agent:** this option allows you to set a queue priority for an agent that is assigned to multiple queues.
- h. **Request Confirmation:** informs the agent that they are receiving a call through the queue and to press 1 if they would like to receive the call.
- i. **Auto Answer:** this option will automatically answer the call by the available agent.

4. Click **“Save Agent.”** You will now be able to see all agents in the queue. All individual agents can be edited from this screen.

SMS For Individual Users

1. Login to your VIP Portal for Managers and select **“Inventory”** and the **“SMS Numbers Tab.”**
2. Click on the available SMS number. Click the drop-down arrow and select **“User”** and **“Save.”**



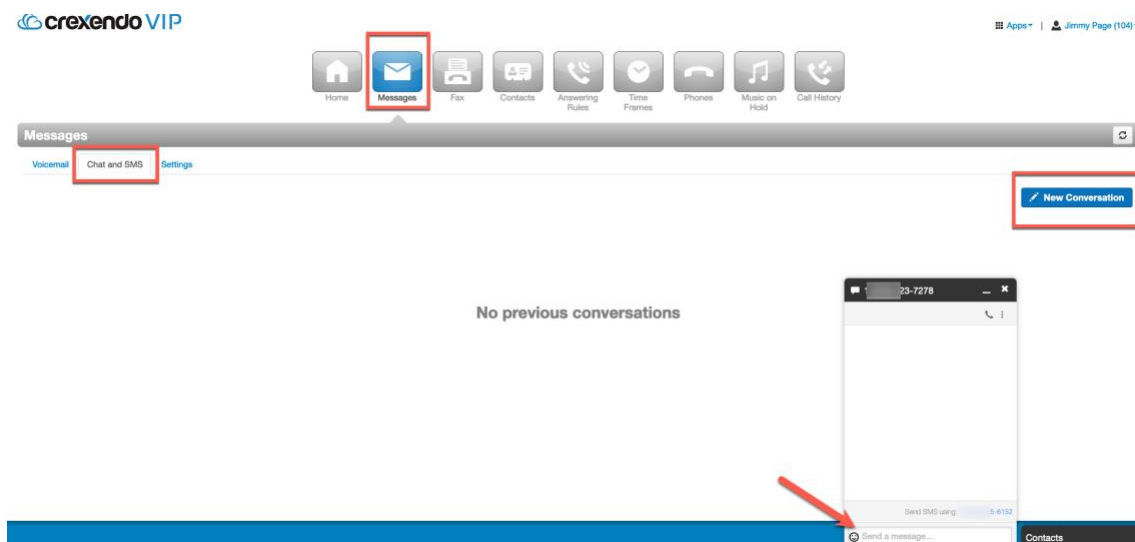
Using your SMS Capabilities

You can send or respond to SMS messages in three areas:

1. VIP Portal Message Tab
2. VIP Web Phone
3. VIP Mobile App

VIP Portal Messages Tab

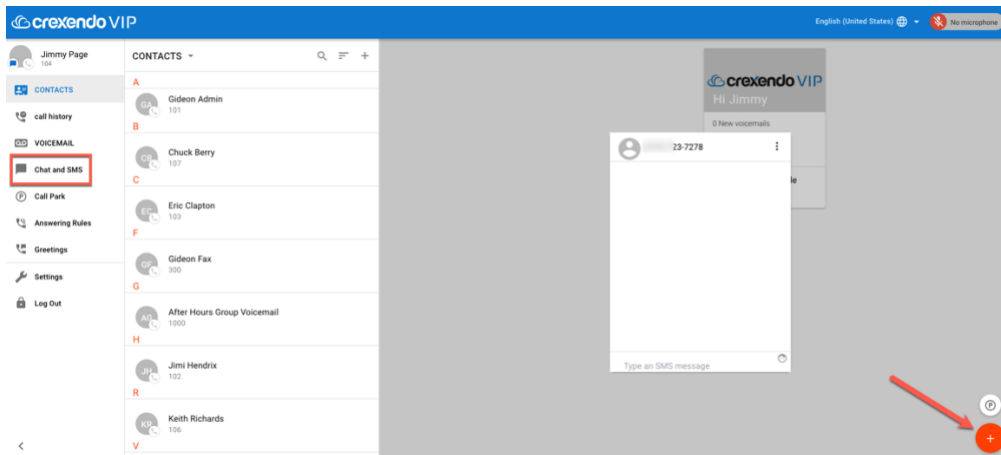
Select **“Messages”** and the **“Chat and SMS”** tab. Select **“New Conversation”** and type in the number you would like to send a message to.



VIP Web Phone

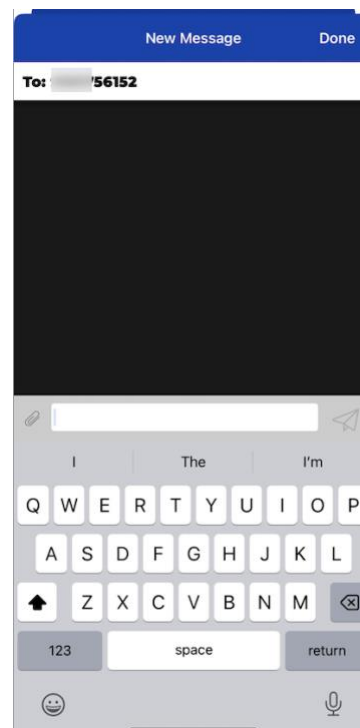
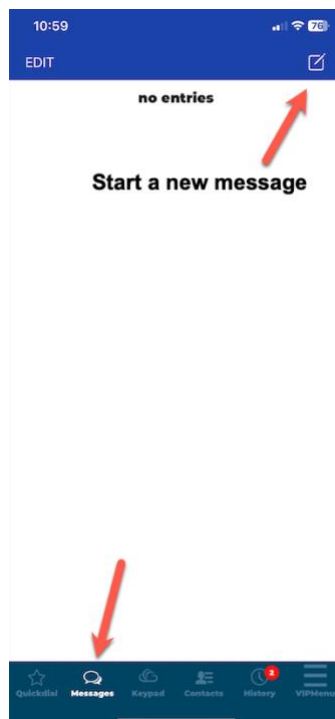
Select the red button on the bottom right side of the screen and select **“New Conversation.”** Enter the number or contact you would like to send a message and press

Enter. You can check new messages and see old conversations from the “Chat and SMS” tab on the left side of the screen.



VIP Mobile Application

Open your VIP Mobile Application and click on the “Messages” tab. Click on the new conversation icon and type in the number or name of the contact you would like to send a message.



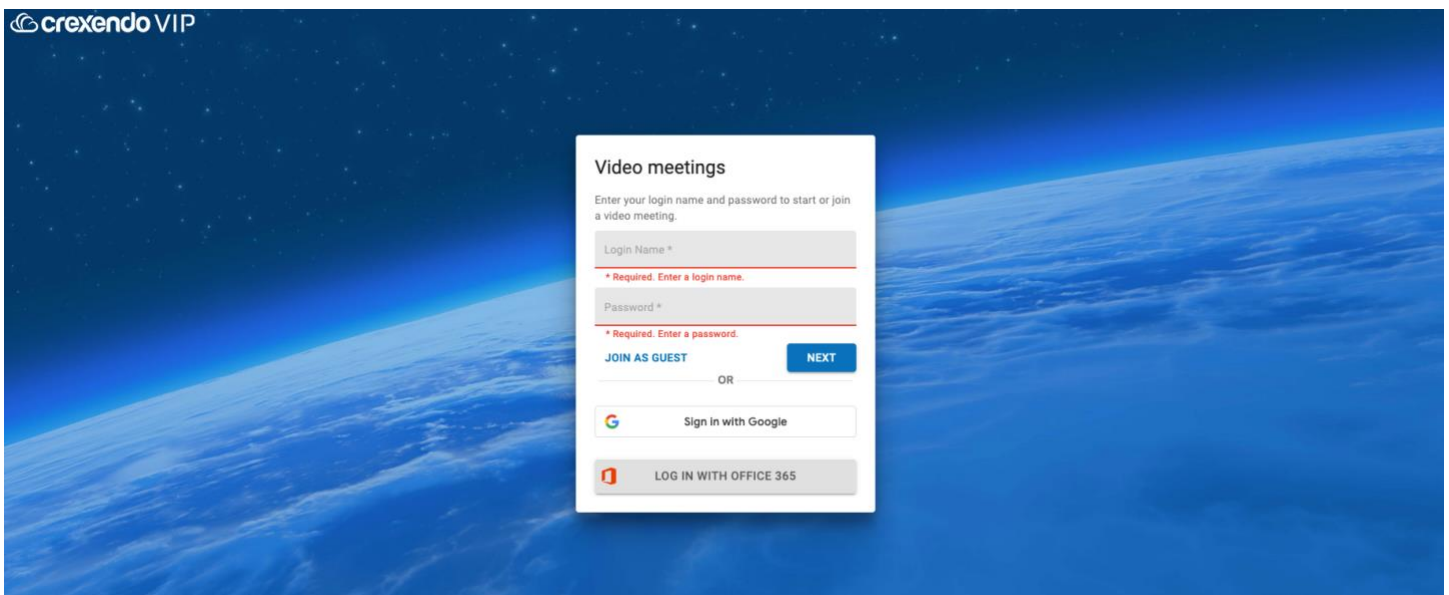
NOTE: SMS messages has a character limit of 1,000 characters. Any images that are sent through SMS has a size limit of 1 Megabyte.

Introduction

The **Crexendo VIP HD** Platform delivers rich High-Definition video meetings for one-on-one sessions, team meetings, and webinars for up to 200 participants. Other valuable features include:

- On demand or scheduled HD video meetings.
- Group meetings.
- Team rooms with persistent chat and document sharing.
- Webinars for up to 200 attendees
- Integrated presence with your Crexendo VIP communications system.
- HD video and audio with convenient one-click-to-join access.

This guide provides the steps to **access the HD platform, start a new meeting, join a scheduled meeting, create a meeting room, and options within a meeting.**

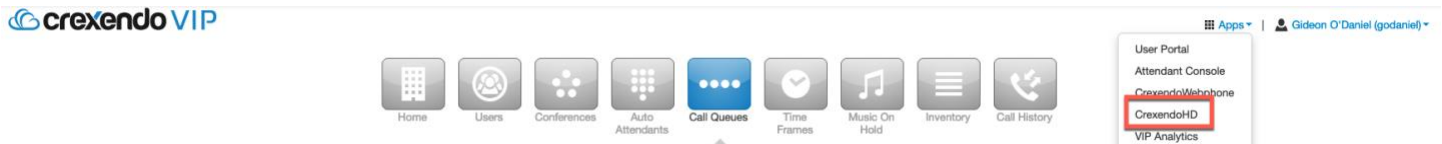


How to Access the HD Platform from Your Web Browser

1. Go to <https://portal.crexendovip.com/video/>
2. Login with your Crexendo credentials or join as a guest.


How to Access the HD Platform from the VIP Portal


1. Login to your Crexendo VIP Portal at <https://portal.crexendovip.com>
2. Select “**Apps**” in the upper right side of your portal and select “**CrexendoHD**.”



How to Start or Schedule a New Meeting

1. From the HD main menu, select “**Start A New Meeting**” or “**Schedule a Meeting**”.
2. You have the options to give the meeting a name and description for any attendees.
3. If you chose to schedule a future meeting, add the date, time, time zone, and if the meeting is a one-time meeting or if it is recurring.

 08/29/2023

 11:00 am

EDT ▼

1 hour 0 min ▼

Does not recur ▼

4. Choose the meeting type:
 - a. **Conference**: This option would be for a meeting that would allow for discussion and collaboration. The maximum number of attendees is 25.
 - b. **Webinar**: This option would be for presenting up to large groups of people. The maximum number of attendees us 1000.
5. Choose the **Video and audio options** for the meeting. These options include allowing camera and screensharing capabilities and microphone capabilities for attendees to be able to turn on their microphone.
6. Choose the **Options** you would like to allow for the meeting:
 - a. **Enable chat** for sending messages during the meeting.
 - b. **Hosts can edit meeting** for editing settings.
 - c. **Hide viewers list and count.**
 - d. **Require invitation or registration to join.**

- e. **Wait for host** which keeps attendees in the “waiting room”.
 - f. **Record meeting**.
 - g. **Require passcode** to join.
7. The **Join Information** displays the Meeting ID, Meeting URL, and direct dial in number for the meeting. All the meeting information can be copied to your clipboard to paste into an email by selecting “**Copy to Clipboard**” next to “**Join Information**.”
 8. Select “**Next**” to proceed to joining the meeting.

Start a new meeting

MEETING SETUP

Meeting name (optional)

Description (optional)

Meeting type

Conference ⓘ
Meet with up to 25 others over video

Webinar ⓘ
Present to up to 1000 viewers

Video and audio

Allow camera and screenshare for **Everyone**

Allow microphone for **Everyone**

Options

Enable chat

Hosts can edit meeting

Hide viewers list and count

Require invitation or registration to join

meeting

JOIN INFORMATION ⓘ


Meeting ID
342 098 714

Meeting URL
portal.crexendovip.com/video?id=342098714

Dial in number
(480) 885-2252
When prompted, enter the meeting ID.

PEOPLE ⓘ ↓

Add by name, extension, number, or email

 **Gideon O'Daniel** Host (Owner)
5318

[CANCEL](#)

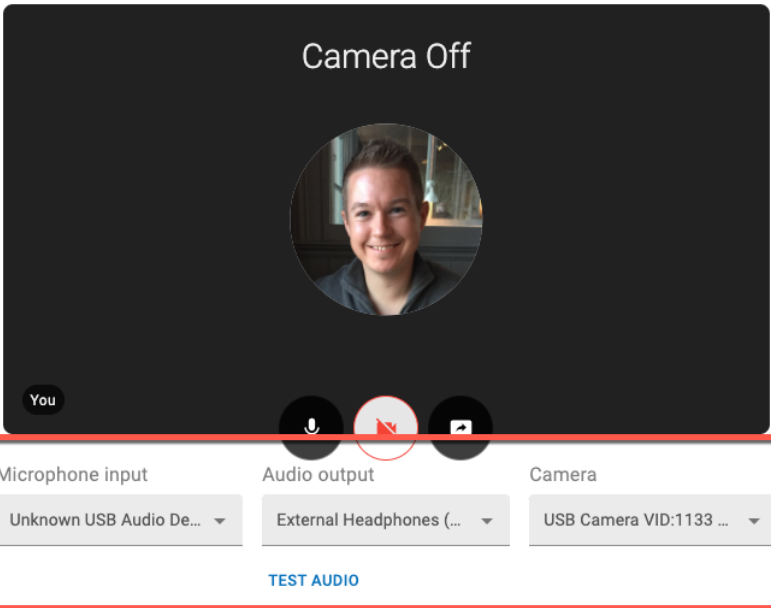
[SCHEDULE](#)

[NEXT](#)

9. Check your **Microphone input, Audio output,** and **Camera settings** to ensure all are working correctly. Select “**Test Audio**” to confirm the sound is coming through the correct output that you have set.
10. If you choose to use a phone for your audio, select either the dial in option and call in using the information provided or select “**Call Me**” and enter your direct phone number to have the platform call you to join the meeting.

Get ready to join the meeting

Choose how you would like to listen to the meeting. You can use your computer audio or a phone.



Use a phone for audio

DIAL IN CALL ME

Call the dial-in number with your phone and enter your Meeting ID and Audio ID when prompted.

Dial In Number
(480) 885-2252

Meeting ID
985 445 884

Audio ID
11

JOIN MEETING

11. Select **“Join Meeting”** or **“Save”** if you are scheduling a future meeting.

How to Join a Scheduled Meeting

1. Login to the HD Platform.
2. Select **“Join A Meeting”**.

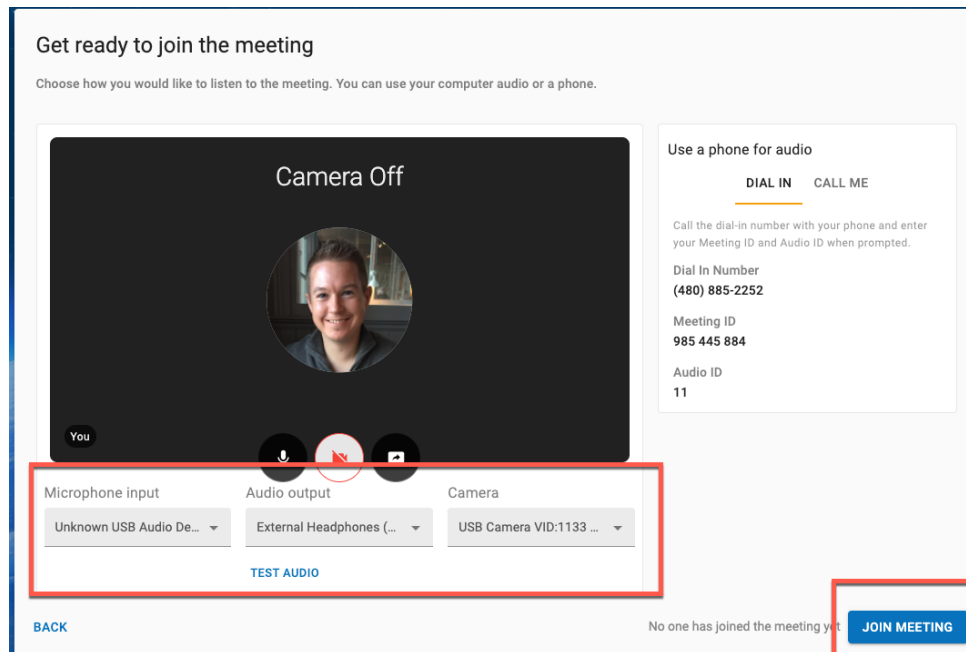
Start or join a meeting

Connect to others with video conferences and webinars.

- [+ START A NEW MEETING](#)
- [→ JOIN A MEETING](#)
- [📅 SCHEDULE A MEETING](#)
- [🏠 CREATE A MEETING ROOM](#)
- [🕒 VIEW PAST MEETINGS](#)

3. Enter the Meeting ID in the blank and select **“Next”**.
4. Check your **Microphone input**, **Audio output**, and **Camera settings** to ensure all are working correctly. Select **“Test Audio”** to confirm the sound is coming through the correct output that you have set.

- If you choose to use a phone for your audio, select either the dial in option and call in using the information provided or select “**Call Me**” and enter your direct phone number to have the platform call you to join the meeting.



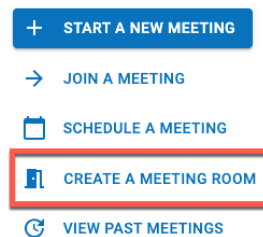
- Select “**Join Meeting.**”

How to Create a Dedicated Meeting Room

- Login to the HD platform.
- Select “Create A Meeting Room” from the list.

Start or join a meeting

Connect to others with video conferences and webinars.



- Give your meeting room a name and go choose the options you would like enabled in your meeting room. The “**Join Information**” will remain the same which can be sent out in any recurring meeting you may want to setup.

Create a meeting room

ROOM SETUP

Crexendo Training Classroom

Description (optional)

Room type

Conference ☺

Meet with up to 25 others over video

Webinar ☺

Present to up to 1000 viewers

Video and audio

Allow camera and screenshare for
Everyone

Allow microphone for
Everyone

Options

Enable chat

Wait for host

Record meeting

Require passcode

Enable chat history

Hosts can edit meeting

Hide viewers list and count

Require invitation or registration to join

meeting

JOIN INFORMATION

Room ID
834 379 805

Room URL
portal.crexendovip.com/video?id=834379805

Dial in number
(480) 885-2252
When prompted, enter the meeting ID.

HOSTS ☺ ↓

Add by name, extension, number, or email

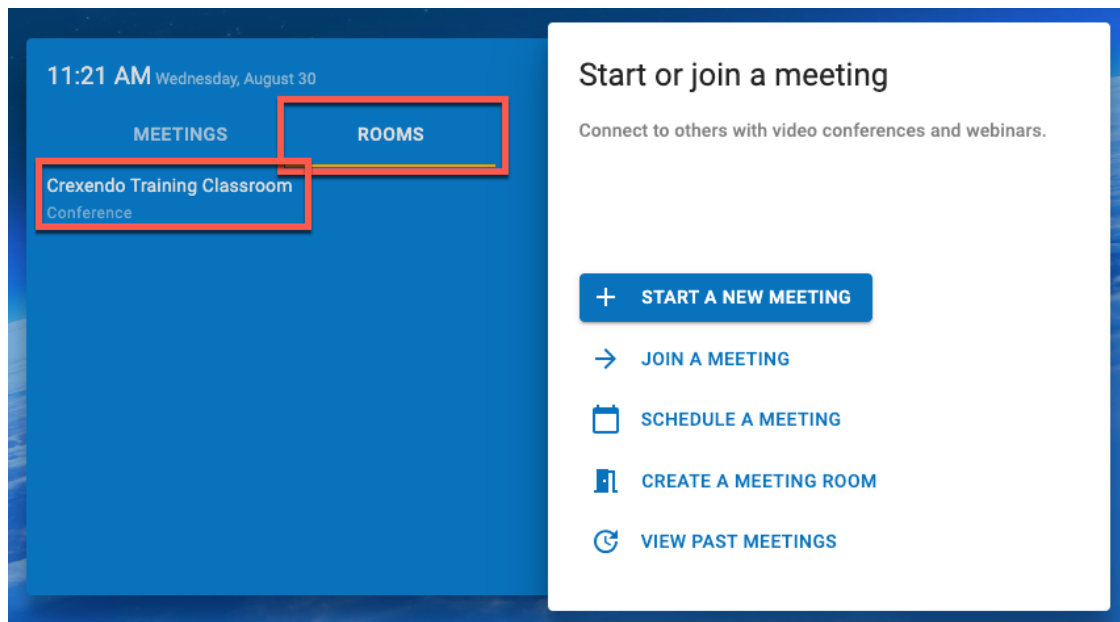


Gideon O'Daniel Host (Owner)
5318

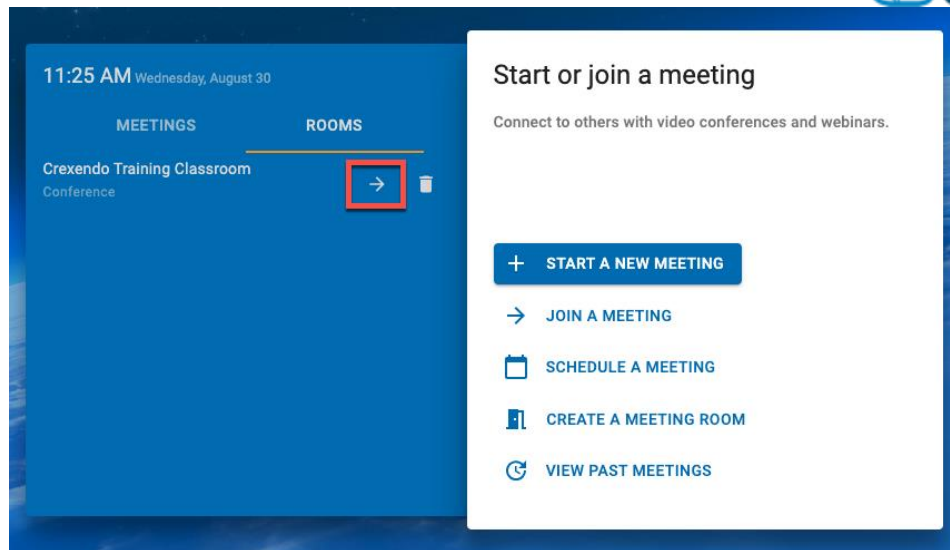
CANCEL

SAVE

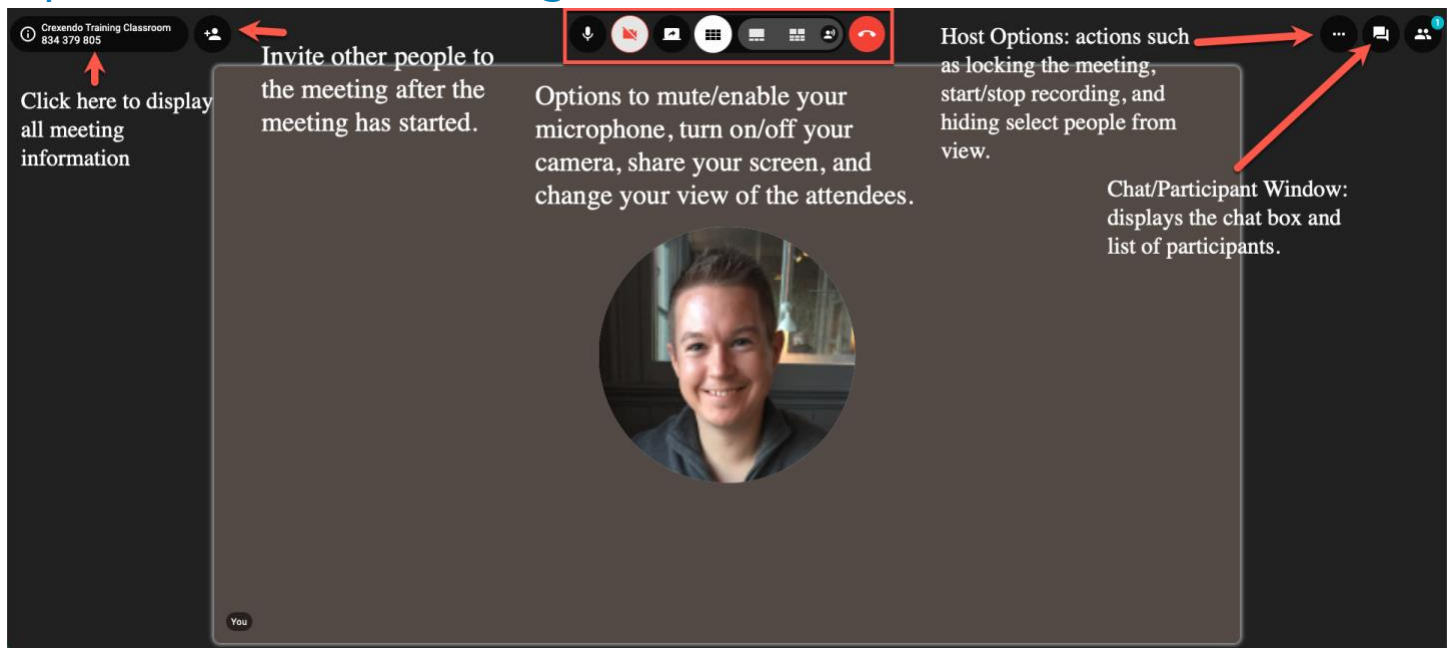
- Select **“Save”** to complete your **Meeting Room**.
- Your Meeting Room can be accessed by launching the HD platform and select **“Rooms”**. Any meeting rooms that have been created will appear here.



- To access your meeting room, select the **“arrow”** icon. To edit your meeting room, select the name of your meeting room to launch the options page.



Options Within a Meeting



Crexendo Training Classroom
834 379 805

Invite other people to the meeting after the meeting has started.

Options to mute/enable your microphone, turn on/off your camera, share your screen, and change your view of the attendees.

Host Options: actions such as locking the meeting, start/stop recording, and hiding select people from view.

Chat/Participant Window: displays the chat box and list of participants.

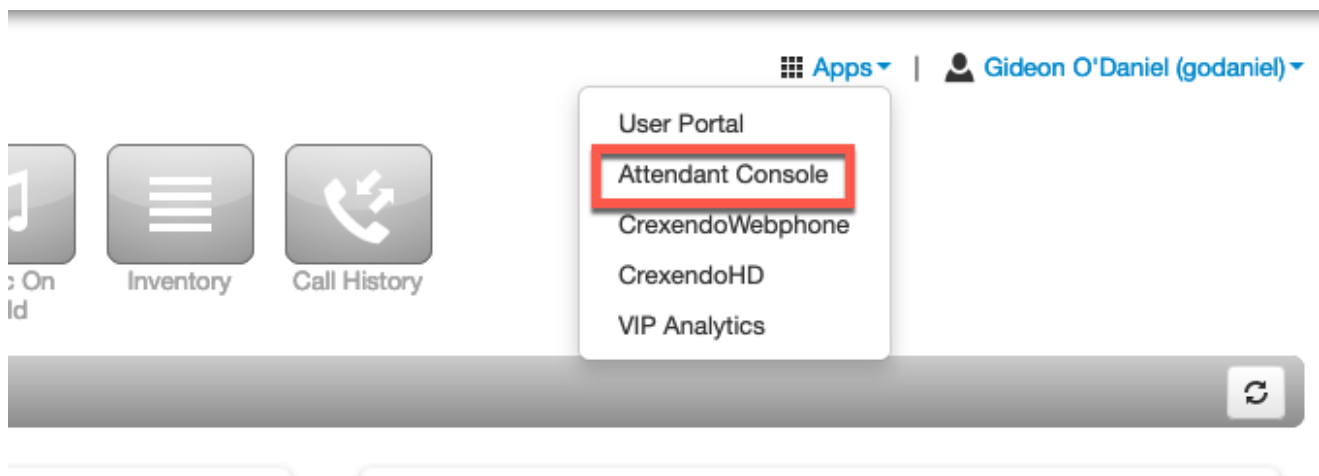
Click here to display all meeting information

You

Introduction:

The **Attendant Console** is a valuable tool if you regularly transfer calls within your business. **This guide contains a brief overview of Crexendo's Attendant Console** - a companion product when coupled with your desk phone or web phone.

The VIP Attendant Console (VAC) is an application that you navigate to from the VIP Portal by clicking on the **Apps** link (upper right) and clicking **Attendant Console**.

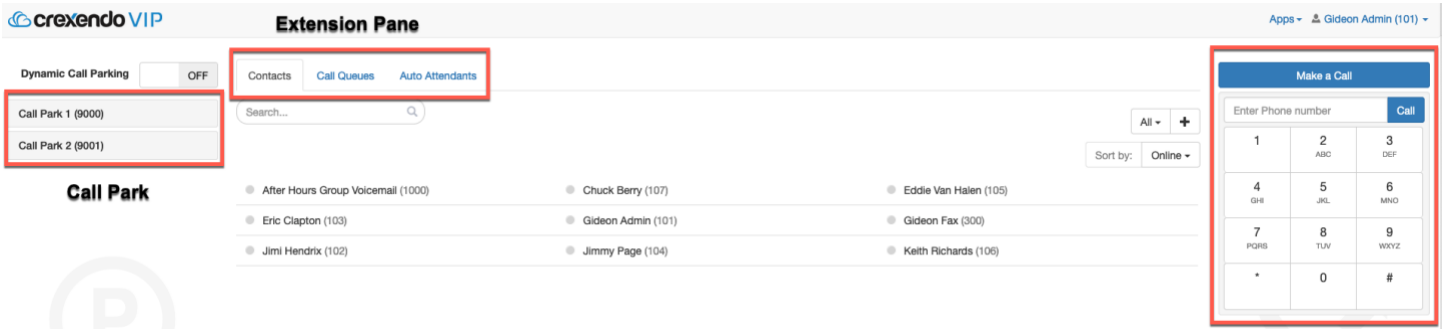


The Console:

When directing calls, the attendant console is an excellent companion to your desk phone. While taking calls on your desk phone, the VIP Attendant Console (VAC) gives you visibility of your entire organization while giving complete control over any phone call that you receive.

The VAC's "drag and drop" function allows you to:

- Transfer any call to another user or user's voicemail.
- Park a call.
- Transfer to a Call Queue.
- Transfer to an Auto Attendant.



The screenshot displays the 'Extension Pane' in the Crexendo VIP interface. At the top left, there is a 'Dynamic Call Parking' toggle set to 'OFF'. Below it, a 'Call Park' section lists 'Call Park 1 (9000)' and 'Call Park 2 (9001)'. The main area features three tabs: 'Contacts', 'Call Queues', and 'Auto Attendants'. A search bar is positioned below the tabs. A list of contacts is shown, including 'After Hours Group Voicemail (1000)', 'Eric Clapton (103)', 'Jimi Hendrix (102)', 'Chuck Berry (107)', 'Gideon Admin (101)', 'Jimmy Page (104)', 'Eddie Van Halen (105)', 'Gideon Fax (300)', and 'Keith Richards (106)'. On the right side, there is a 'Make a Call' button and a numeric keypad for entering a phone number.

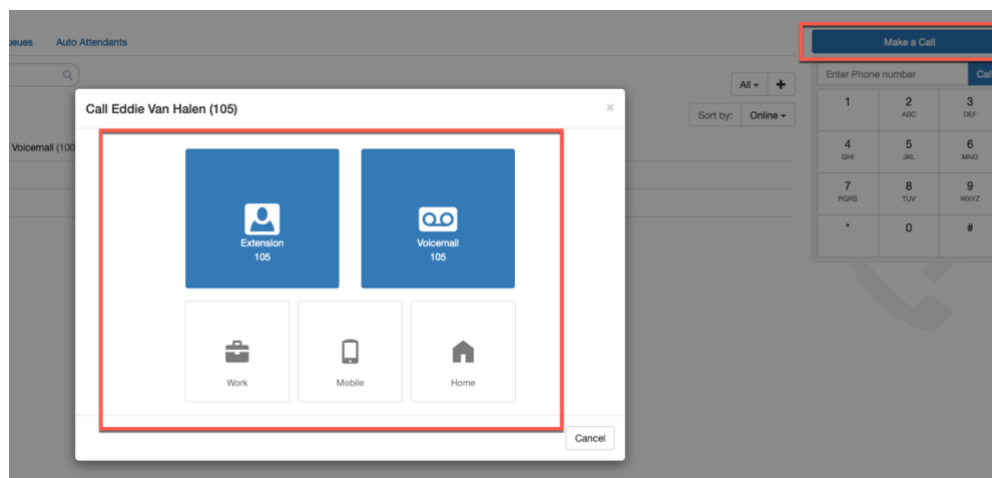
Navigating the Attendant Console:

- **The Extension Pane:** A list of your organization's contacts appear on the **Contacts** tab. You can also click the **Call Queues** or **Auto Attendants** tab to display those. You can drag calls to any of these objects to transfer a call to it.
- **The Call Park List:** If your organization utilizes parking spots, they will appear here. You can drag calls here to park them. You can also active Dynamic Call Parking which picks the call park for you.
- **Make a Call Button:** Click here to place calls. After the call is initiated, it will be transferred to your desk phone.

Handling Calls in the Attendant Console:

To Make a Call:

- *A Number not in the directory:* Select "**Make a Call**" and enter the phone number in the blank and press "**Call**." The call will be transferred to your desk phone.
- *A Number in the Directory:* Click the name you would like to call in the console. You can search for a specific contact from the Extension Pane. A separate pane will pop up to give you the option to call the extension or voicemail.



This screenshot shows a dialog box titled 'Call Eddie Van Halen (105)'. The dialog box contains two main options: 'Extension 105' and 'Voicemail 105', each with a corresponding icon. Below these are three smaller buttons: 'Work', 'Mobile', and 'Home'. A 'Cancel' button is located at the bottom right of the dialog box. In the background, the 'Make a Call' button and the numeric keypad from the previous screenshot are visible, indicating the context of the call initiation process.

To Transfer a Call:

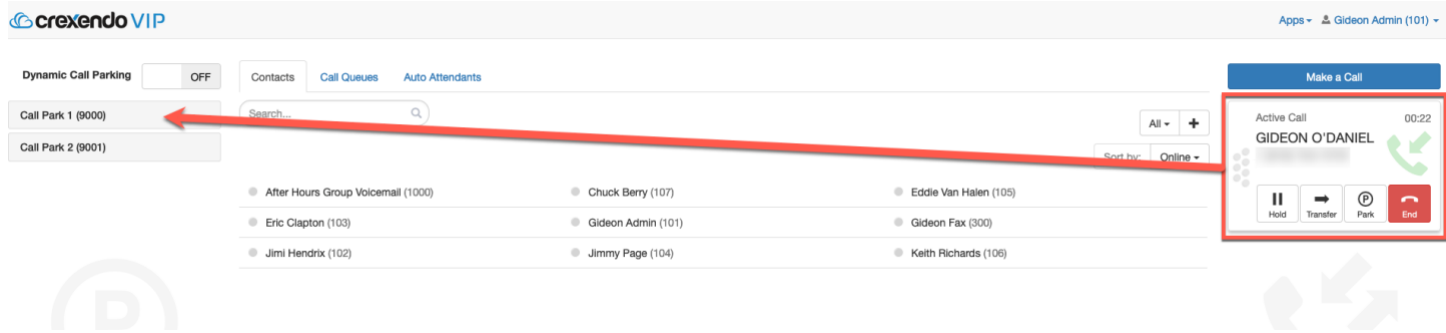
- To an Internal User:** In the call pane, select **“Transfer”** and drag the call pane to the user the call needs to go to. You can search for the user in the **“Extension Pane.”** Once you drag the call to the user, the option to do a blind transfer, an assisted transfer, or transfer the call to the user’s voicemail will be provided.

The screenshot shows the Crexendo VIP interface. On the right, the 'Active Call' pane for GIDEON O'DANIEL (00:22) has a red box around the 'Transfer' button. A red arrow points from this button to the 'Chuck Berry (107)' contact in the 'Extension Pane' list. Below the list, a modal window titled 'Transfer to Chuck Berry (107)' is open, showing three options: 'Transfer', 'Assisted Transfer', and 'Voicemail'. The 'Extension - 107' dropdown is also visible.

- To an External Number:** If the number is in your contact list, proceed with the drag and drop function. If it is NOT in your contact list, initiate the transfer from your DESK PHONE by pressing Transfer, the 10-digit number, and Transfer.
- To a Call Queue or Auto Attendant:** Select the desired destination from the Extension Pane and drag and drop the call.

The screenshot shows the Crexendo VIP interface. The 'Call Queues' pane is highlighted with a red box. A red arrow points from the 'Transfer' button in the 'Active Call' pane (for GIDEON O'DANIEL, 00:06) to the 'Tech Support Daytime (2001)' contact in the 'Call Queues' pane. The 'Active Call' pane also shows a numeric keypad for entering a phone number.

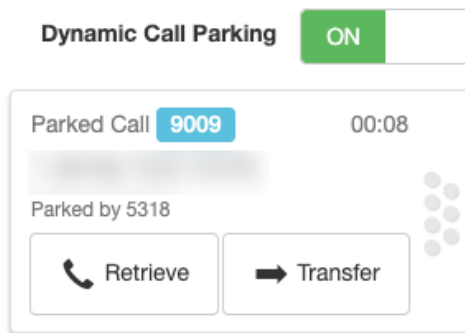
- **To a Call Park:** Drag and drop the call into the Call Park Pane.



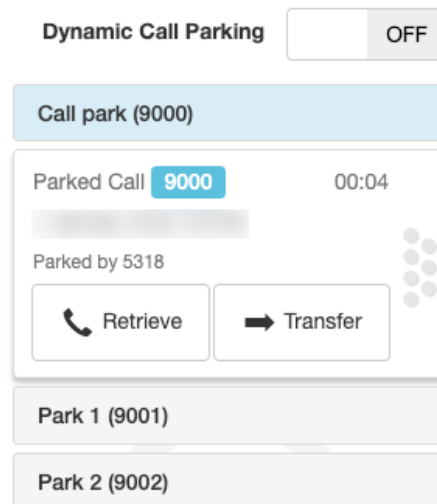
The screenshot shows the Crexendo VIP interface. At the top, there's a header with the Crexendo logo and 'Apps - Gideon Admin (101)'. Below that, there's a navigation bar with 'Dynamic Call Parking' set to 'OFF', and tabs for 'Contacts', 'Call Queues', and 'Auto Attendants'. A search bar is present. On the left, there are two call park options: 'Call Park 1 (9000)' and 'Call Park 2 (9001)'. A red arrow points from the 'Active Call' pane on the right to the 'Call Park 1 (9000)' option. The 'Active Call' pane shows 'GIDEON O'DANIEL' with a duration of 00:22 and buttons for 'Hold', 'Transfer', 'Park', and 'End'. Below the search bar, there's a list of contacts including 'After Hours Group Voicemail (1000)', 'Eric Clapton (103)', 'Jimi Hendrix (102)', 'Chuck Berry (107)', 'Gideon Admin (101)', 'Jimmy Page (104)', 'Eddie Van Halen (105)', 'Gideon Fax (300)', and 'Keith Richards (106)'.

- **Dynamic Call Park vs Non-Dynamic Call Park:**

- *Dynamic Call Park:* The parking pane will still be present, but no parking spots will be displayed. You only need to drag calls to the pane and the VIP system determines which parking spot is parked the call.
- *Non-Dynamic Call Park:* All your Call Parks will appear, and you choose which call park it goes to.



This screenshot shows the 'Dynamic Call Parking' toggle set to 'ON'. Below it, a 'Parked Call' pane is visible for call 9009, with a duration of 00:08. The call is parked by 5318. There are 'Retrieve' and 'Transfer' buttons. The call park pane is highlighted in blue.




This screenshot shows the 'Dynamic Call Parking' toggle set to 'OFF'. Below it, a 'Call park (9000)' pane is visible for call 9000, with a duration of 00:04. The call is parked by 5318. There are 'Retrieve' and 'Transfer' buttons. Below the call park pane, two other call park options are listed: 'Park 1 (9001)' and 'Park 2 (9002)'.

Introduction

Accessing your voicemail and voicemail settings can be done from several areas including your desk phone, mobile app, web phone, and Portal. This guide will walk you through how to **access and manage your voicemail through your desk phone, portal, web phone, and mobile app.**

How to Check and Manage Your Voicemail Settings – Desk Phone

To check your voicemail:

1. Press the **Voicemail button** which is an envelope icon. 
2. When prompted, **enter your voicemail PIN and press #**. (If you have not set one, it will be **1234**.)
3. After your PIN is accepted, the system will announce a voicemail summary starting the number of new and saved messages.

When listening to your voicemails, each message includes the following information by default:



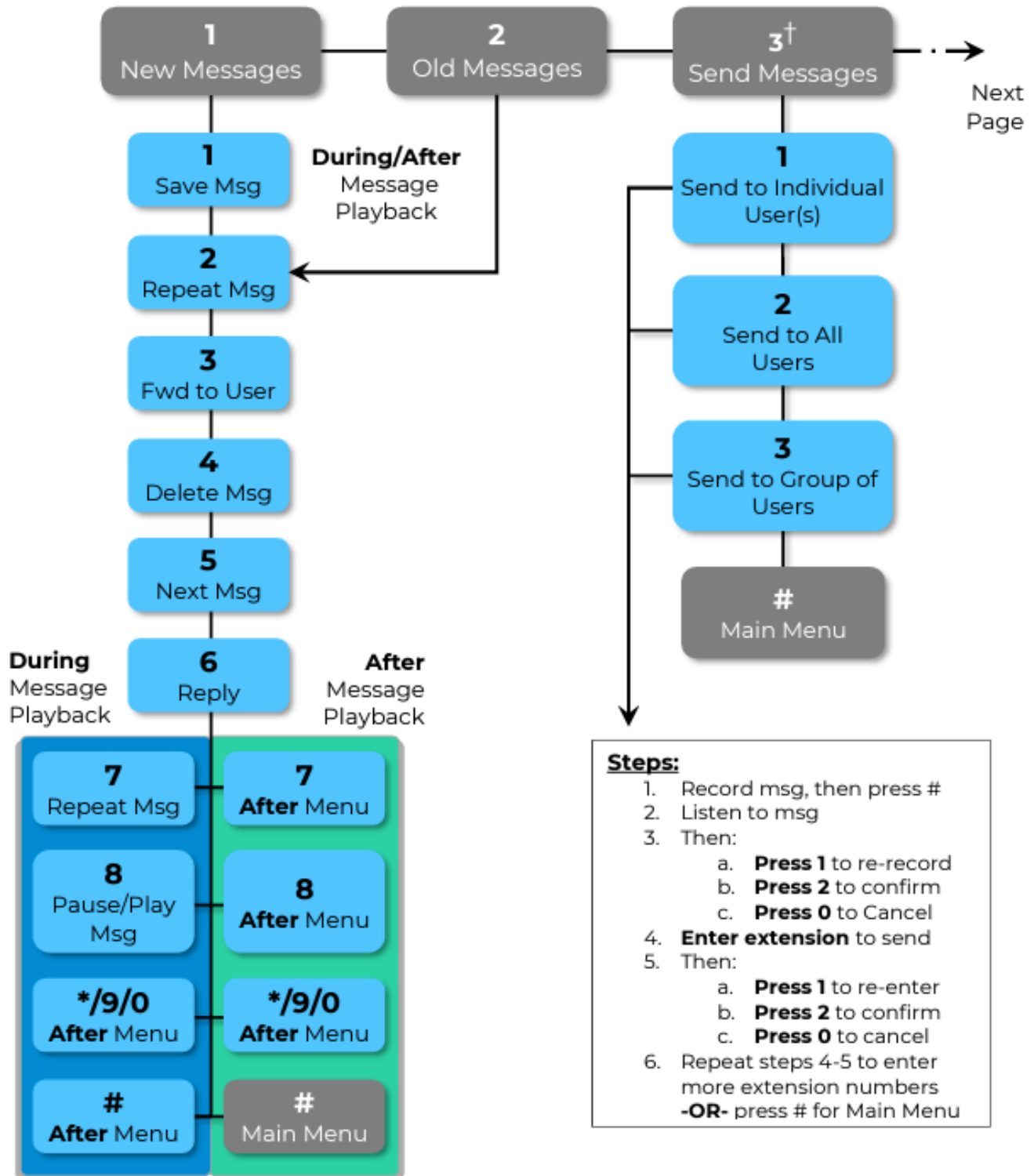
The Voicemail Header Includes: **Message received on [day or date] at [Time] am/pm.**

Tips:

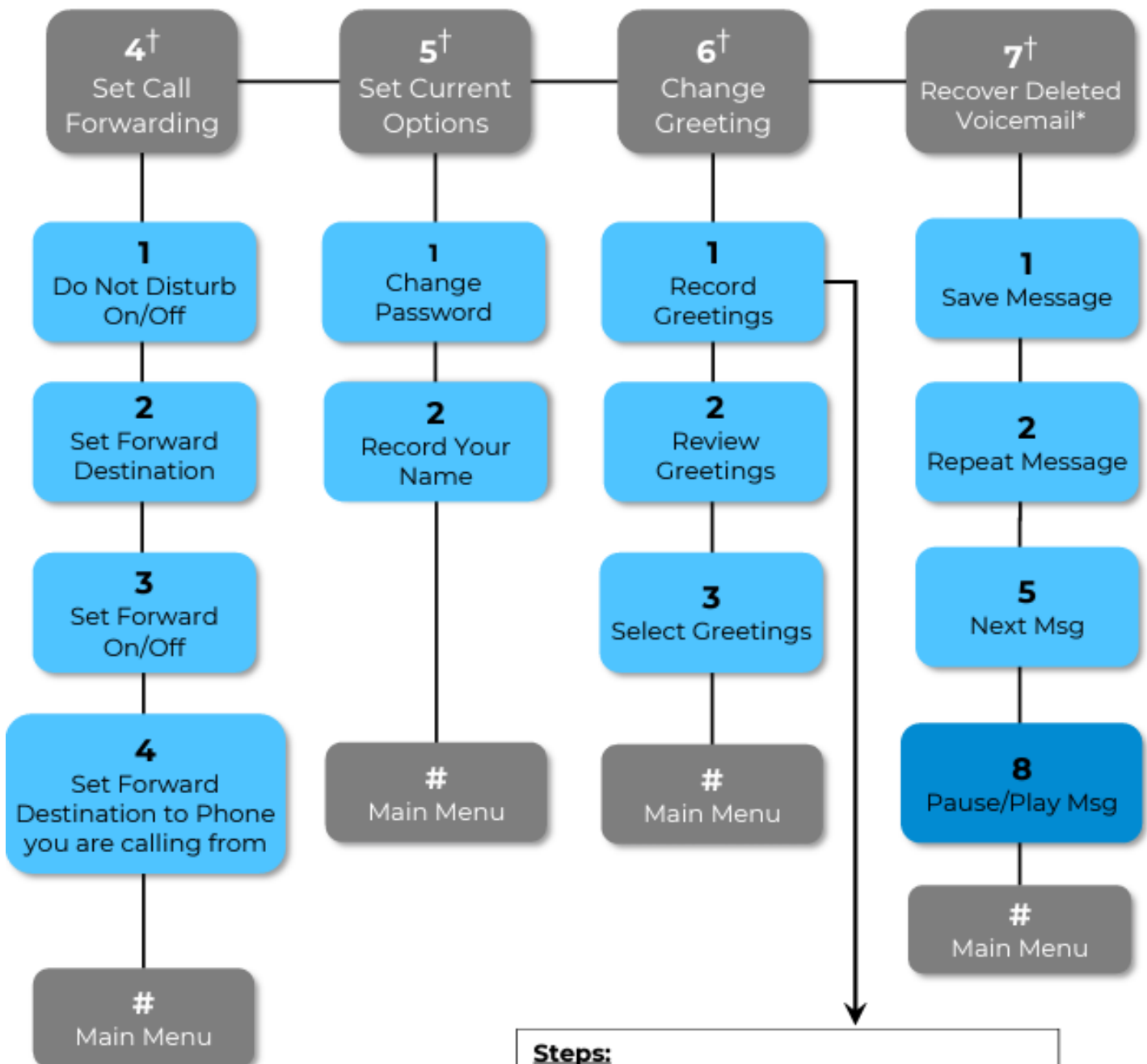
- To skip the header and go directly to the voicemail message, **press any key**.
- While listening to any voicemail message, the Playback Menu is in effect which is shown on the next page. Some options in that menu will cause the system to jump to the end of the message and play the “**After Menu**”.

To manage your voicemail settings:

After you enter your PIN and hear your voicemail summary, the main menu is available to you as shown below:



†=Press any key not shown for help



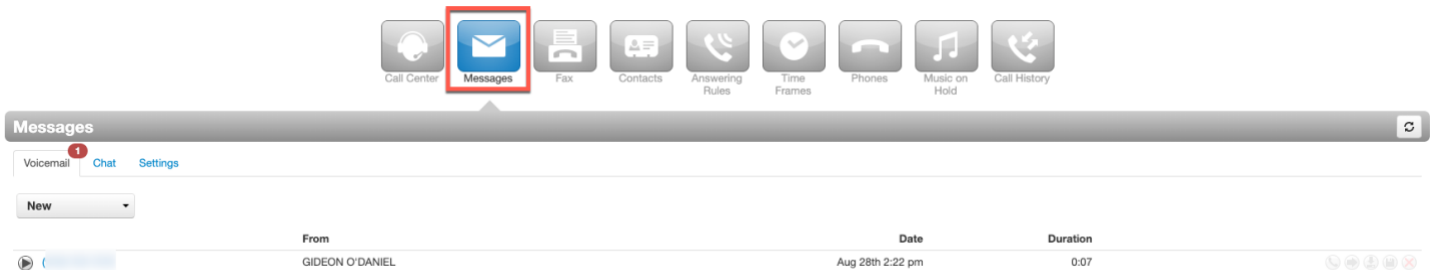
†=Press any key not shown for help

* = Recovered voicemails are saved in OLD MESSAGES

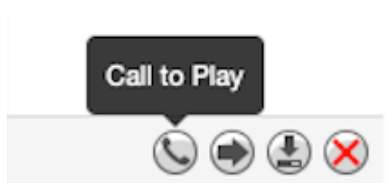
How to Check and Manage Your Voicemail Settings – Portal

To check your voicemail:

1. Login to your VIP Portal
2. Select the “**Messages**” navigation button at the top of the page.



3. Your new voicemails will be displayed and can be played through your computer's speakers or headset. Select the **drop-down arrow** to access any saved messages.
4. To the right of each message, you have the options to **play your message on your primary phone, forward the voicemail to another user's voicemail box, download the voicemail, and delete the voicemail.**



To manage your voicemail settings:

1. Within **Messages**, select the “**Settings**” tab.



2. The following settings are available for you to manage your voicemail:
 - a. **Enable Voicemail:** Uncheck the box to turn off your voicemail.

- b. **Options:** Provides options for sorting your voicemail.
- c. **Operator Forward:** You can direct a caller that gets your voicemail to press “0” to be forwarded to another user. Simply enter the extension that they can be forwarded to.
- d. **Copy to extension(s):** If you would like your voicemails to be copied to another user’s voicemail, enter the name or extension you would like this to happen for. **NOTE:** This simply copies the voicemail to another user, but it does NOT mirror the actions that someone takes with that voicemail. If you delete the voicemail, it does NOT delete the voicemail in another user’s voicemail box.
- e. **Voicemail Transcription:** enable this option if you would like your voicemails transcribed so you can read them.
- f. **Options:** You can receive an email when your mailbox is full or if you have missed a call.
- g. **Voicemail Greeting:** To add a new voicemail greeting from the VIP Portal:

- i. Select the “**Manage**” button.



- ii. Select “**Add Greeting**” at the bottom of the window.
- iii. Select the method you would like to use to add your new greeting:
 1. **Text-To-Speech:** Allows you to type in your message and select a voice inflection that will read your message.
 2. **Upload:** Allows you to upload a recording that you may have from the past.
 3. **Record:** Allows you to specify where you would like to be called to record your message.

Manage Greetings

- New Greeting
- Text-To-Speech ⓘ
 - Upload
 - Record

- iv. Select “**Save**” to add your greeting. You can delete any old messages that you do not need.
- h. **Recorded Name:** allows you to use the record, text-to-speech, and upload methods to record your name if you do not want to add a voicemail greeting.

- i. **Email Notifications:** This option sends you an email notification if you receive a new voicemail. This can be set to automatically delete the voicemail from your inbox once it has been sent to your email inbox.

Notifications

Email Notifications Receive an email for new voicemail

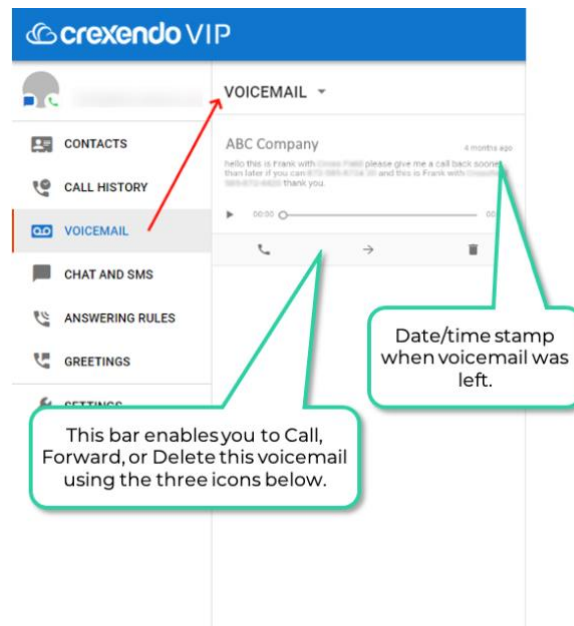
Email Type Send with attachment ▼

After Email Notification Move to trash ▼

Save
Cancel

How to Check Your Voicemail – Web Phone

1. Within the Crexendo Web Phone, select “**Voicemail**” from the navigation pane.
2. The Voicemail option displays a list of your voicemails. It displays both new and saved voicemails to which you can listen by clicking the **Play** button. The image below shows voicemail that has been transcribed using our premium transcription feature.

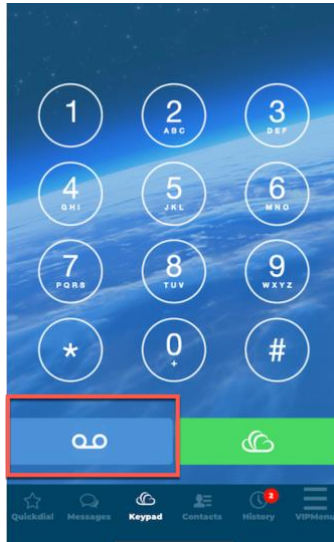


How to Check Your Voicemail – Mobile Application

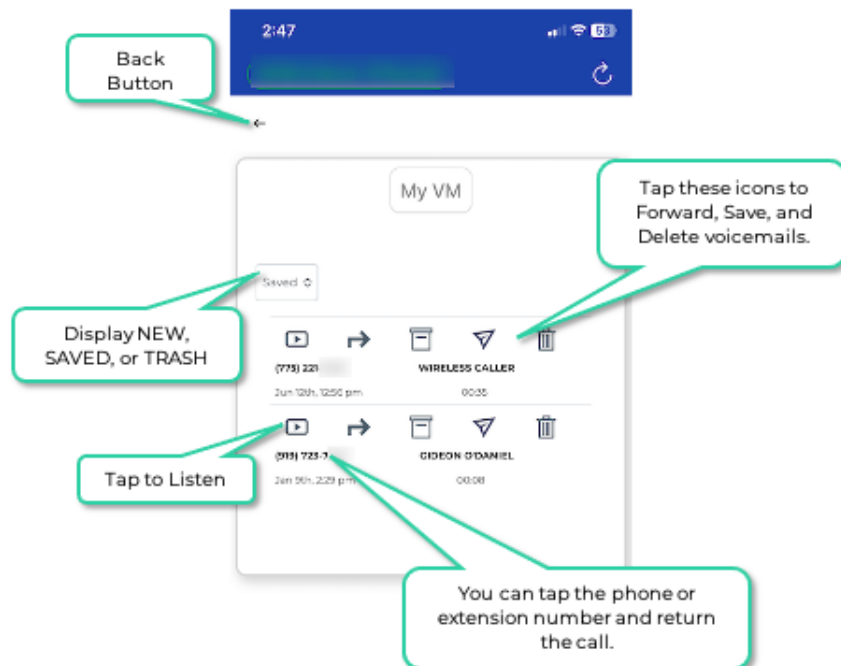
1. If you have missed a call or received a new voicemail, you will receive a notification on your phone and the app icon will notify you.



2. There are two ways to check your voicemail from your mobile application:
 - a. **The Keypad:** When you have a NEW voicemail, your keypad will look like this to offer you to call your voicemail and enter your voicemail PIN.



- b. **Visual Voicemail:** This option is in the “VIP Menu.” This screen does not call the audio voicemail system, but you can play your messages from here. You will be able to read your voicemails if the transcription function enabled.



Introduction

If you are using a desk phone with your Crexendo environment, you have several features and functions at your disposal. While Crexendo provides several different desk phone models, basic functionality remains the same across all phones.

This guide will illustrate how to **answer a call, making a call, transfer a call, place a call on hold, create a conference call, park a call, and feature codes that can be used on your desk phone.**



Key Terms:



- **Line/Feature Buttons:** The first couple of buttons on the left side are YOUR phone lines which allows you to juggle multiple calls. The other buttons are for assigning features such as speed dials, PARK buttons, internal speed dial/status buttons or BLF Keys, etc.
- **Soft Keys:** The function of these buttons change based on what your phone is doing.
 - **When you phone is idle:** History, Directory, Do Not Disturb, and Menu.
 - **When you pick up the handset:** Directory, 123, and Cancel
 - **When you are dialing a number:** Send, 123, Delete, and Cancel
 - **When you are on a call:** Transfer, Hold, Conference, and End Call
- **Hard Buttons:** These buttons remain the same and are used to for direction, volume, headset, voicemail, mute, hold, redial, transfer, and speaker phone.

Answering a Call

When not on another call:

- Lift the handset.

When on another call:

- Press the **“Answer”** soft key.
- The incoming call is answered, and the original call is placed on hold.
- Press  to access the new call.
- Press  or the **“Answer”** soft key.
- The incoming call is answered, and the original call is placed on hold.

NOTE: The **Soft Keys** will change based on what you are doing on the phone.

Making a Call

Internal Call:

- Lift the handset.
- Enter the desired extension and press the **“Send”** soft key.


External Call:

- Lift the handset.
- Enter the desired 10-digit number using the keypad.
- Press the **“Send”** soft key or wait 4 seconds for the system to dial the number for you.
- If you are using the speakerphone, enter the 10-digit number and press **“Send”** or wait 4 seconds.

Transferring a Call

There are two ways to transfer a call: **Attended** and **Unattended**.



Attended: This option puts the caller on hold while you confirm that the receiver of the call can take the call. To perform this option:

1. Press the **“Transfer”** button  and the caller will be put on hold and another line will be activated.
2. Dial the phone number or extension and press **“SEND (#).”**
3. Inform them that a call is coming and confirm they can receive it.

4. Press the **“Transfer”** button  again (Hanging up will also complete the transfer).


The call is now being transferred to the desired extension or number and you can hang up. If the person does NOT want you to transfer the call to them, you can press the **“End Call”** soft key and then connect back to the caller (who is still on hold) and let them know.

Unattended: This option immediately transfers the call to the extension or number. To perform this option:

1. Press the **“Transfer”** button  and the caller will be put on hold and another line will be activated.
2. Dial the phone number or extension.
3. Press the **“Transfer”** button  again to complete the transfer.

Hold Function

To place a call on hold:

1. While on a call, press the **“Hold”** soft key or the **“Hold”** hard button. 
2. The line is now on hold and flashing on your phone only.

To pick up a call on hold: Press the **“Hold Key”** of the **“Resume”** soft key.

Conference Call



To set up a conference call for up to three people:

1. Press the **“Conference”** soft key during an active call. The call is placed on hold.
2. Enter the number or extension of the second party and press the **“Send”** soft key.
3. Press the **“Conference”** soft key again when the second party answers. All parties are now joined in the conference.

Park Function

Call Park is a feature that allows you to place a call into a hold queue that allows another user to retrieve the call themselves instead of performing a direct transfer. Call Parks must be created by an administrator for users to utilize them. All Call Park extensions will be in the 9000 range such as Call Park 1 would be extension 9001, Call Park 2 would be extension 9002, etc. An administrator can program as many Call Parks for users as needed and can be done in the Call Queue section of the VIP Portal for Managers.

To place a call in a Call Park:

1. While on a call, press the “**Transfer**” soft key or the “**Transfer**” hard key . This will place the call on hold.
2. Dial the extension of the Call Park and press the “**B. Transfer**” soft key or the “**Transfer**” hard key .
3. The call is now in the Call Park that you sent it to.
4. If you have assigned your Call Parks to the feature buttons on your phone:
 - a. While on an active call, select the feature button for the call park and the call will be instantly assigned to that call park.
 - b. The feature button for that call park will show the call that is there for anyone who has the call park assigned to one of their feature buttons.

To Retrieve a Call from the Call Park:

1. Dial the extension of the Call Park that the call was sent to, and press “**Send**” or wait 4 seconds.
2. The call is now transferred from the Call Park to your extension.
3. If you have the Call Park assigned to a feature button, simply press the feature button for the Call Park and it will be transferred to your extension.

Phone Feature Codes

Feature Codes are shortcuts that you can perform on your phone, web phone, and mobile app to complete a myriad of tasks. See below for the feature code or “star code” that include **dialing/calling out, receiving calls, forwarding/transferring, and some miscellaneous options.**

Dialing/Calling Out

Code	Name	Description	Usage
*69	Last Call Return	Call the last person that called you	*69 + [SEND]
*71+Ext	Intercom†	Turn on speaker of another internal phone	*71 + [Extension # of other phone] + [SEND]
*67	CallerID-Block Enable	Block your CallerID and phone # from being sent when calling someone.	All future calls: *67 + [SEND] One call only: *67 + [destination phone #] + [SEND]
*68	CallerID-Block Disable	Your CallerID information will be sent on future calls.	*68 + [SEND]

† = Web phone does not auto-answer

Receiving Calls

Code	Name	Description	Usage
*77	Anonymous Calls Reject	Reject all incoming calls if the caller's CallerID is blocked.	*77 + [SEND]
*87	Anonymous Calls Accept	Accept incoming calls if the caller's CallerID is blocked.	*87 + [SEND]
*78	DND Activate	Do Not Disturb (DND) is activated across all your phones.	*78 + [SEND]
*79	DND Deactivate	Do Not Disturb (DND) is deactivated across all your phones.	*79 + [SEND]
*99	Directed Call Pickup	Allows a user to intercept an incoming call	*99 + [Extension # of ringing phone] + [SEND]

Forwarding/Transferring

Code	Name	Description	Usage
*10	Transfer to Voicemail	Transfer caller directly to voicemail.	[Transfer] + *10 + [destination extension #] + [Transfer]
*80	Move Call	Move a call from one of your phones to the phone you're on (other party not aware)	*80 + [SEND]
*72	Call-Forward <u>Always</u> Set/Activate	Enter a phone number and activate call forwarding to that number. Forwarding will trigger in all situations	*72 + [forward destination number]
*40	Call-Forward <u>Always</u> Activate	Activate call-forwarding to a previously set number (*72). Forwarding will trigger in all situations.	*40 + [SEND]
*73	Call-Forward <u>Always</u> Deactivate	Deactivate Forward-Always Mode only (*40 & *72). Other modes are unaffected.	*73 + [SEND]
*41	Call-Forward <u>Busy</u> Set/Activate	Enter a phone number and activate call forwarding to that number. Forwarding will trigger only when you are on the phone (Busy).	*41 + [forward destination number] + [SEND]
*90	Call-Forward <u>Busy</u> Activate	Activate call-forwarding to a previously set number (*41). Forwarding will trigger only when you are on the phone (Busy).	*90 + [SEND]
*91	Call-Forward- <u>Busy</u> Deactivate	Deactivate Forward-Busy Mode only (*41 & *90). Other modes are unaffected.	*91 + [SEND]
*42	Call-Forward <u>No-Answer</u> Set/Activate	Enter a phone number and activate call forwarding to that number. Forwarding will trigger only when you do not answer incoming call (No Answer).	*42 + [forward destination number] + [SEND]
*92	Call-Forward <u>No-Answer</u> Activate	Activate call-forwarding to a previously set number (*42). Forwarding will trigger only when you do not answer incoming call (No Answer).	*92 + [SEND]
*93	Call-Forward <u>No-Answer</u> Deactivate	Deactivate Forward-No-Answer Mode only (*42 & *92). Other modes are unaffected.	*93 + [SEND]

Call Recording

Code	Name	Description	Usage
*81	Call Recording Start	Start recording phone call in-progress. (Other party not aware)	*88 + [SEND]
*75	Call Recording Pause	Pause call recording in-progress.	*75 + [SEND]
*76	Call Recording Resume	Resume call recording that was paused.	*76 + [SEND]
*82	Call Recording Stop	Stop recording phone call in-progress.	*89 + [SEND] (or hang up)

Feature Codes for VIP Call Center Agents

Code	Name	Description	Usage
*99	Directed Call Group Pickup as Agent	Allows an agent of a call group to intercept an incoming call to that group. (i.e. the interceptor must be an agent of the group)	[*99 + Extension # of ringing group] + [SEND]
*50	Agent Available Once	Agent is available to take one call from their call queue(s). After a call is taken, the agent will not automatically be made available for subsequent calls.	*50 + [SEND]
*51	Agent Available Always	Agent is available to take calls from all call queue(s) of which they are an agent.	*51 + [SEND]
*52	Agent Not Available	Agent can no longer take calls from any their call queue(s).	*52 + [SEND]

All Feature Codes in Numerical Order

Code	Name	Description	Usage
088	Call Monitoring	Allows a manager to listen to and barge into calls	088+Extension + [SEND]
*10+Ext	Send To voicemail	Send active call to designated extensions voicemail	*10+Extension + [SEND]
*40	Activate-Forward	Activate call forwarding	*40 + [SEND]
*41+Ext	Set-Forward-Busy	Enter a phone number and activate call forwarding to that number. Forwarding will trigger only when you are on the phone (Busy).	*41 + [forward destination number] + [SEND]
*42	Set-Forward-No-Answer	Set Forward No Answer Number	*42 + [SEND]
*43	Express Hotdesk Sign In	Sign in Hotdesking with Device Override	*43 + [SEND]
*44	Express Hotdesk Sign Out	Sign Out of Device Hotdesking	*44 + [SEND]
*50	Agent Available Once	Agent is available to take one call from their call queue(s). After a call is taken, the agent will not automatically be made available for subsequent calls.	*50 + [SEND]
*51	Agent Available Always	Agent is available to take calls from all call queues of which they are an agent	*51 + [SEND]
*52	Agent Not Available	Agent can no longer take calls from any of their call queues	*52 + [SEND]

All Feature Codes in Numerical Order Continued

Code	Name	Description	Usage
*67	To Connection w/Privacy	Once Time CallerID Block	*67 + [SEND]
*68	Disable Caller ID Block	Disable one-time CallerID block	*67 + [SEND]
*69	Call Return	Call return	*69 + [SEND]
*71+Ext	Intercom	Intercom	*71+Extension + [SEND]
*72+Ext	Set-Forward	Forwards calls to another extension	*72+Extension + [SEND]
*73	Deactivate Forward	Deactivates call forwarding	*73 + [SEND]
*75	Pause Recording	Pauses current recording	*75 + [SEND]
*76	Resume Call Recording	Resumes call recording	*76 + [SEND]
*77	Activate Reject Anonymous	Rejects all calls without CallerID	*77 + [SEND]
*78	Activate DND	Activates Do Not Disturb	*78 + [SEND]
*79	Deactivate DND	Deactivates Do Not Disturb	*79 + [SEND]
*80	Move Call	Moves call to your current device	*80 + [SEND]
*81	Start Call Recording	Starts recording your current call	*81 + [SEND]
*82	Stop Recording	Stops recording your current call	*82 + [SEND]
*83	Enable Hotdesking	Sign into HotDesk extension	*83 + [SEND]
*84	Disable HotDesking	Sign out of HotDesk extension	*84 + [SEND]
*87	Deactivate-Reject Anonymous	Stops rejecting all calls without CallerID	*87 + [SEND]
*88	Call Forward Active	Activates call forwarding	*88 + [SEND]
*89	Call Forward Active Disable	Deactivates call forwarding	*89 + [SEND]
*90	Activate Call Forwarding-Busy	Activate call-forwarding to a previously set number (*41). Forwarding will trigger only when you are on the phone (Busy).	*90 + [SEND]
*91	Deactivate-Forward-Busy	Deactivate Forward-Busy Mode only (*41 & *90). Other modes are unaffected.	*91 + [SEND]
*92	Activate-Forward-No Answer	Enables all calls to forward to another extension when unanswered	*92 + [SEND]
*93	Deactivate-Forward-No Answer	Deactivates call forwarding when you don't answer the phone.	*93 + [SEND]
*95	Site Group Pickup	Used for picking up a call that is ringing at an extension that belongs to a pre-defined group (department).	*95 + [SEND]
*96	Domain Pickup	used for picking up a call that is ringing at an extension that belongs to the same domain.	*96 + [SEND]

*98	Site Pickup	Used for picking up a call that is ringing at an extension that belongs to a pre-defined site and a pre-defined group (department).	*98 + [SEND]
*99	Call Pickup	Allows a user to intercept an incoming call	*99 + [Extension # of ringing phone] + [SEND]

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Introduction

In the Crexendo VIP platform, each user has a “User Scope” that dictates which Crexendo features are available to the user. This guide will provide a list of features for the following User Scopes: **No Portal, Professional, Advanced, Elite, Call Center Agent, Call Center Supervisor, Office Manager, and Site Manager.**

Crexendo Platform Features:	No Portal	Professional	Advanced	Elite
User Portal Access		X	X	X
Manager Portal Access				
Call Center Portal Access				
Call Center Statistics				
SMS/MMS*		X	X	X
Fax	Optional	Optional	Optional	Optional
Call Center Agent Features				
Contact Lists	X	X	X	X
Answering Rules	X	X	X	X
Time Frames	X	X	X	X
Call History	X	X	X	X
Voicemail and Voicemail to Email	X	X	X	X
Adding Devices				
Portal Based Device Management		X	X	X
Dedicated Audio Conference Bridge	X	X	X	X
Auto Attendants with Automated Scheduling				
Call Queue Management				
Phone Number Management				
SMS Number Management				
Crexendo Web Phone		X	X	X
Attendant Console			X	X
Crexendo HD (Video/Presentation)				X
Crexendo VIP Mobile Application		X	X	X
VIP Analytics				
Unlimited Inbound Calling	X	X	X	X
Work From Anywhere	X	X	X	X
Call Waiting, Park, Retrieve, and Screen	X	X	X	X
Dial by Name or Extension Directory	X	X	X	X
Maximum Number of Devices	1	1	5	8
Voicemail Transcription			X	X
Automatic Call Recording	X	X	X	X
Instant Messaging			X	X

*Requires SMS registration and activation.

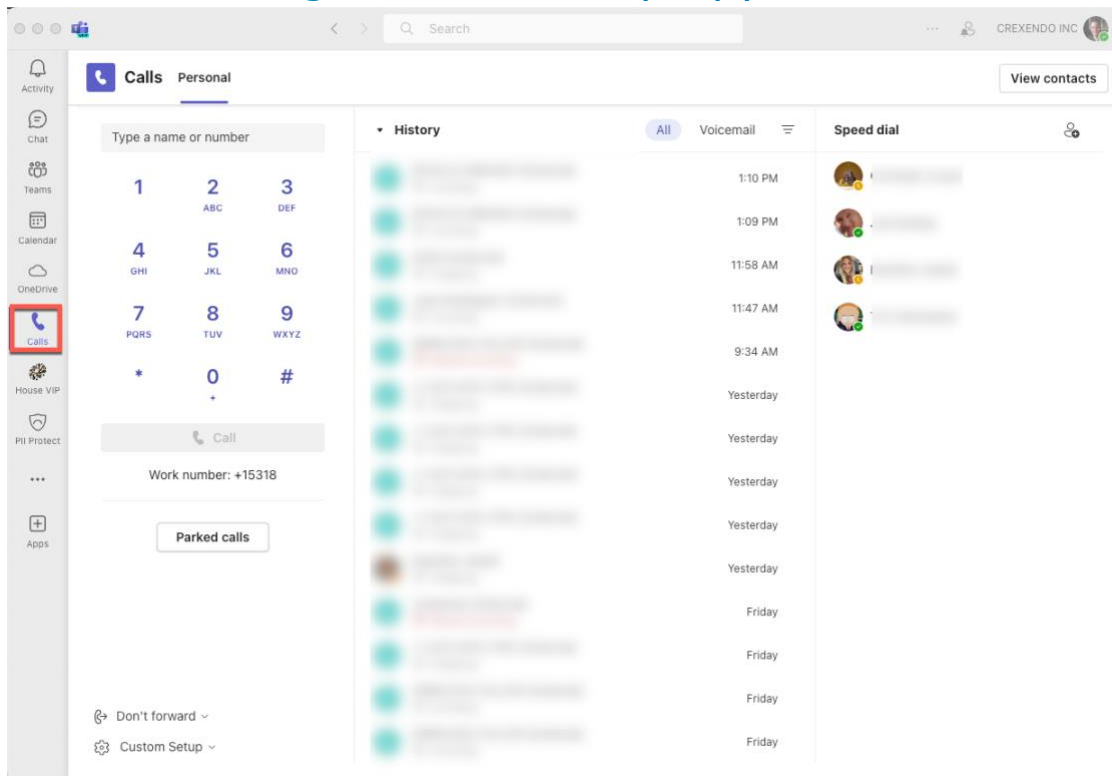
Crexendo Platform Features:	Call Center Agent	Call Center Supervisor	Office Manager	Site Manager
User Portal Access	X	X	X	X
Manager Portal Access			X	X
Call Center Portal Access	X	X	X	X
Call Center Statistics	X	X	X	X
Call Center Reports		X	X	X
SMS/MMS*	X	X	X	X
Fax	Optional	Optional	Optional	Optional
Call Center Agent Features	X	X	X	X
Contact Lists	X	X	X	X
Answering Rules	X	X	X	X
Time Frames	X	X	X	X
Call History	X	X	X	X
Voicemail and Voicemail to Email	X	X	X	X
Adding Devices			X	X
Portal Based Device Management	X	X	X	X
Dedicated Audio Conference Bridge	X	X	X	X
Auto Attendants with Automated Scheduling		X	X	X
Call Queue Management		X	X	X
Phone Number Management			X	X
SMS Number Management			X	X
Crexendo Web Phone	X	X	X	X
Attendant Console	X	X	X	X
Crexendo HD (Video/Presentation)	X	X	X	X
Crexendo VIP Mobile Application	X	X	X	X
VIP Analytics		X	X	X
Unlimited Inbound Calling	X	X	X	X
Work From Anywhere	X	X	X	X
Call Waiting, Park, Retrieve, and Screen	X	X	X	X
Dial by Name or Extension Directory	X	X	X	X
Maximum Number of Devices	5	5	8	8
Voicemail Transcription	X	X	X	X
Automatic Call Recording	X	X	X	X
Instant Messaging	X	X	X	X

*Requires SMS registration and activation.

Introduction

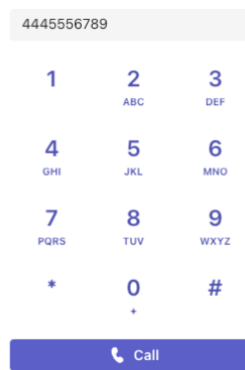
Microsoft Teams can be utilized to make and receive calls on a personal computer or by using the Microsoft Teams application on your mobile device. This guide will illustrate how to make and receive calls, in call options, and how to configure your own settings using both the Microsoft Teams Desktop Application and the Mobile Application

Making and Receiving Calls – Desktop Application



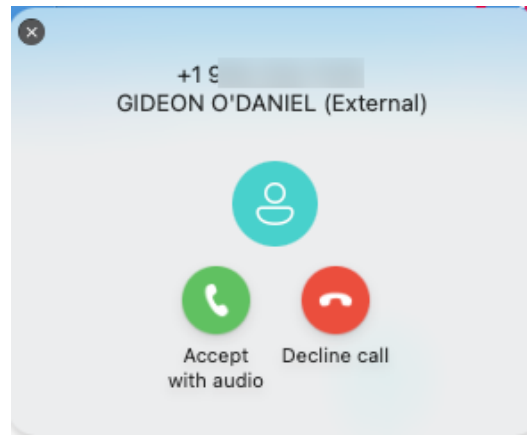
To make a call in the Teams application:

1. Select the **“Calls”** icon on the left side menu.
2. In the **“Type a name or number”** blank, enter either the 10-digit phone number you would like to call, or if the number is in your contacts, type the name in the blank.
3. Press **“Call”** to place the call.



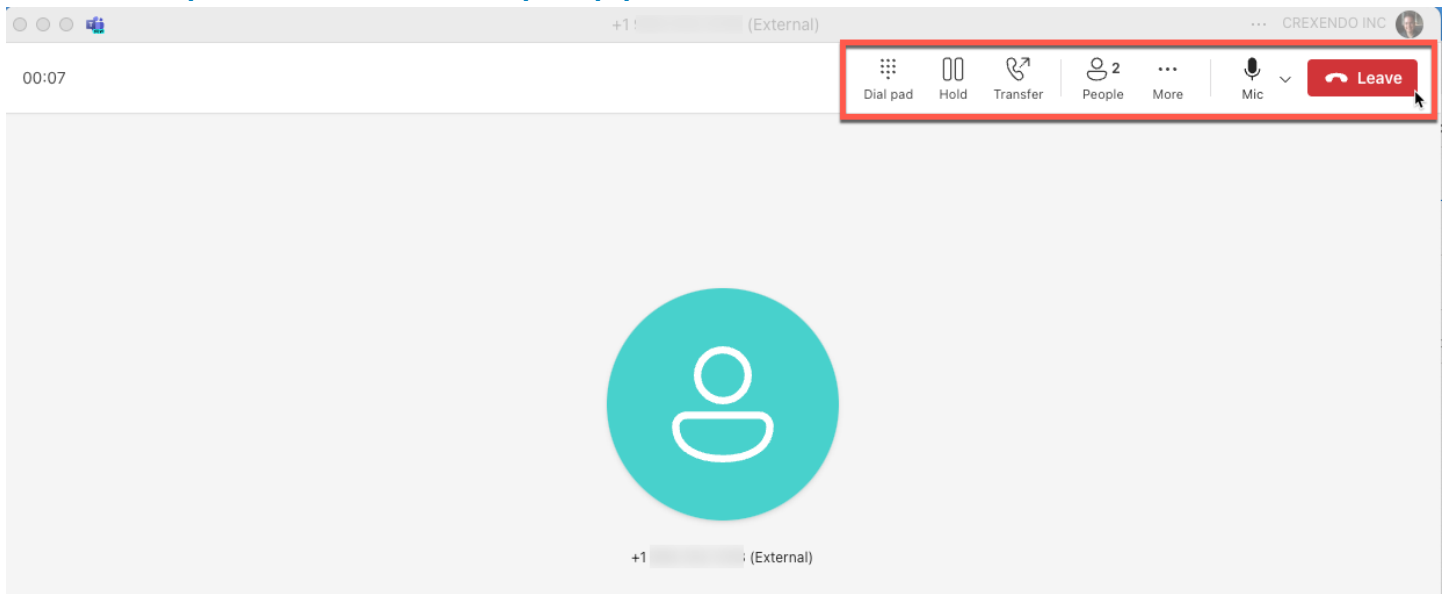
To Receive a Call in the Teams Desktop Application:

1. When you are receiving a phone call, you will be notified by both a tone through your speakers or headset, and a screen notification with the options to **“Accept with audio”** or to **“Decline call.”**



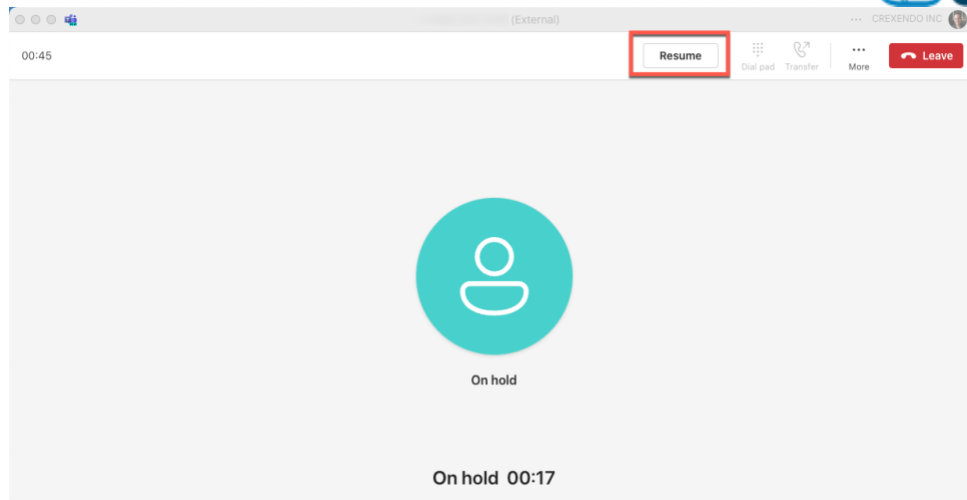
2. Select **“Accept with audio”** to be connected to the call or **“Decline call”** to send the call to voicemail.

In Call Options – Desktop Application



While you are on an active call, you have several options available to you:

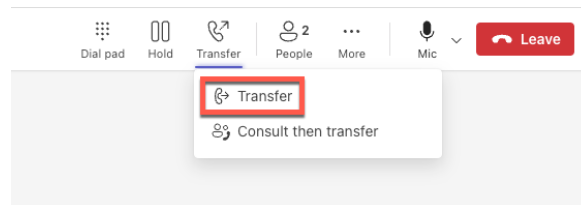
- **Dial pad:** Opens a dial pad to make selections if necessary.
- **Hold:** Select **“Hold”** to place the caller on hold. The option to **“Resume”** the call will appear while the caller is on hold. A timer will also appear at the bottom of screen indicating how long the caller has been on hold.



- **Transfer:** This option allows you to perform a cold or warm transfer depending on your needs. Select the “**Transfer**” button to start the process. You will have two options to transfer the call: *Transfer*, which will immediately send the call to the recipient, or *Consult then transfer*, which will place the caller on hold while you speak to the intended recipient to ensure they are ready to receive the call.

- **To Perform a Cold Transfer:**


- Select the “**Transfer**” button from the list.



- Type in the name (if already one of your contacts) or the 10-digit phone number the call will be transferred to. If you are transferring the call to a user with an extension in your company, you can choose to transfer the call to their voicemail or to ring back to you if they do not answer.

Transfer the call

Invite someone or dial a number

 [Name]

Work voicemail

Ring back to me

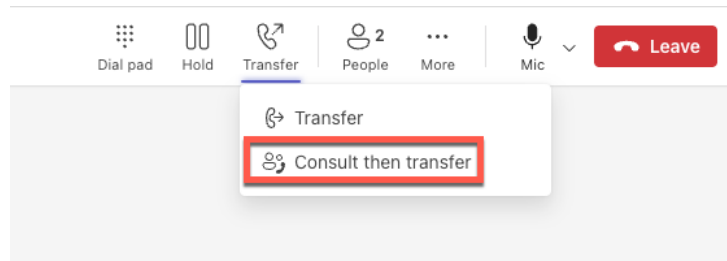
Work+1 [Number]

Cancel Transfer

- Select “**Transfer**” to complete the transfer.

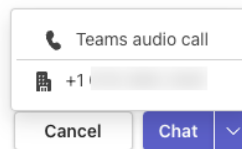
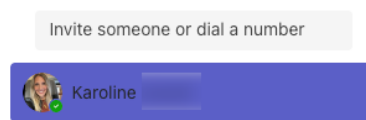
- **To Perform a Warm Transfer**

- Select the **“Consult then transfer”** option from the transfer list.



- Select the person you would like to transfer the call to. You can choose to either call the person or open a chat window with the user.

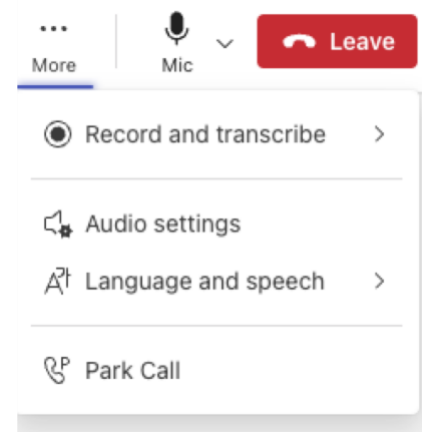
Choose a person to consult



- Once you have confirmed they are ready for the transfer, select **“Transfer”** at the top of the page which will complete the transfer.

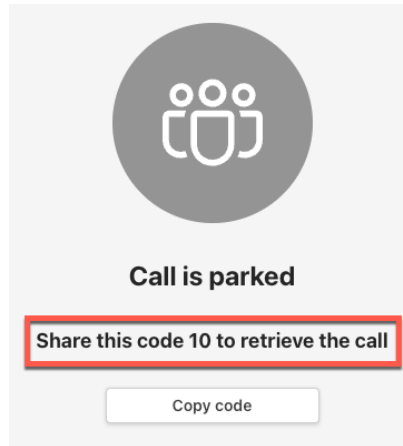


- **People:** This option shows the current participants on the call.
- **More:** provides the options to record the call, audio settings, Language and speech options, and the option to park a call.



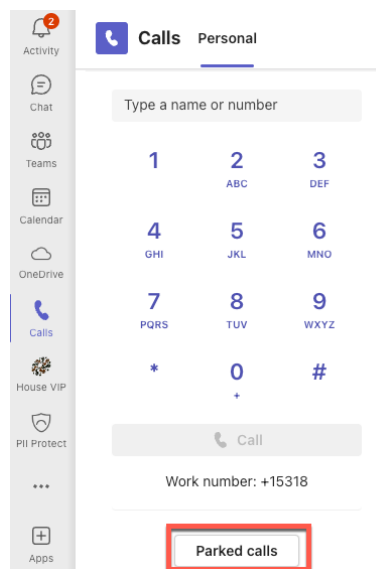
- **To Park a Call:**

- Select “**Park Call**” from the options. The caller will be placed on hold.
- Teams will provide a park code that is needed to retrieve the call.



- **To Retrieve a Parked Call:**

- From the Calls section in Microsoft Teams, select “**Parked Calls.**”



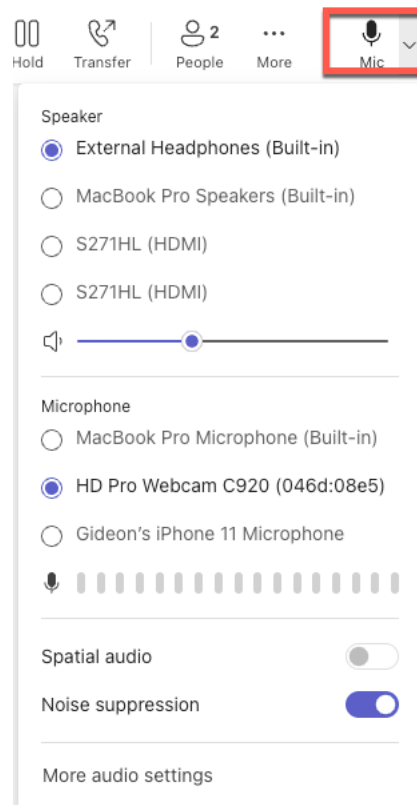
- Enter the code for the parked call and select “**Pick up.**” The call will now be transferred to you.

Pick up a parked call

10

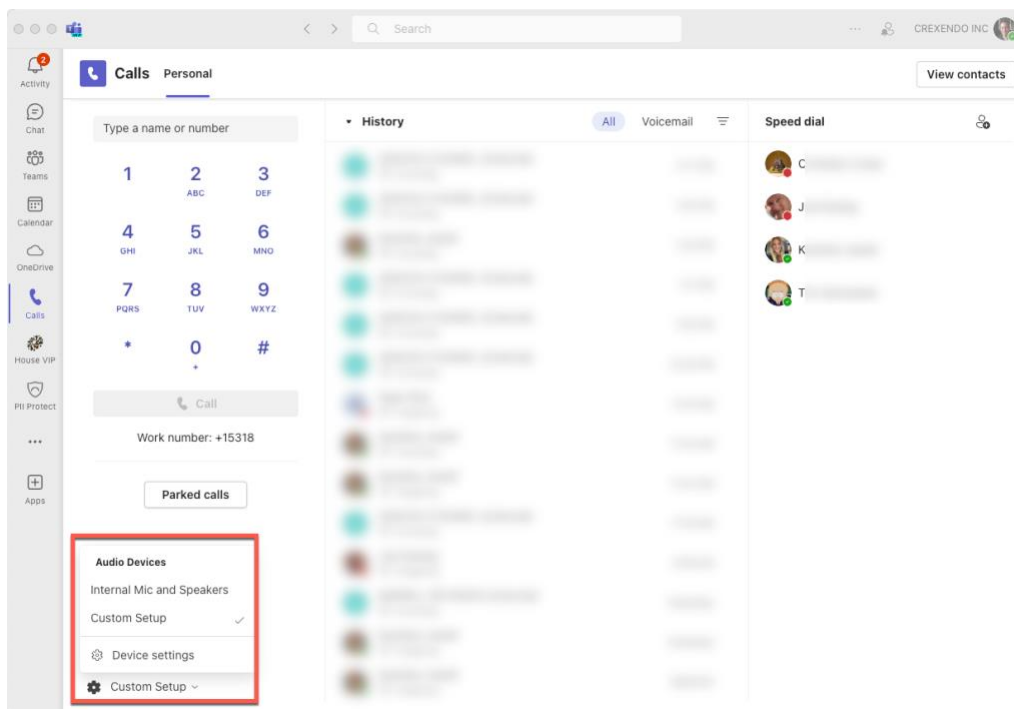
Cancel Pick up

- **Mic:** This option allows you to place yourself on mute or to change your audio settings.

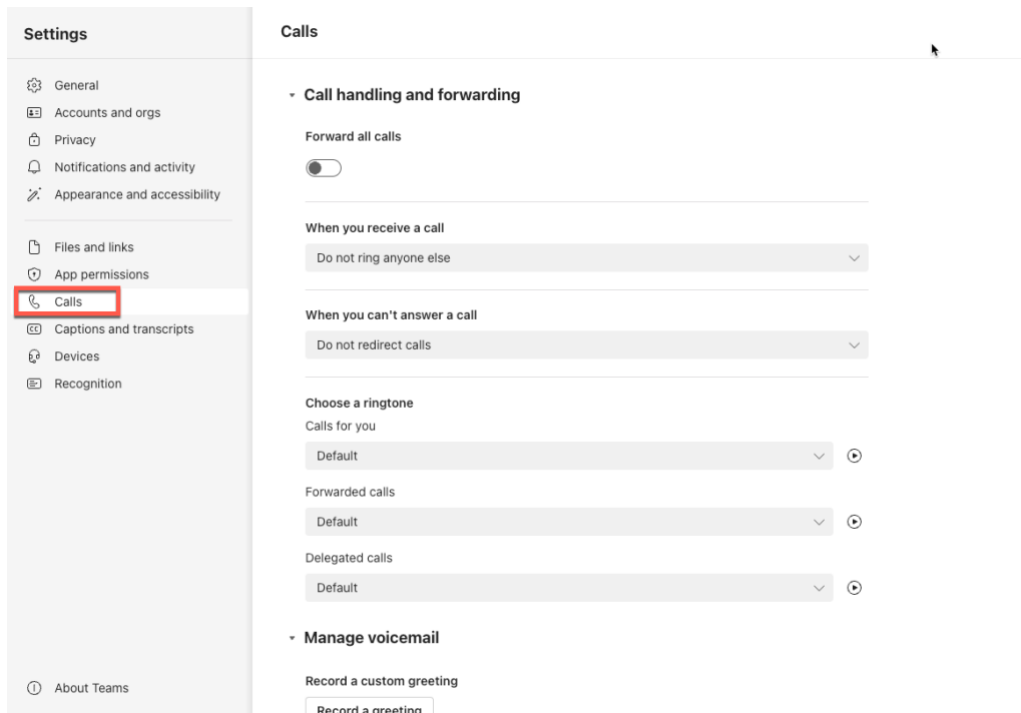


Settings – Desktop Application

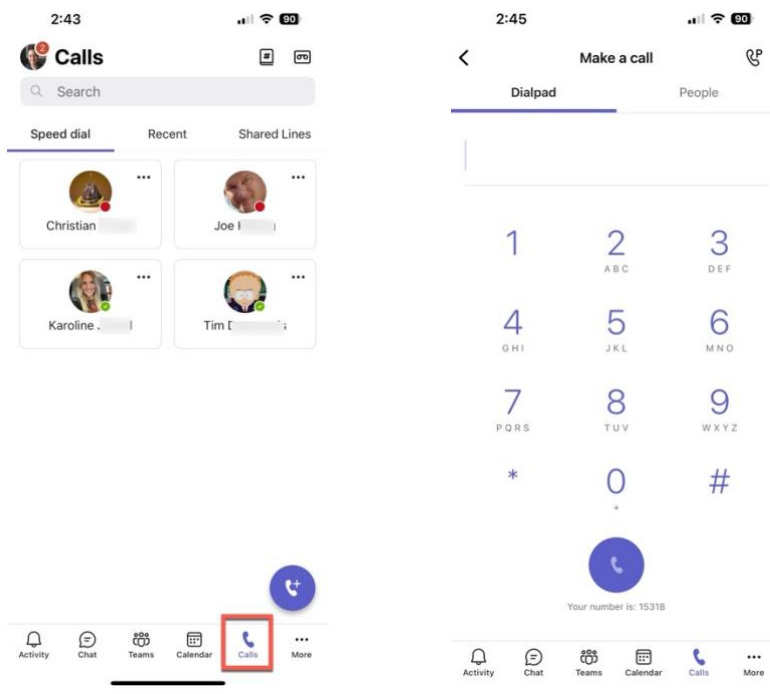
Your settings can be configured and customized by selecting the **“Custom Setup”** option on the bottom left of the screen and select **“Device settings.”**




Select the “**Calls**” Option to configure all call settings including **forwarding your calls, answering rules, ringtones, and your voicemail options.**

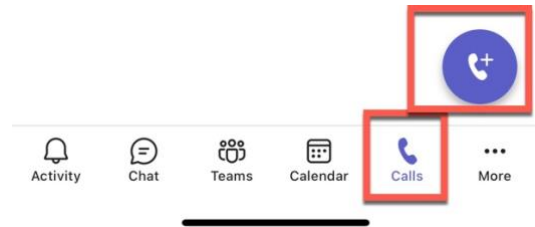



Making and Receiving Calls – Mobile Application



To make a call in the Teams Mobile Application:

1. Select the “**Calls**” icon on the bottom menu.
2. Select the  icon.

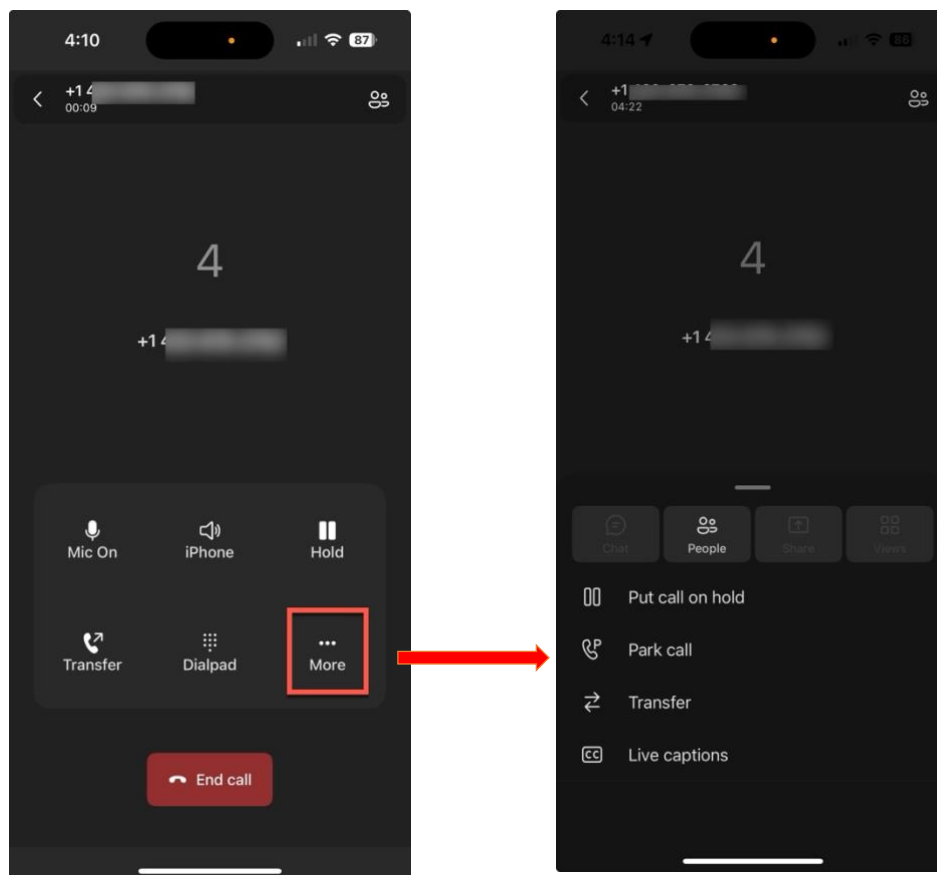


3. In the blank, enter either the 10-digit phone number you would like to call, or if the number is in your contacts, select the “**People**” tab to search your contacts.
4. Press the  icon to place the call.

To Receive a Call in the Teams Mobile Application:

1. When you are receiving a phone call, you will be notified by both a tone/vibration (*based on your phone settings*) and a screen notification with the options to “**Accept**” or to “**Decline**.”
2. Select “**Accept**” to be connected to the call or “**Decline**” to send the call to voicemail.

In Call Options – Mobile Application

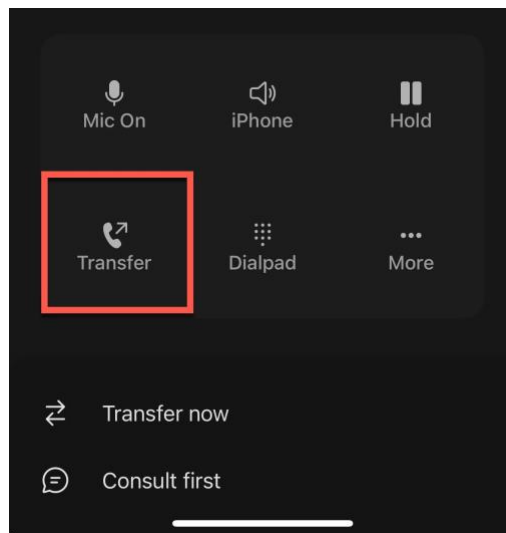


While you are on an active call, you have several options available to you:

- **Mic On/Off:** This option mutes your microphone.
- **Hold:** This option places the caller on hold.
- **Transfer:** This option allows you to perform a cold or warm transfer depending on your needs. Select the “**Transfer**” button to start the process. You will have two options to transfer the call: **Transfer**, which will immediately send the call to the recipient, or **Consult then transfer**, which will place the caller on hold while you speak to the intended recipient to ensure they are ready to receive the call.

- **To Perform a Cold Transfer:**

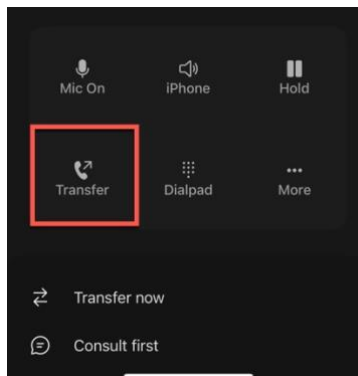
- Select the “**Transfer**” button and select “**Transfer now.**”



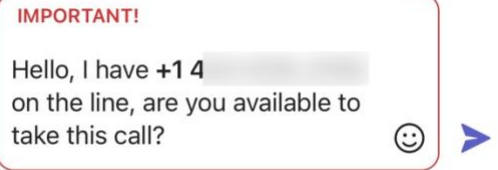
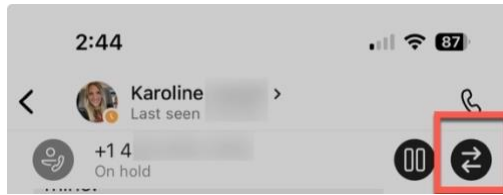
- Enter and select either the contact or the 10-digit phone number you would like to transfer the call to.
- The call will be instantly transferred to intended recipient and you can select “**End Call**” to complete the transfer.


- **To Perform a Warm Transfer:**

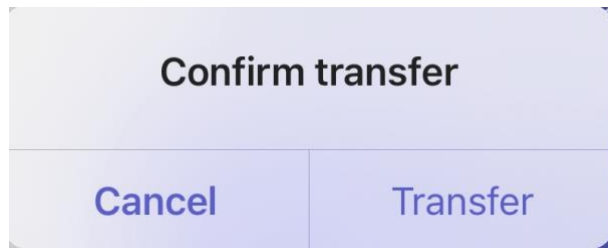
- Select the “**Consult then transfer**” option from the transfer list.





- Select the person you would like to transfer the call to. You can choose to either call the person or open a chat window with the user if they are an internal user.



- Once you have confirmed they are ready for the transfer, select  at the top of the page and confirm or cancel the transfer.



- **Dialpad:** This option opens a dial pad if needed.
- **More:** provides the options to place a caller on hold, park a call, transfer a call, and live captions.
 - **To Park a Call:**
 - Select “**Park Call**” from the options. The caller will be placed on hold.
 - Teams will provide a park code that is needed to retrieve the call.
 - **To Retrieve a Parked Call:**
 - In the Calls section of the Teams application, select  to display the dial pad.
 - Select  and enter the park code.
 - Select “**Pick up.**” The call will now be transferred to you.
 - **People:** This option shows who is currently on the call.
 - **Put call on hold:** This option places the caller on hold.
 - **Live Captions:** This option displays the text of the conversation. This conversation is **NOT** retrievable in Crexendo VIP.