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=PLXADOltuavV9jC_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=PLXADOltuavV9jC_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

Table of Contents:

Users....1

How to Add a User....1

How to Edit an Existing User....3

How to Delete or Reset an Existing User....4

How to Create a Ring Group....5

How to Add a Shared Contact....6

Conference Bridges....8

Getting to Your Conference Bridges....8

Types of Bridges....8

Creating and Configuring Conference Bridges....9

Using Your Conference Bridges....10

Auto Attendants....12

Basic Procedure....12

How to Create and Configure a New Auto Attendant....13

Call Queues....16

Creating a Call Queue....16

Adding Agents to a Call Queue....20

Time Frames....22

Creating a Time Frame for the Domain....22

Enabling a Time Frame for the Domain....26

Music on Hold....28

Adding Music to ALL Call Queues....28

Adding Messages to ALL Call Queues....29

Adding Music/Messages to SPECIFIC Call Queues....30

Inventory....31

Phone Numbers Tab....31

SMS Numbers Tab....34
Phone Hardware Tab....34
Fax Accounts Tab....36
Call History....37
Call History for an Office Manager....37
How to Block SPAM and Robocalls....40
Voice AI Studio....42
How to navigate Voice AI Studio....42
Call Center for Supervisors....46
Call Center....46
Agent Call Monitoring....47
Reports....48
Agents....49
Conferences....50
Call Queus....50
Music On Hold....50
Call History....50
VIP Analytics....52
How to Access VIP Analytics....52
How to Create a Board....52
How to Add a Card to Your Board....52
VIP Call Center Reporting....56
Call Center Reports Builder....57
Call Recording....62
How to Record a Call on Your Desk Phone....62
How to Record a Call on Your Web Phone....63
How to Turn on Call Recordings for a User....63
How to Turn on Call Recordings for a Call Queue....64

How to Add Remote Storage for Call Recordings....65

How to Listen to Your Call Recordings....68

VIP Portal for Users and Agents....69

Home....69

Call Center....70

Messages....70

Fax....72

Contacts....72

Time Frames....73

Answering Rules....74

Phones....75

Music on Hold....76

Call History....76

VIP Fax....78

Receiving Inbound Faxes....78

Sending Outbound Faxes....78

Fax Machines....82

SNAP Builder....83

Accessing SNAP Builder in the VIP Portal....83

Inside SNAP Builder....84

Editing Your Phone....85

Saving the Changes to Your Phone....86

Available Features....87

VIP Mobile Application....88

Launching VIP Mobile....88

VIP Mobile Navigation Bar....90

Quick Dial....90

Messages....91

Keypad......92
On a Call......93
Contacts......94
History......95
VIPMenu......96
Visual Voicemail......97
VIP Web Phone......98
Accessing the VIP Web Phone......98
Navigating the VIP Web Phone......100
Making a Call......101
Options During a Call......101
Contacts......104
Call History......104
Voicemail......105
Chat and SMS......105
Answering Rules......106
Greetings......107
Call Park......107
Call Center......108
Settings......109
VIP SMS Capabilities......110
SMS Queues......110
SMS For Individual Users......113
Using Your SMS Capabilities......113
VIP HD......115
How to Access the HD Platform......115
How to Start or Schedule a New Meeting......116
How to Join a Scheduled Meeting......118
How to Create a Dedicated Meeting Room......119

VIP Attendant Console....122
The Console....122
Navigating the Attendant Console....123
Handling Calls in the Attendant Console....123
Voicemail....126
How to Check and Manage your Voicemail Settings – Desk Phone....126
How to Check and Manage your Voicemail Settings – Portal....129
How to Check Your Voicemail – Web Phone....131
How to Check Your Voicemail – Mobile Application....131
Basic Phone Functions....133
Key Terms....133
Answering a Call....134
Making a Call....134
Transferring a Call....134
Hold Function....135
Conference Call....135
Park Function....136
Phone Feature Codes....136
User Scopes....141
Microsoft Teams Integration....143
Making and Receiving Calls – Desktop Application....143
In Call Options – Desktop Application....144
Settings – Desktop Application....148
Making and Receiving Calls – Mobile Application....149
In Call Options – Mobile Application....150

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

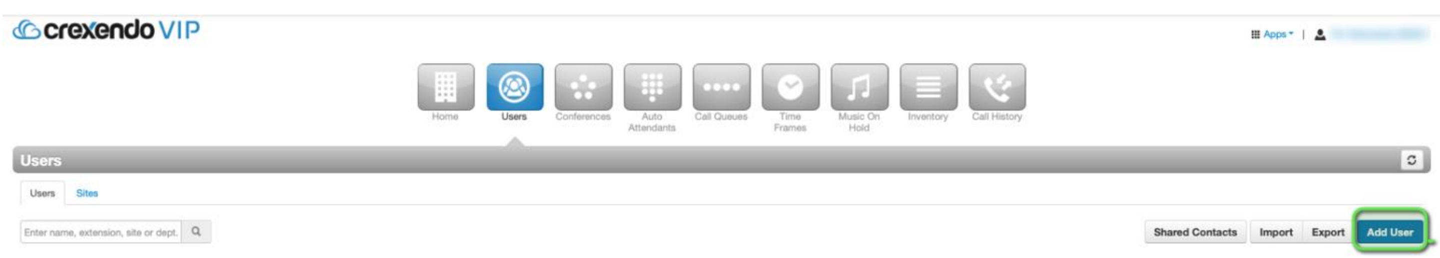
For a video demonstration, go to:
https://www.youtube.com/watch?v=gcSX3uh53ho&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=6

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

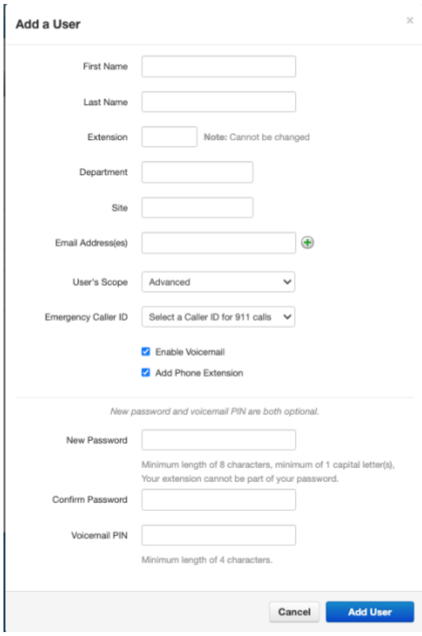
- First and last name of the new user
- Extension number
- The user's email address
- The MAC address of the phone they will be using (*optional*)
- Their User License

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.

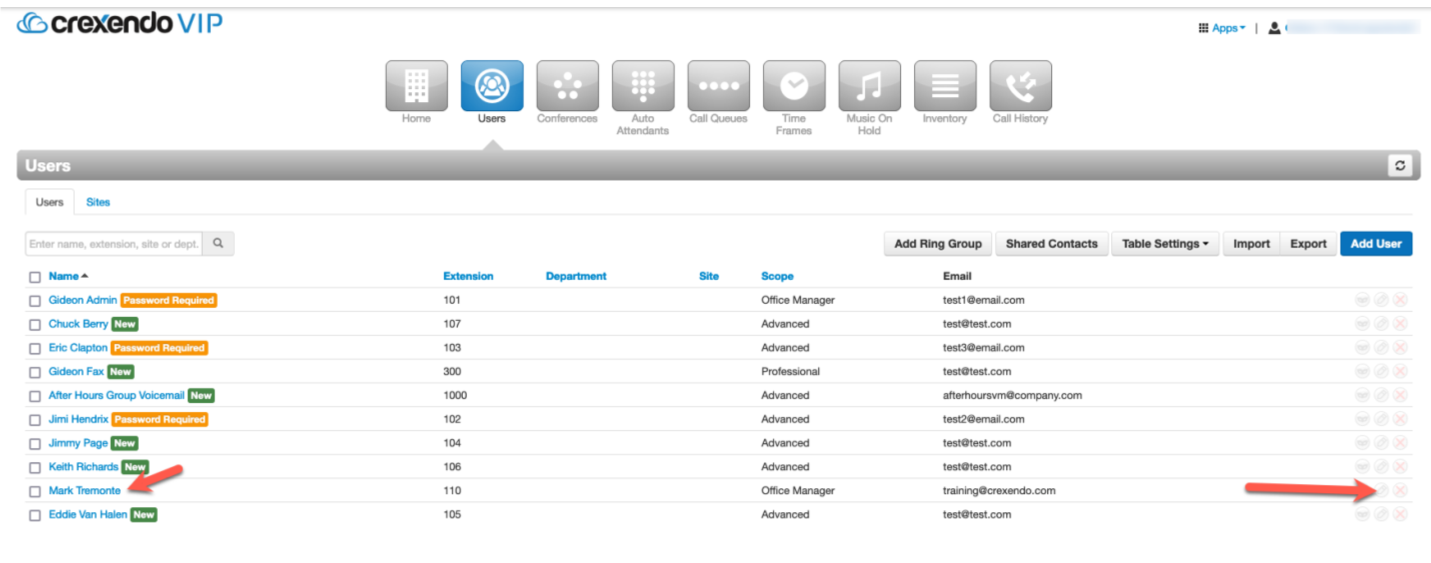
5. Select “**Add User**” and the new user will be added to the Crexendo VIP Platform.

How to Edit an Existing User

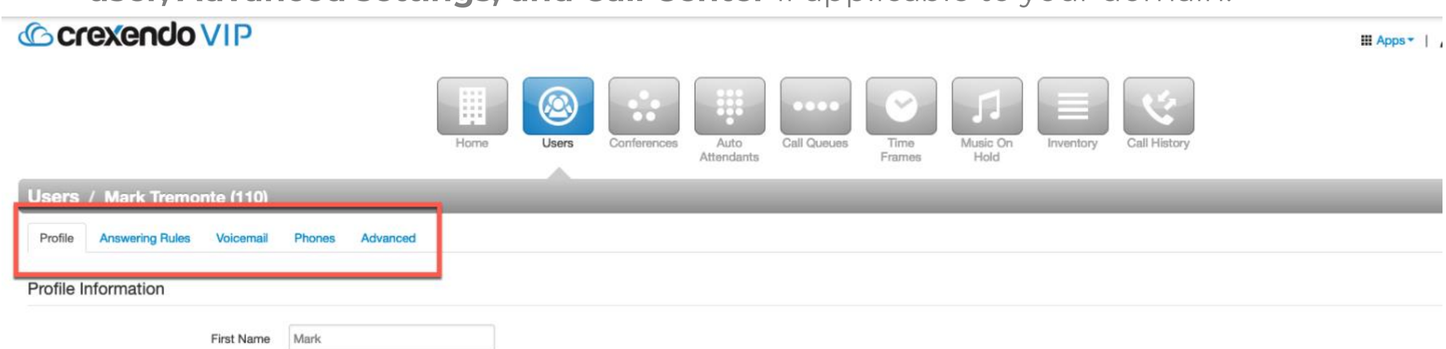
For a video demonstration, go to:
https://www.youtube.com/watch?v=LBtbsSTcJow&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=5&t=20s

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.



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.



- **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.

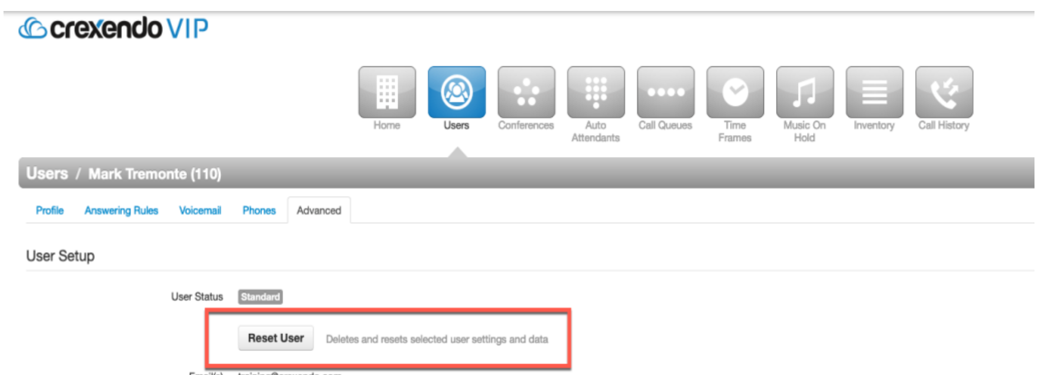
- **Answering Rules**: This tab shows the default answering rule that is active and any other rules that have been created by the user. You can also create a rule for the user from this tab.
- **Voicemail**: This tab allows you to enable/disable the user's voicemail as needed. The rest of the options 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=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=12&t=19s

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

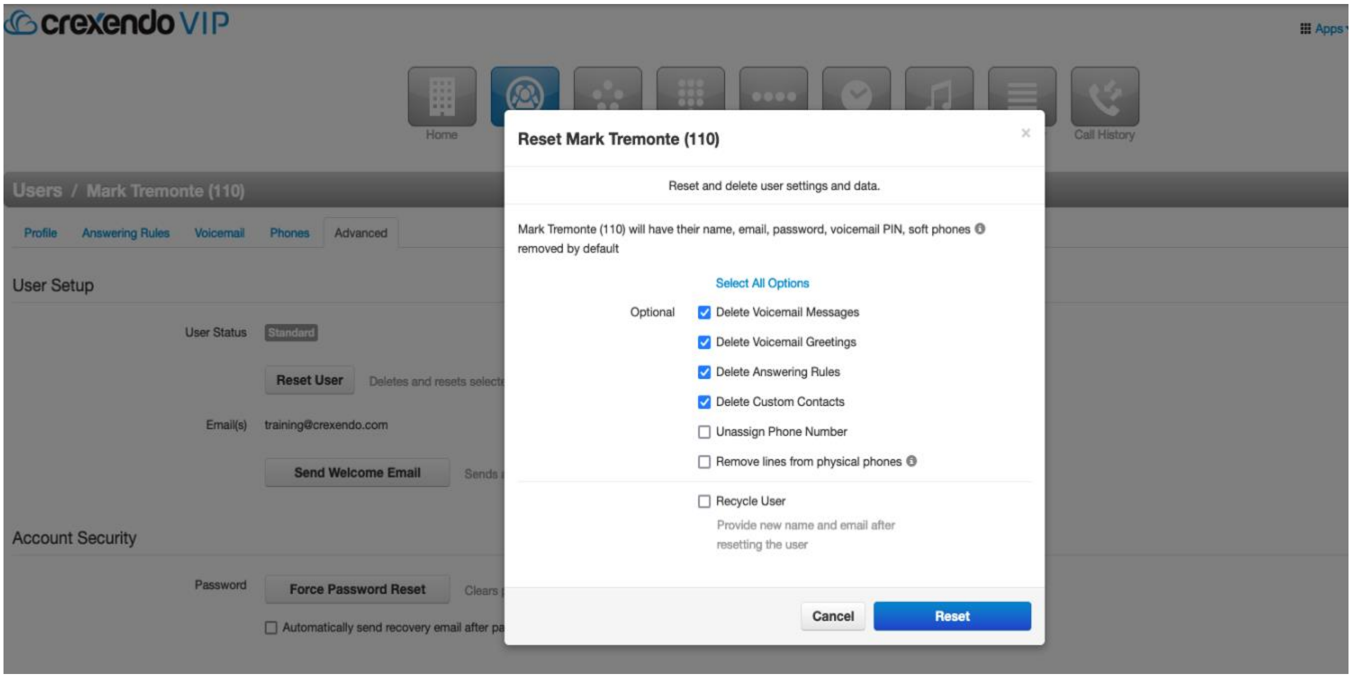
1. Go to Users and click on the user's name.
2. Select the "**Advanced**" tab.
3. Select "**Reset User**"



4. Review the options presented. The portal 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**".

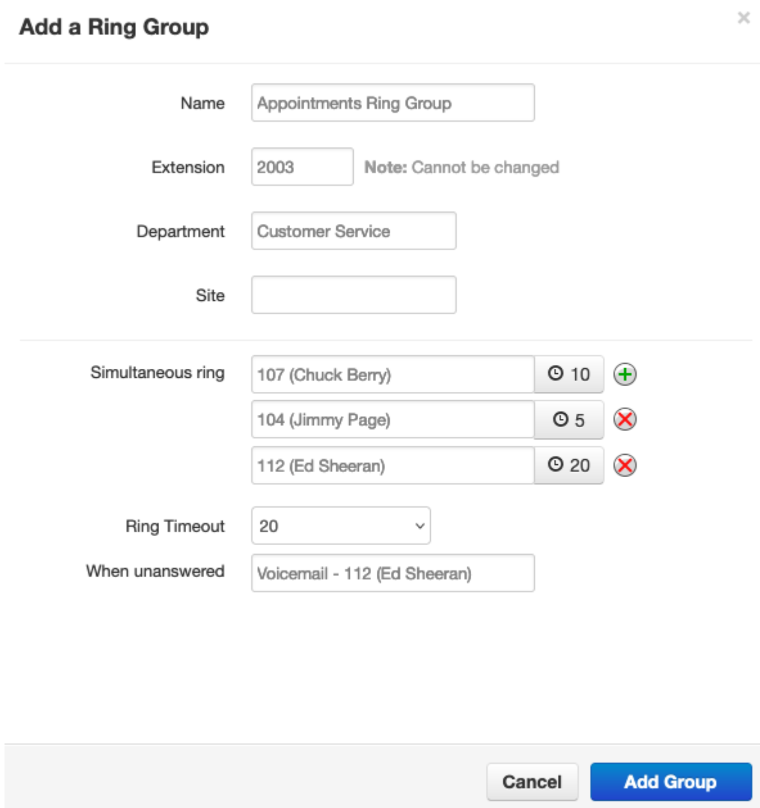


- After the user has been reset, the extension will show in the "**Users**" as setup required. You can leave the extension as is until you have a new user to take the extension or delete the extension completely by selecting the red "**X**" on the right of the user.

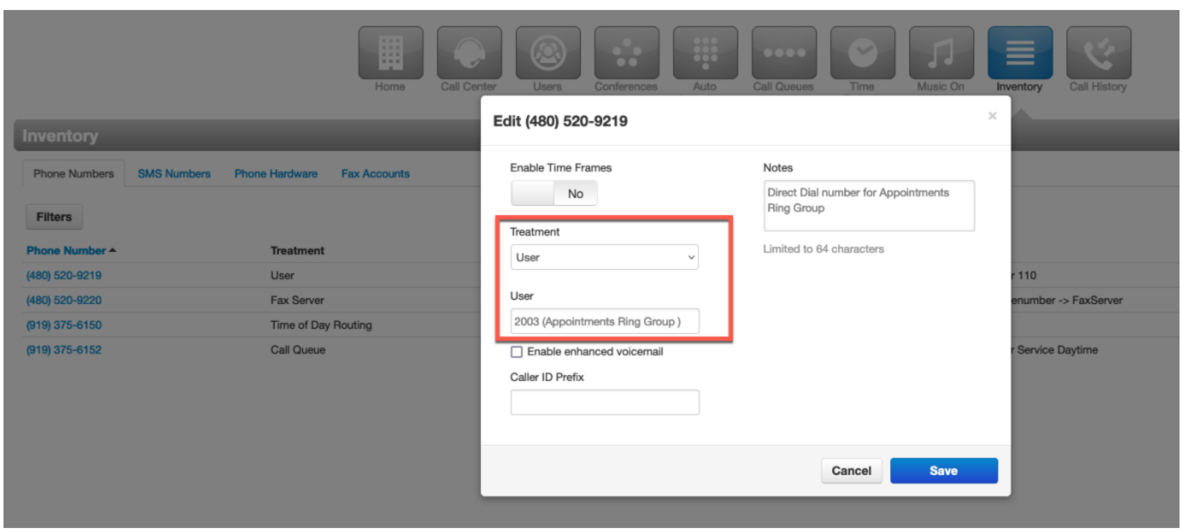
How to Create a Ring Group

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.



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

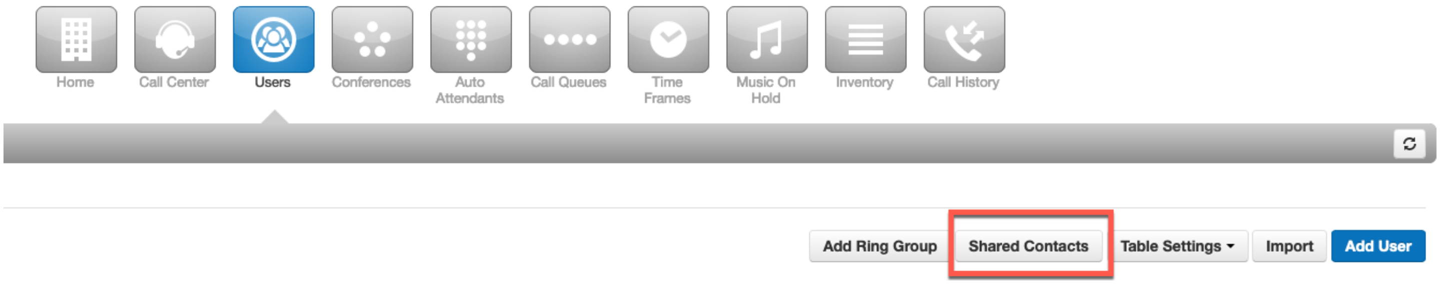


How to Add a Shared Contact

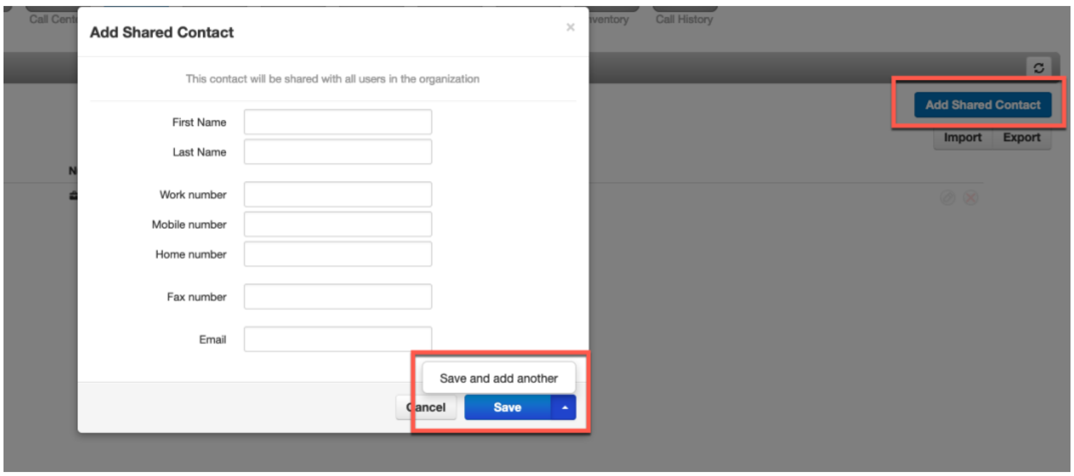
For a video demonstration, go to:
https://www.youtube.com/watch?v=YJ7DjUW3pAU&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=9

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

1. Select "**Shared Contacts**" on the upper right side of the screen.



2. Select “**Add Shard 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**”.



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

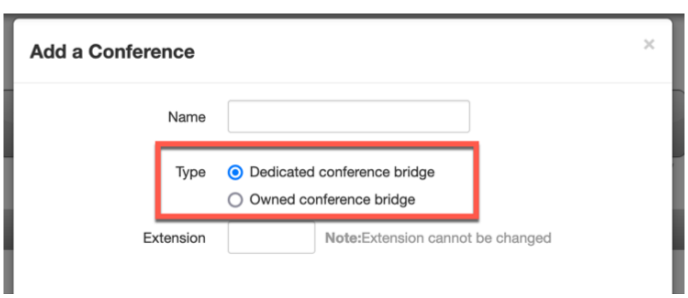
A conference bridge is assigned to an extension number by your VIP Office Manager. Internal users can call the extension number while outside callers must dial the outside number if one is assigned. If a leader is required to start a conference, all participants will be sent to a “**waiting room**” with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

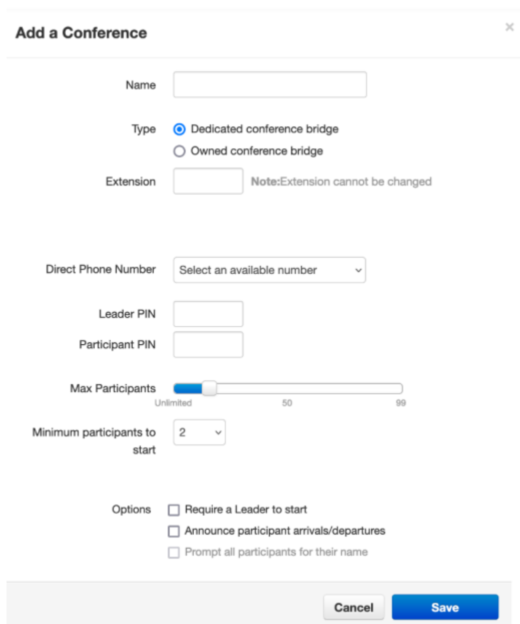


Creating and Configuring Conference Bridges

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:

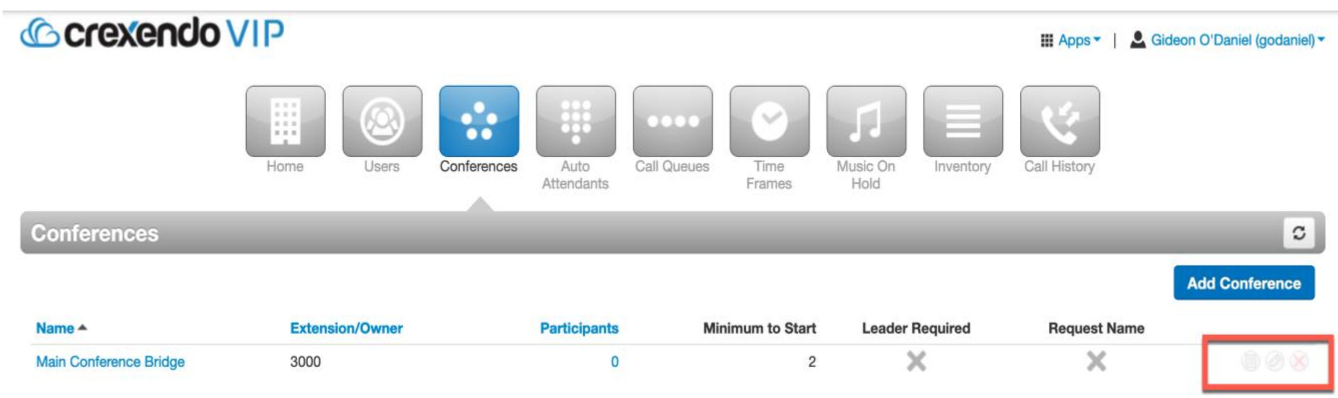
1. Login to your VIP Portal as an "**Office Manager**" and select the "**Conferences**" icon at the top of the page.
2. From here, you will see any existing bridges that have already been created. To create a new conference bridge, select "**Add Conference**" on the upper right side of the screen.
3.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



- **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.



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:

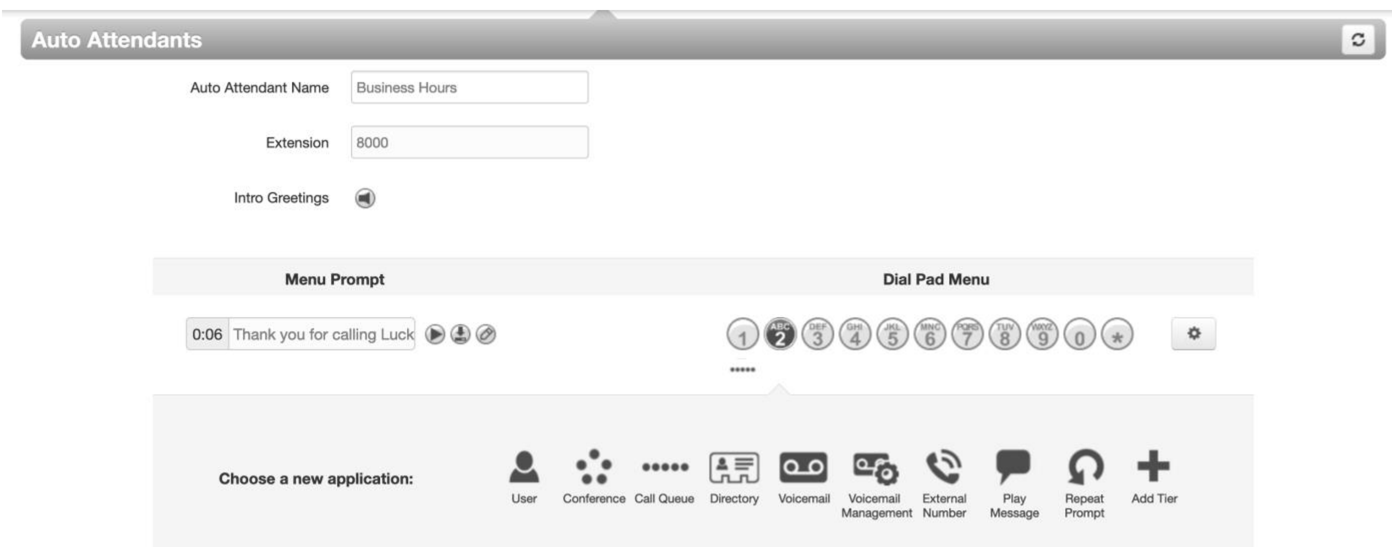
Star Code	Function
✱6	Toggle mute for yourself ON/OFF
✱71	Recording ON
✱73	Recording OFF
✱74	Decrease volume of others
✱75	Reset volume of others
✱76	Increase volume of others
✱77	Decrease conference volume
✱78	Reset conference volume
✱79	Increase conference volume
✱91	Announce list of active participants (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=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=11



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.

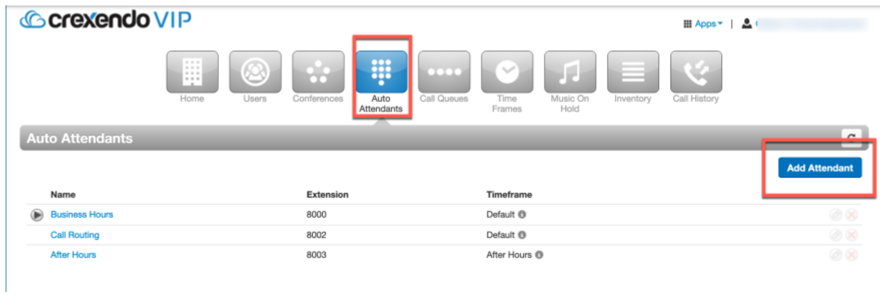
Basic Procedure:

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

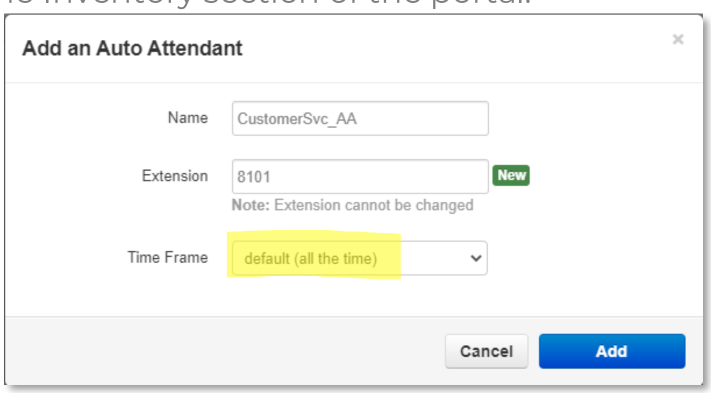
1. Create the Auto Attendant and specify the proper extension number.
2. Set the Menu Prompt.
3. Set the Menu to match the menu prompt from step 2.
4. Set the Auto-Attendant Options.

How to Create and Configure a New Auto Attendant:

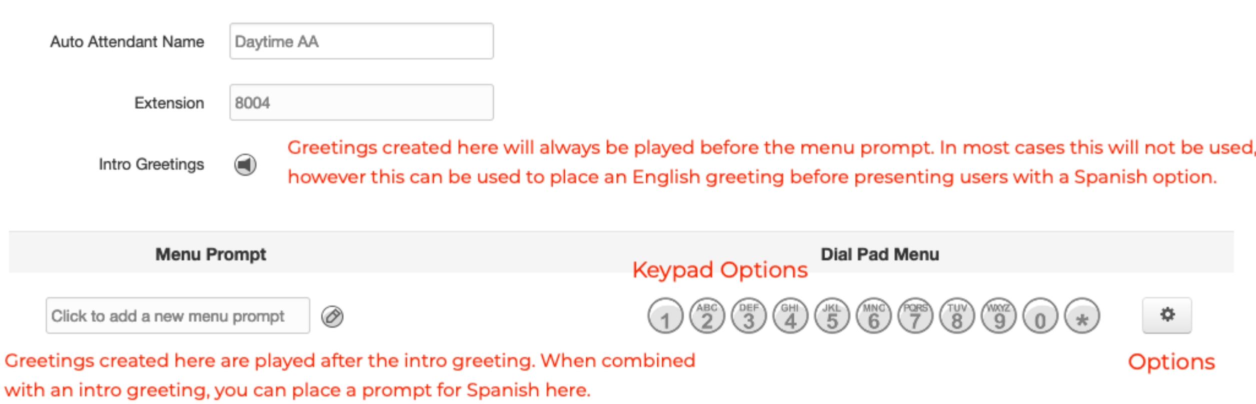
1. Navigate to the "**Auto Attendants**" section of the VIP Portal.
2. Click the "**Add Attendant**" button (upper right).



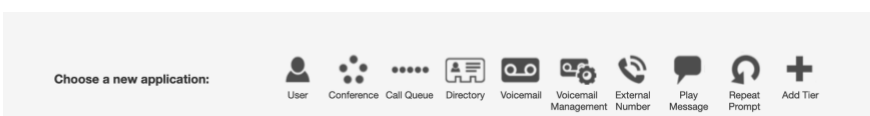
3. When the "**Add an Auto Attendant**" dialog box appears, enter the following:
   a. **Name:** Appropriate name of the AA.
   b. **Extension:** An extension number in the 8000 range. <u>Avoid 911, or anything in the 5000 or 9000 range.</u>
   c. **Time Frame:** Select "**default.**" You can control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



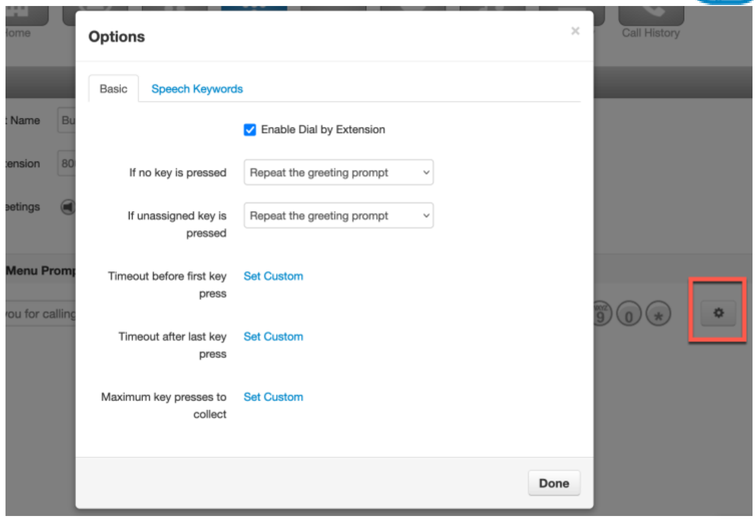
4. Click the "**Add**" button. The Auto Attendant configuration screen will appear where you can set the Menu Prompt. You can set the *optional* "**Intro Greeting**" as well. Usually, the Menu Prompt is sufficient in most cases.



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.*



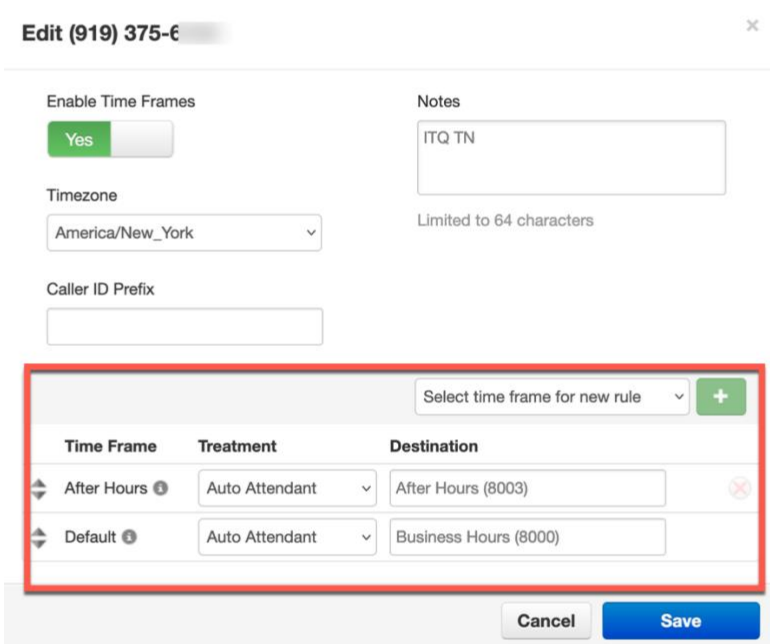
7. Once your options match the instructions you gave in the menu prompt, review your options by clicking the "**gear**" icon to the right.



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.

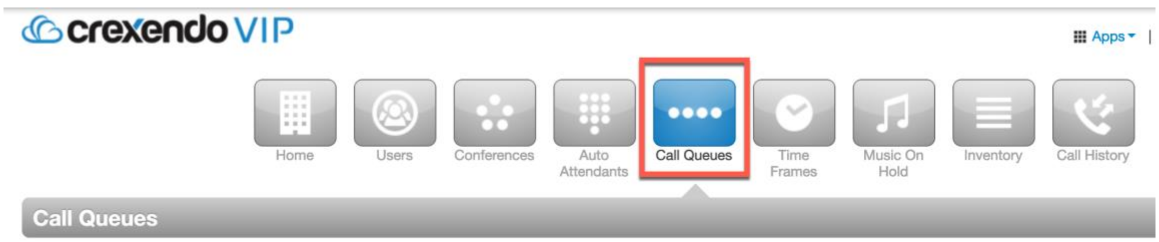


Introduction:

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 Mangers and Call Center Supervisors can create, modify, and delete call queues.

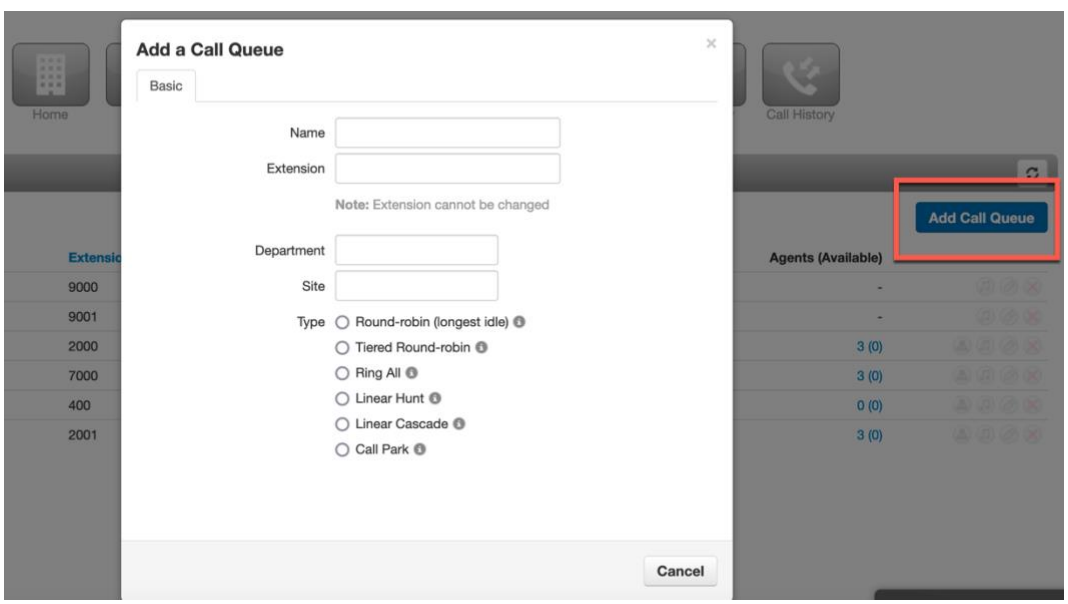
This guide will cover **creating a new call queue and adding agents to a call queue.**

For a video demonstration, go to:
https://www.youtube.com/watch?v=5ReyFC2Kovw&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=14



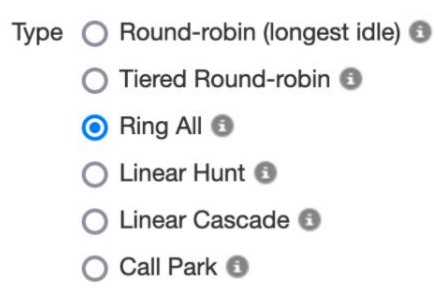
Creating a Call Queue:

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.



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.



    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:

    a. **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.

    b. **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.

    c. **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.

    d. **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.

    e. **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.

    f. **Allow Callback Option**: Allows the caller to receive a call back instead of waiting in the queue.

    g. **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**.

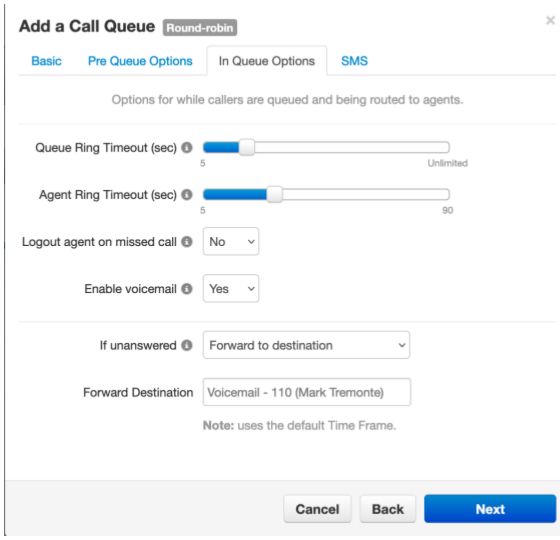
7. The **In Queue Options** will change slightly depending on which type of call queue that you are creating. Edit the options based on the needs of your call queue:

    a. **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.

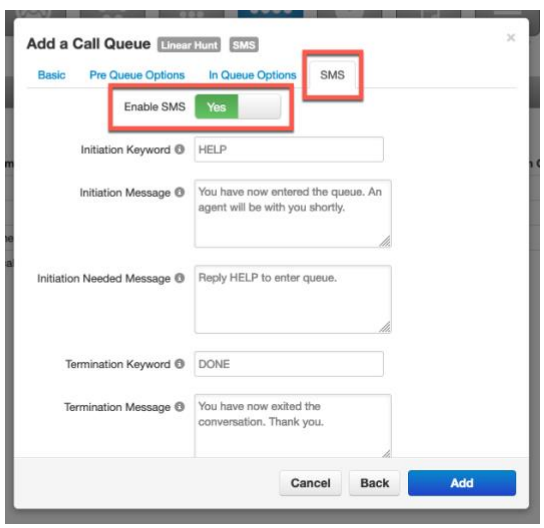
    b. **Logout Agent on Missed Call**: If an agent misses a call, this will log them out of the queue.

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.



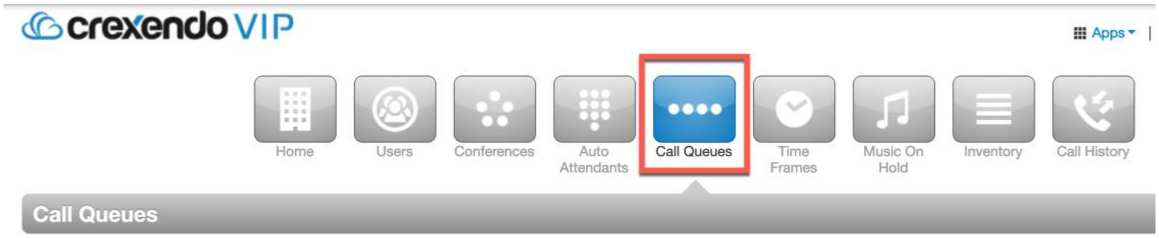
8. Click “**Next**” to proceed to the SMS tab.
9. If your company has already completed the “*Campaign Registry*” form and have SMS enabled on your domain, then you can provide callers a way to text your call queue.
10. Click “**Enable SMS**” and customize the options for your callers to text your call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



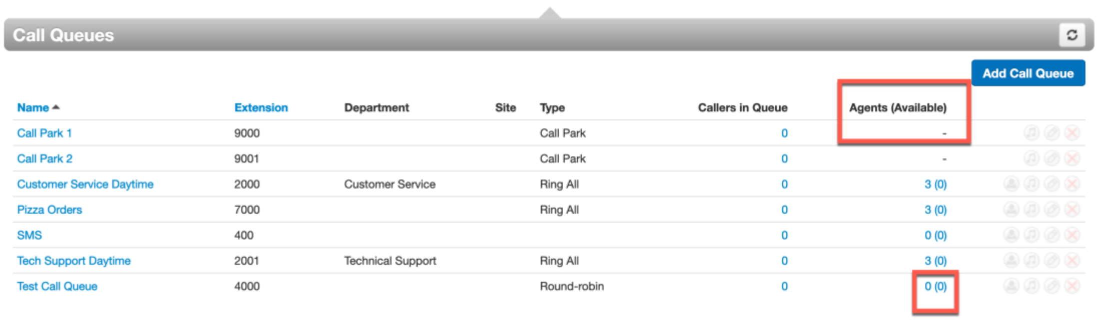
11. Click “**Add**” to complete your new call queue. You will now see it in the Call Queue section of the VIP Portal. Call queues can be edited anytime from this page.

Adding Agents to a Call Queue:

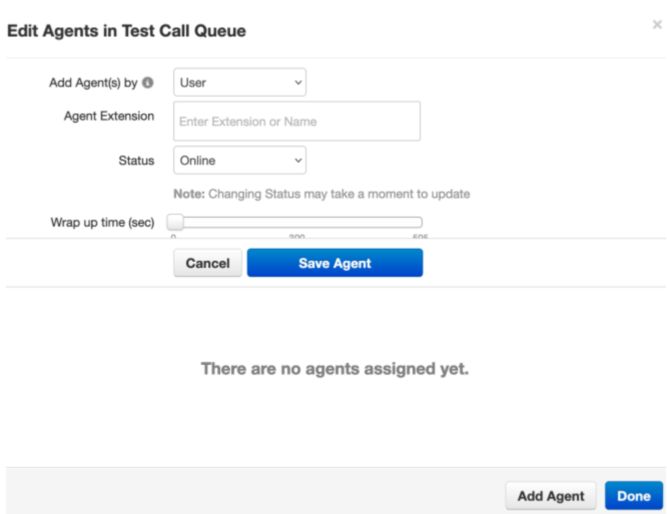
1. In the VIP Portal for Managers or Call Center Supervisors, click on the "**Call Queues**" button at the top of the page.



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.



3. Click "**Add Agent**"



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.

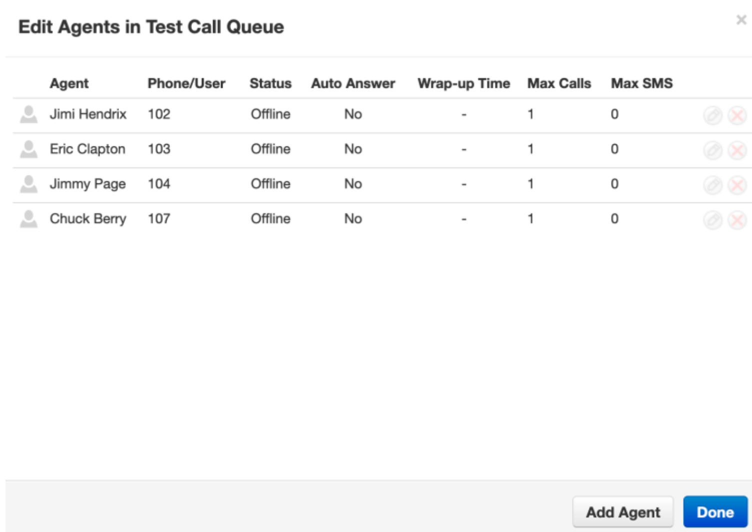
f. **Max SMS Sessions**: set a limit of how many SMS conversations that an agent can be on at the same time.

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.



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

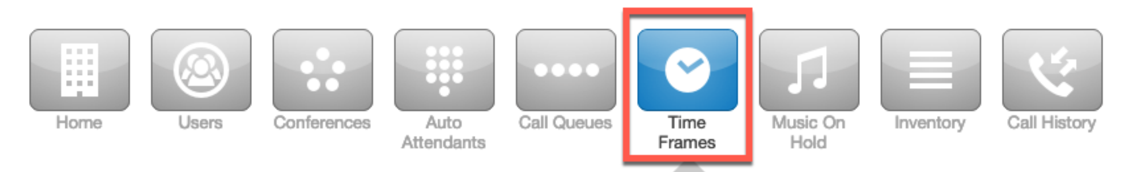
Introduction

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.

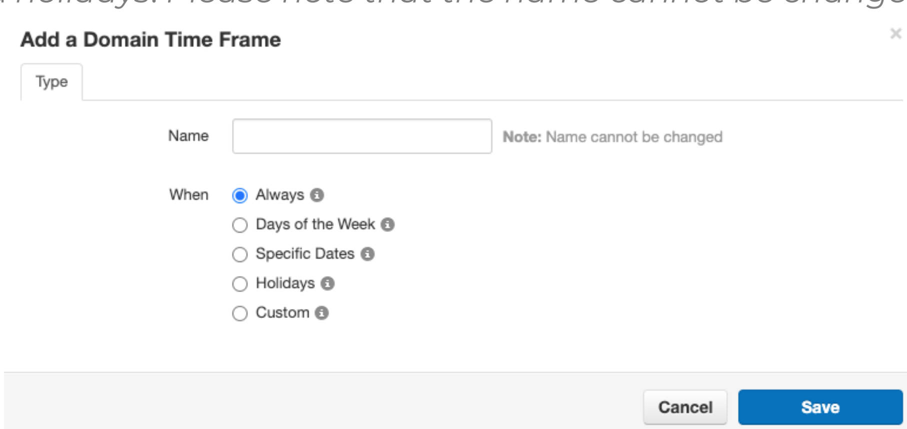
For a video demonstration, go to: https://www.youtube.com/watch?v=GdlOdTjSDS8&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=13



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.*



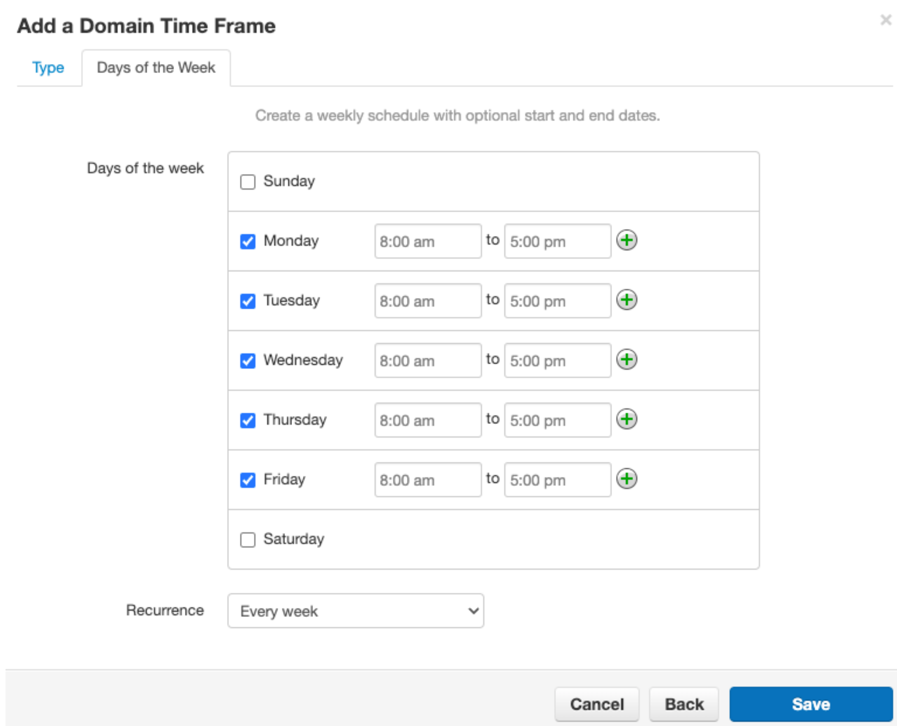
5. Select when you would like this Time Frame to take place. You are presented with five options:

    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.

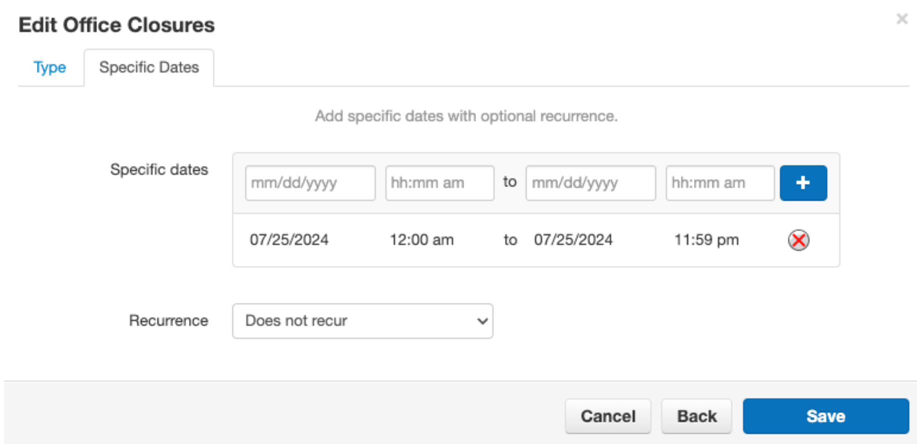
        - Name the time frame and select "**Days of the Week**."
        - Select the "**Days of the Week**" tab and select the days you would like to include in the time frame.
        - In each day, select the hours you want the time frame applied to.
        - The drop-down arrow allows you to set an every week recurrence or customize it to a specific schedule.



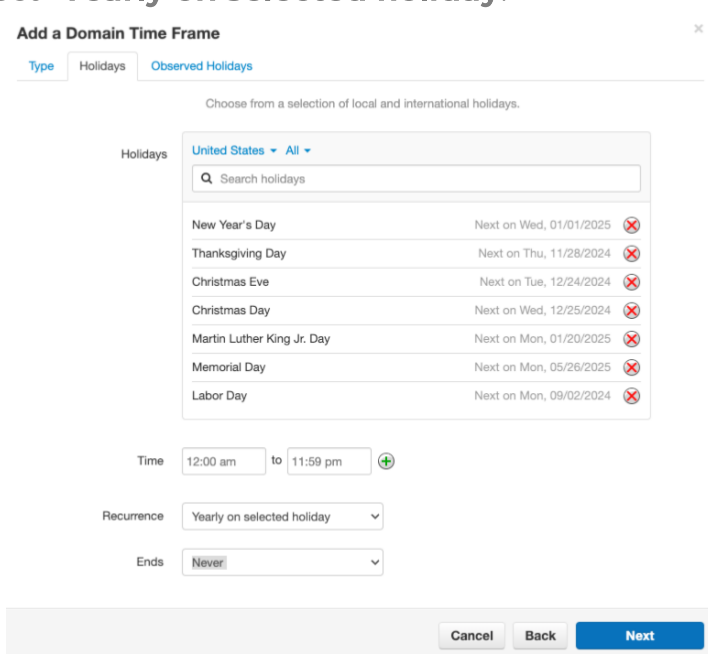
    3. **Specific Dates**: makes the time frame only in affect during a specific date range and time such as an office closure with the option for recurrence.

        - 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.

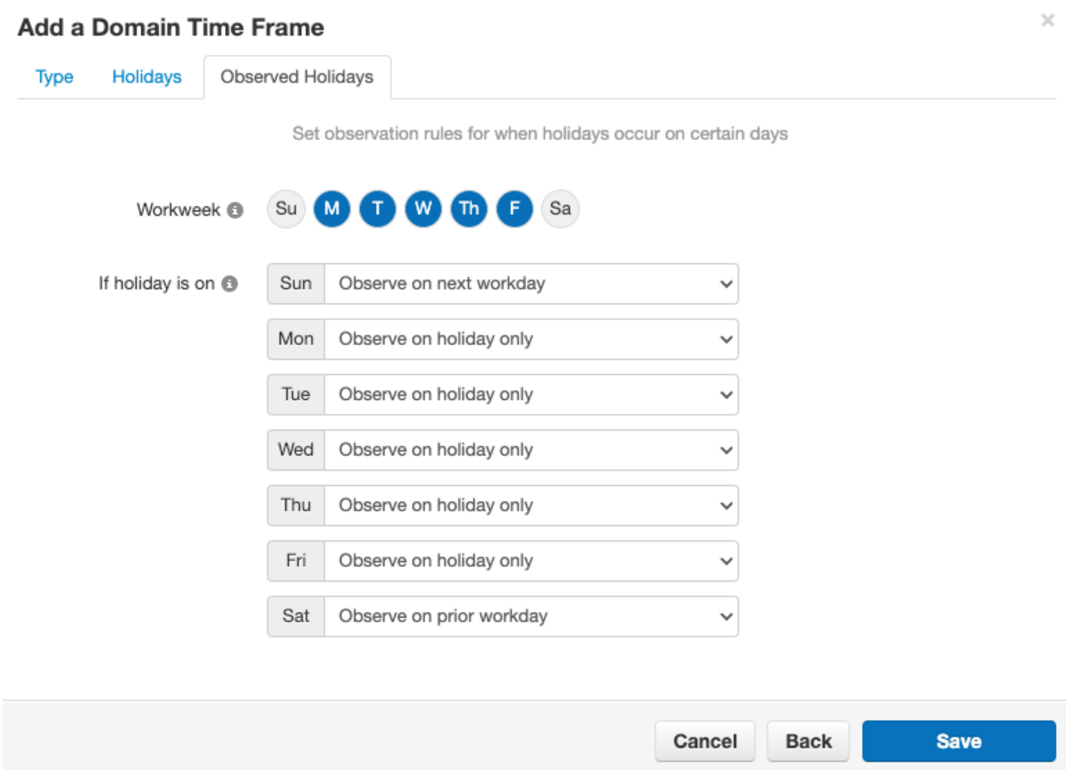
- Select the drop-down menu next to Recurrence to customize when this will recur if needed.
- Select "**Save**" to complete the time frame.



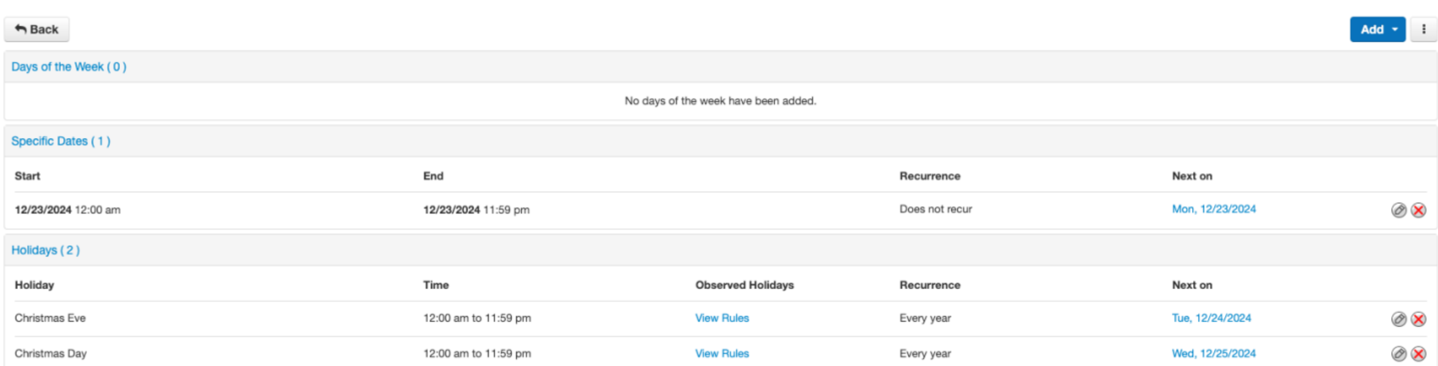
4. **Holidays:** allows you to select from national and international holidays and make them recur each year.
    - Name the Time Frame and select "**Holidays**."
    - Search for or click in the "**Search holidays**" box to show all United States holidays.
    - Select the holiday or holidays and the 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**."
    - Select "**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.



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.

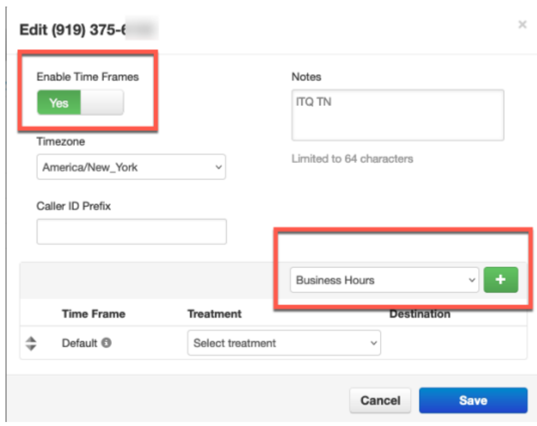


Enabling a Time Frame for the Domain

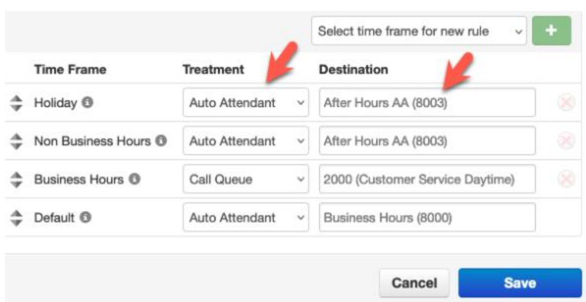
To enable your new time frame in your domain, you will need to associate it with a phone number in the "**Inventory**" section of the portal or with an auto attendant.

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**"

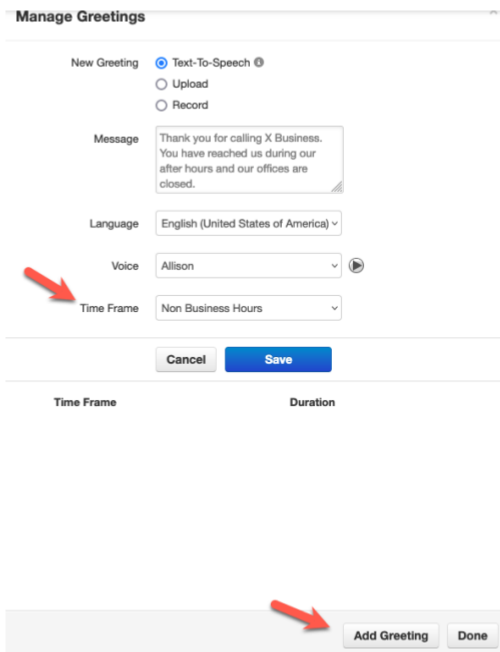


jk

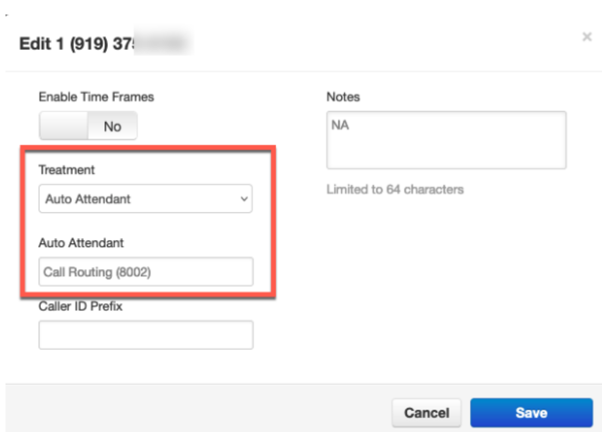
NOTE: When arranging your time frames, <u>make sure your Holiday time frame is at the top of the list and your Default is at the bottom.</u> When a call comes in, it will start at the top of the list and work down to find an applicable time. If "Holiday" is under business hours, it will follow that one 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**."

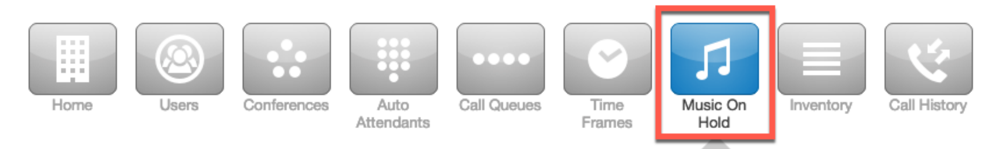


Introduction

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.**

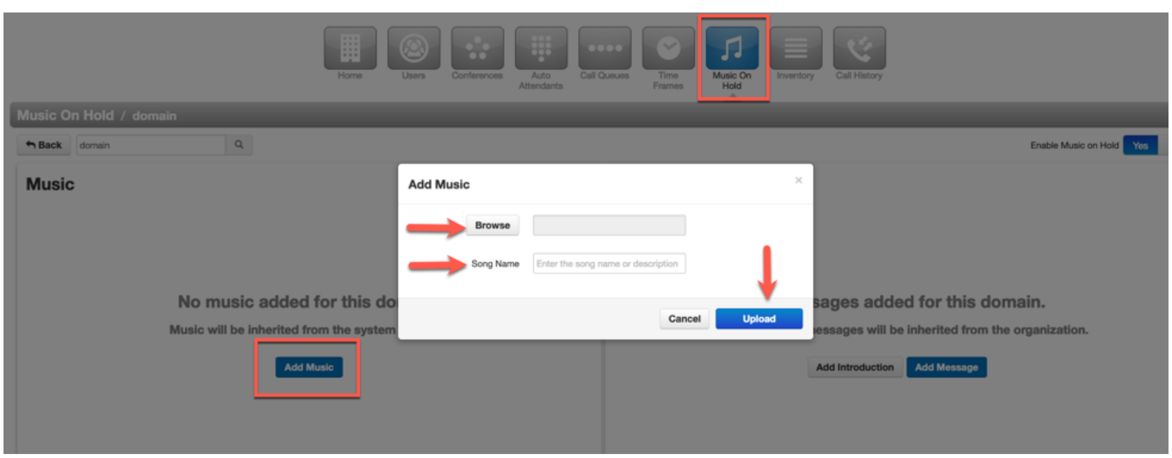
For a video demonstration, go to:
https://www.youtube.com/watch?v=9jqgBDHvkmc&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=8



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**."

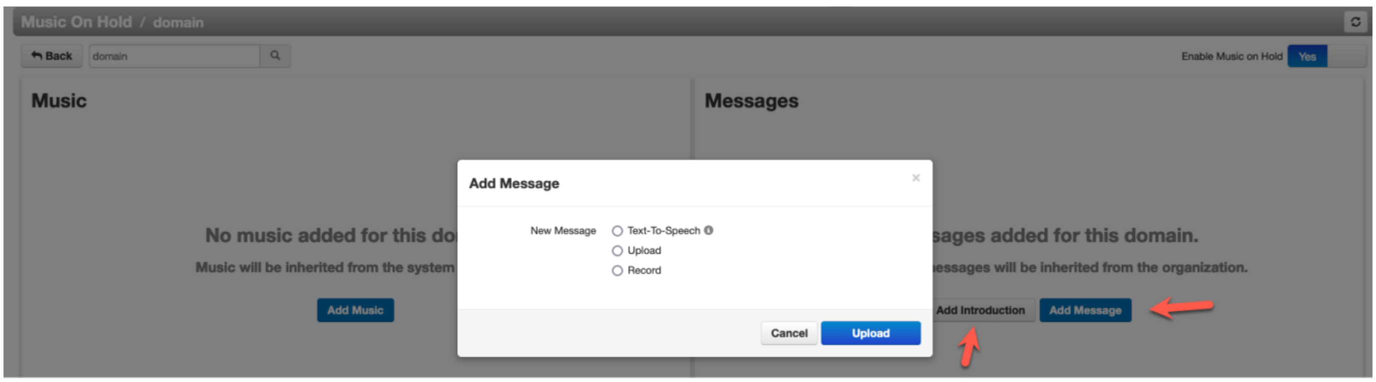


5. Repeat to add any additional music to your hold music library.

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.*

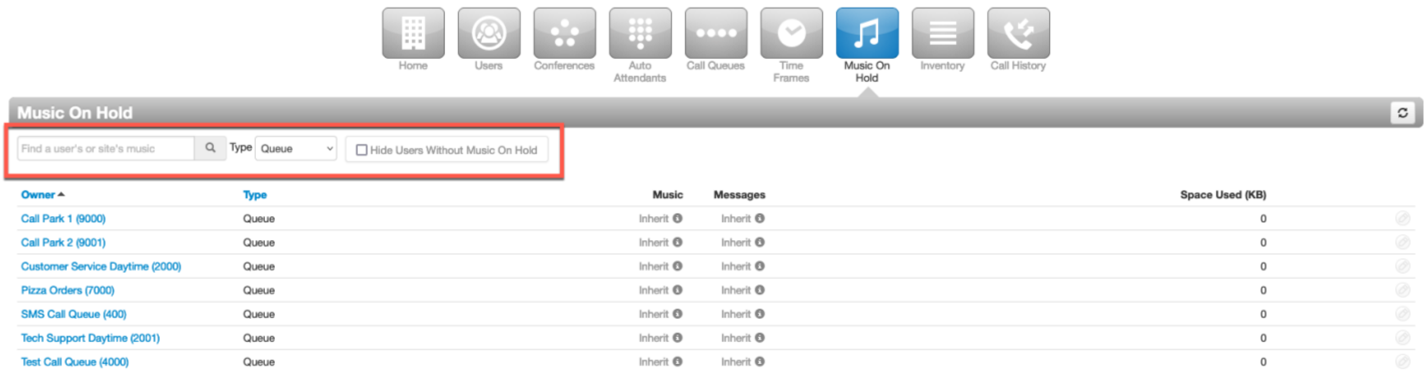


5. Click "**Upload**" or "**Save**" depending on which option you chose.
6. After you have saved your messages, you can play, download, edit, and delete them from the Messages section. To edit the intervals of how often the messages will play, click the "**clock icon**" to adjust it to your preference.

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*.



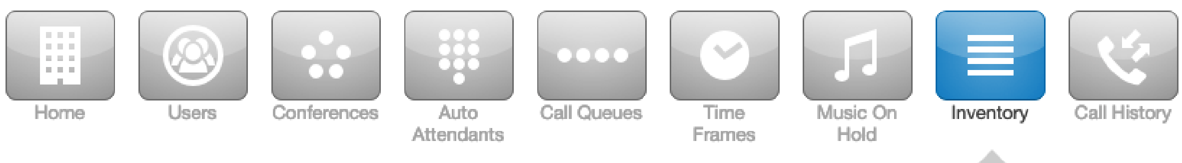
3. Select the call queue you would like to edit and follow the same steps for adding hold music or messages as mentioned in the previous sections.

Introduction

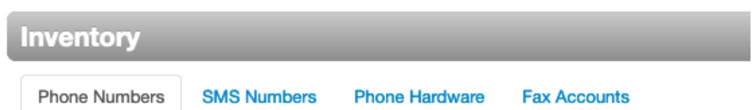
The **Inventory** section of your Crexendo Portal provides the **Office Manager** an organized list of your domain's direct dial *Phone Numbers, SMS numbers (if applicable), Phone Hardware, and Fax Numbers*. The Inventory sections is also where you can assign direct dial numbers to users, assign time 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_HL7NiOiBoKA9VZIBxm&index=16&t=25s



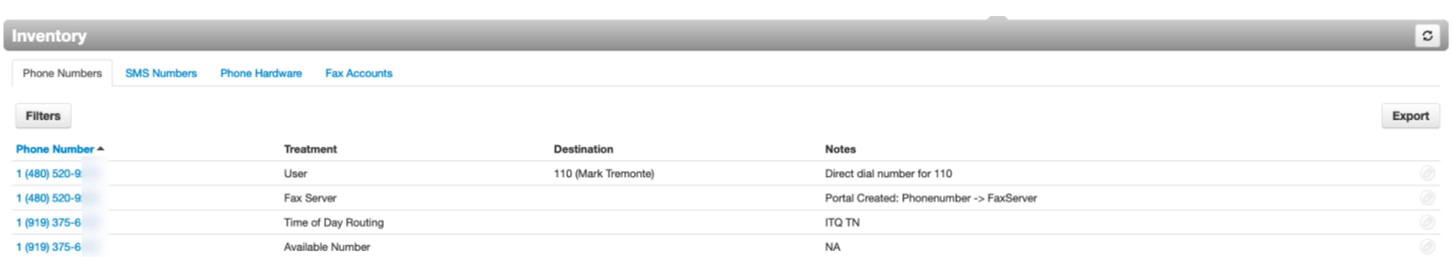
To get started, login to the VIP Portal as an "**Office Manager**." To access each section of the Inventory, select the tab you would like to view.



Phone Numbers Tab

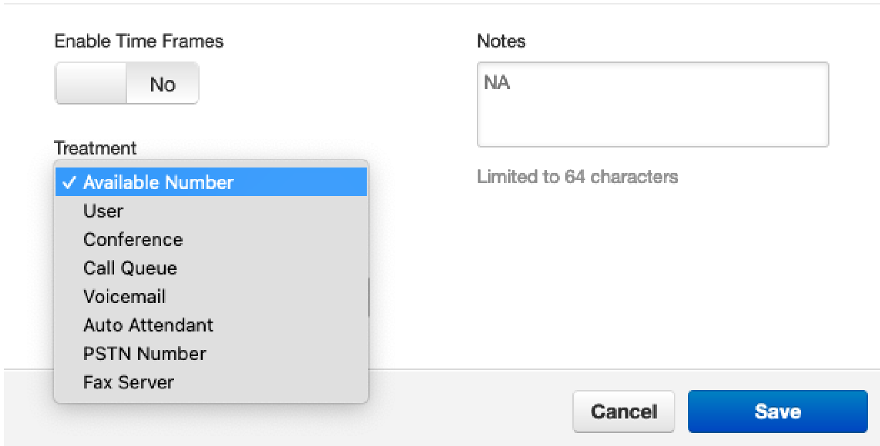
You can access, manage, and edit all phone numbers associated with your domain from the phone numbers tab.

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.

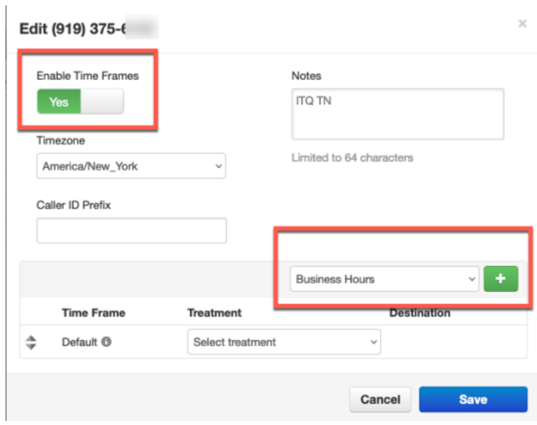


- **User**: Enter the extension or name of the user you would like to assign a direct dial number to. The Caller ID Prefix allows the user to see where the call is being routed from.
- **Conference**: Assign a direct dial number for your previously created conference bridge so that outside callers can 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.*

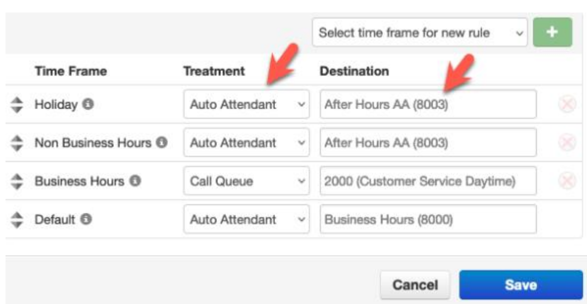
- Fax Server: If an available number will be used for a fax line, choose the "**Fax Server**" treatment, and click "**Save**". The fax line can be configured in the "**Fax Accounts**" tab.

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.**"



NOTE: When arranging your time frames, <u>make sure your Holiday time frame is at the top of the list and your Default is at the bottom.</u> 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.

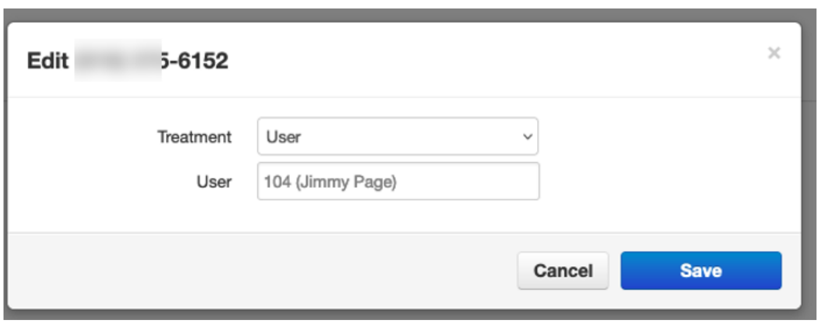
To assign an SMS number to a call queue:

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**."



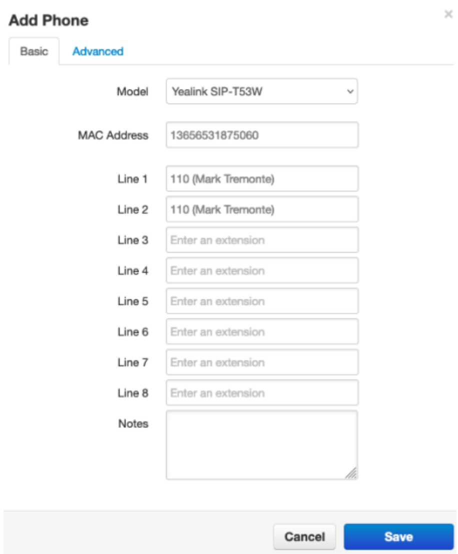
Phone Hardware Tab

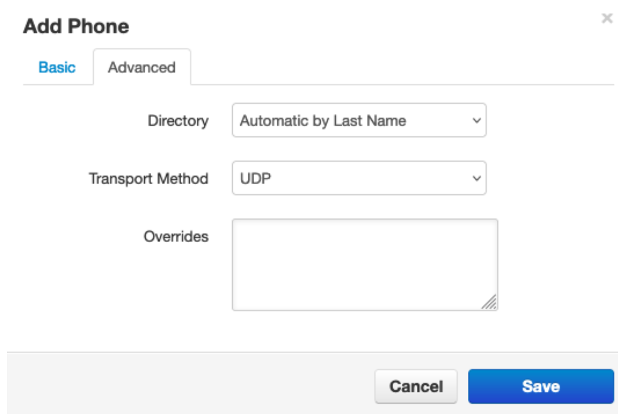
This tab shows you all physical devices and phone hardware in your Crexendo domain. From the Hardware tab, you can add new phones to the domain, edit each phone, and assign phones to users.

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.





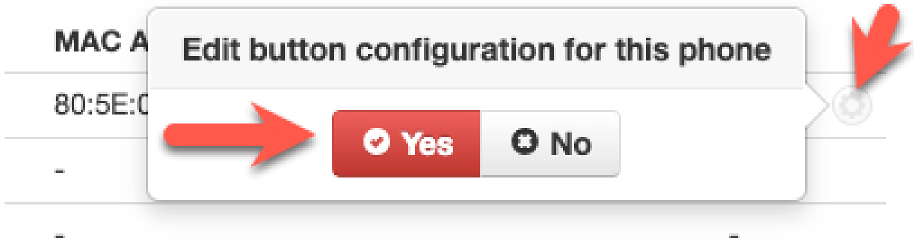
To Edit an Existing Phone:

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.

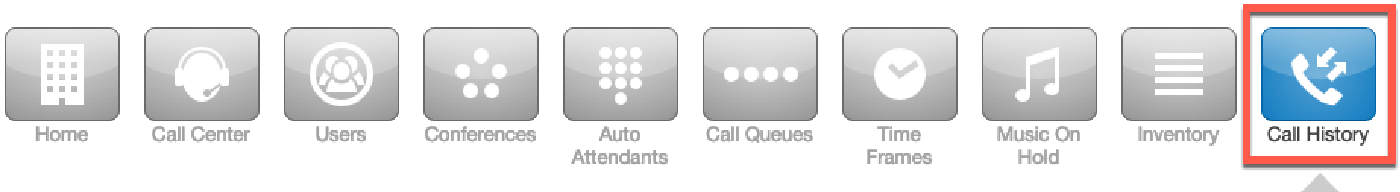
To create a new fax account, please reference the **VIP Fax** guide for complete instructions on setting up your fax number for a physical fax account, faxing from your VIP Portal, or by email.

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



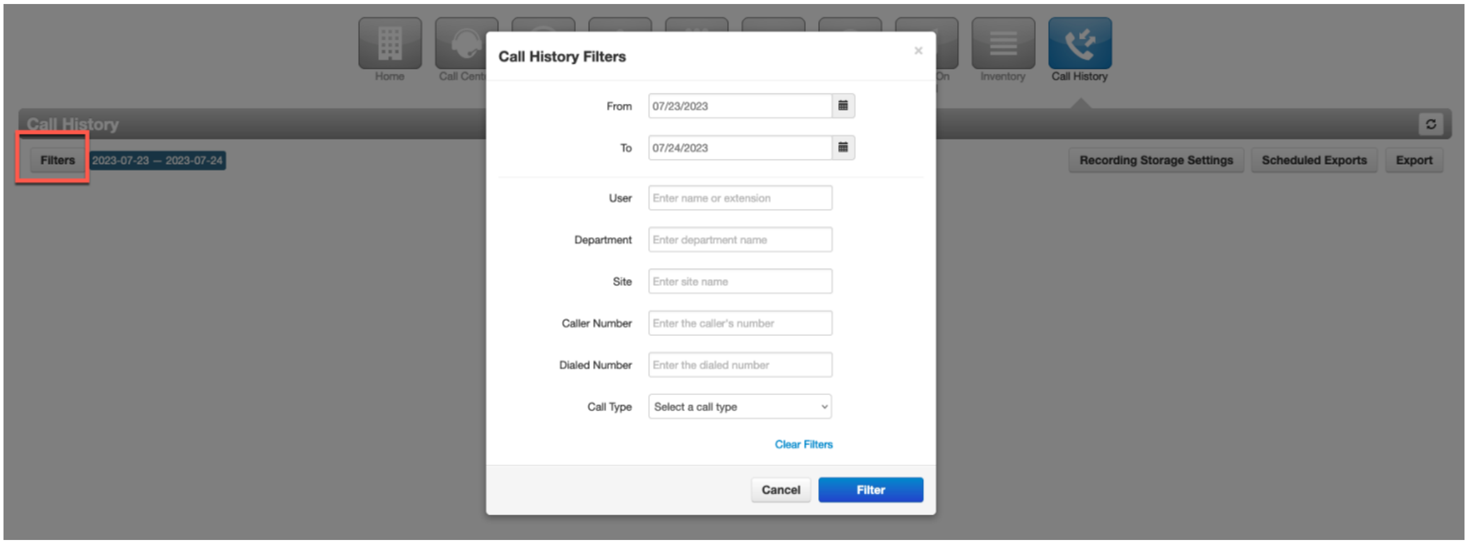
To access the Call History Section of the VIP Portal for Managers or Call Center Supervisor:

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.*

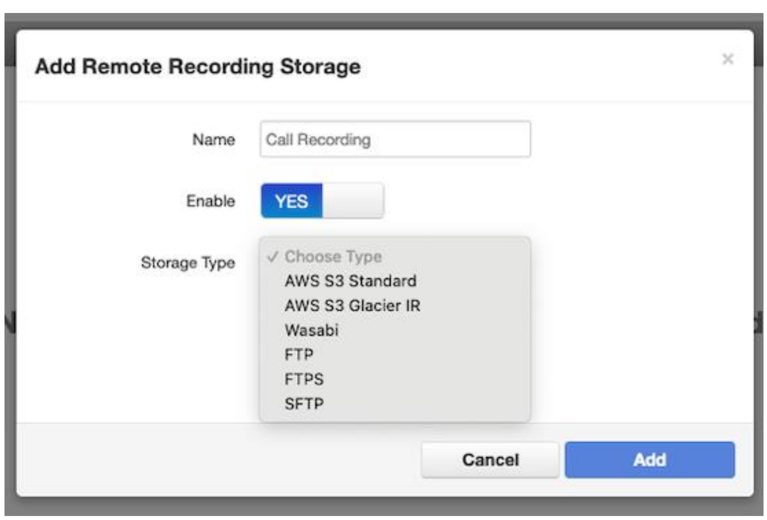
Call Filtering: To filter through calls from specific dates, numbers, call types, etc.:

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.



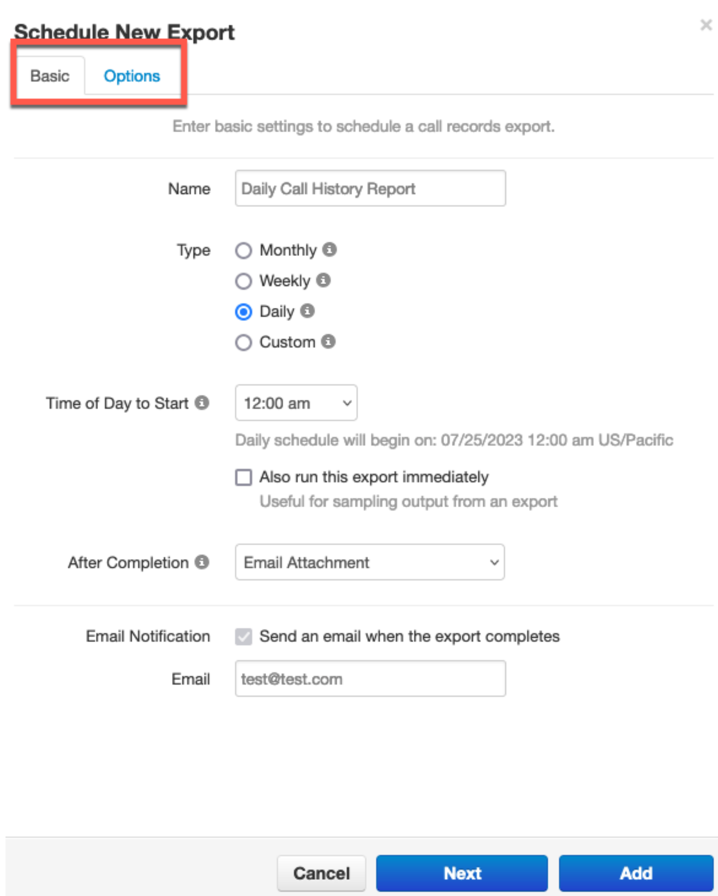
Recording Storage Settings: You have the option to house all call recordings to external storage options of your choice. To configure your call recordings to be offloaded to external storage:

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.



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

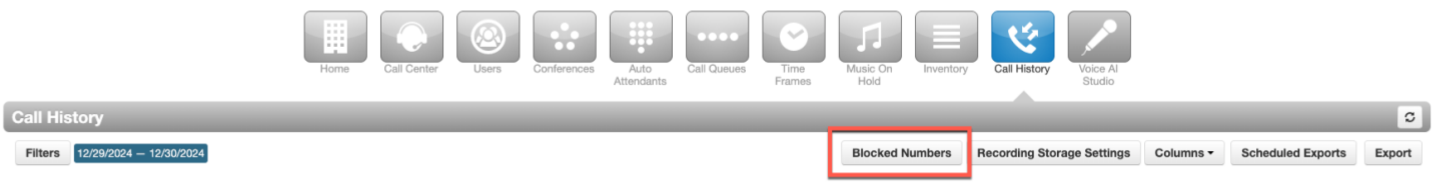
How to Block SPAM and Robocalls

For a video demonstration, go to:
https://www.youtube.com/watch?v=LKZBrCKiHVY&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=18&t=2s

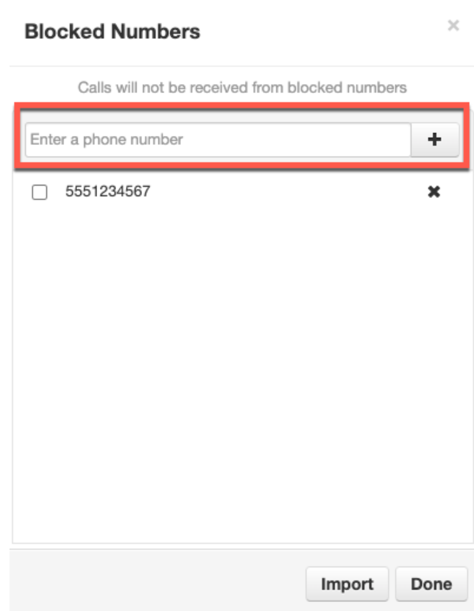
This feature can be activated per user or domain wide.

To Block a Number for the Entire Domain:

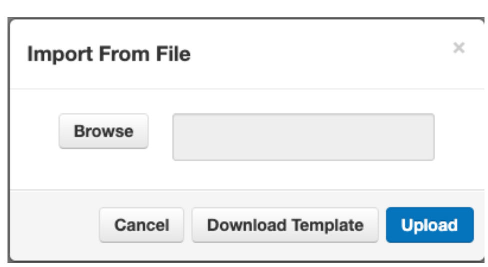
1. In the Call History section, select the "**Blocked Numbers**" button.



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



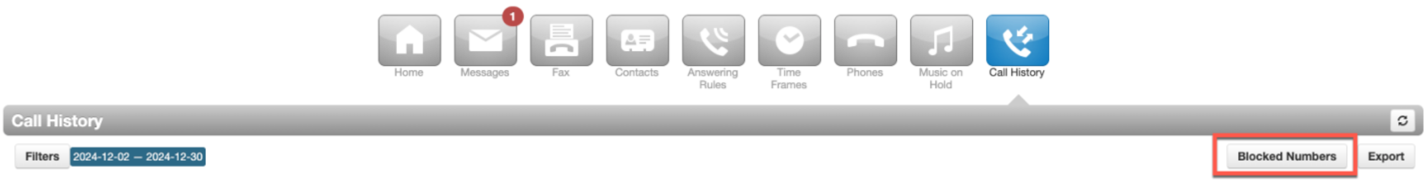
3. If you have a list of numbers to add in all at once, select "**Import**" and download the template to add your numbers to. Once completed, browse to the template and "**Upload**" the file.



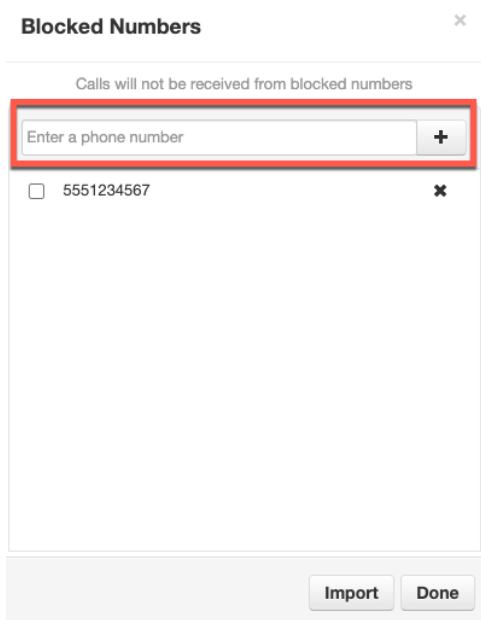
How a User Can Block a SPAM or robocall number:

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.

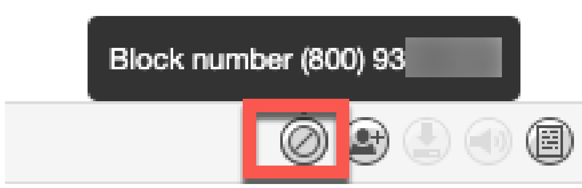
1. From the Call History Section of the VIP Portal for Users, Select the "**Blocked Numbers**" button.



2. Enter the number into the blank and press the "**+**" button.



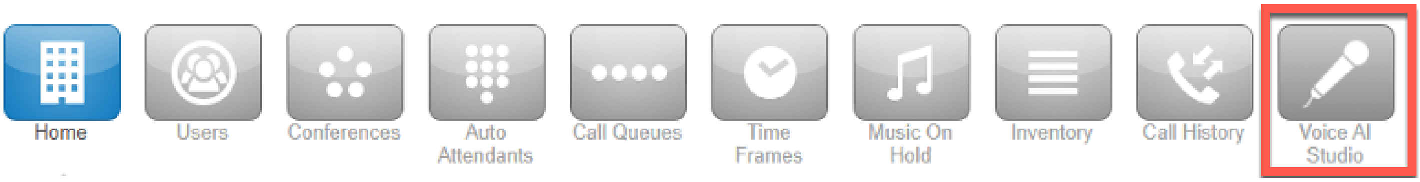
3. You can also block or unblock a number from the Call Details section by selecting the Block Call icon.



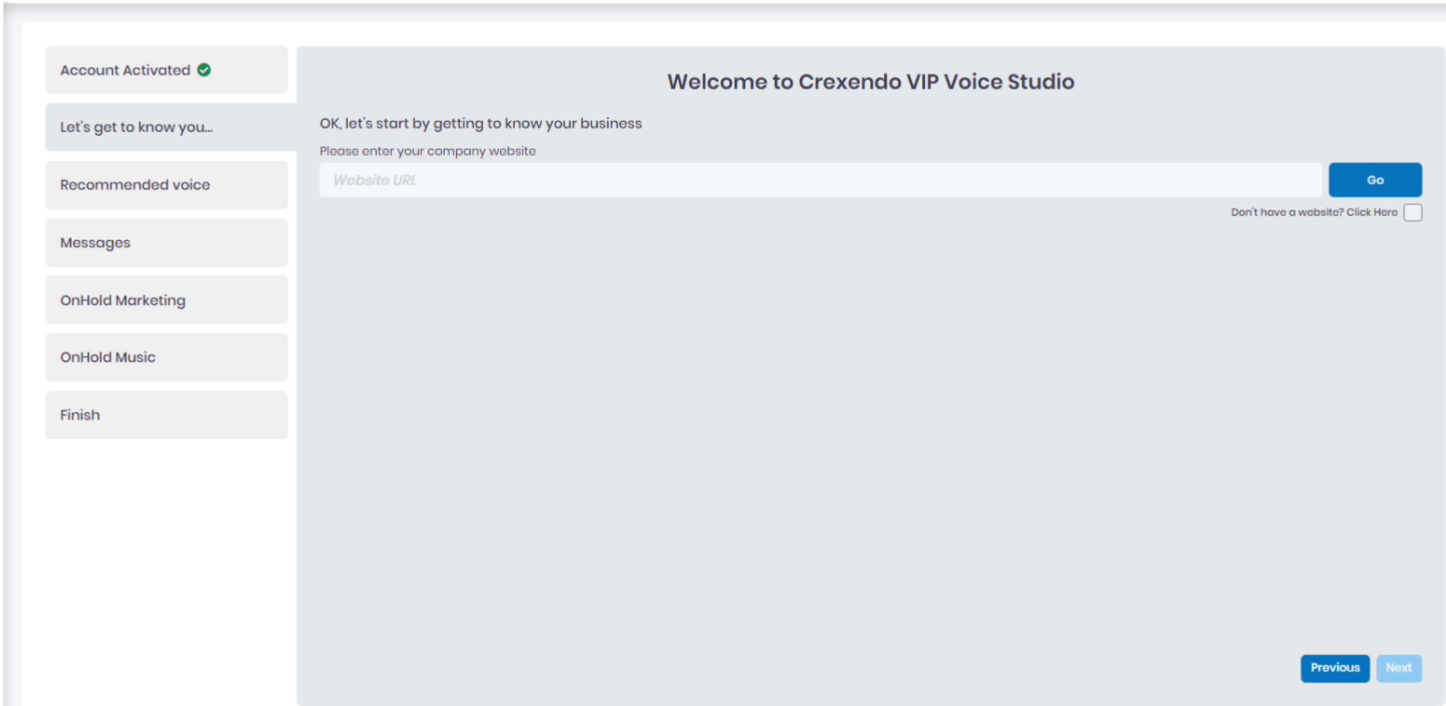
Introduction

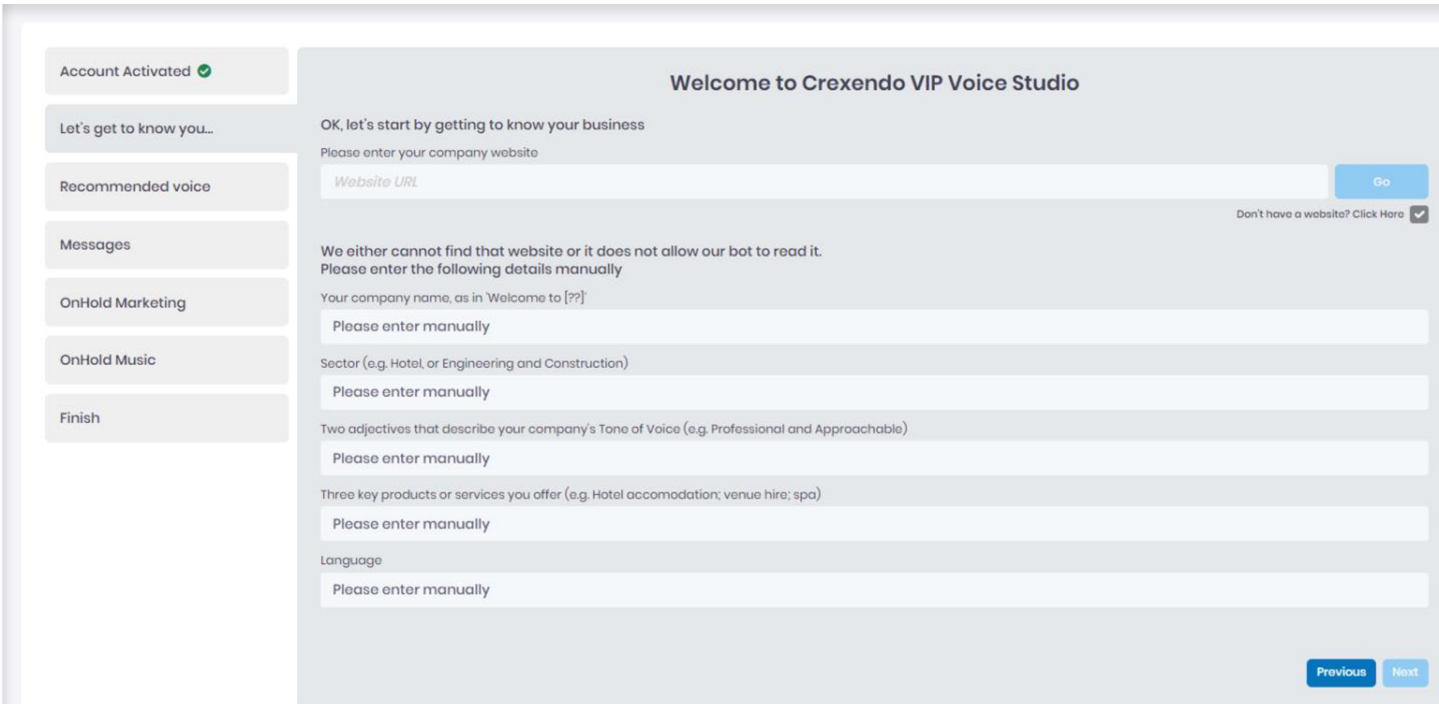
Crexendo® VIP™ Voice AI Studio enables you to create professional welcome greetings, auto-attendant, IVR (Interactive Voice Response), and call menu recordings, and mix them with license-free music ready to play to queuing and holding callers. This guide provides the steps to accessing and using Voice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

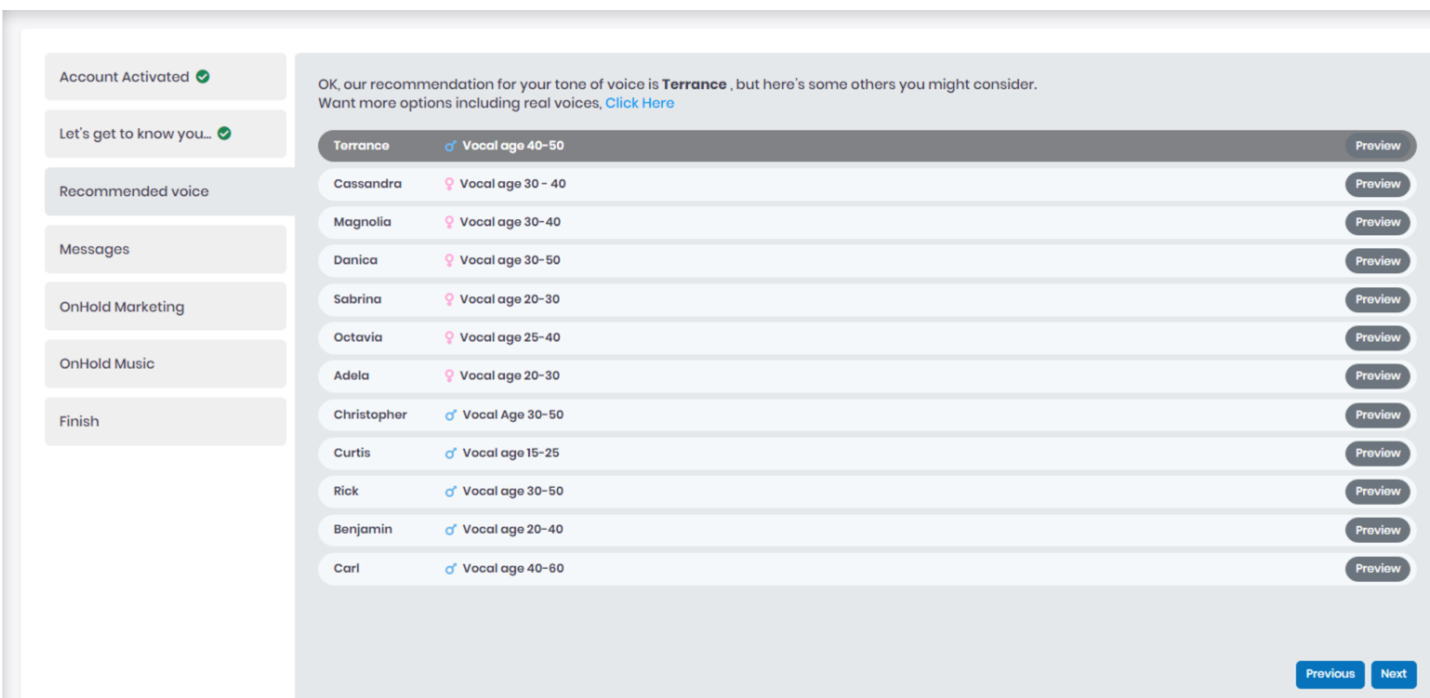


2. Select "**Get Started**" and a new tab will open with a separate URL for Voice AI Studios to fill out the information for your company. You can either enter in your company's URL and the information will be pulled for you automatically or you can enter in the information manually.

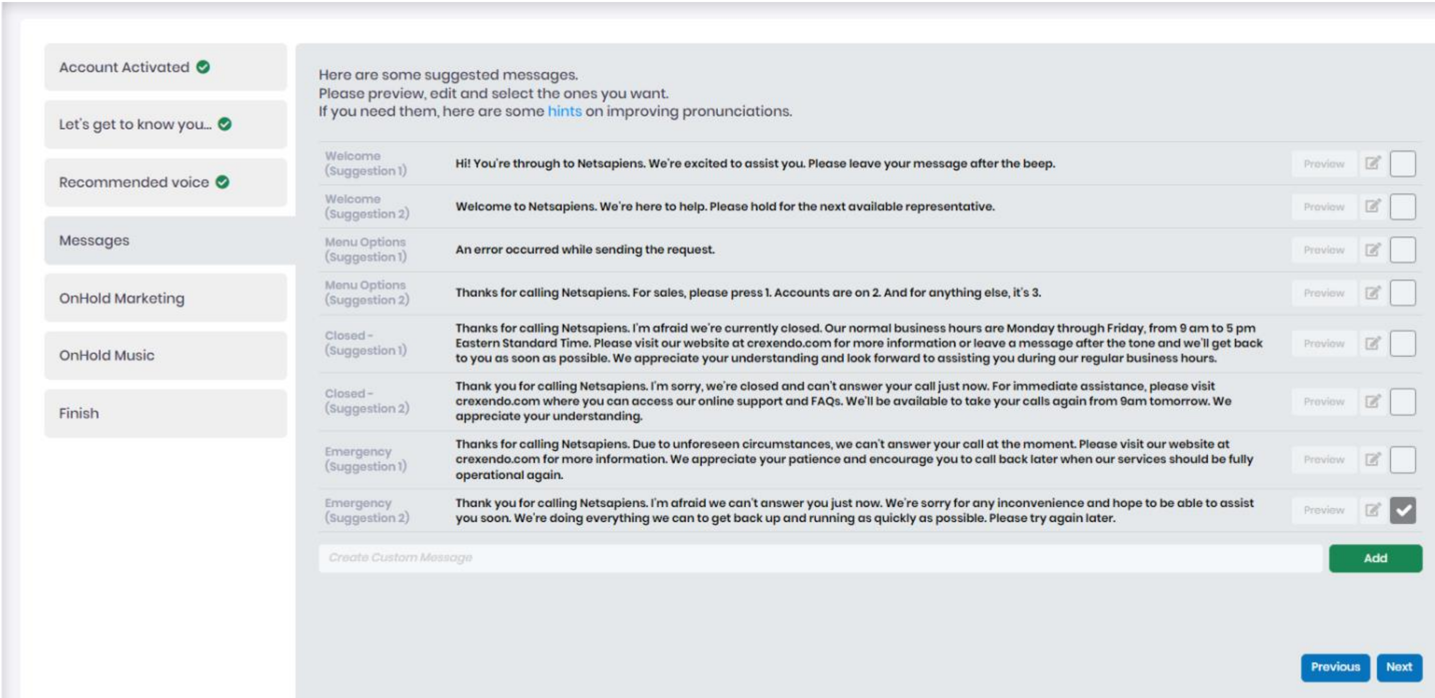




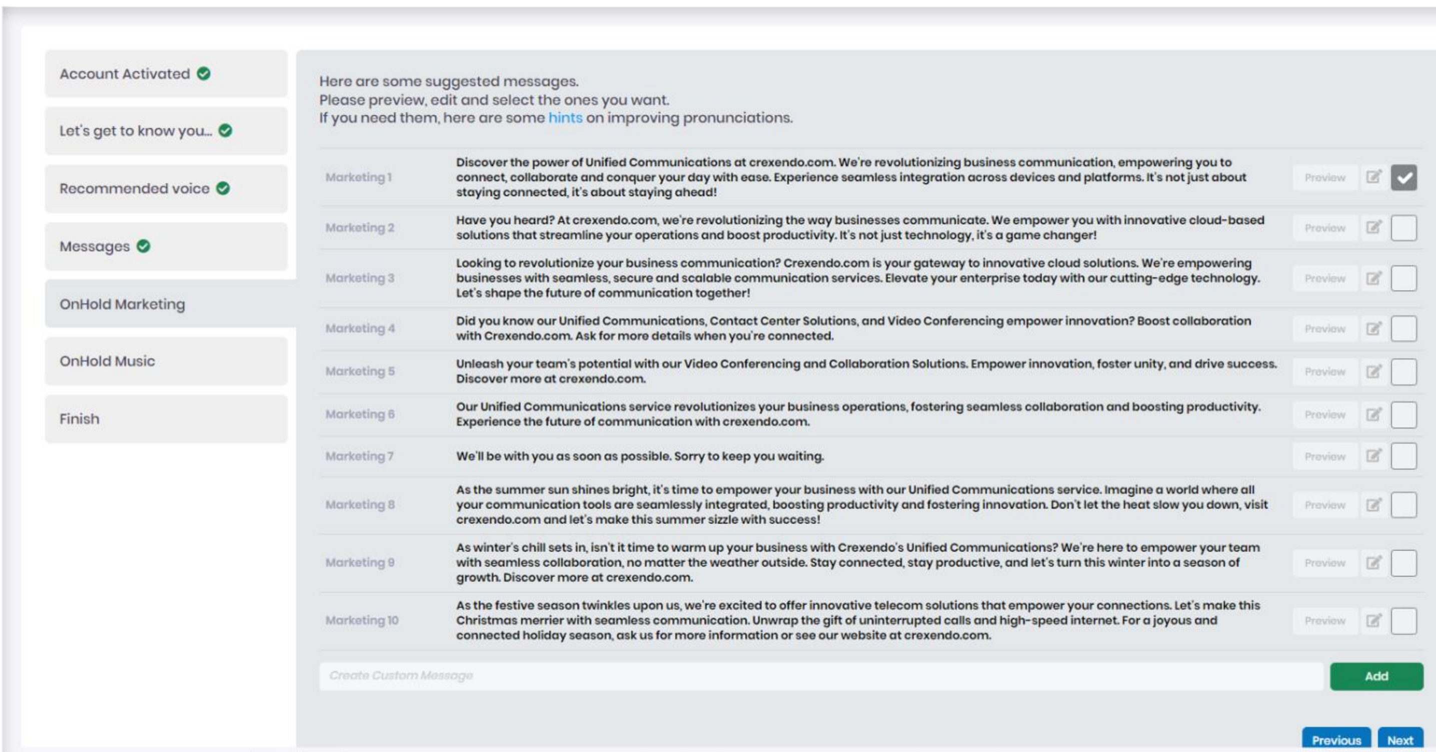
3. Select the voice in which you want your prompts to play. You can preview them by clicking "**Preview**" on the right-hand side of the screen.



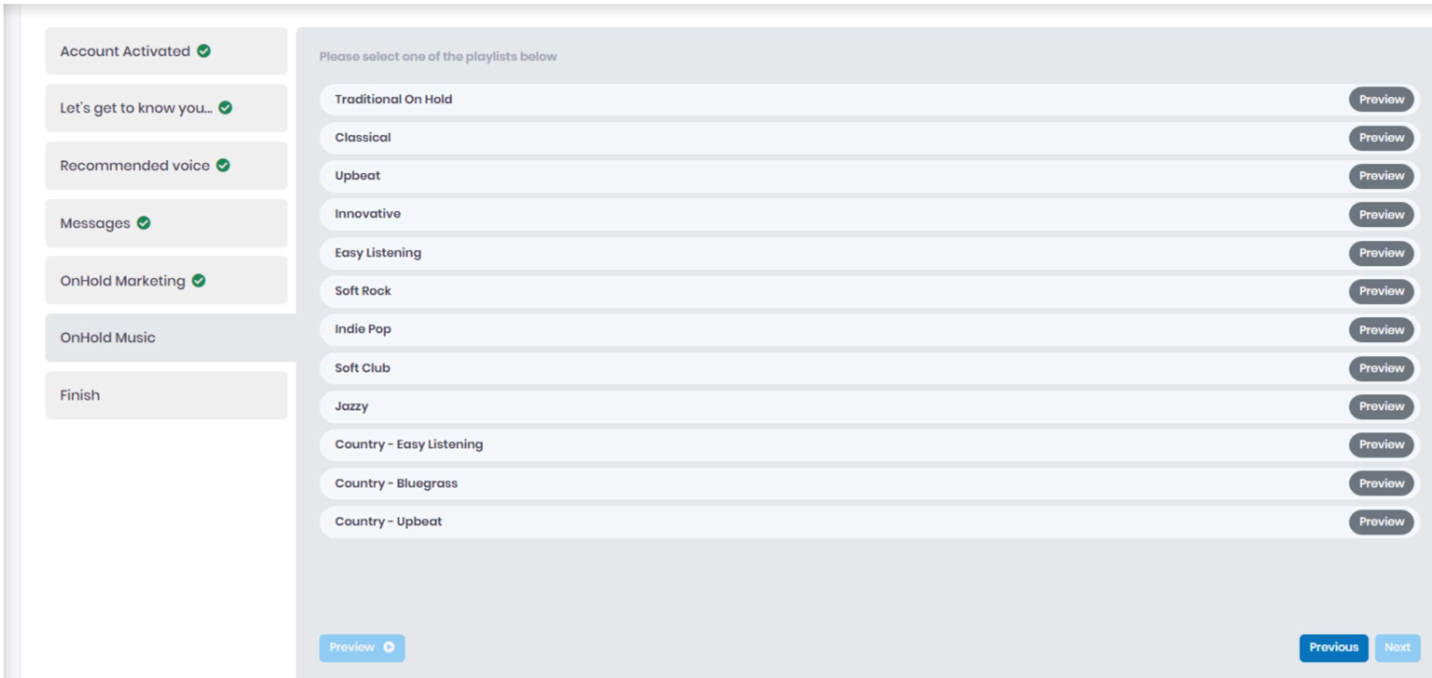
4. Select the message(s) you want for your welcome greetings, auto-attendant, IVR (Interactive Voice Response), and call menu recordings. Additionally, you can manually enter in the prompt you want in the blank below.



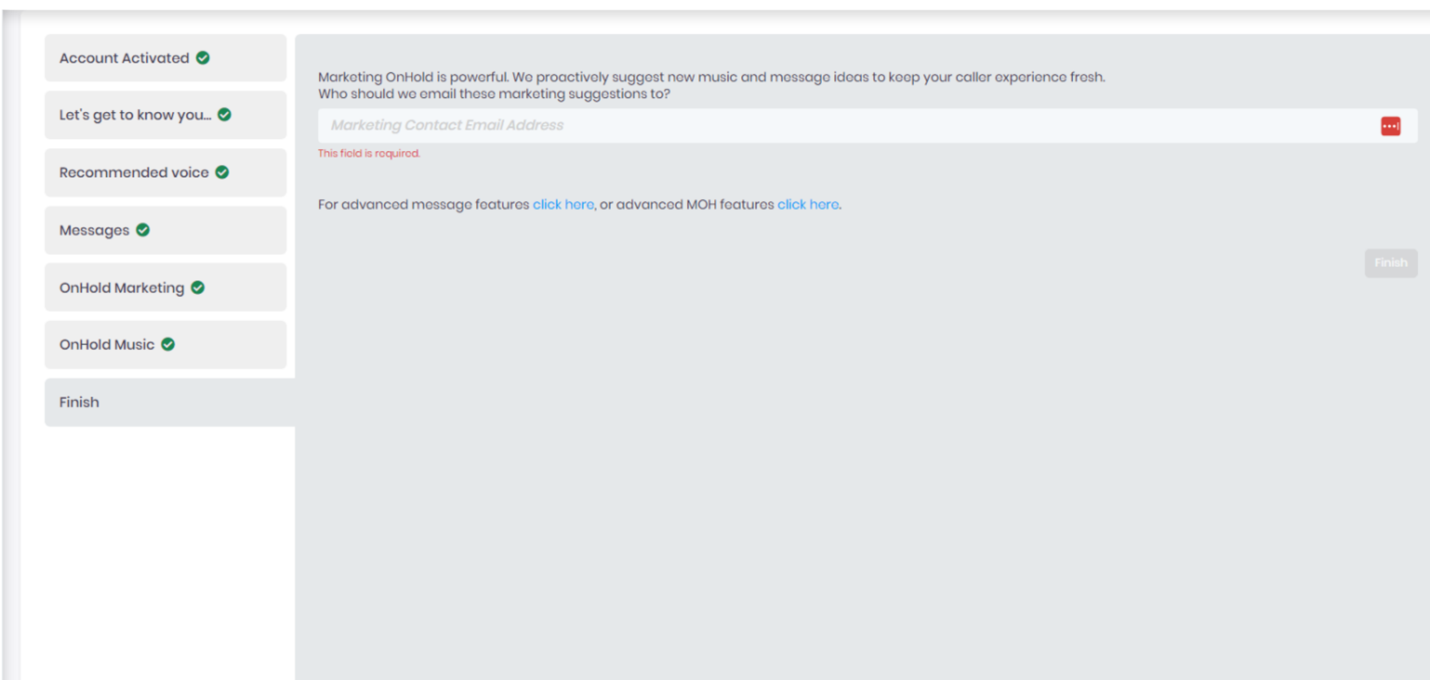
5. Select the on-hold marketing prompt(s). This is the prompt that will play to customers when on-hold.



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



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

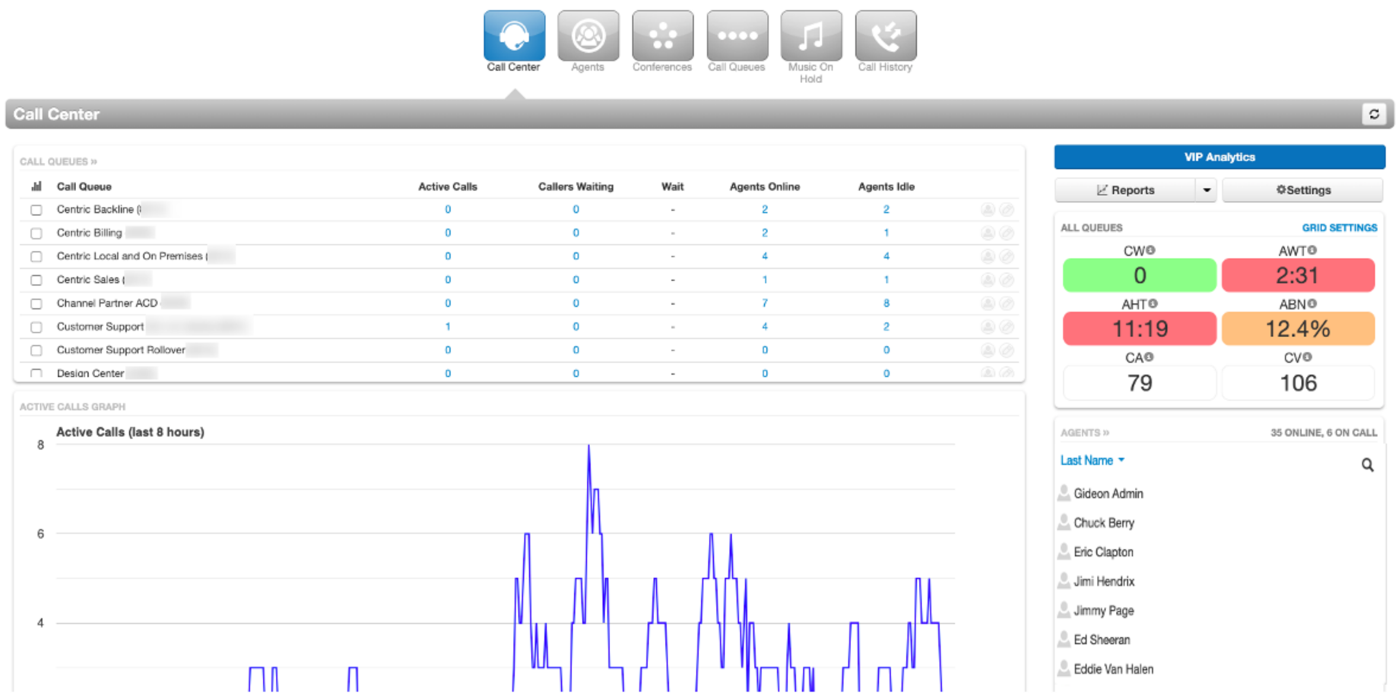


To upload your files to be used in your domain, see **[Music on Hold]**.

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=xTvZpBGTl5k&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=3



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.

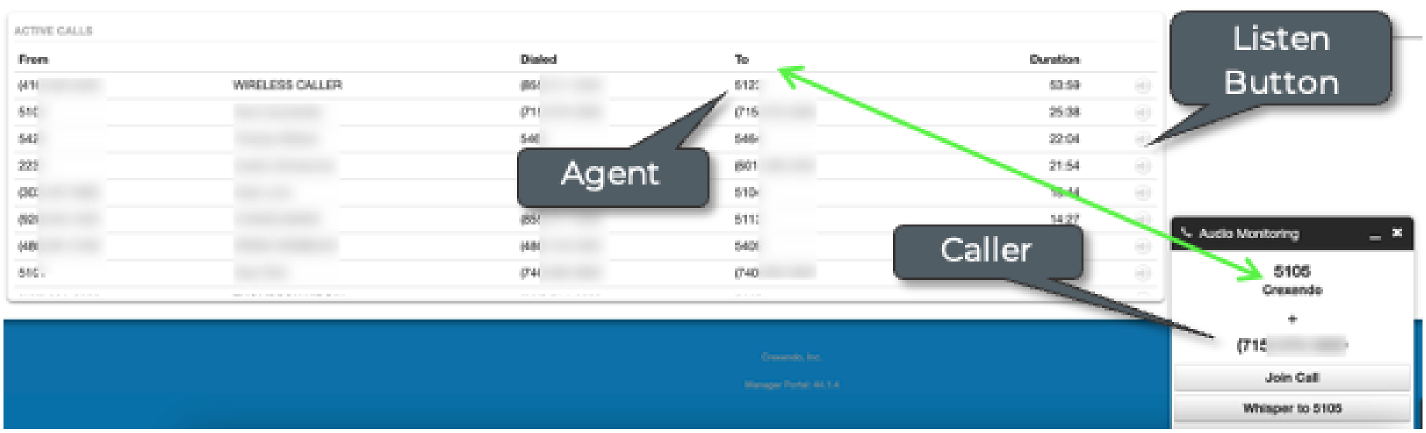
VIP Analytics: gives your access to our reporting and analytic tools which will give you the insight to drive your business. These tools include daily reports and customized real time dashboards. For more detail regarding VIP reporting and call center dashboards, see **VIP Analytics**.

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.

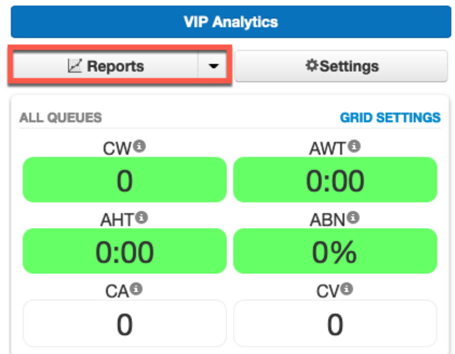


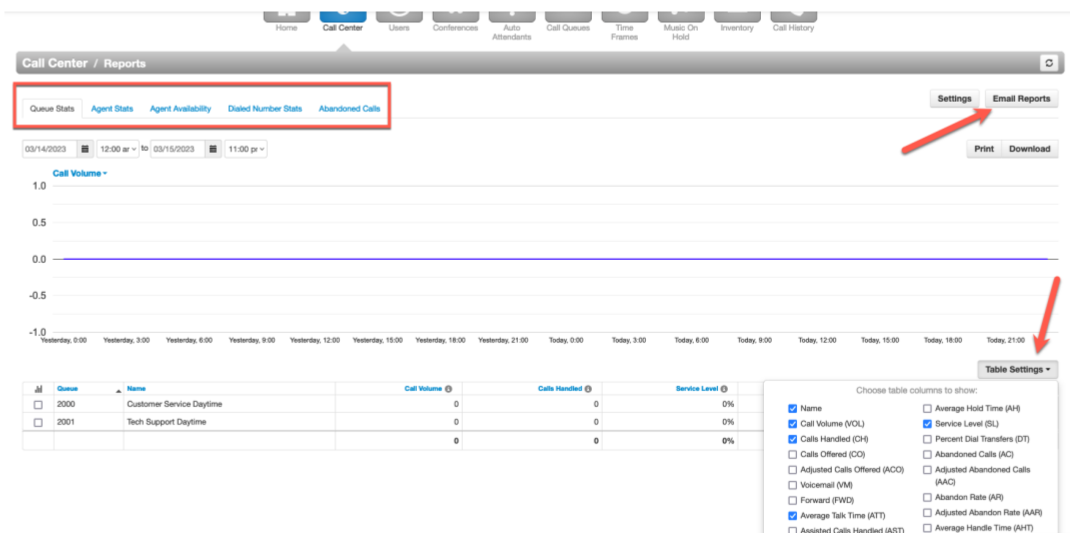
- After you answer the phone, you will hear the conversation, and the participants will not be alerted that you are listening.
- In the AUDIO MONITORING card, click the appropriate button:
  - **Join Call:** Speak with both the agent and caller.
  - **Whisper to [Agent]:** Speak with the agent without 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.

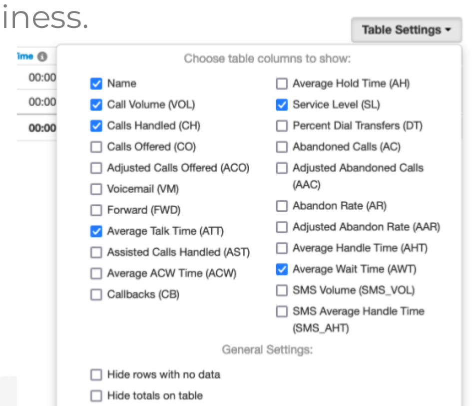




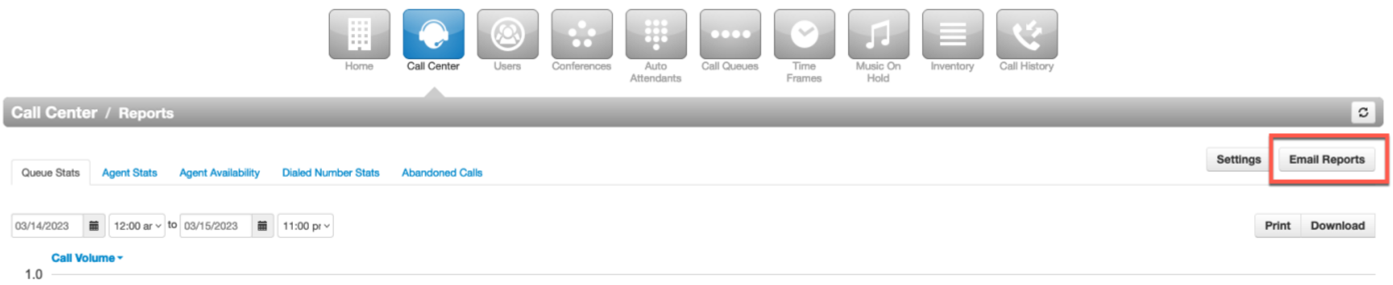
To create your customized reports:

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.



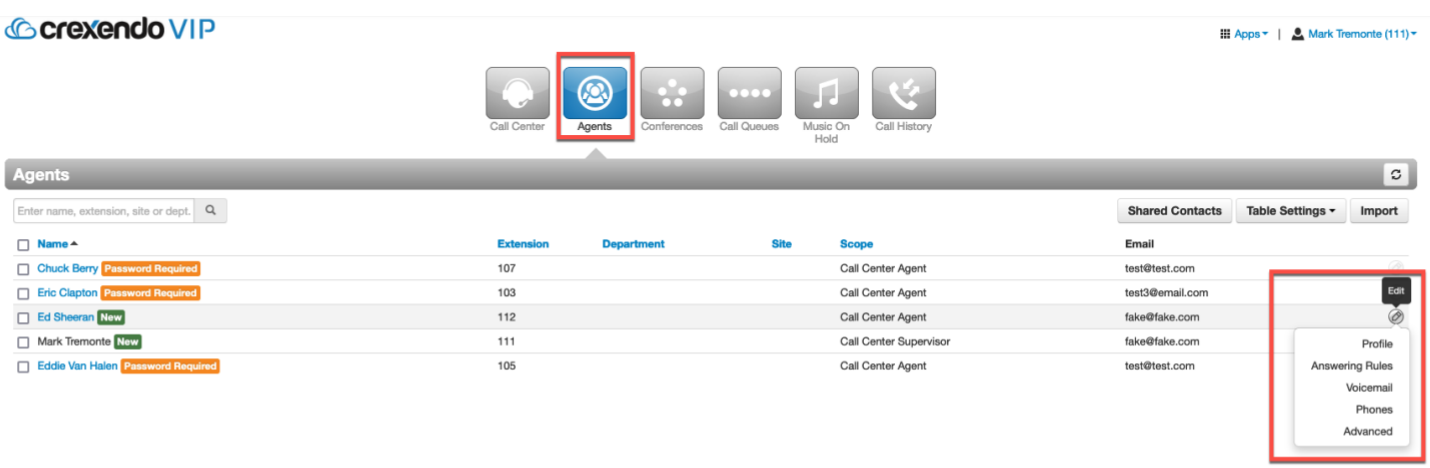
To export and automate your custom reports:



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.



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

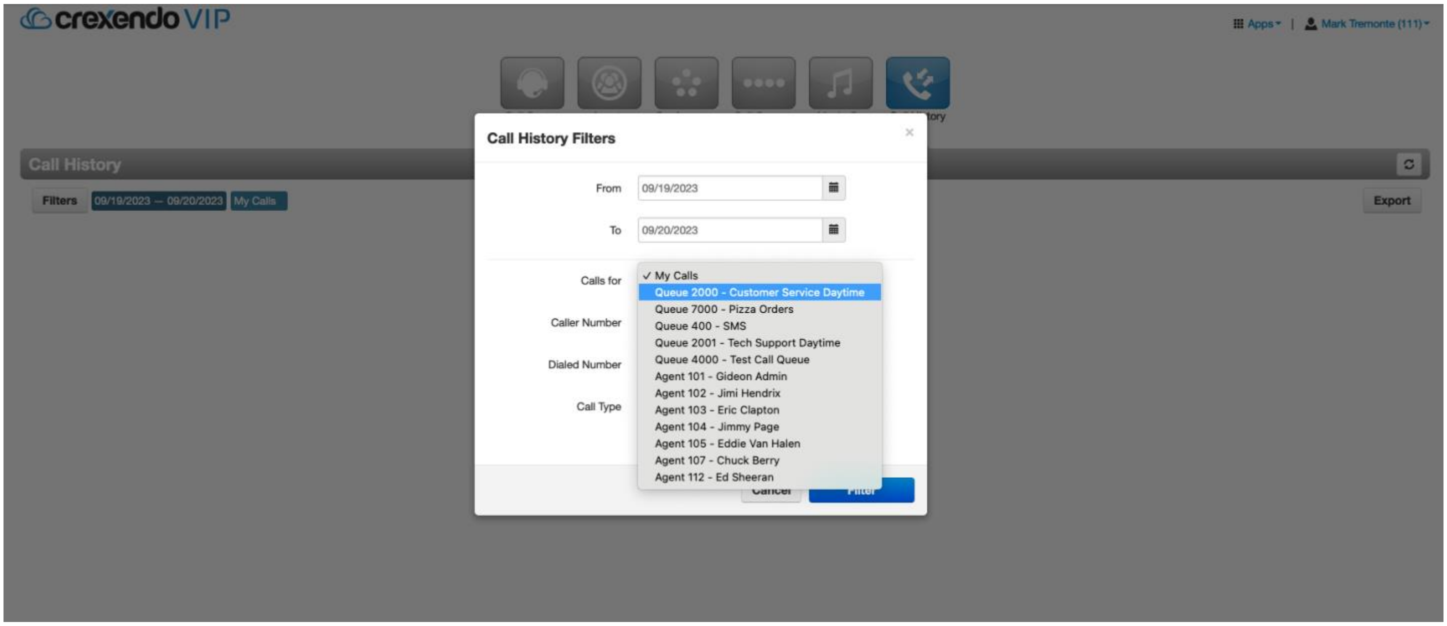
The **Call History** section of the VIP Portal for Call Center supervisors gives you quick access to filter through all incoming/outgoing calls by either an agent or call queue. To access the Call History Section of the VIP Portal:

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.


crexendo VIP
Apps
Mark Tremonte (111)
Call History
Filters
09/19/2023 — 09/20/2023
My Calls
Export
Call History Filters
From
09/19/2023
To
09/20/2023
Calls for
Caller Number
Dialed Number
Call Type
✓ My Calls
Queue 2000 - Customer Service Daytime
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
Agent 112 - Ed Sheeran

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.

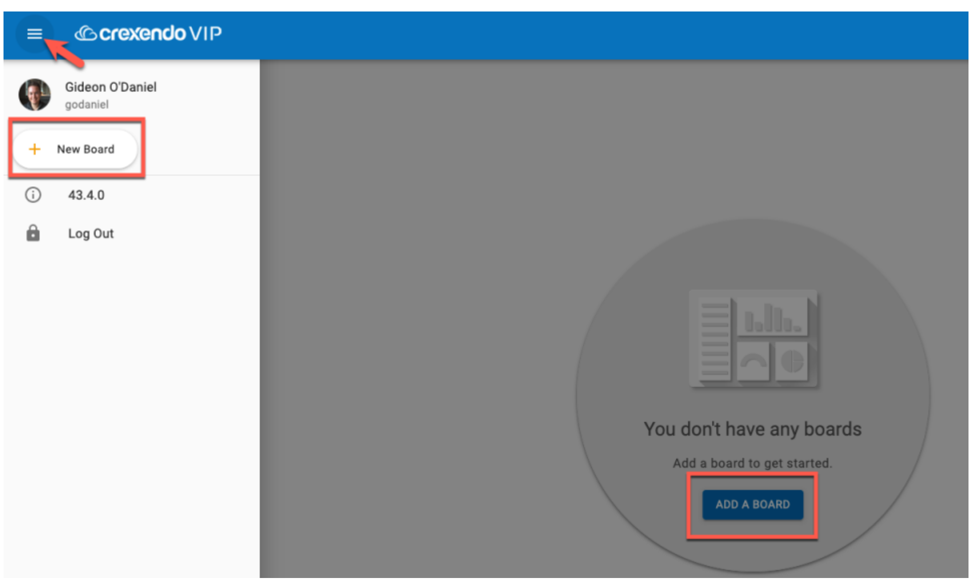
How to Access VIP Analytics

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.

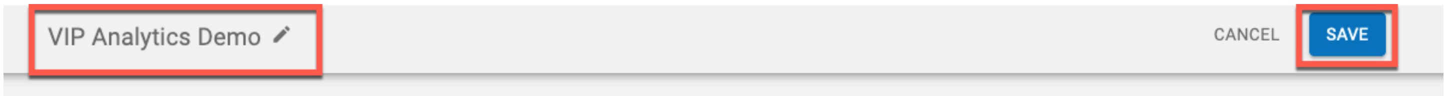
If you have any previously created boards, they will appear here.

How to Create a Board

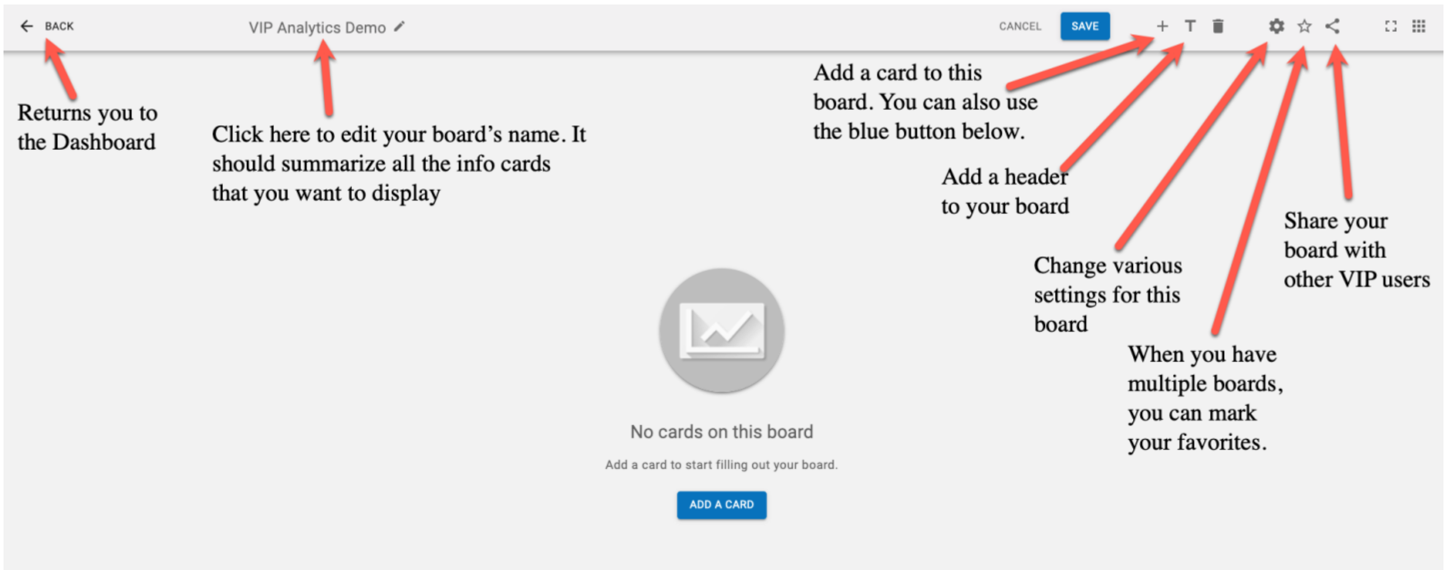
1. Select "**ADD A BOARD**" to get started. You can also select the "**hamburger**" button in the upper left corner to display the main menu, then select "**New Board**".



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.

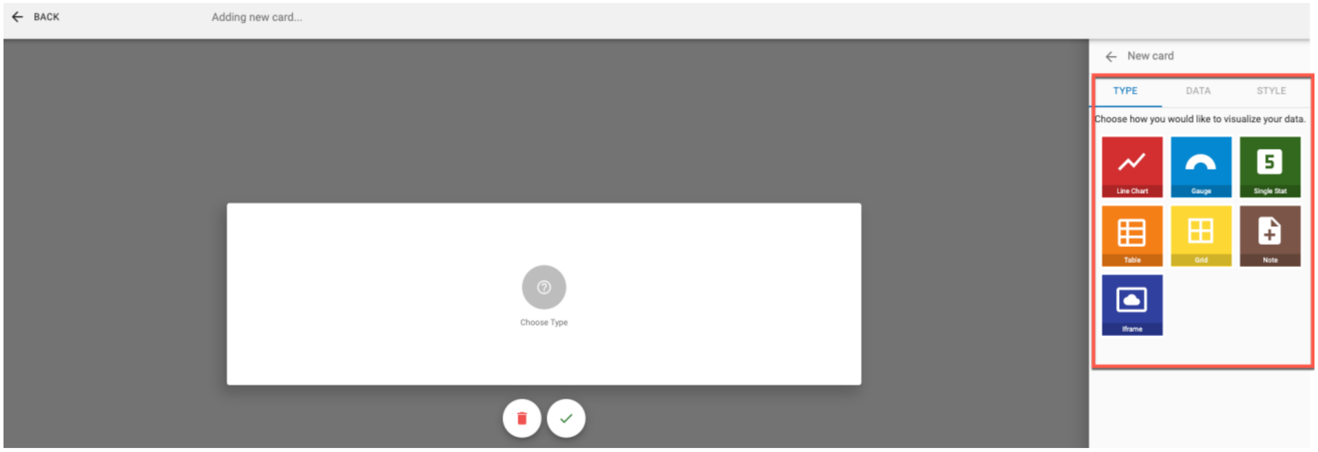


How to Add a Card to Your Board

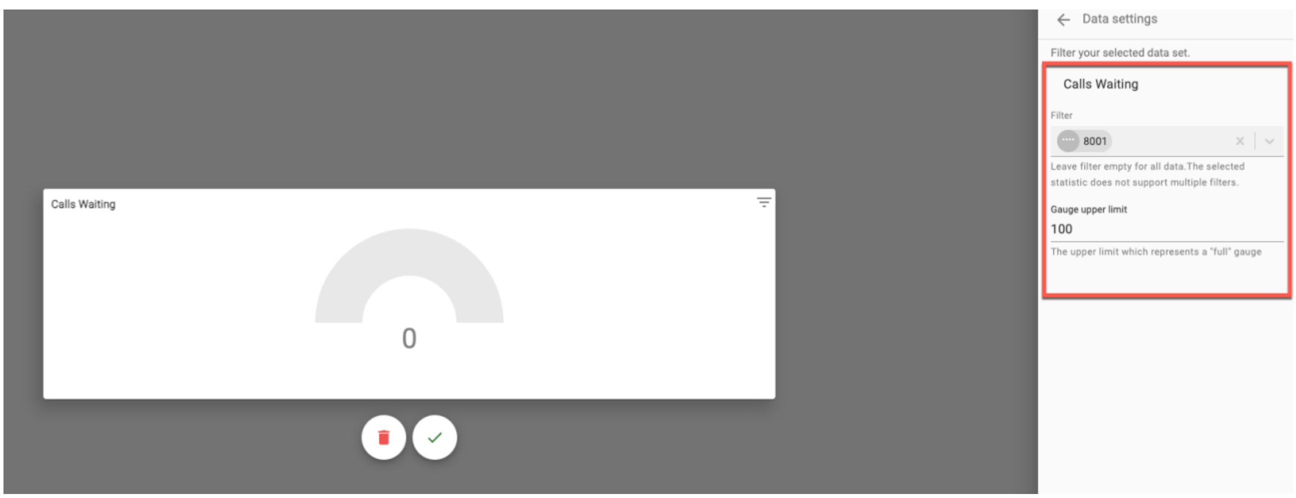
After you create and name your board, you can start adding information cards. Each type of card will have a "gauge" which displays the data you want.

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.

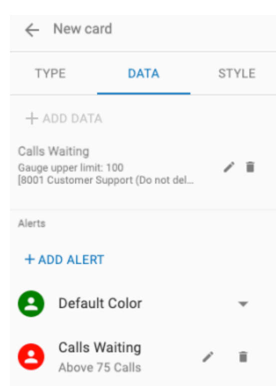
In this example, the Gauge option has been selected.



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.

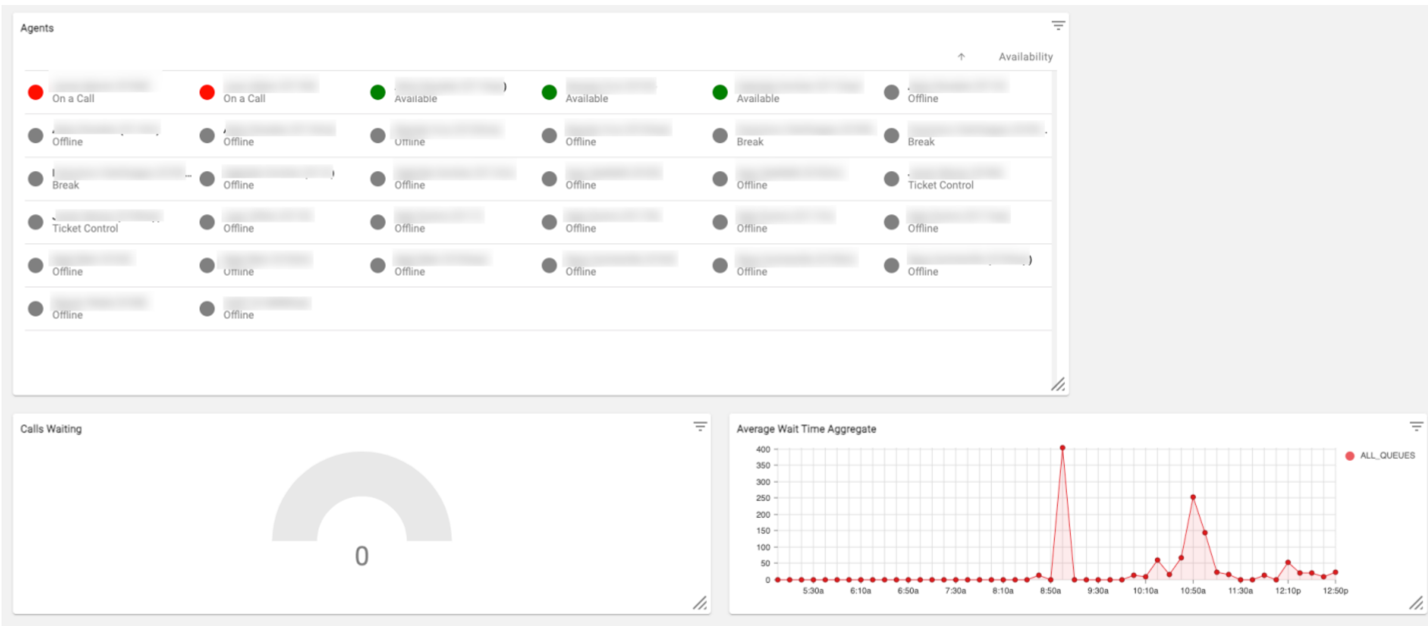


7. If you would like to set an alert for when the levels get to a certain level, select "**Add Alert**". Select the threshold and color that you want the alert to present and select "**Add**" at the bottom right side of the screen.



8. 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:

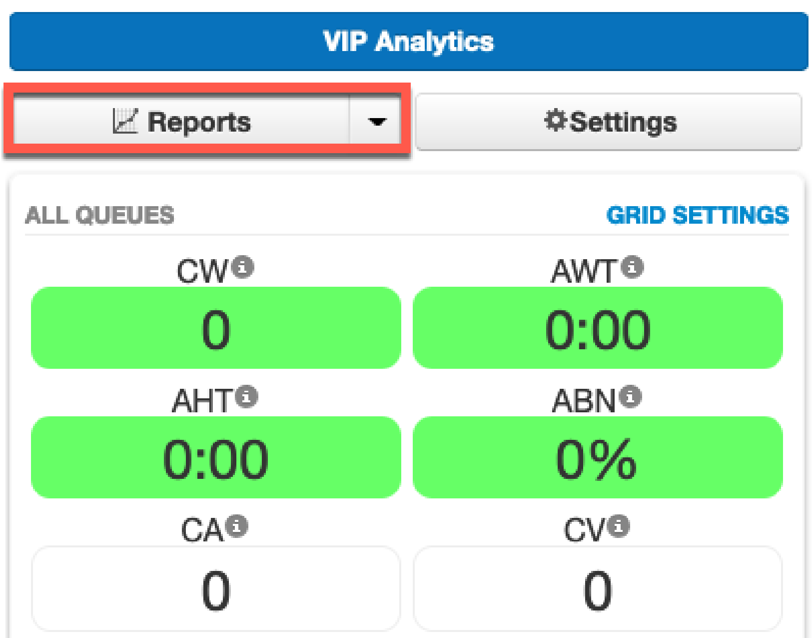
VIP Call Center gives you the ability to gather data on queues and agents in your Crexendo VIP environment. In addition to the default Call Center Dashboard, supervisors can:

- **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**.

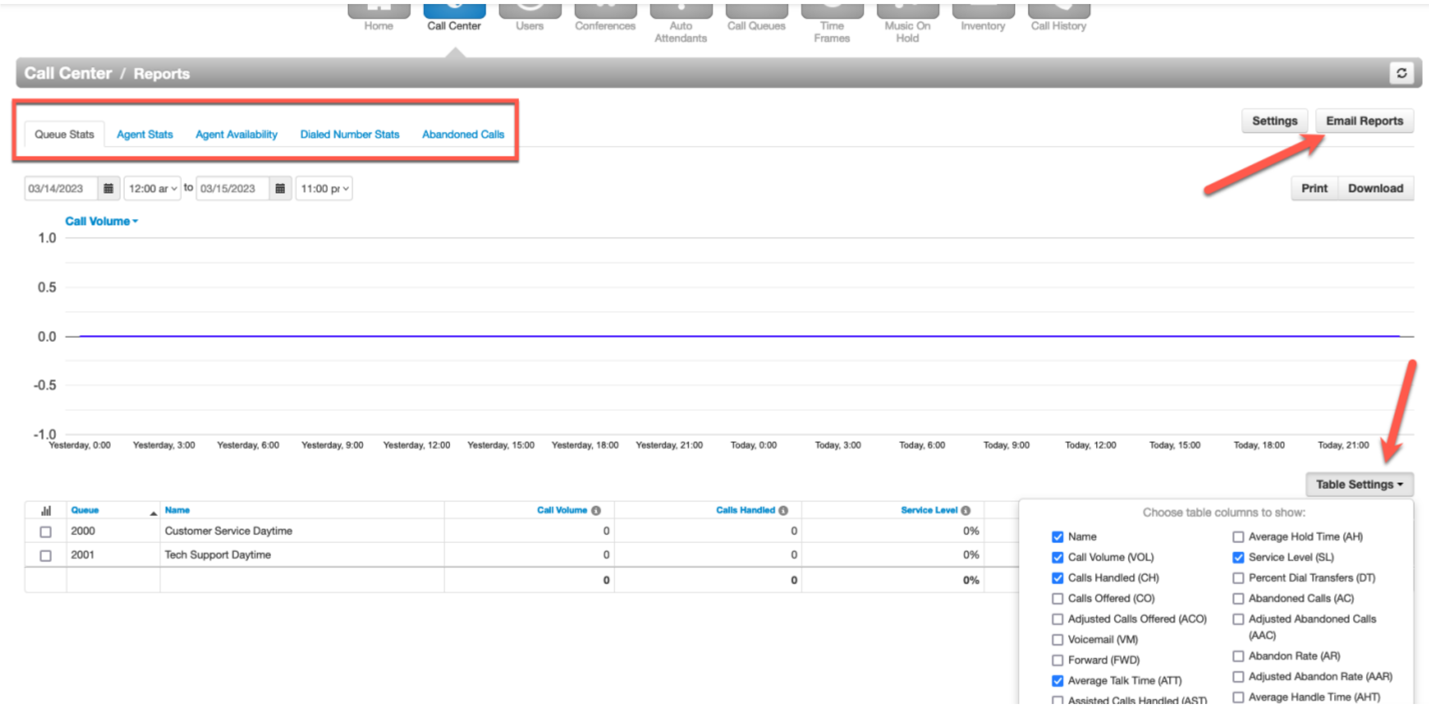
For a video demonstration, go to:
https://www.youtube.com/watch?v=kJxYoAVHL30&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=15

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



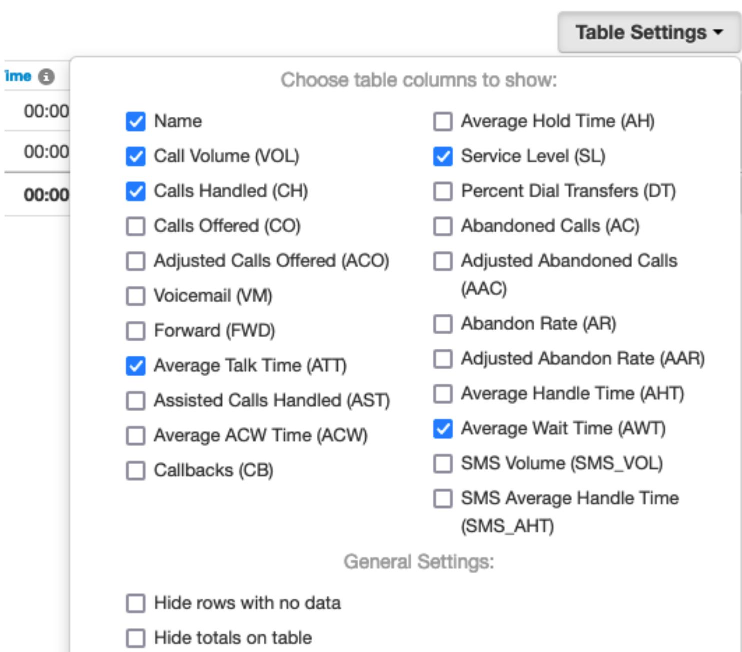
Select **"Reports"** which will open the options for what kind of reports you would like to run.

Call Center Reports Builder:



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.



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.

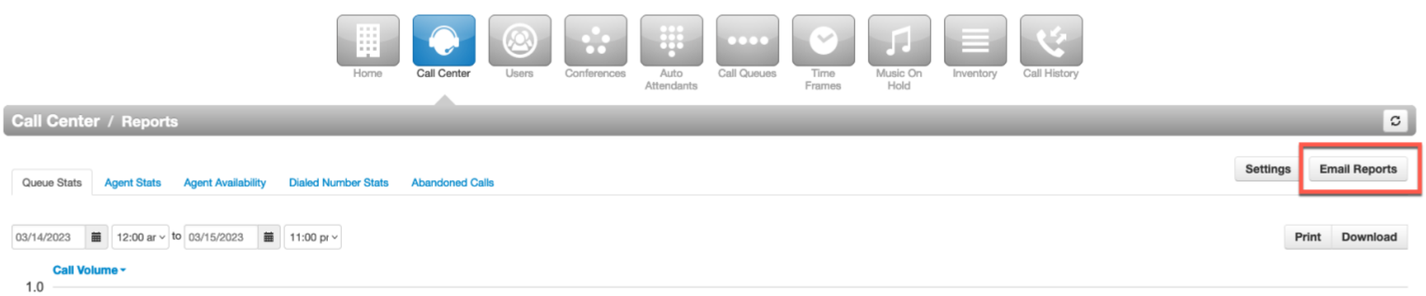
- **Average Handle Time (AHT):** Average time an agent spent on a call. Includes Talk Time, Hold Time, and Disposition Time.
- **Average Wait Time (AWT):** average number of seconds a caller spent in the selected queue before being dispatched to an agent. If none selected, total for all queues will be 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

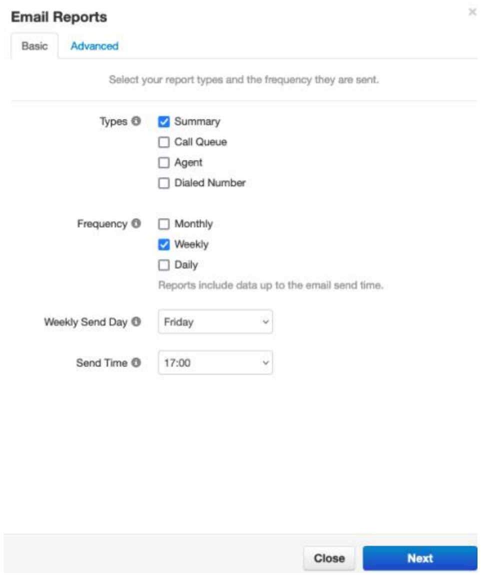
- **Calls Handled (CH):** number of calls answered by agent originating through a call queue.
- **Time Talking (TT):** number of minutes spent by agent on answered calls originating through a call queue.
- **Average Talk Time ATT):** average number of minutes spent by agent talking per answered call 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.

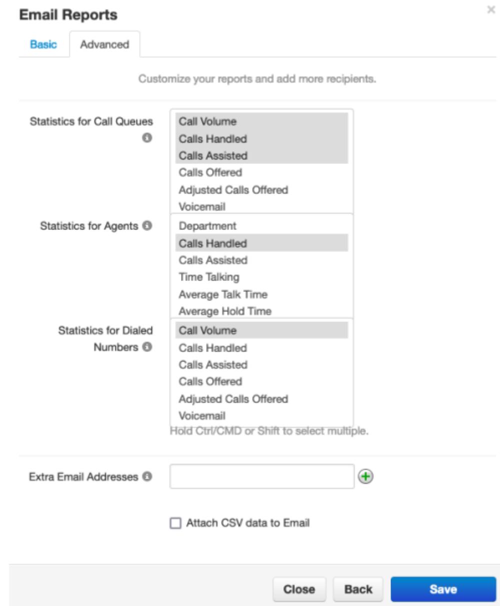
- **Inbound Calls Today (IA):** number of attempted calls inbound to agent. Includes call center calls. Excludes on-net calls and conference calls.
- **Inbound Calls Answered Today (IANS):** number of inbound answered calls to an agent. Includes call center calls. Excludes on-net calls and conference 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:



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.





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.

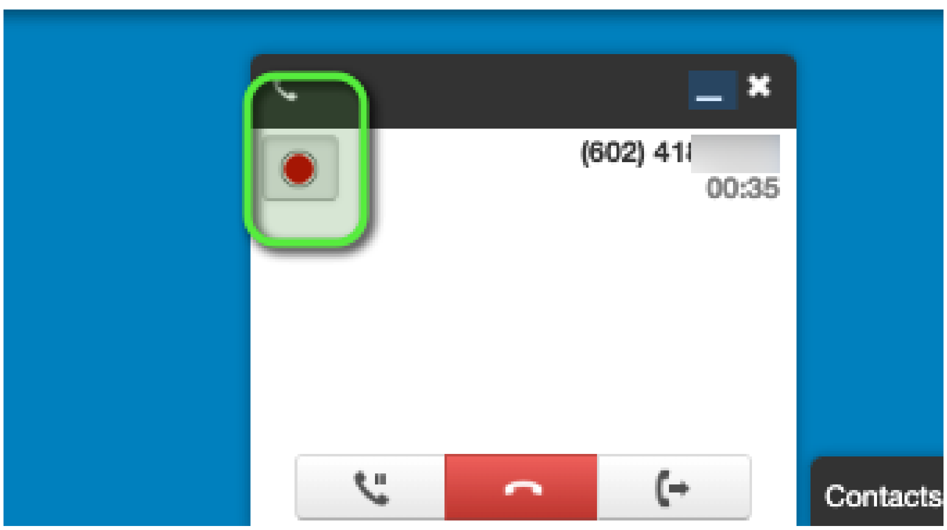
Introduction

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.

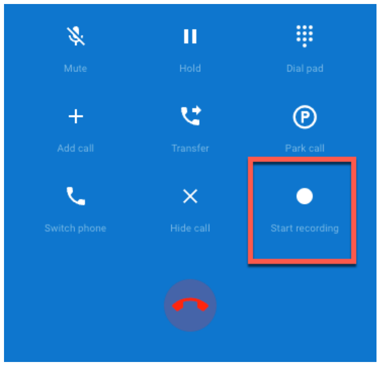


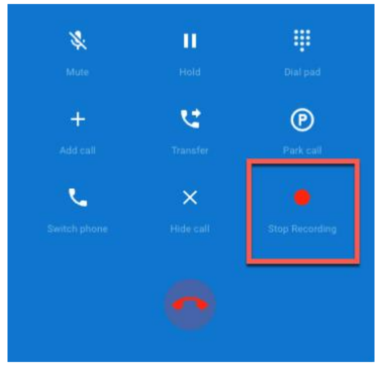
Recording a Call on Your Desk Phone Using *81.

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 faller on **HOLD** and press ***82** to stop the recording.

Recording a Call on Your Web Phone

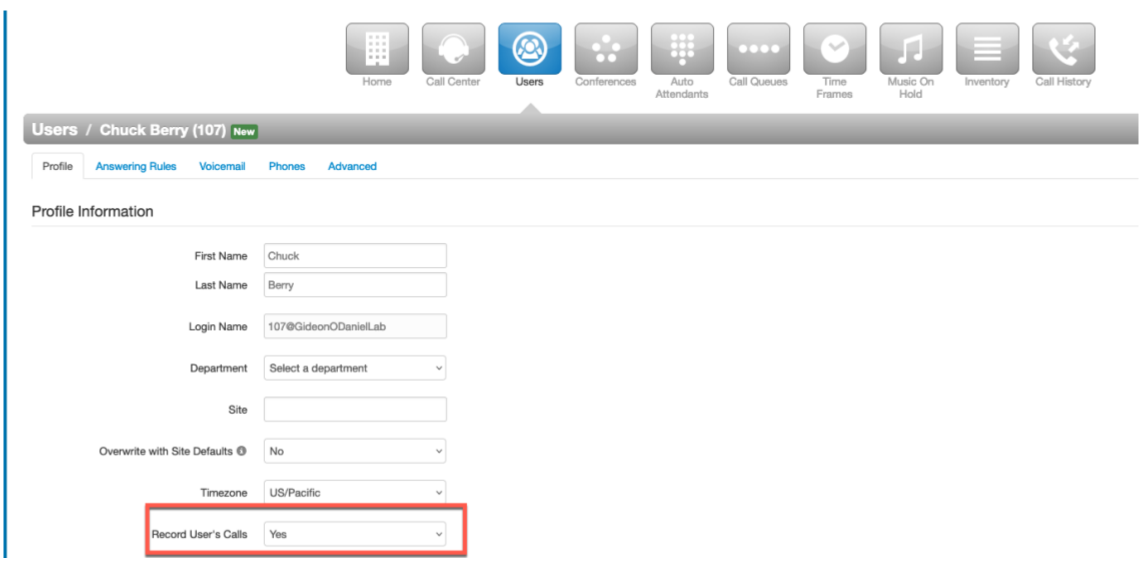
1. While on an active call, select "**Start recording**" on the in-call options. This will NOT alert the caller that you are recording the call.
2. To end the recording, select "**Stop Recording**" in the in-call options.





How to Turn on Call Recordings for a User

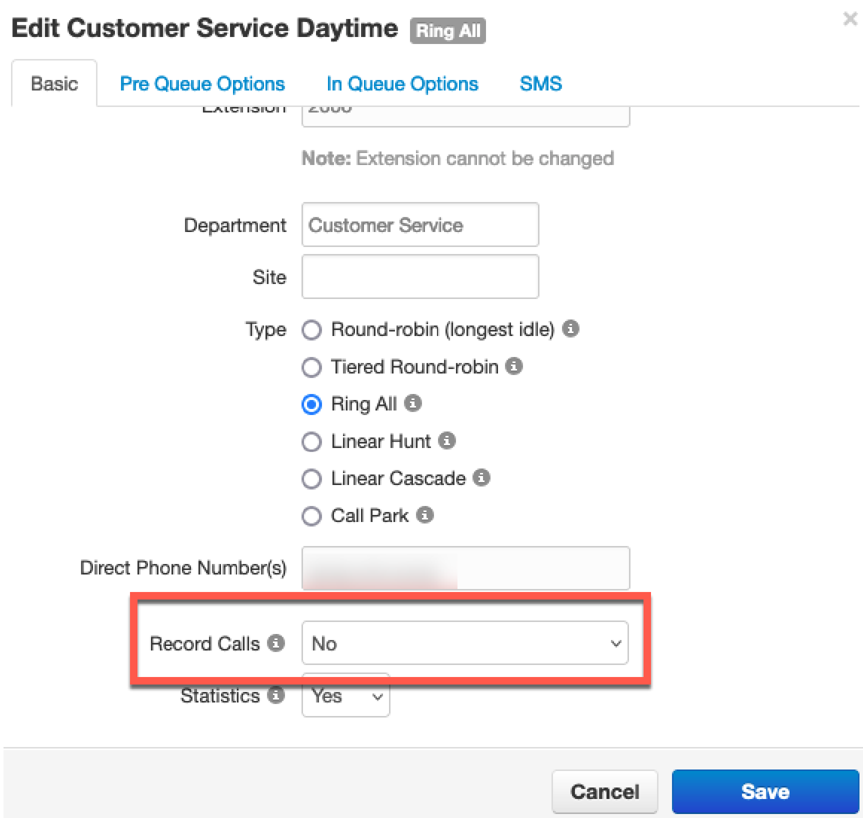
1. Login to the VIP Portal for Managers.
2. Select the "**Users**" navigation button at the top of the page.
3. Select the user you would like to enable call recordings on.
4. In the user's "profile Information", select the drop-down menu for "**Record User's Calls**".



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**".



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.

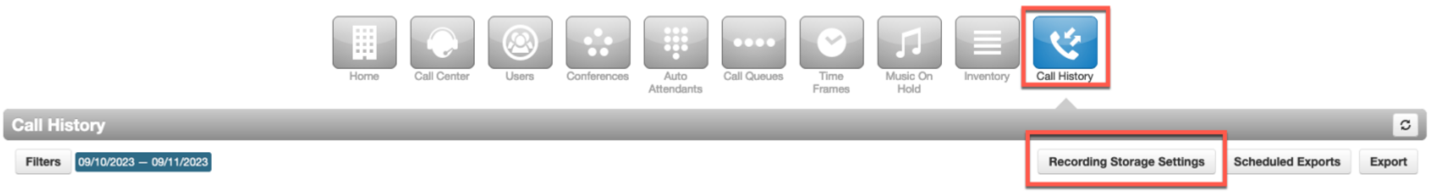
Call History:

Call Center:

How to Add Remote Storage for Call Recordings

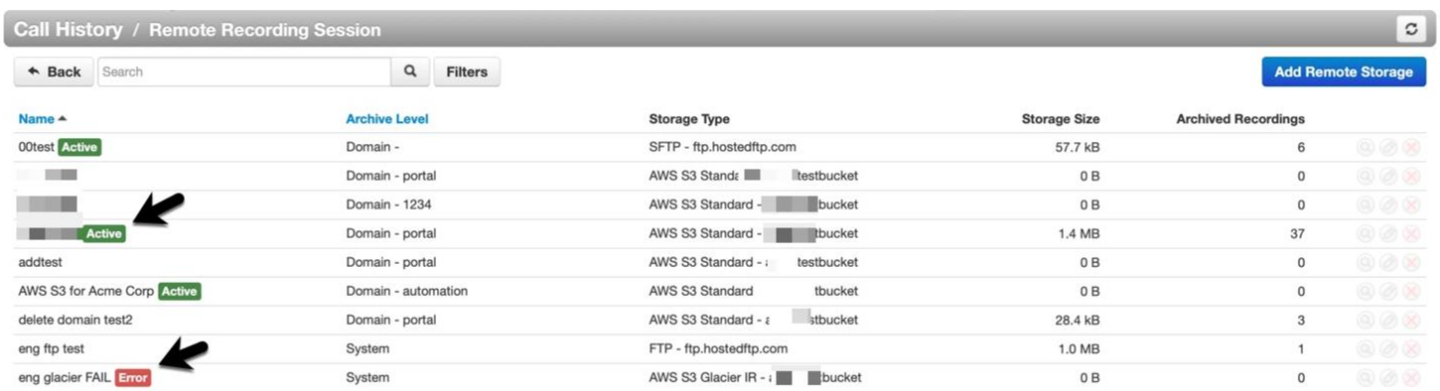
Call Recordings are stored in the VIP Portal for 90 days. If you would like to keep your recordings for longer than 90 days, you will need to configure your calls to offload onto external storage.

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.*

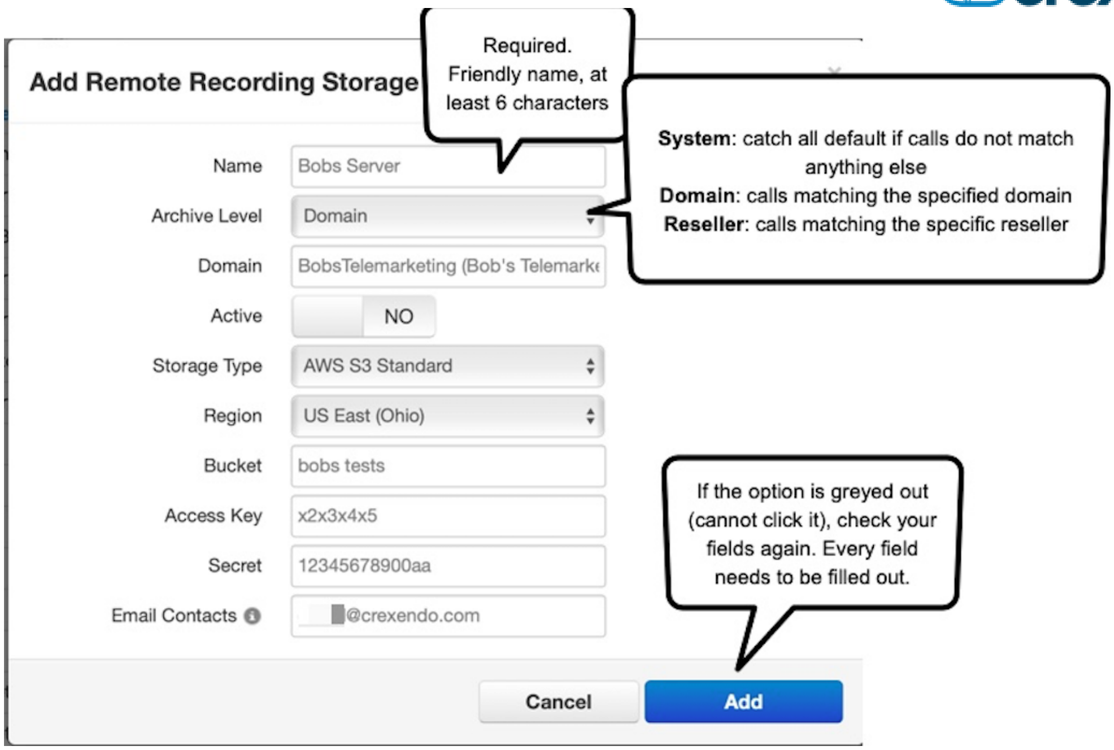


Name	Archive Level	Storage Type	Storage Size	Archived Recordings
00test Active	Domain -	SFTP - ftp.hostedftp.com	57.7 kB	6
[redacted]	Domain - portal	AWS S3 Stand[redacted]testbucket	0 B	0
[redacted]	Domain - 1234	AWS S3 Standard - [redacted]bucket	0 B	0
[redacted] Active	Domain - portal	AWS S3 Standard - [redacted]tbucket	1.4 MB	37
addtest	Domain - portal	AWS S3 Standard - [redacted] testbucket	0 B	0
AWS S3 for Acme Corp Active	Domain - automation	AWS S3 Standard [redacted] tbucket	0 B	0
delete domain test2	Domain - portal	AWS S3 Standard - [redacted]tbucket	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 - [redacted]bucket	0 B	0

2. Click **"Add Remote Storage"** and fill out the following fields and then click **"Add."**

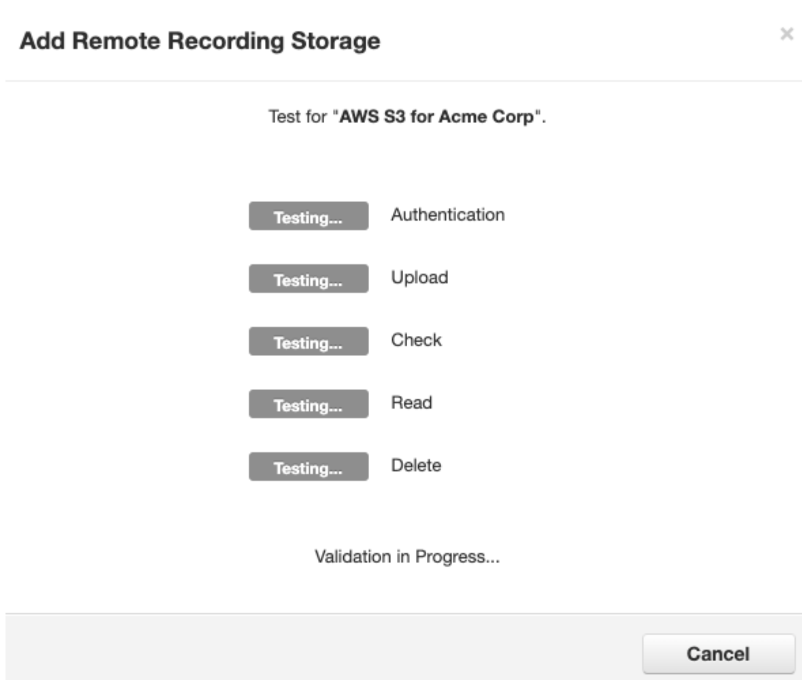
   - **"Archive Level"** indicates which calls are retrieved for remote storage.
   - **"System"** is a catch all for calls that do not match the specified Reseller or Domain name.

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.

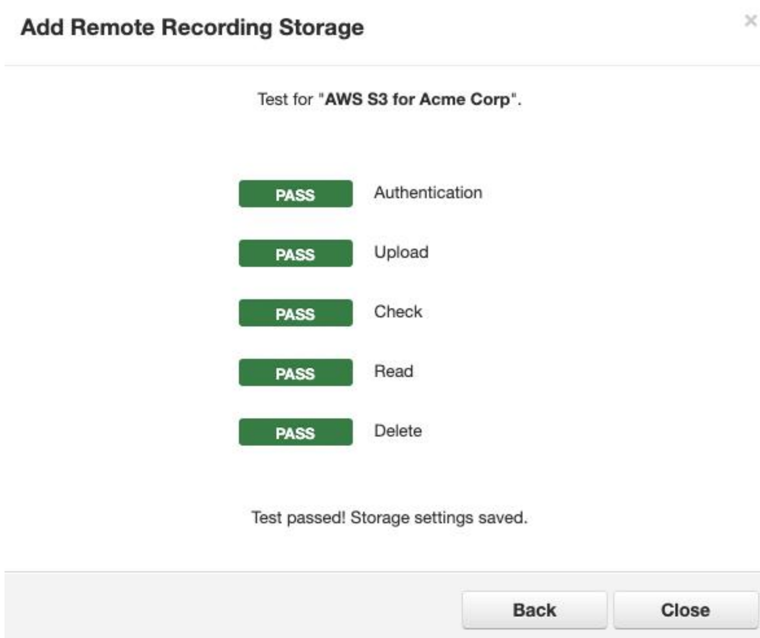


3. After filling out the required fields in the modal, the **"Add"** button should be able to be selected.

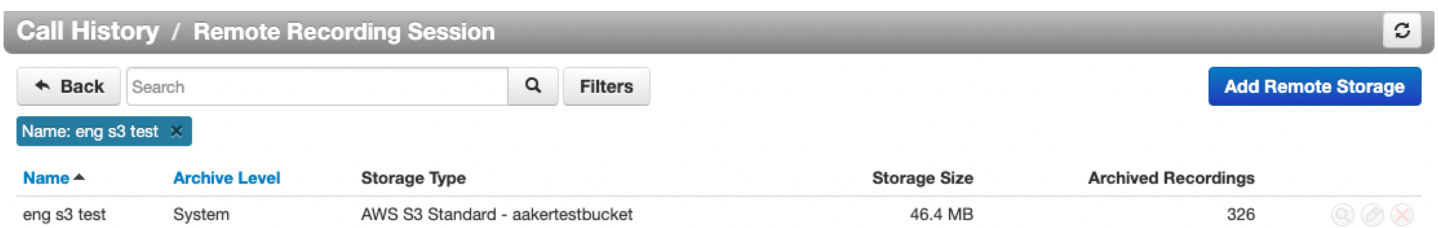
   Now the system will audit the addition of this configuration. Using the information provided, the Portal will work alongside the API to authenticate the remote side, upload a small .wav file, read it back, and then remove it to test all access requirements for this feature to perform correctly. *This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



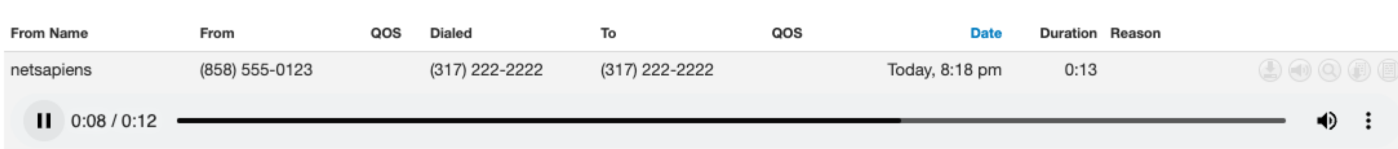
4. If successful, the prompt will look like this: "**Test passed! Storage settings saved**."



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.



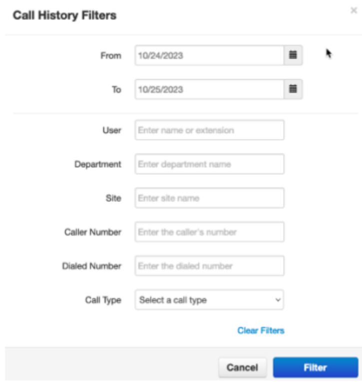
To listen to your archived call recordings, use the same process as listening to any recorded call from the **Call History** page. If the file is remote and not local, there will be a small added delay while the recording is fetched. This only happens once the "**Play**" button is pressed and not on 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.



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.

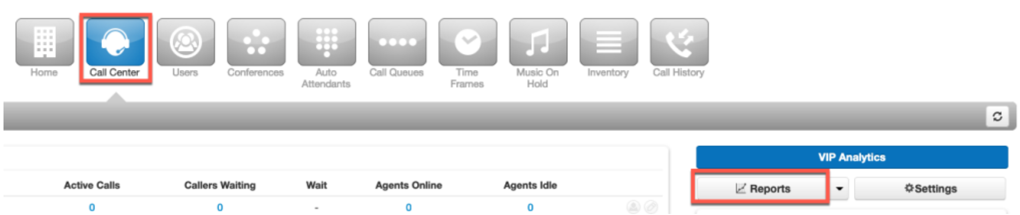


4. If there is a call recording available, select the "**play**" or "**download**" buttons to play the recorded call.

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**."



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.

Introduction

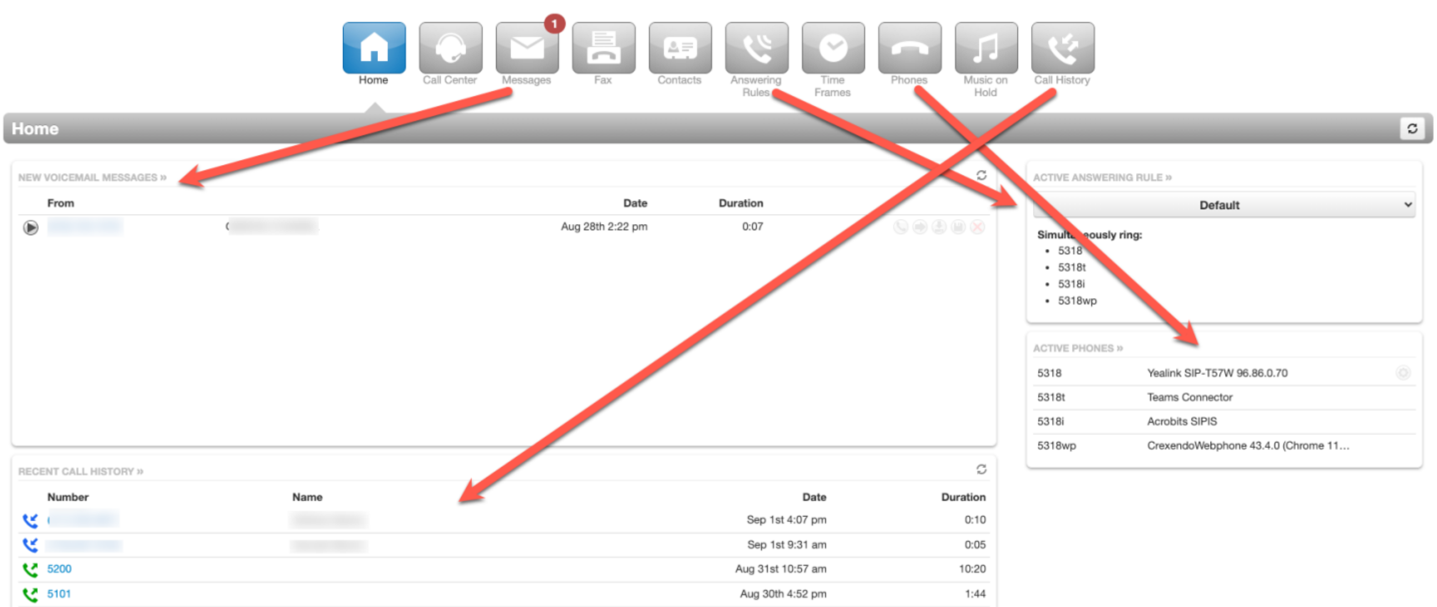
The **VIP Portal for Users** is a web-based tool that is available to be used to access your own settings including *messages (voicemail, SMS, and fax), add personal contacts, customize your own answering rules, and time frames, edit your physical phone settings, music on hold options, and your call 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=Iprw3iYzzHQ&list=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&index=4

Home

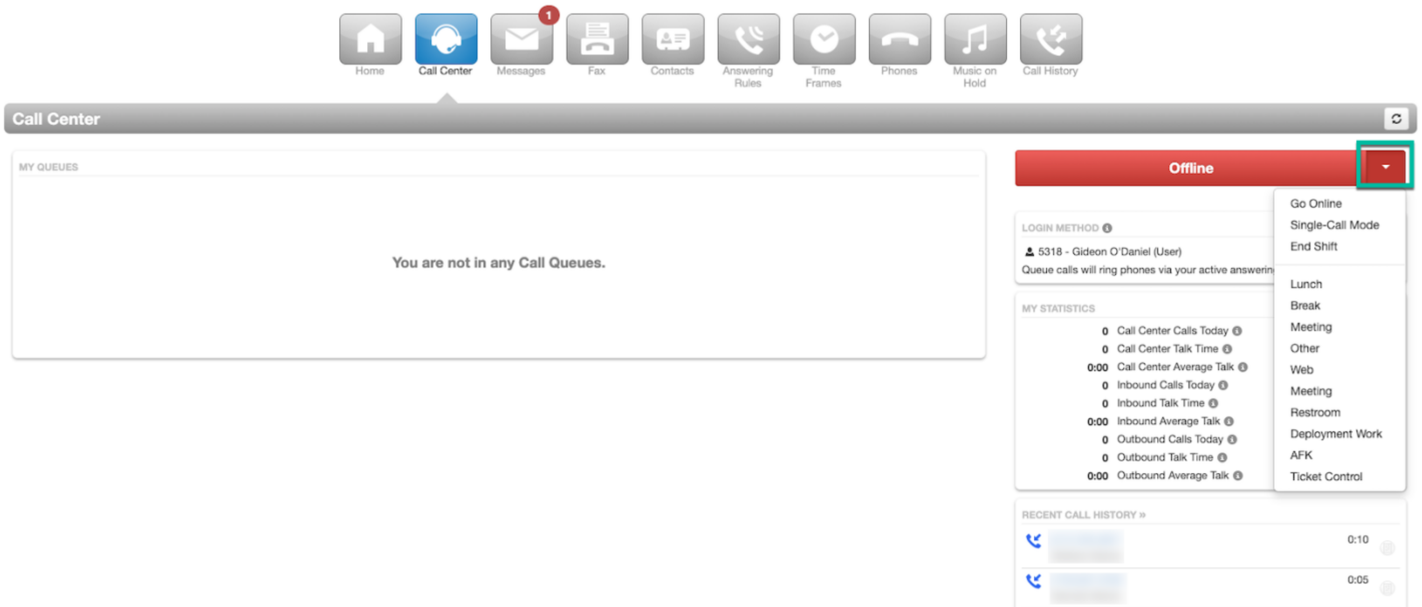
The **Home** screen displays a quick at-a-glance view of the other areas of the portal including **New Voicemail Messages, Active Answering Rule, Active Phones, and Recent Call History**.



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.

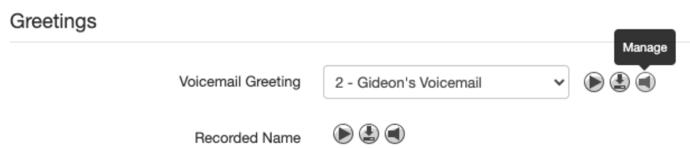
d. **Copy to extension(s)**: If you would like your voicemails to be copied to another user's voicemail, enter the name or extension you would like this to happen for. **NOTE:** This simply copies the voicemail to another user, but it does NOT mirror the actions that someone takes with that voicemail. 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.



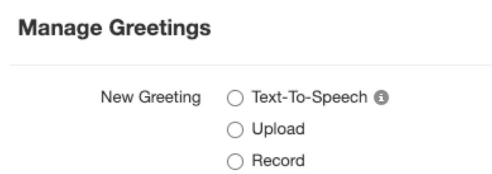
   ii. Select "**Add Greeting**" at the bottom of the window.

   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.

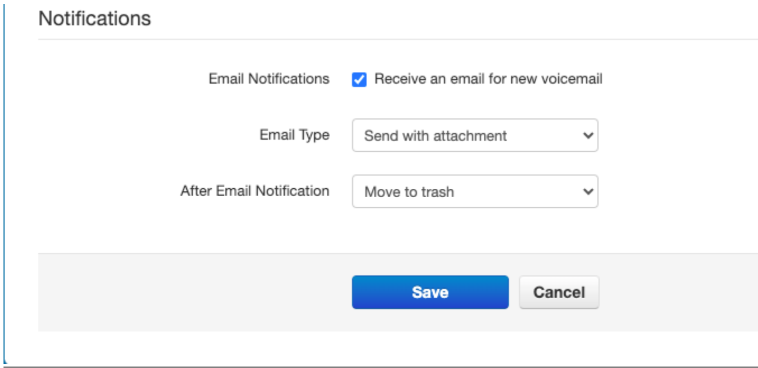
      3. **Record**: Allows you to specify where you would like to be called to record your message.



   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.



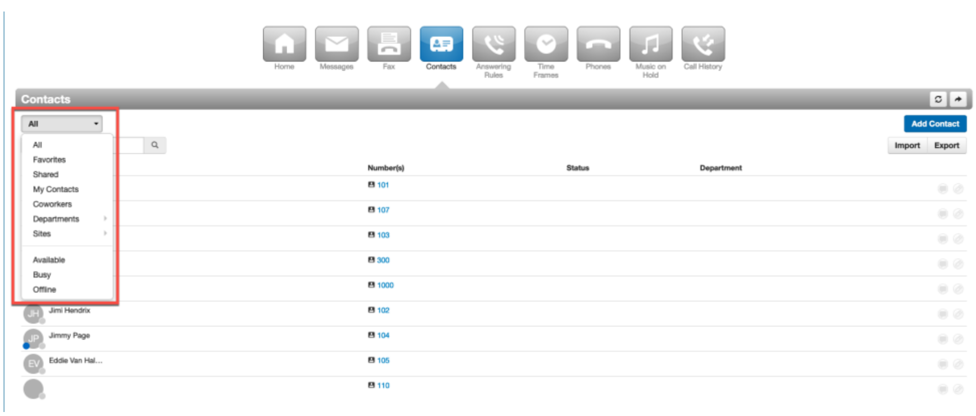
Fax

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**.

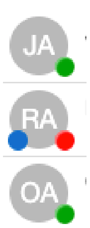
Contacts

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

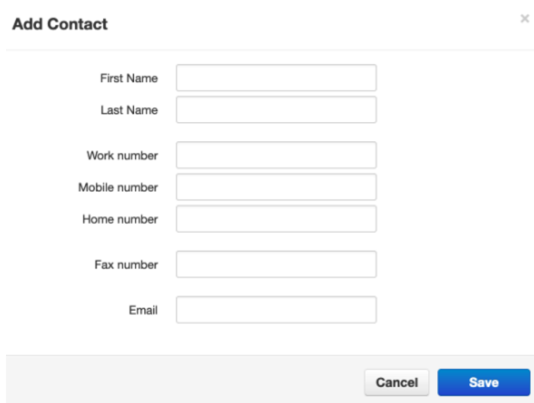
Red: They are not available for a call

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.

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



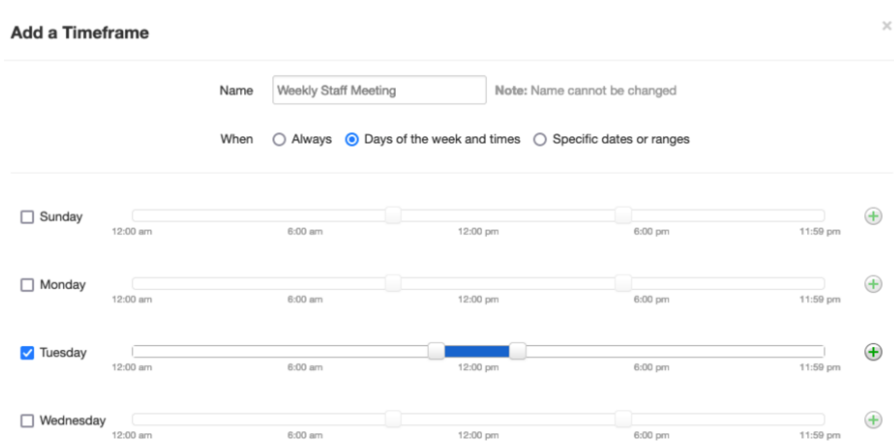
Time Frames

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.

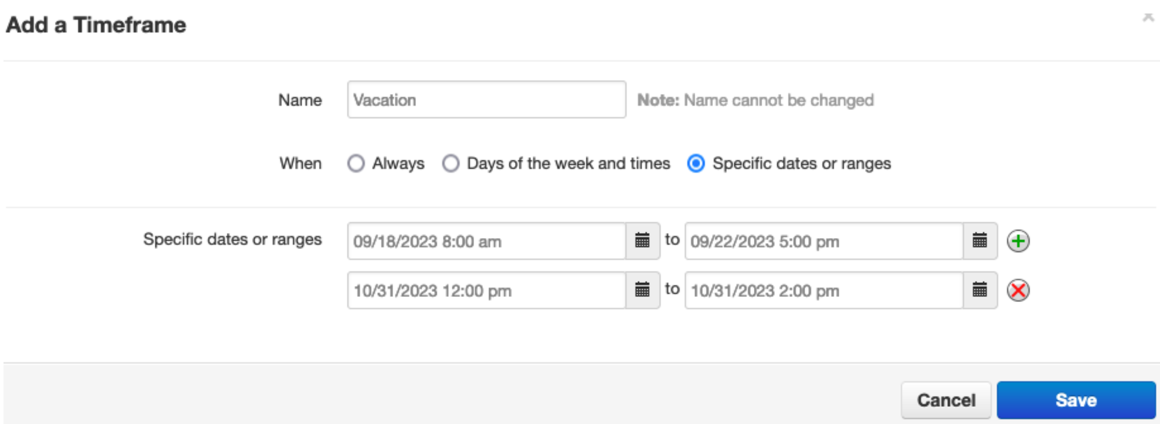
NOTE: Specifying time frames only makes the system aware of these periods. **A time frame (by itself) does not cause the system to perform any actions** or respond to certain events (such as phone call) during these periods. Time Frames are closely related to and work together with **Answering Rules**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

To Create a new Answering Rule:

1. From the VIP Portal, select “**Add Time Frame**”.
2. Select “**Add Time Frame**” at the top right side of the screen.
3. Name the time frame so that you can recognize it such as *Weekly Team Meeting*.
4. Select when you would like this time frame to take place:
    a. **Always**: this would be always in affect unless you deactivate it.
    b. **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 schedular will open to set that schedule accordingly.



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



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

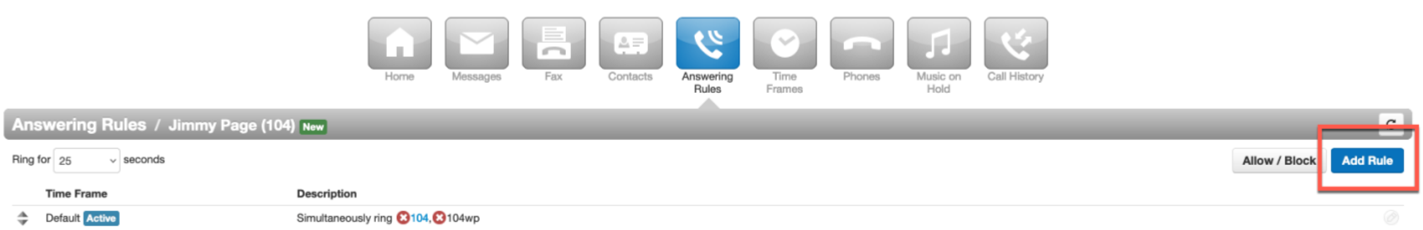
Answering Rules

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

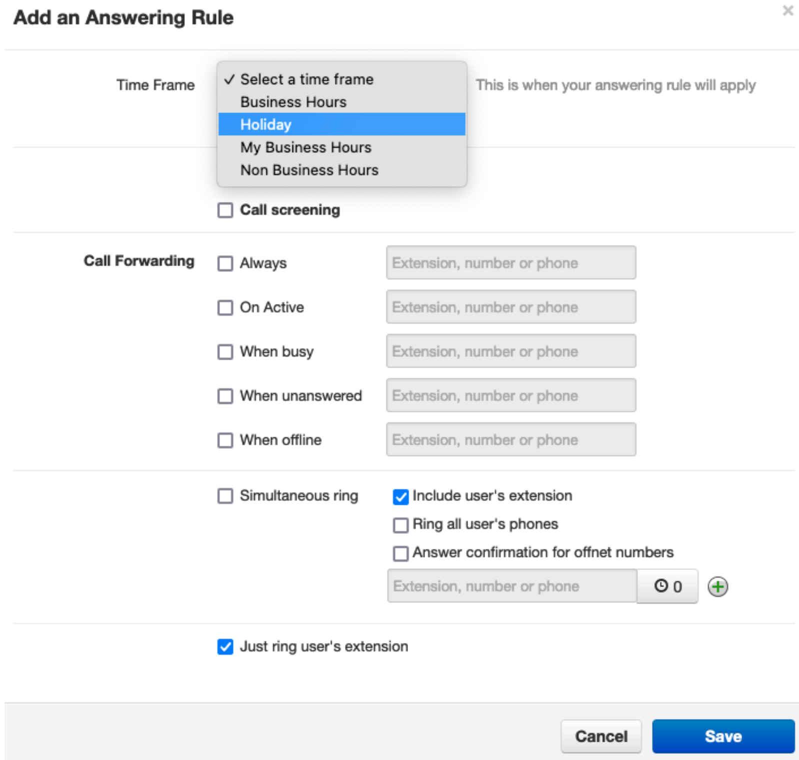
- Answering Rules take on the name of the time frame they are attached to. For example, the "Business Hours" answering rule is based on the "Business Hours" time frame.
- Once the time frame is chosen, you can select what actions should be performed such as go to voicemail, forward to a user, etc.

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.



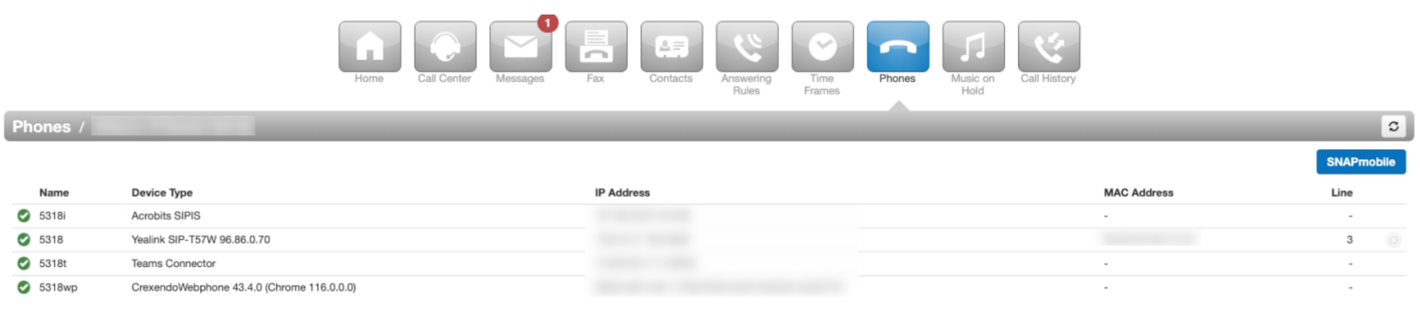
3. Select the time frame that you want to apply the rule to from the drop-down menu.



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.

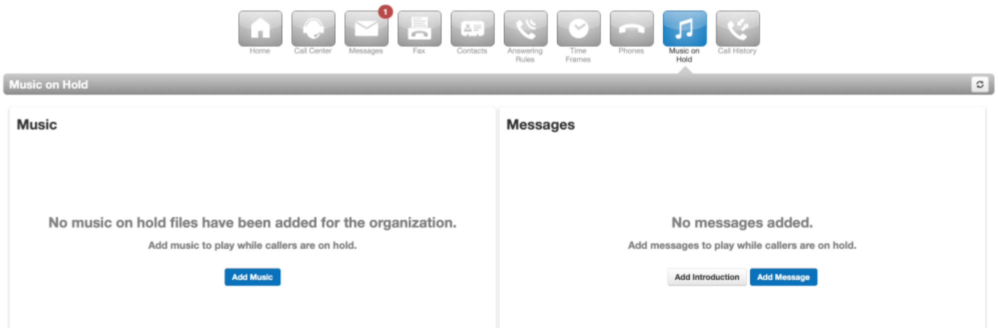


If you are using a desk phone, you can edit the line buttons using "**SNAPbuilder**" which can be opened by selecting the "**gear**" icon next to the phone. For more information on editing your phone's buttons, see the **SNAPbuilder** guide.

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]**.

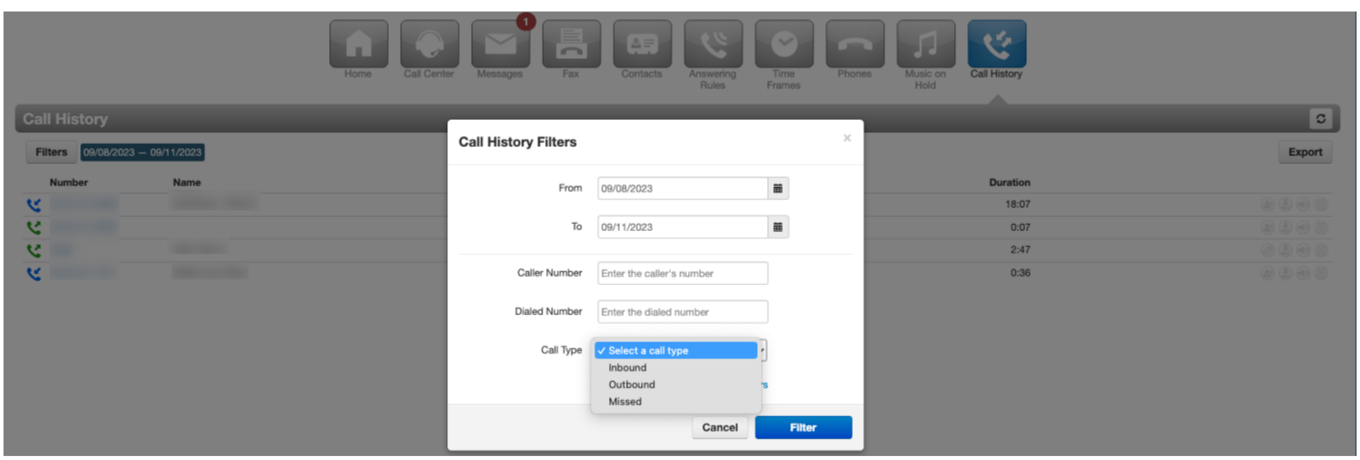


Call History

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.



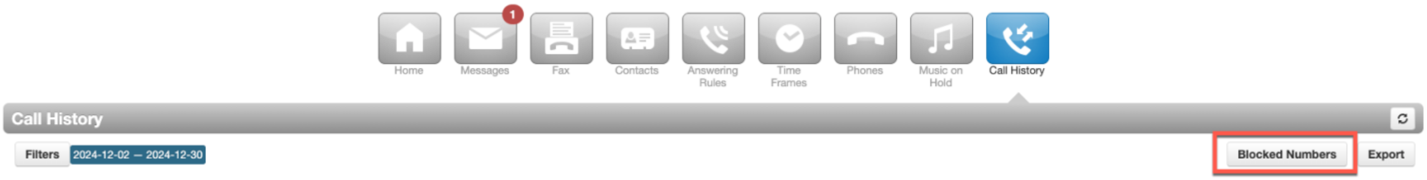
3. Select "**Filter**" to run the search.

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.

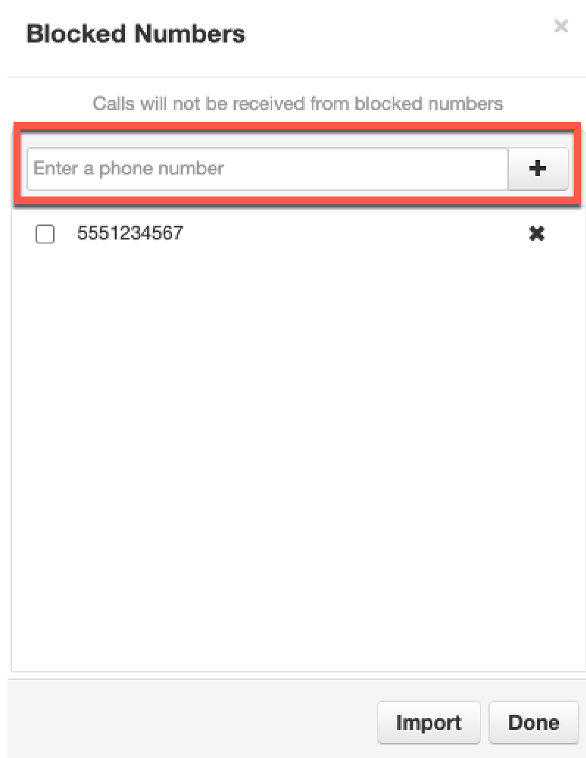
To block SPAM or Robo Calls:

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.

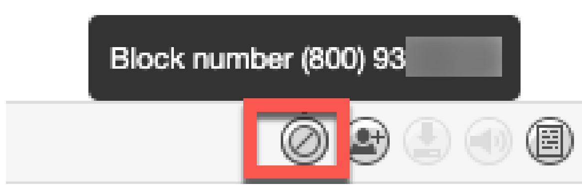


Table of Contents

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.

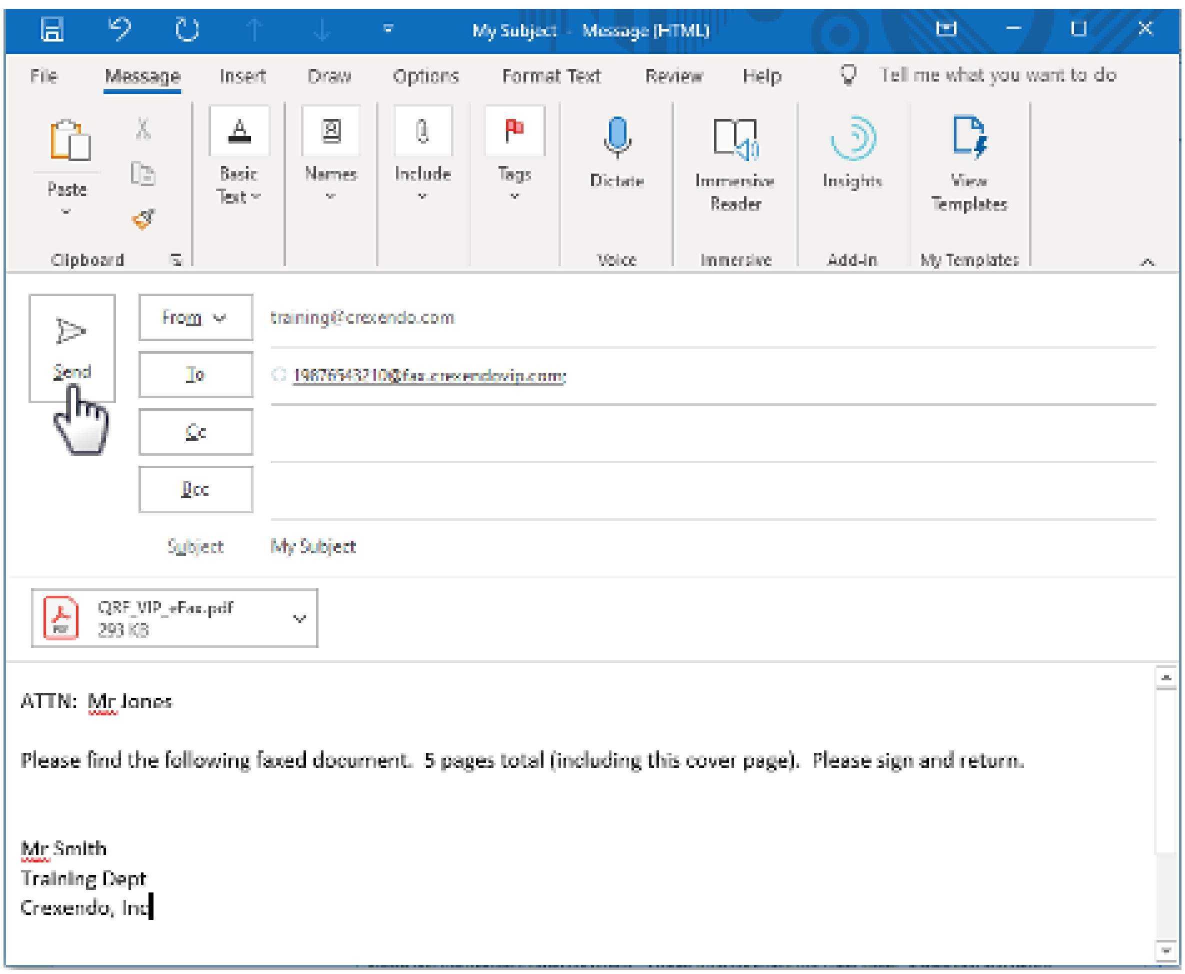
Outbound Faxes – Email

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.

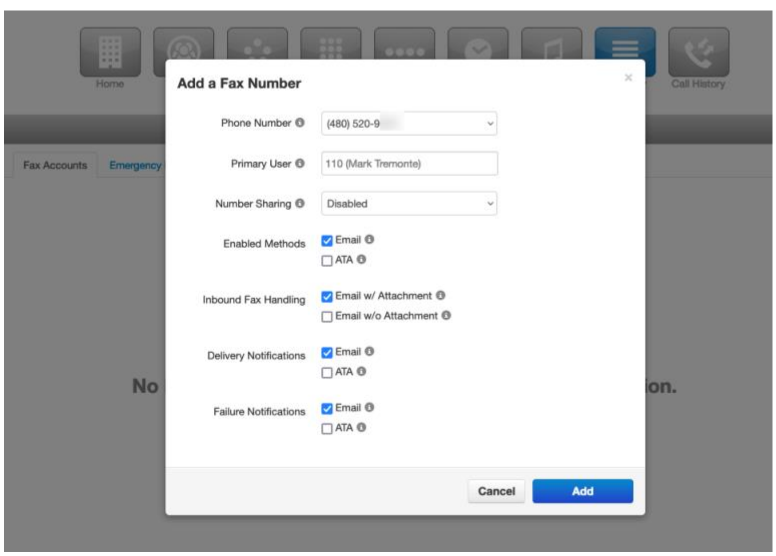


After the email has been sent, you will receive an email with a delivery confirmation.

Outbound Faxes – VIP Portal

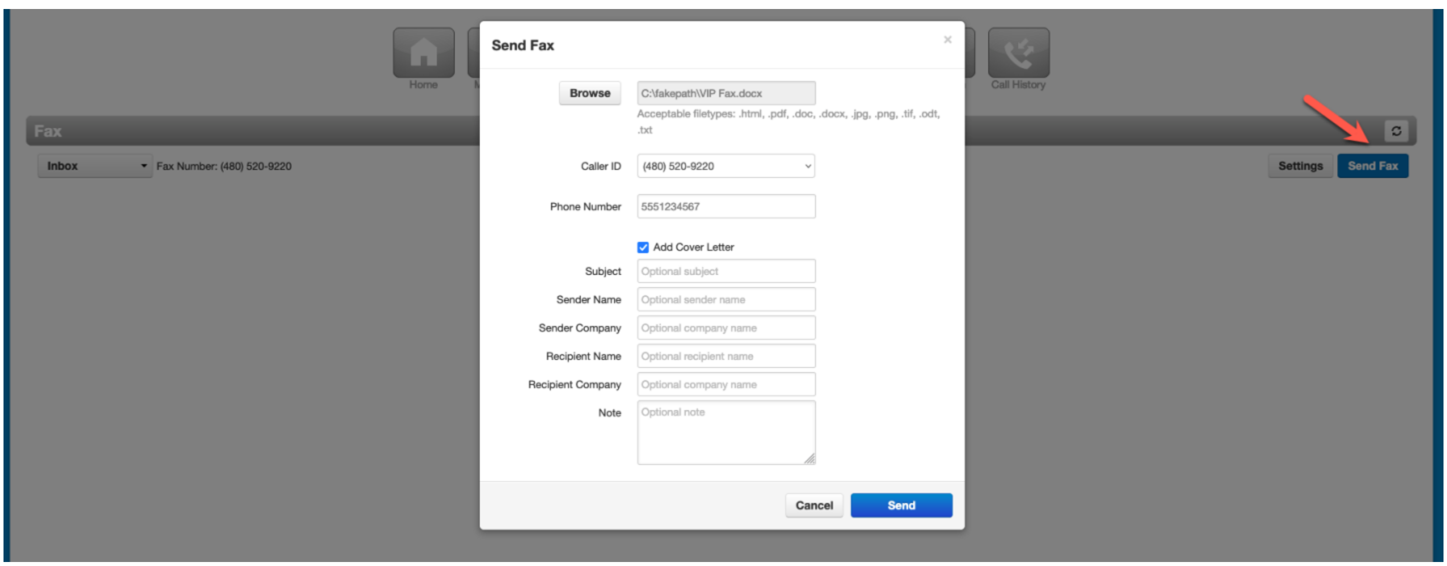
To Setup a User to Fax from the Portal:

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**"



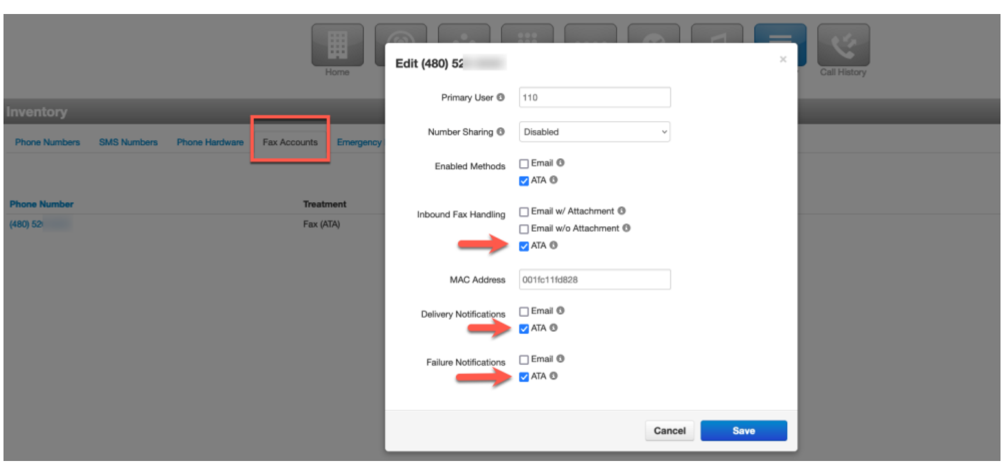
8. To check the status of the fax, either select the drop-down for your "**Sent**" faxes or check your email inbox for the confirmation email.

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=PLXADOltuavV9jC_HL7NiOiBoKA9VZIBxm&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.

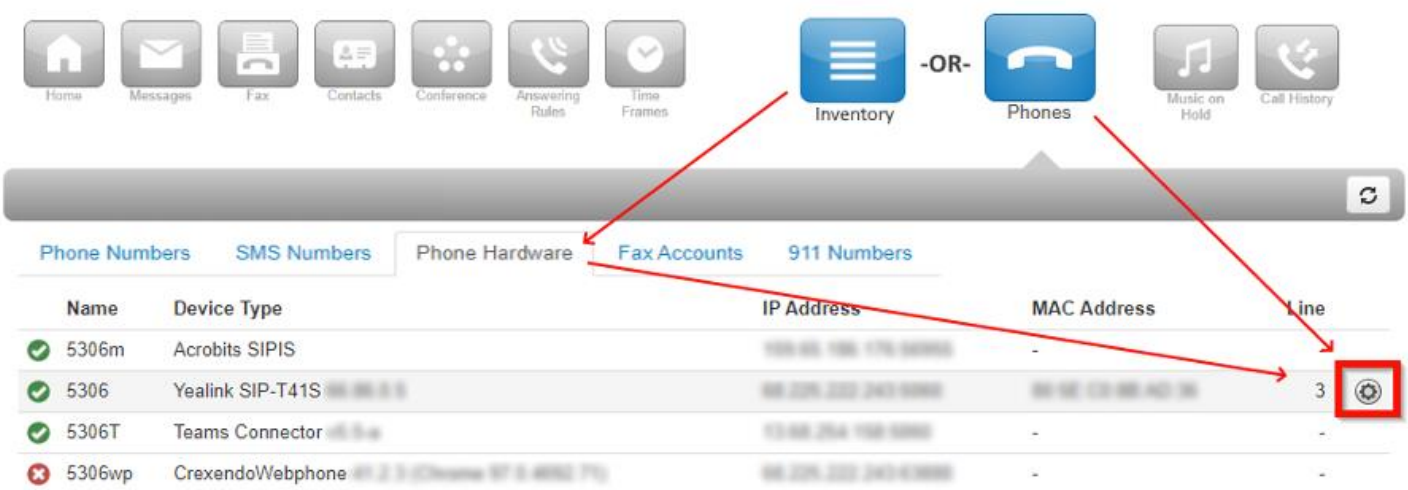
Accessing SNAPbuilder in the VIP Portal

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.

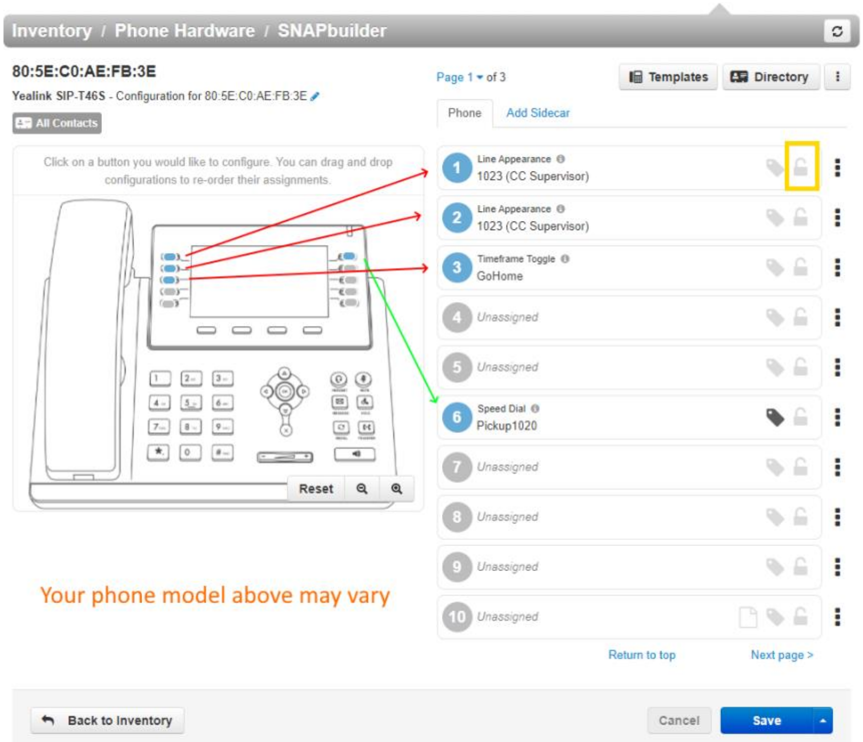
Office Manager:
If you have Office Manager permissions in the portal, the SB is in the **INVENTORY** center, under the "**Phone Hardware**" tab. Then find the desk phone entry you are looking for. Click the "**gear**" button on the right side of the phone entry to launch the SNAPbuilder by selecting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



Inside SNAPbuilder

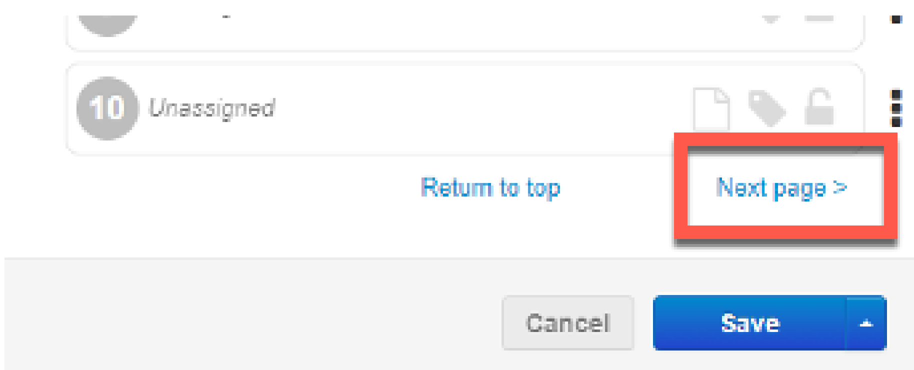
After launching SNAPbuilder, you will see a screen like what is shown below with a diagram of your desk phone on the left and a list of buttons on the right (blue and gray numbered circles).



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 **<u>has 10 buttons on page one</u>**. 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.



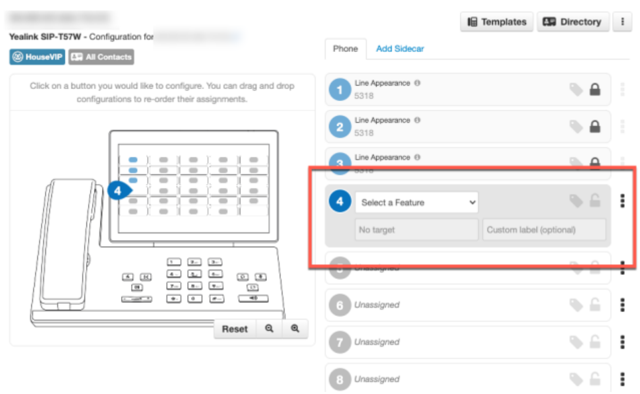
crexendo®

Editing Your Phone

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

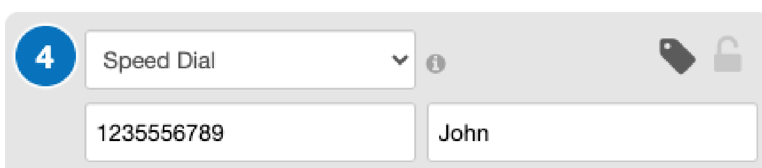
Adding a Button:
On the right, navigate to the desired page and choose a button entry that is marked "**Unassigned**". Click on the entry and it will expand and allow you to modify it as shown below.

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.

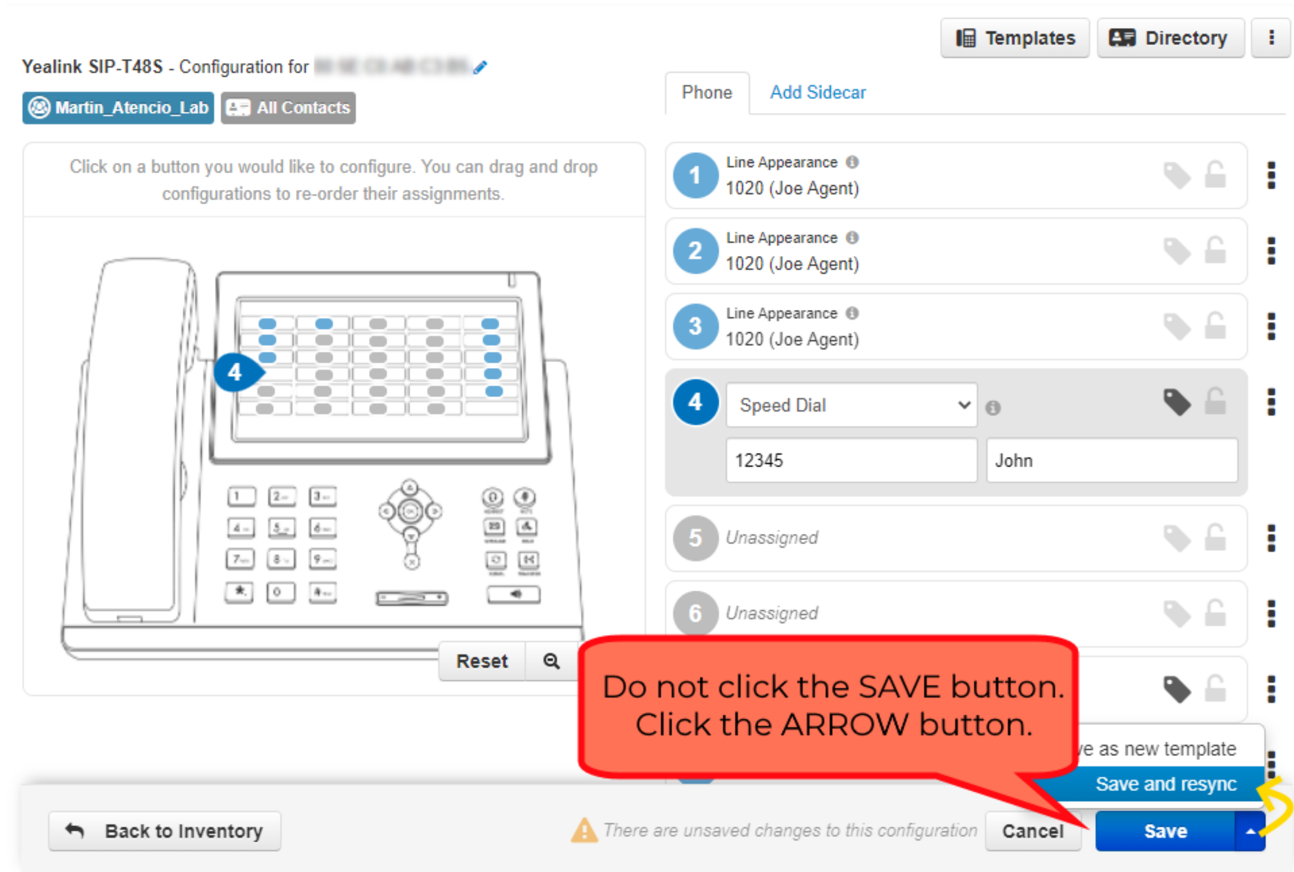


Example #2
Set button #5 to the **Call Park** feature. The target will be a call park extension number that your organization has already set up. The custom label can say: "**Park 1**." Now you can park and unpark calls in and out of that parking spot.

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.



crexendo

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 **<u>IN</u>** to all queues of which you are an agent.	N/A
Queue Logout	Push this button to log yourself **<u>OUT</u>** 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

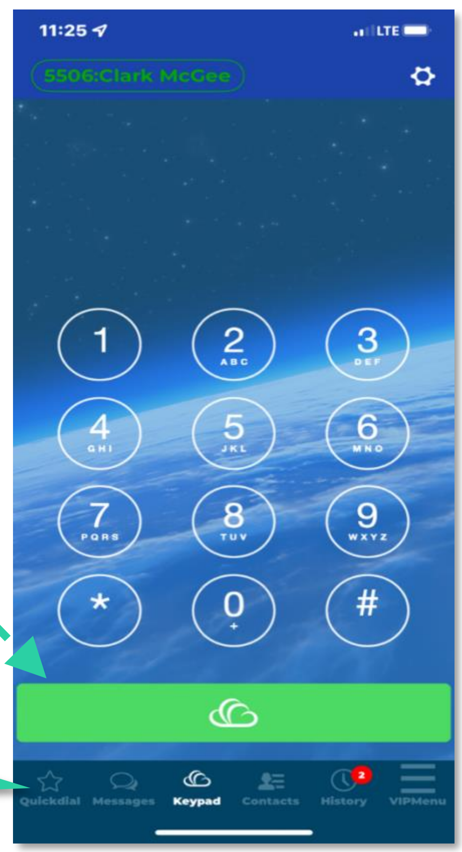
Your name and extension are displayed here.
You can also tap here to select "Do Not Disturb."

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

Android

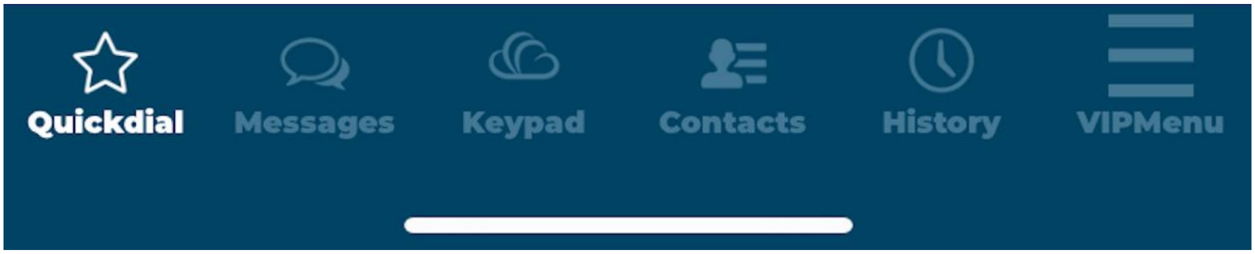
If you have any new voicemails waiting, this blank area will display a voicemail icon. On the iPhone, this button appears here.

iPhone



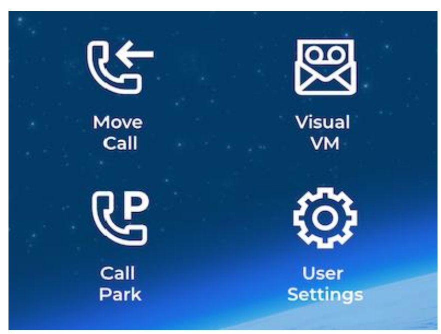
On iPhone, the Navigation Bar appears at the bottom. On Android, it appears at the top. You can also swipe left and right to switch screens.

VIP Mobile Navigation Bar



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

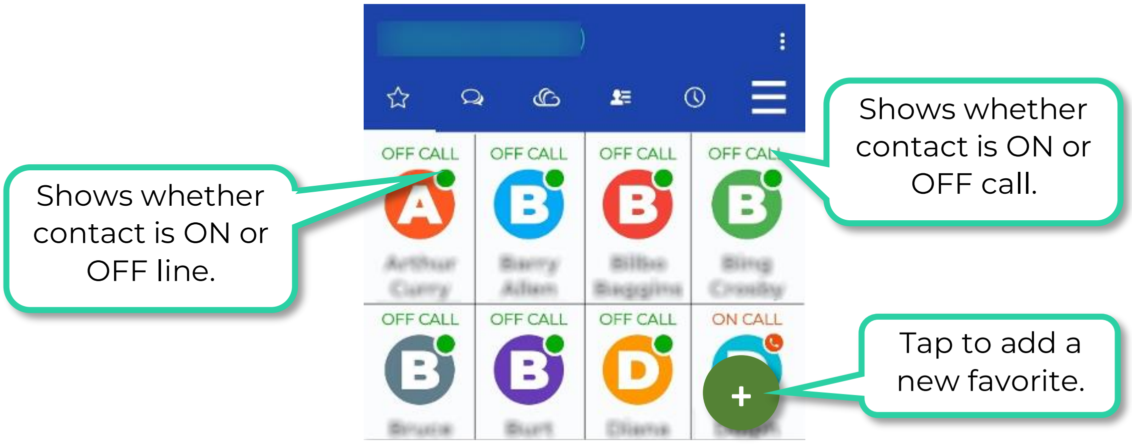
- **Quick Dial:** Indicated by the "**Star**" icon, this is a fully customizable speed dial list.
- **Messages:** Indicated by the "**Chat Bubble**" icon, this is where all text messages and internal conversations are conducted. **This is NOT where voicemails are checked.**
- **Keypad:** Indicated by 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.

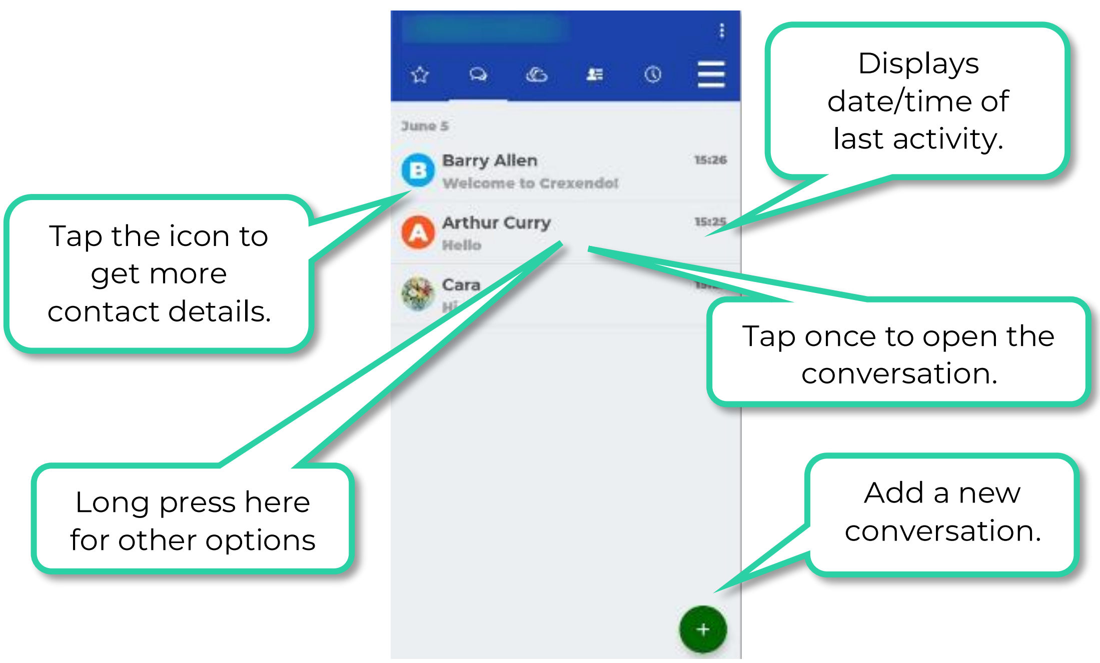
Quick Dial

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

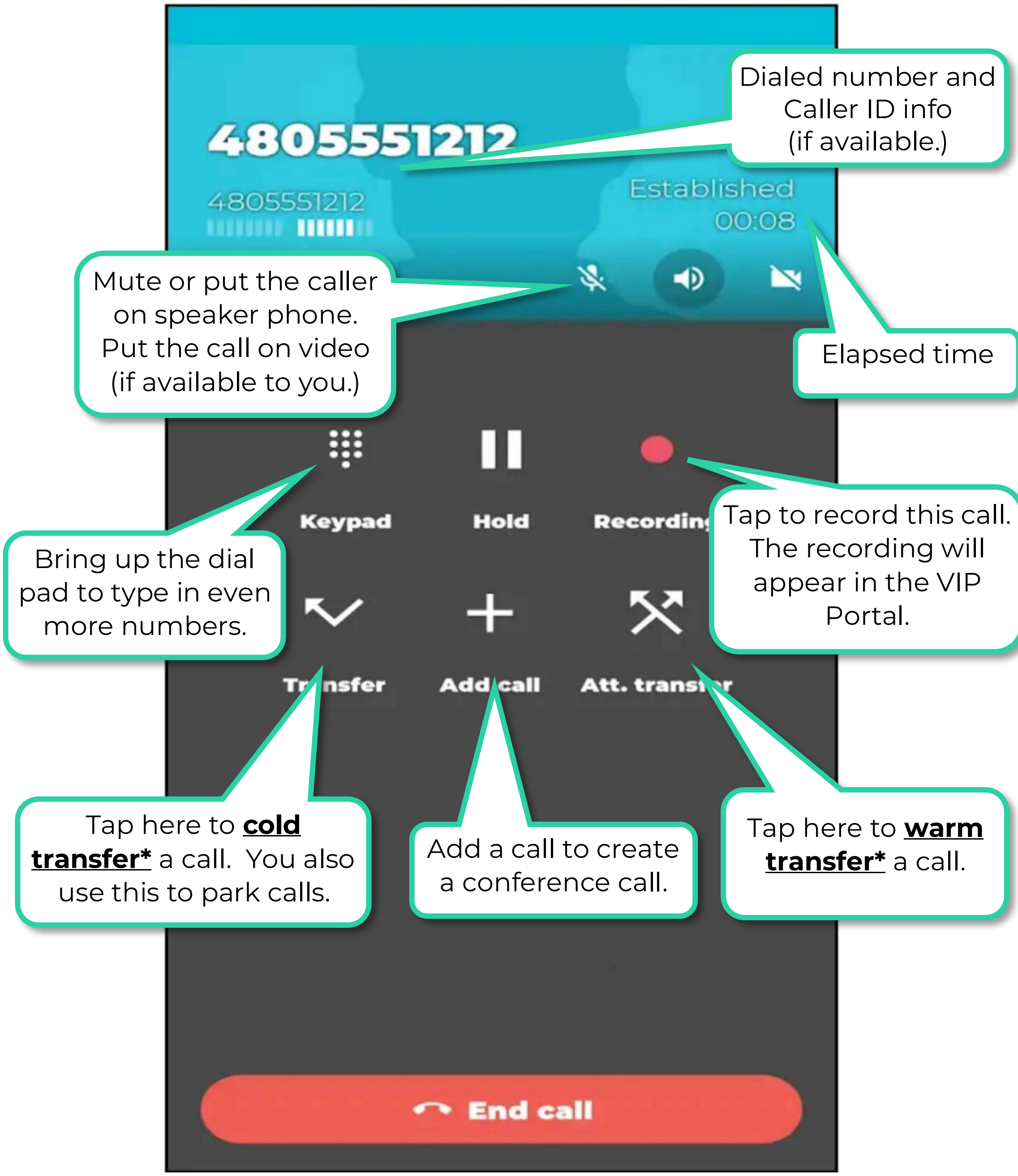
This area is where you make all your internal and external calls.

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.

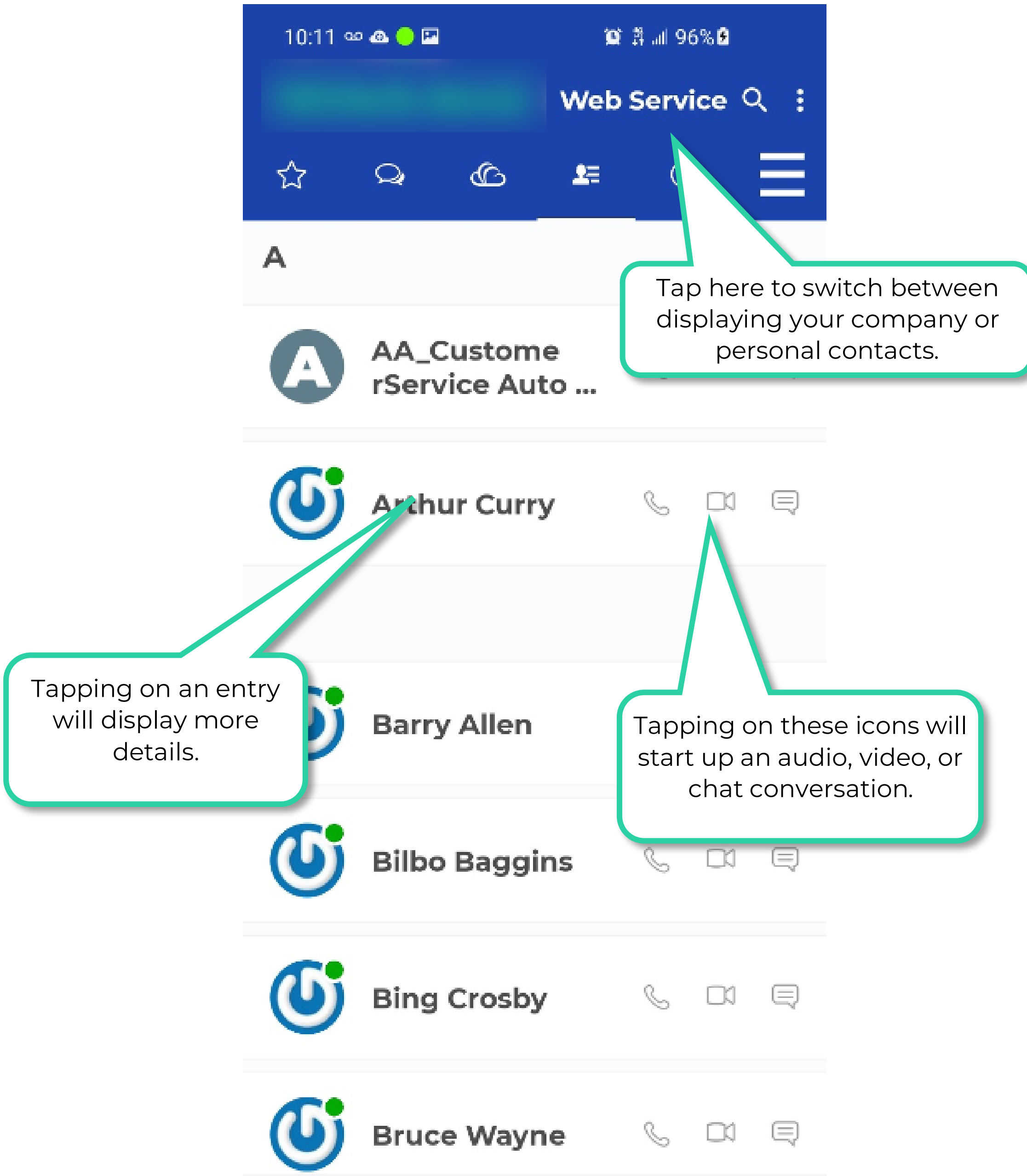


Callers will hear hold music when you put the call on hold by tapping the "**Hold**" button (above).

*=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.

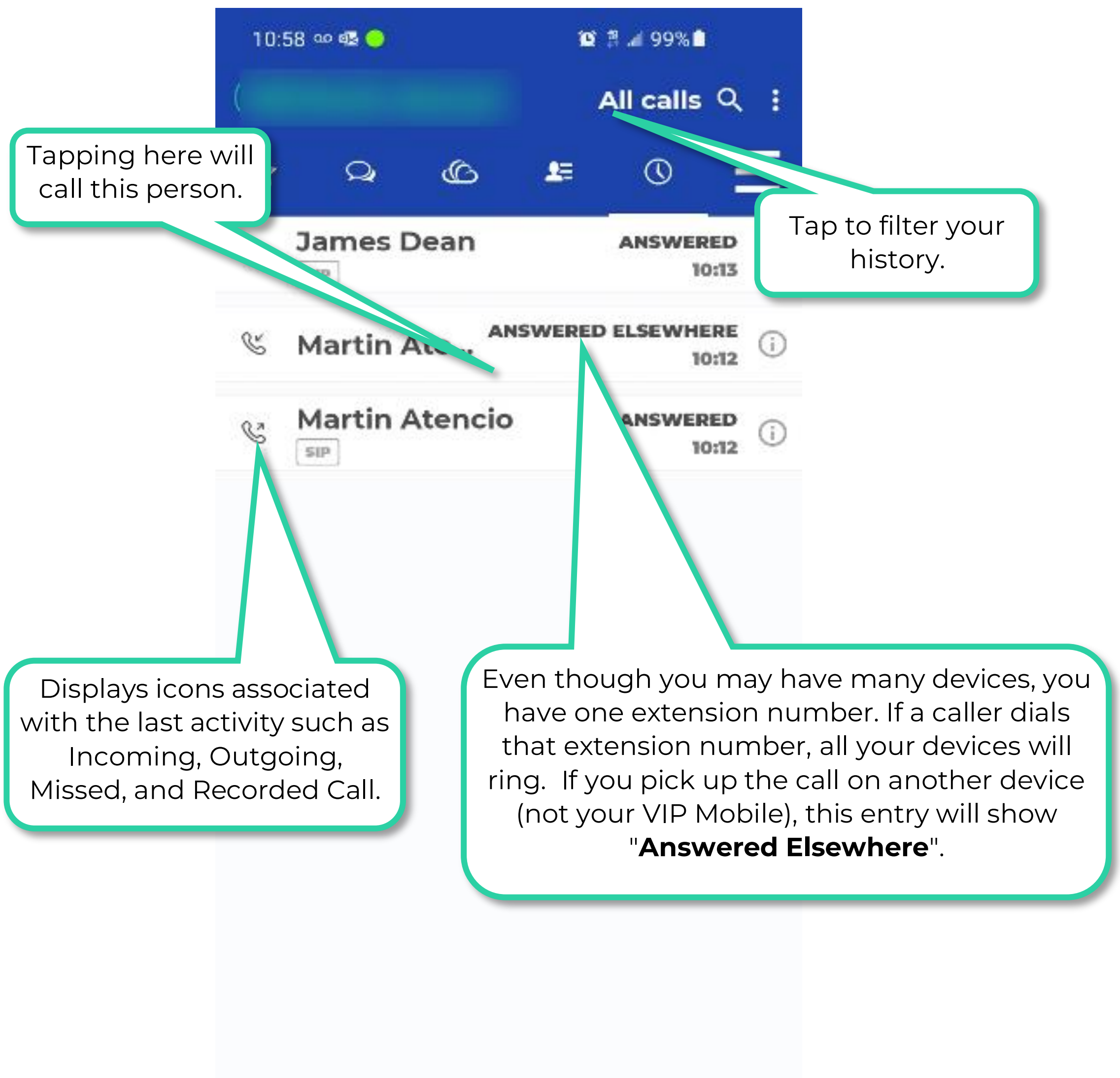


History

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 ⓘ icon to the right.

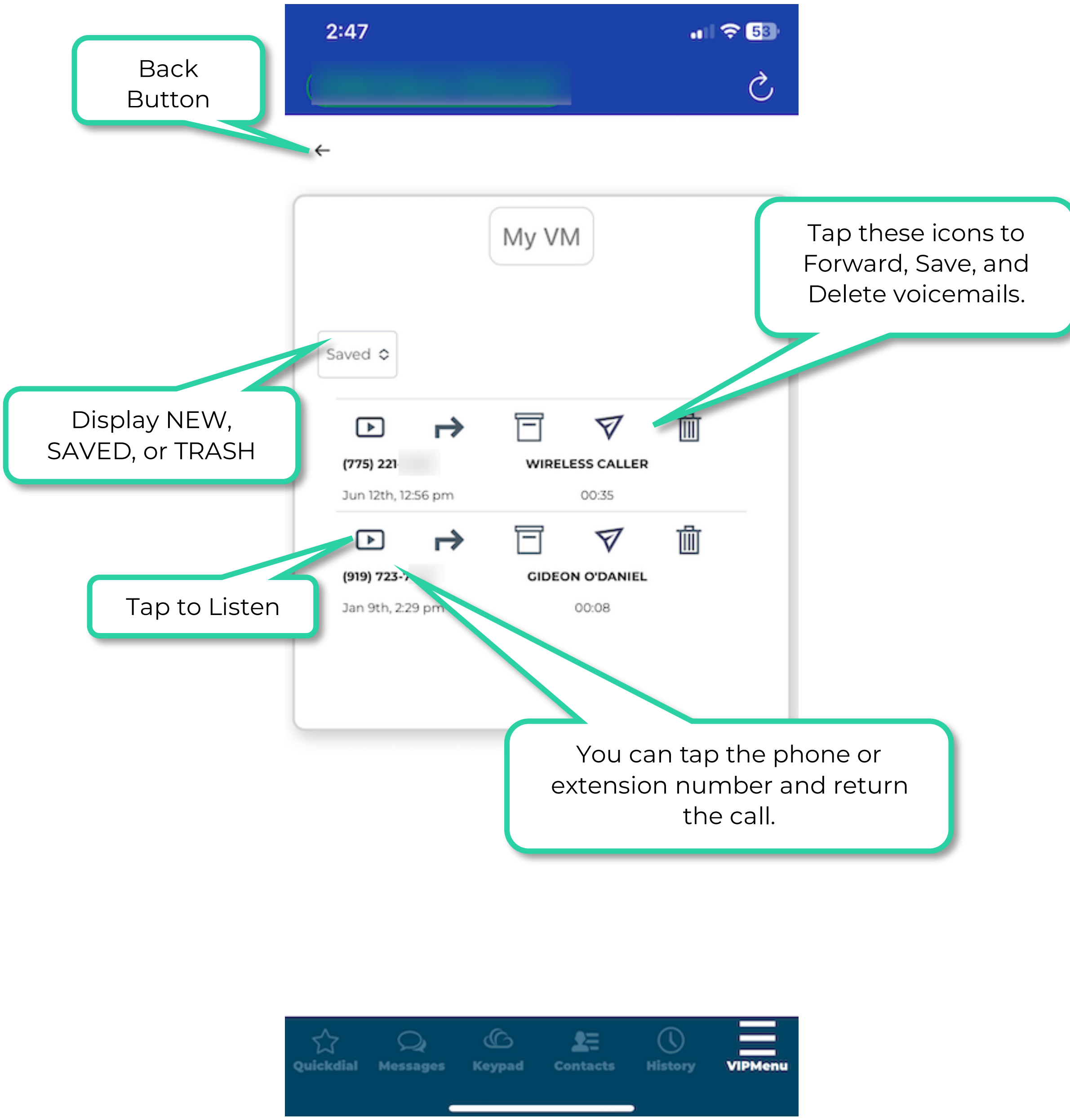


VIPMenu

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.



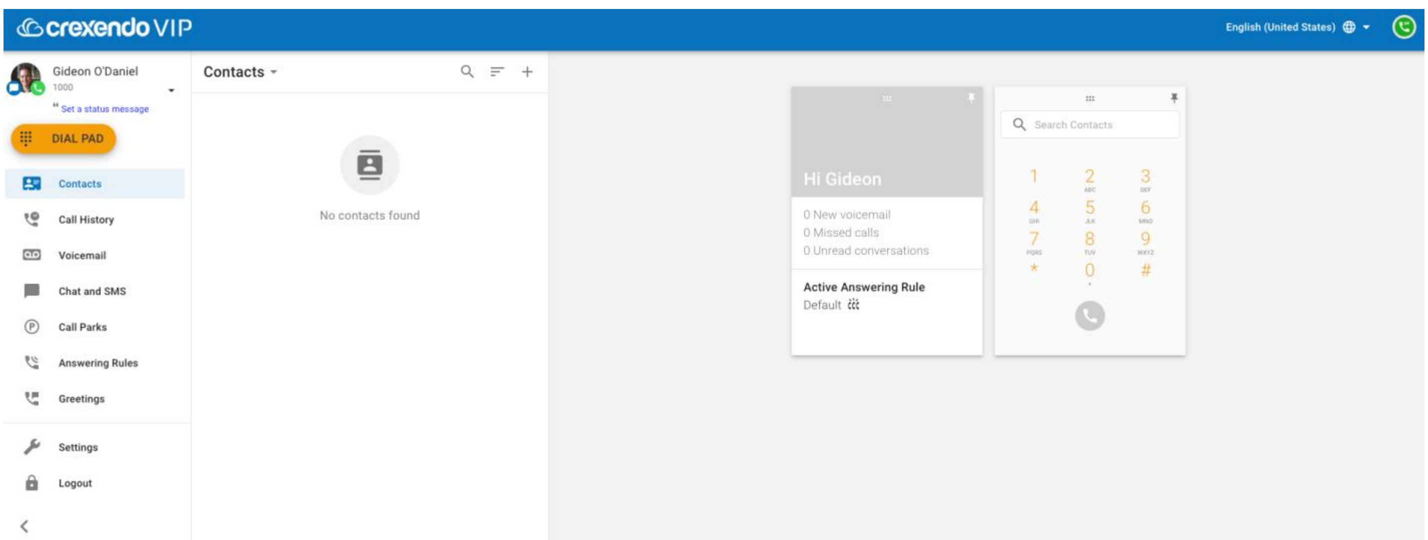
Introduction

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-4b5IHe1mfxcEZ



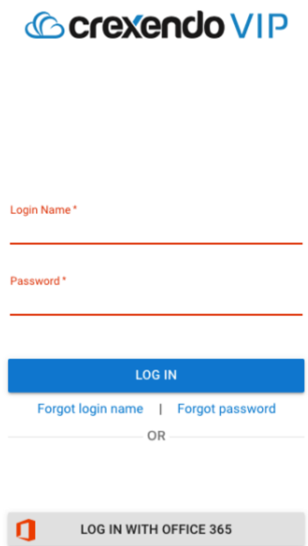
Accessing the VIP Web Phone

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)

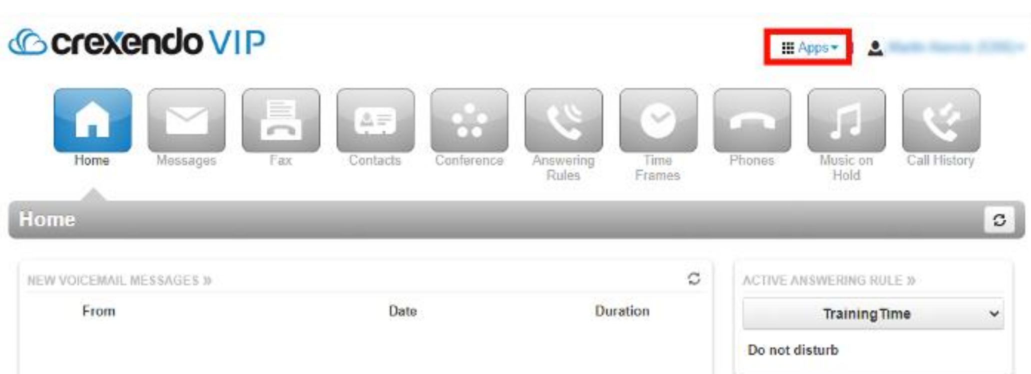
1. Web Browser

- 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.



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.

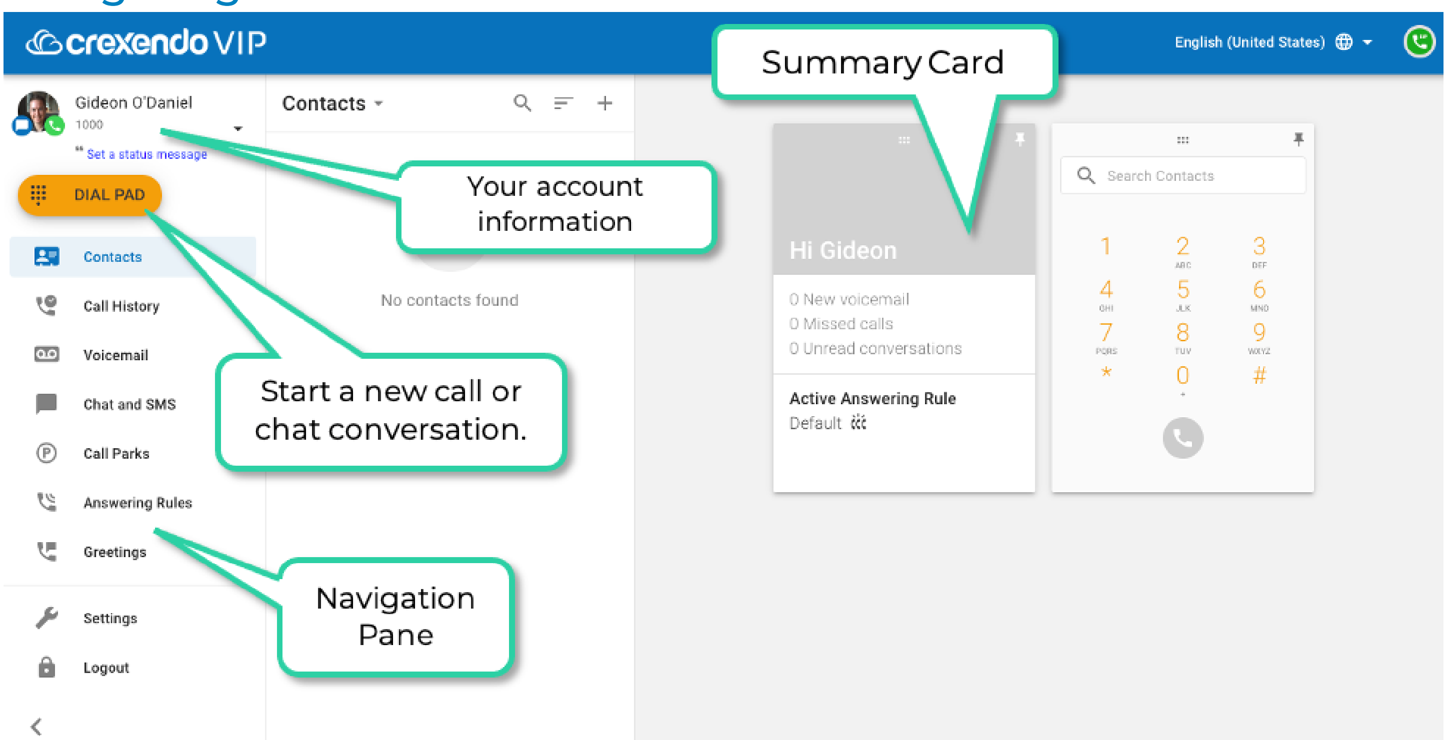


3. Progressive Web App (PWA)

- **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



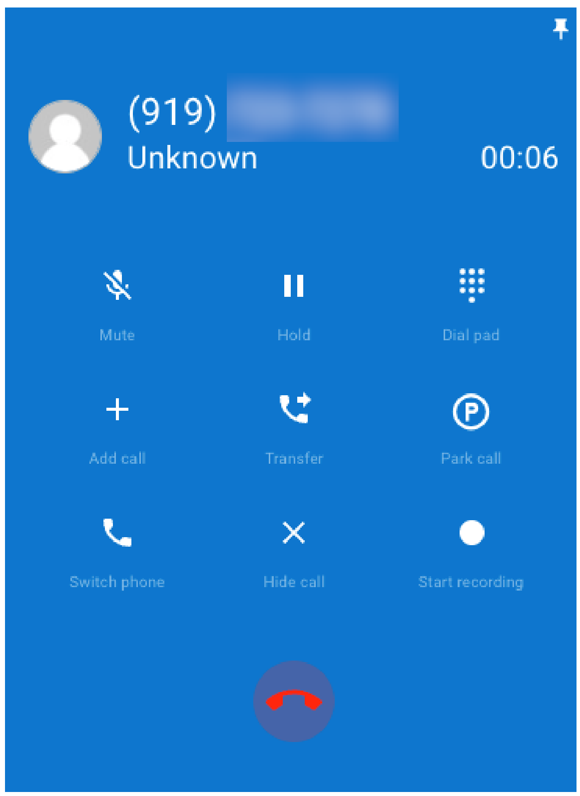
Making a Call

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.

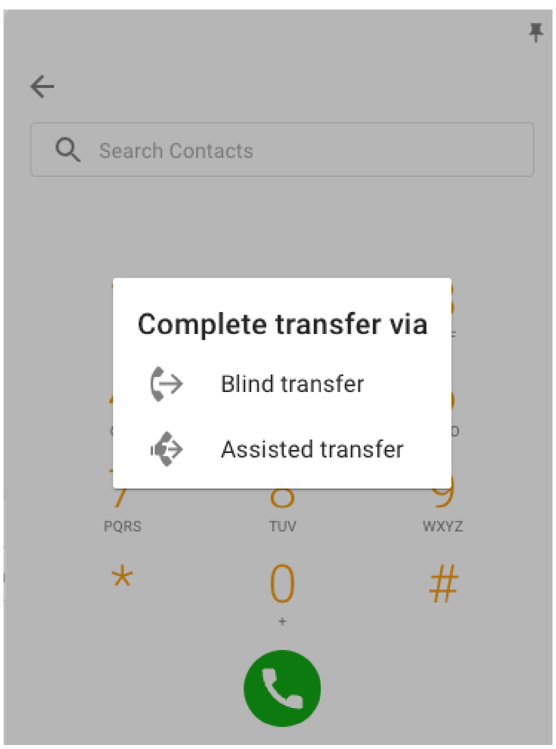
Options During a Call

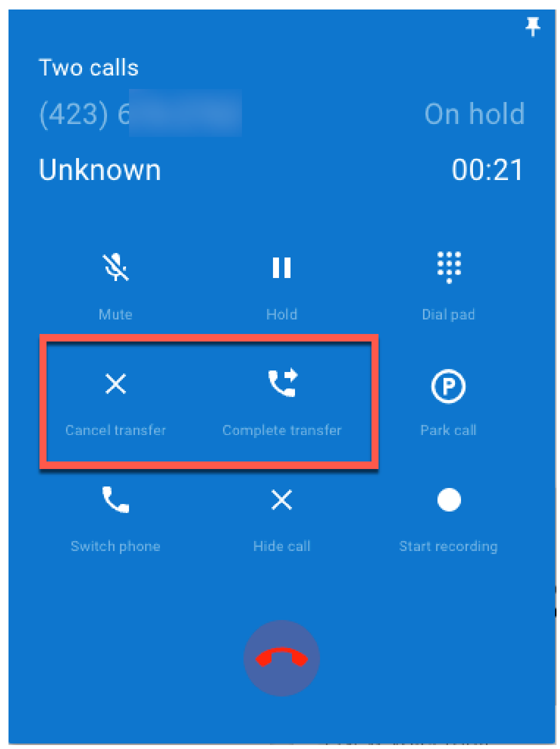
While a call is in process, a card is placed on the grid, and you have all the usual options open to you.



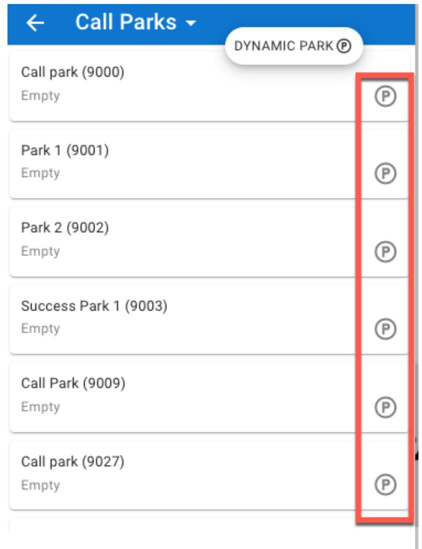
- **Mute**: mutes your microphone so that the caller will not hear you, but you will still be able to hear the caller.
- **Hold**: places the caller on hold. Select the "**Hold**" button again to resume the call.
- **Dial pad**: reveals a dial pad to make selections. Select "Back" to go back to the in-call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

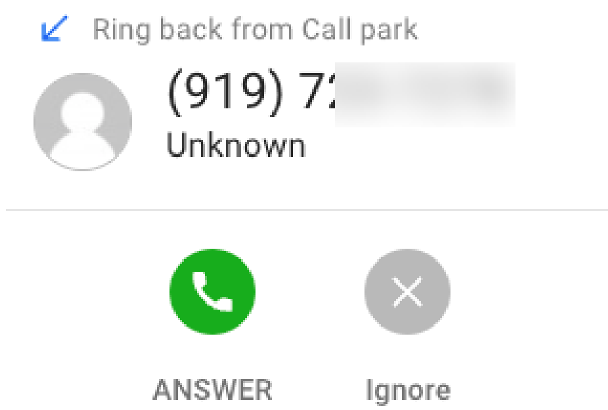




- **Park Call**: to park a call in a call park:
  - Select “Park call.”
  - Select an available call park to send the call to by selecting the icon and the call will be instantly parked.



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

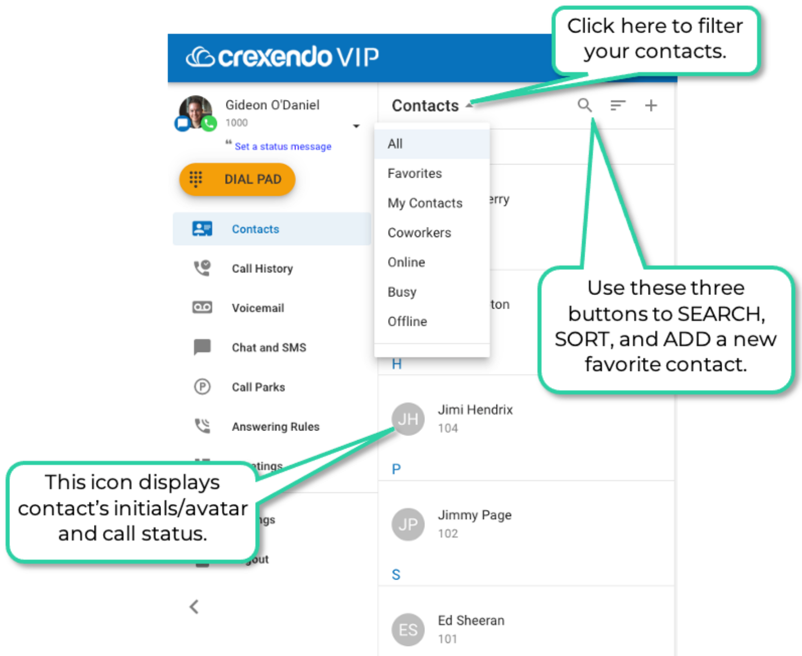


- **Switch Phone:** gives you the option to send this call to one of your other Crexendo phones such as a desk phone or VIP Mobile App.
- **Hide call**: pins the active call to your available workspace to allow you to multi-task.
- **Start recording**: records the active call which will be available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

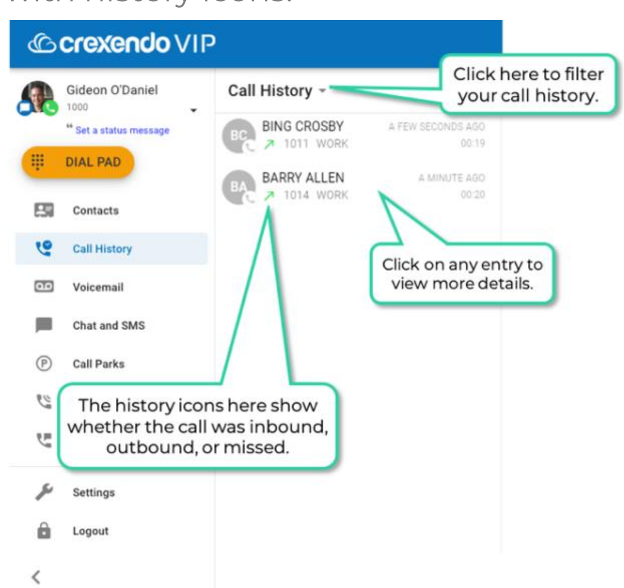
This displays a customizable list of contacts within your organization. You can search, sort, and filter this list. In addition to what is shown below, you can click on any contact entry to display its details and initiate any kind of phone call.



Call History

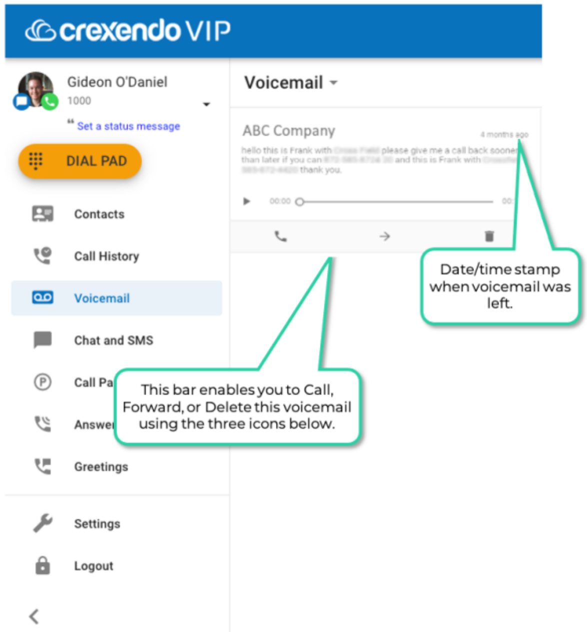
This displays a list of your call activity. In addition to what is shown below, you can click on any entry to display all related history, initiate contact, and add this person as an entry in your "**Contacts**." Each call entry is shown with history icons:

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



Voicemail

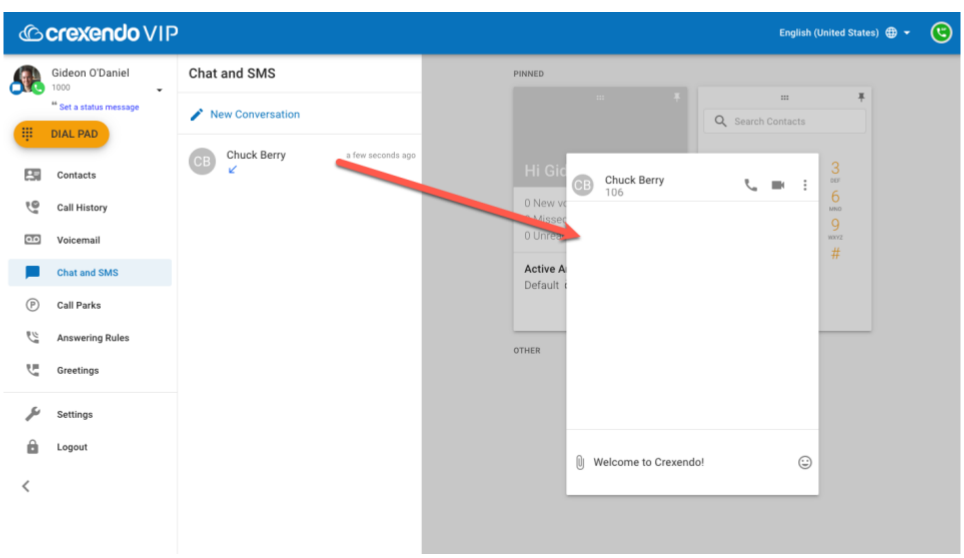
This displays a list of your voicemails. It displays both new and saved voicemails to which you can listen by clicking the Play button. The image below shows voicemail that has been transcribed using our premium transcription feature.



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.*

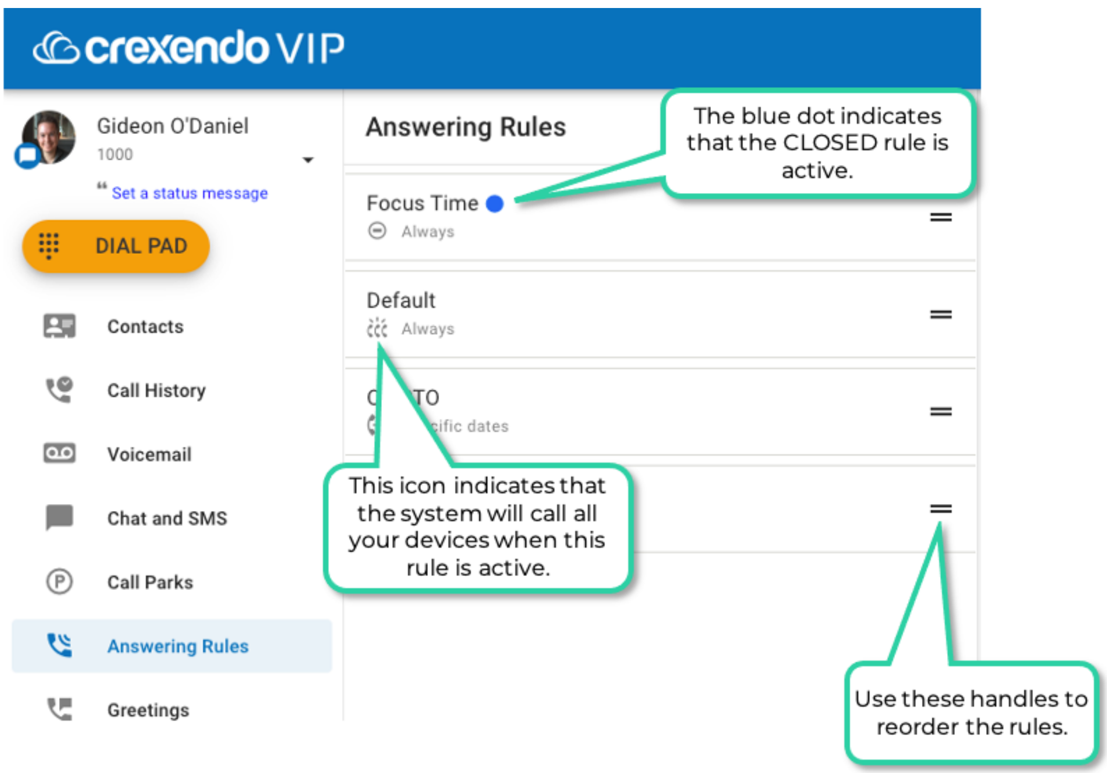


As shown above, for each conversation you have, by default, a conversation card is placed on the grid. You can close any of these cards and delete them. Deleting a card from the grid does not delete the conversation itself.

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

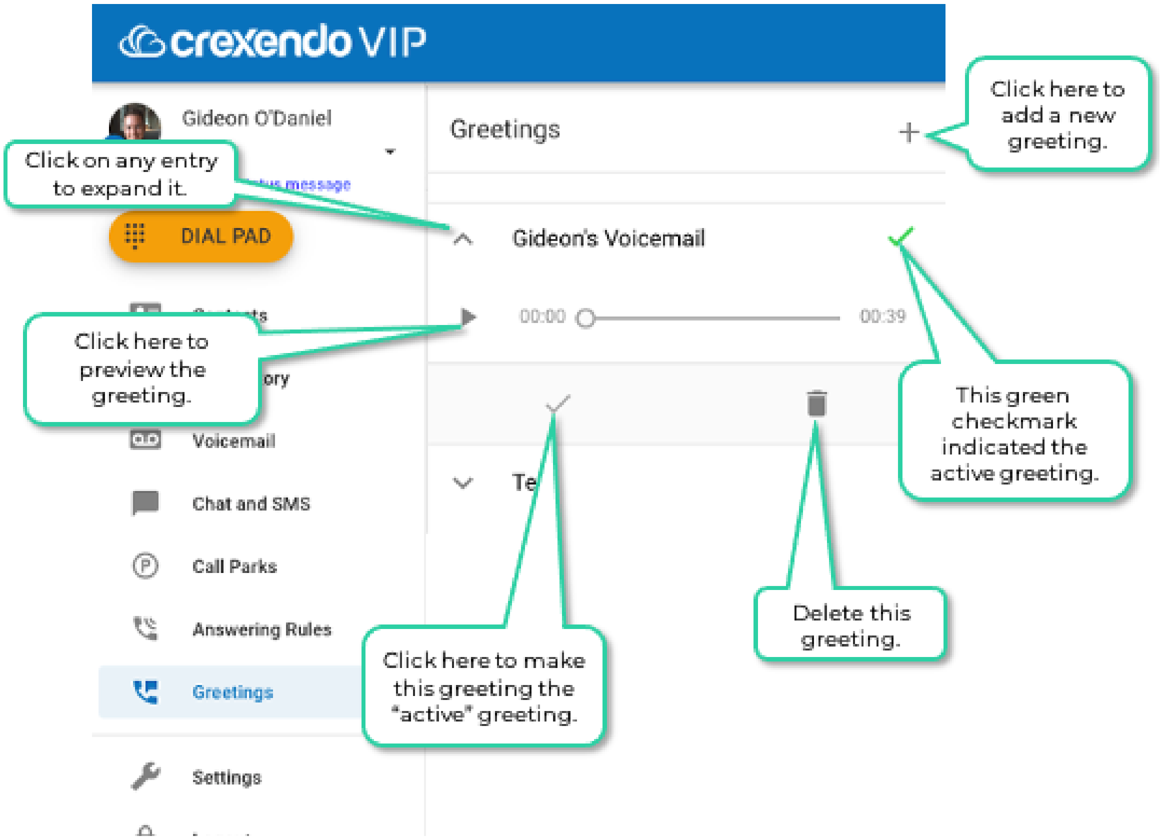
This area displays the answering rules that you can set which tells the system what to do when someone is calling you. You can have many different answering rules but only one rule can be "active" (depending on the date/time). The active rule is marked by a blue dot and depends on your **Time Frames**:



- **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.

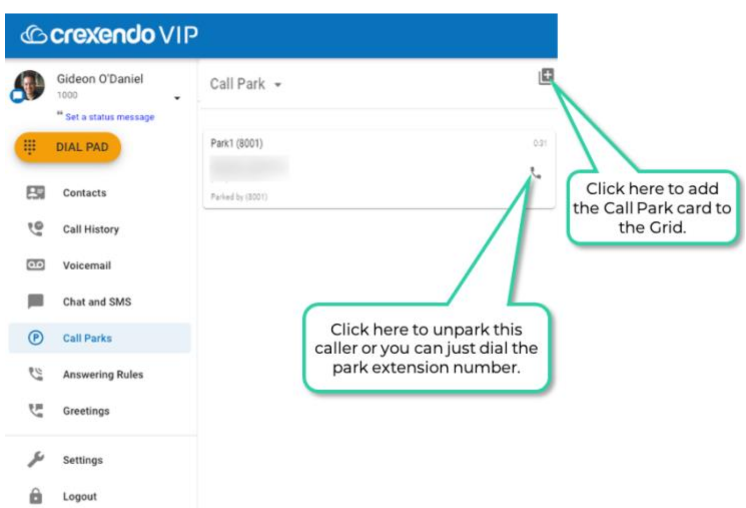
Greetings

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.



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.

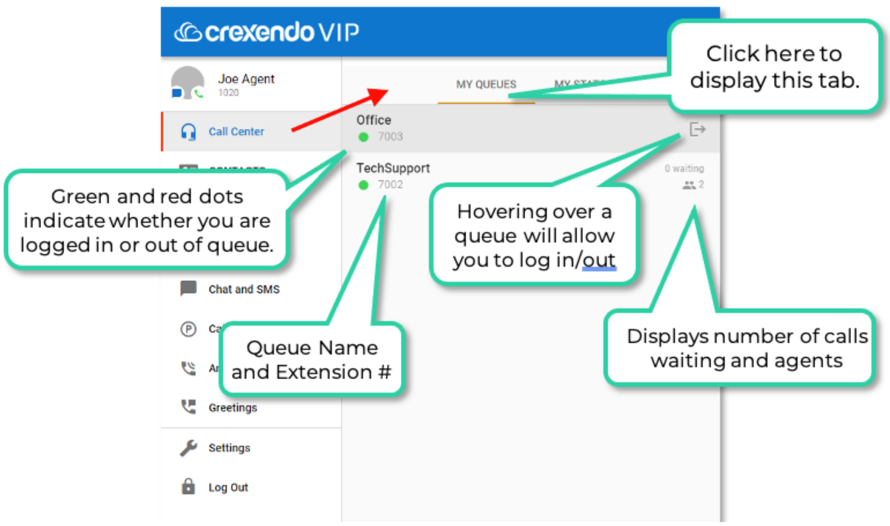


Call Center

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.

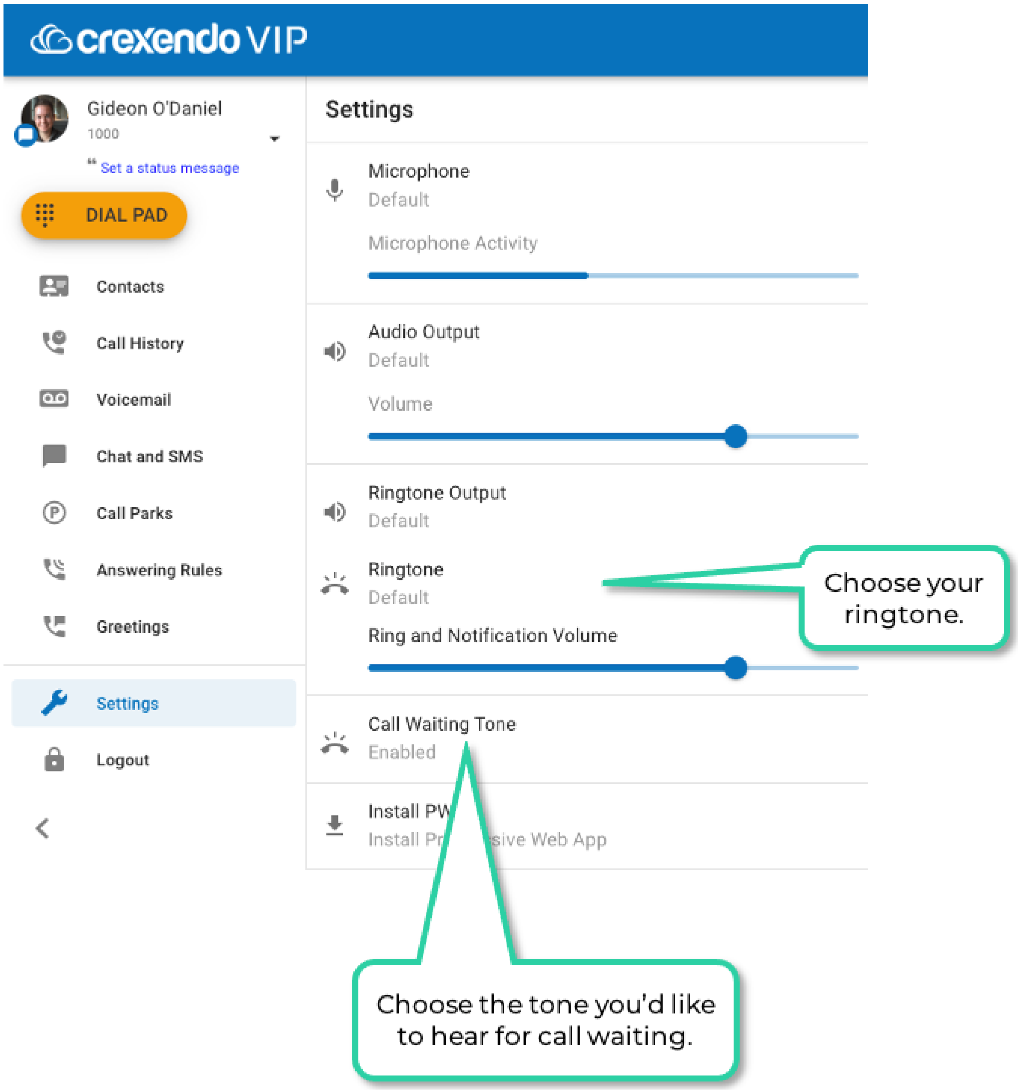
My Queues Tab: Displays all queues of which you are an agent. The example below shows that you are an agent of the Office and the TechSupport queues.



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.



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.

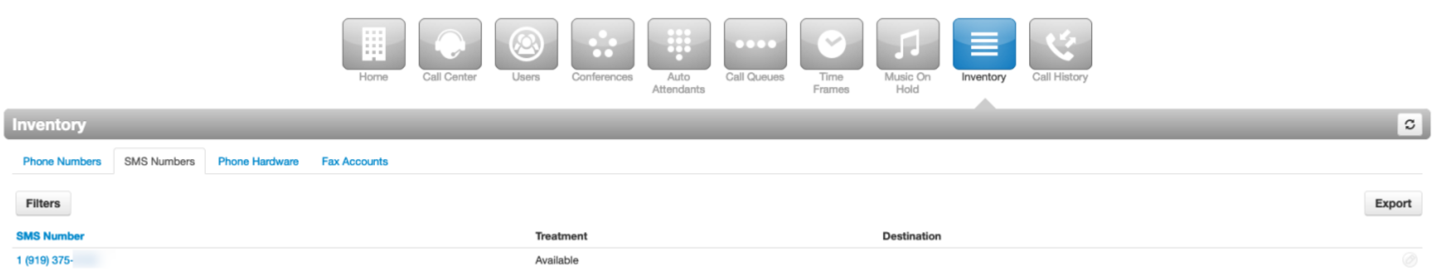
Before the SMS functionality can be used in your Crexendo domain, federal regulations require that each business complete a "**Brand and Campaign Registration Form.**" If you have not received this form from your implementation specialist, please contact cr@crexendo.com to request the form.

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.

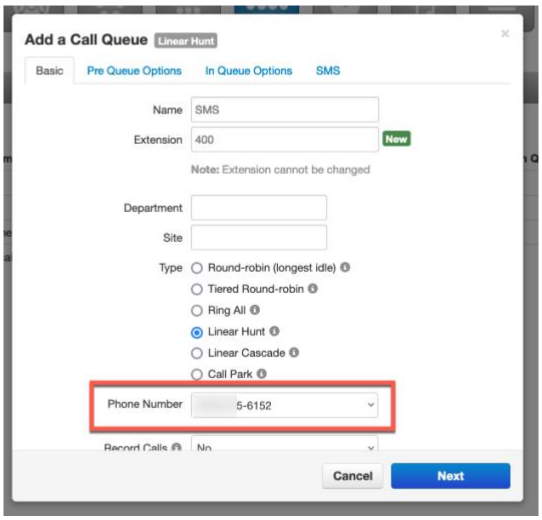
To Create a SMS Queue:

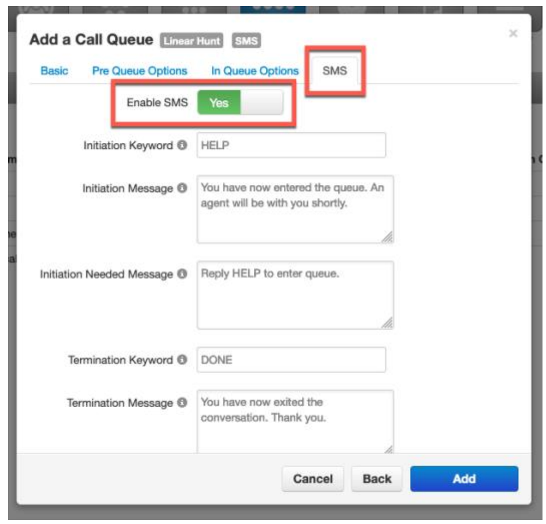
1. Login to your VIP Portal for Managers
2. Verify that you have an available number to utilize for your SMS queue by clicking **"Inventory"** and the **"SMS Numbers"** tab.



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.

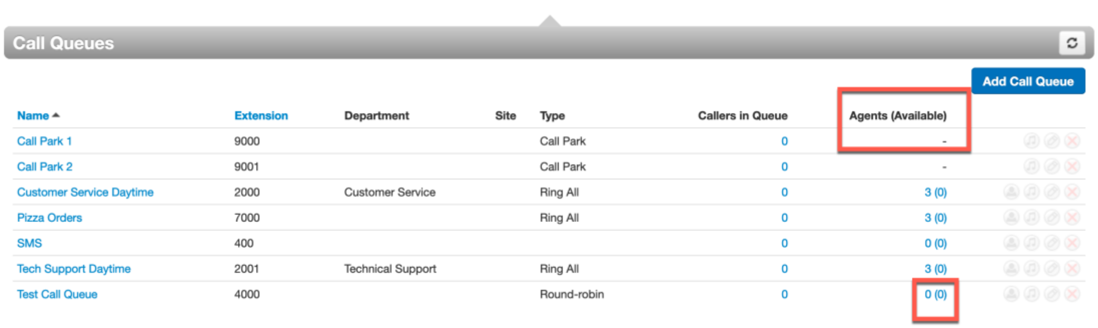




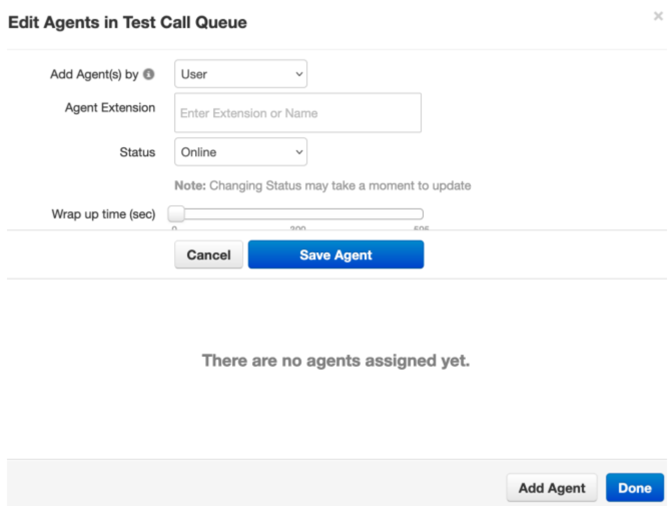
5. Click **"Add"** to complete the queue. Once you have built the queue, you can add your agents who will be responsible to receive the messages through the queue.

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.



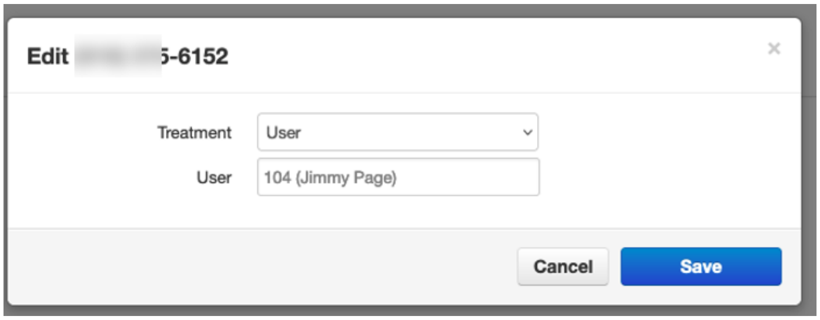
2. Click "**Add Agent**"



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."**



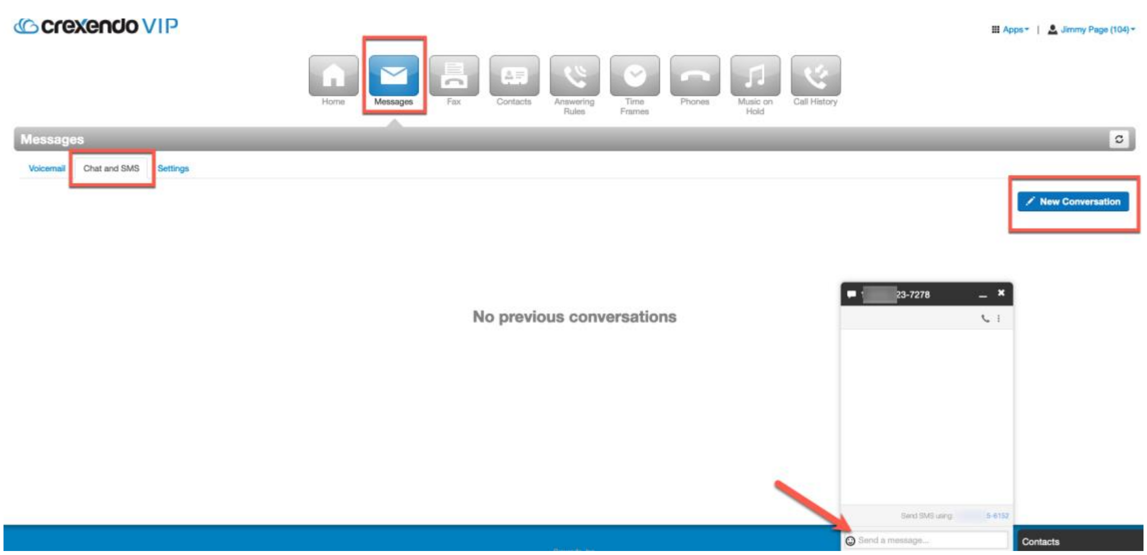
Using your SMS Capabilities

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

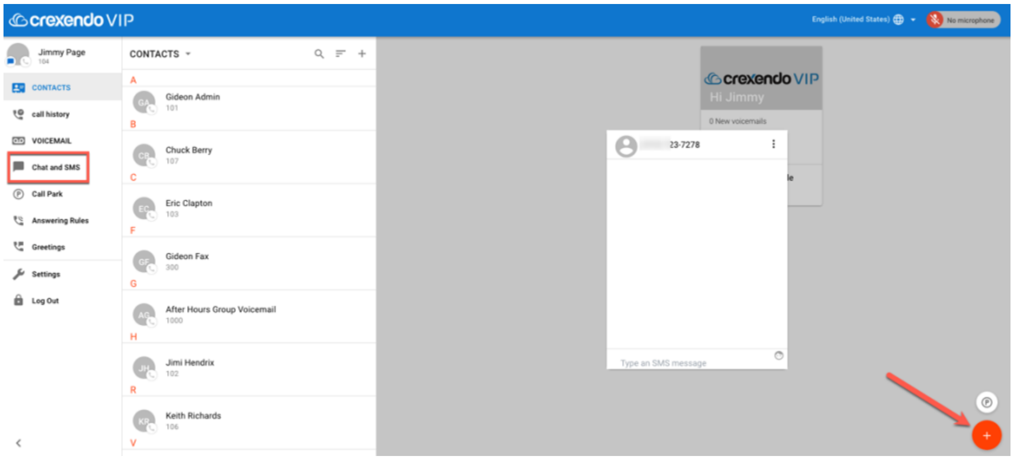
Select **"Messages"** and the **"Chat and SMS"** tab. Select **"New Conversation"** and type in the number you would like to send a message to.



VIP Web Phone

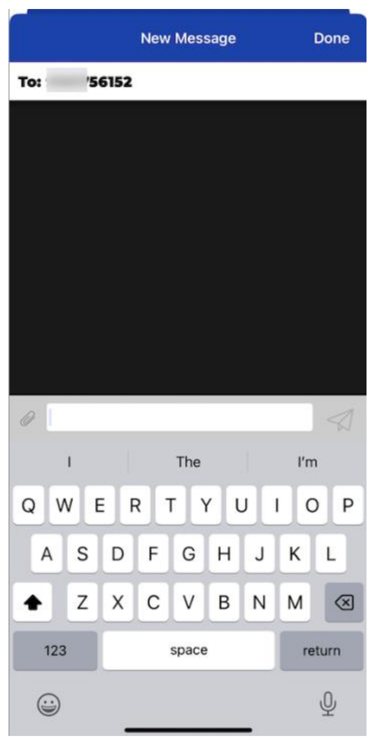
Select the red button on the bottom right side of the screen and select **"New Conversation."** Enter the number or contact you would like to send a message and press

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.

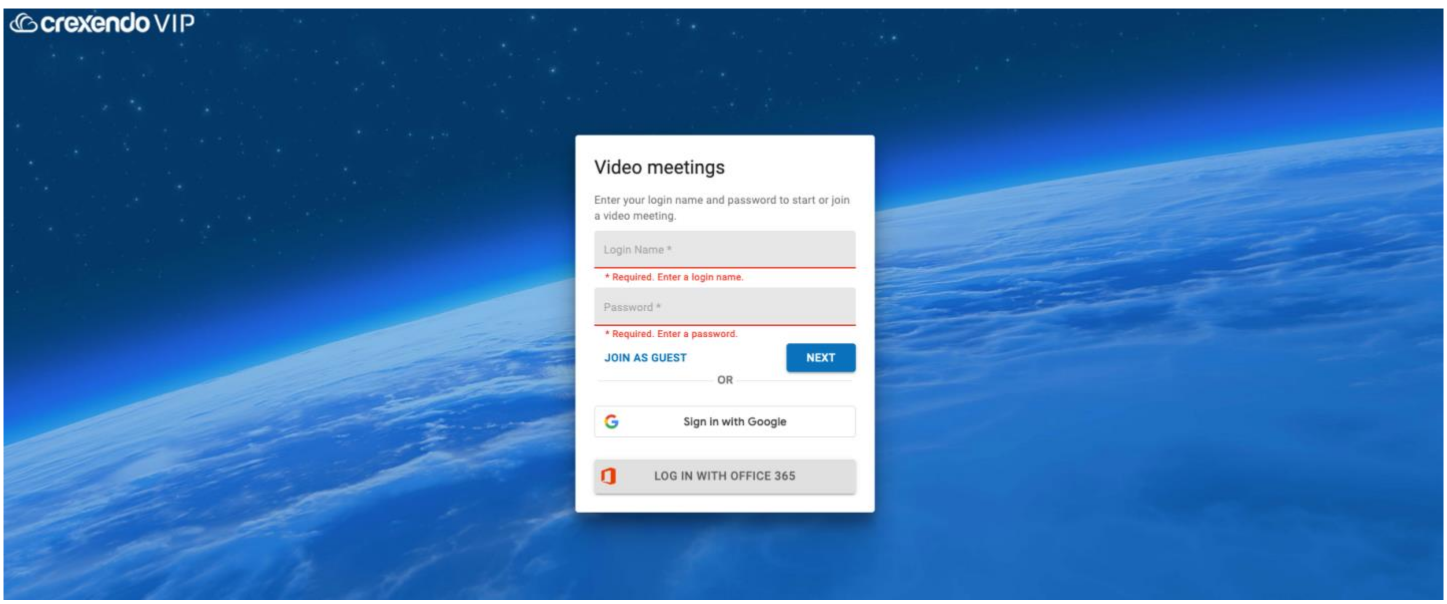
Table of Contents

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.**

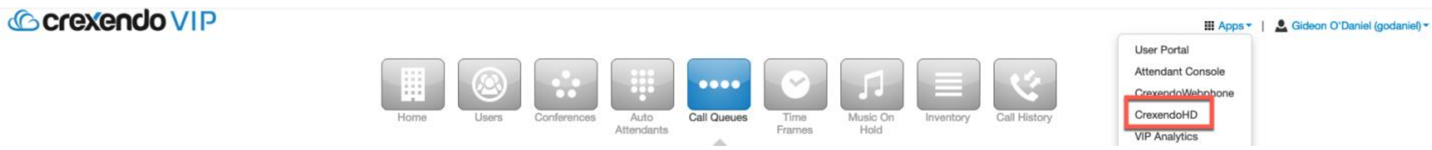


How to Access the HD Platform from Your Web Browser

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

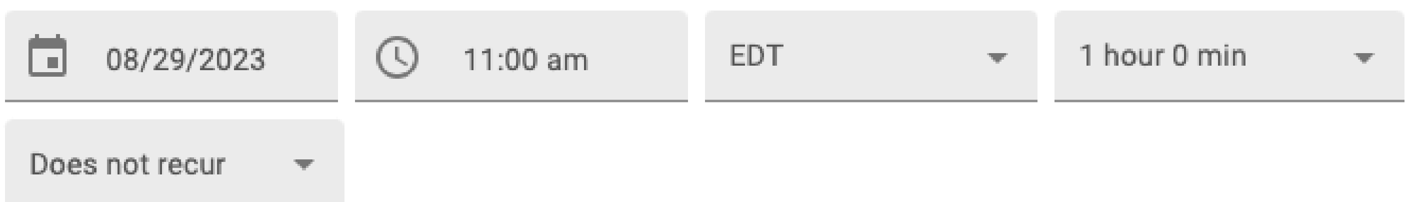
How to Access the HD Platform from the VIP Portal

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.



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**.

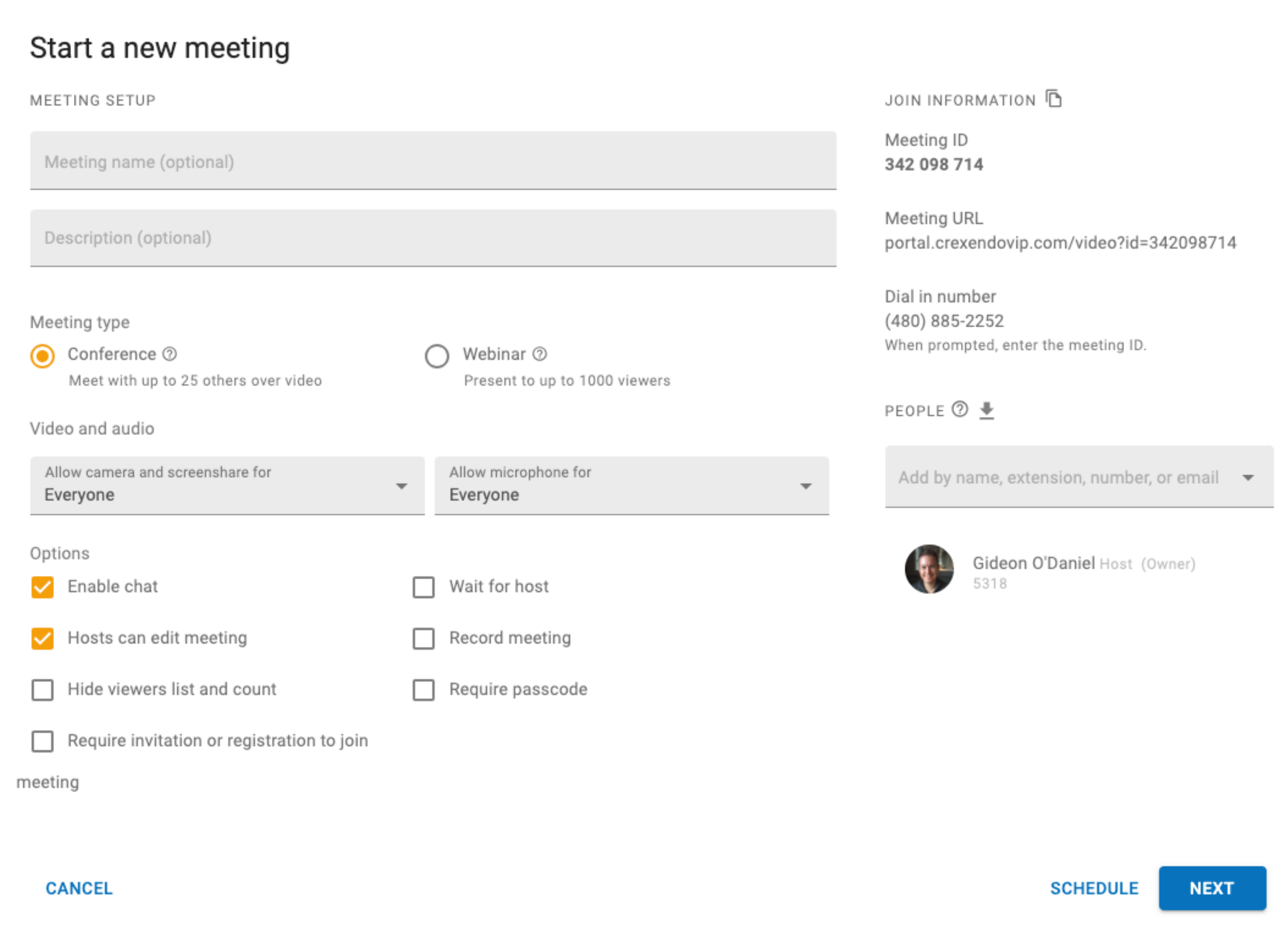
e. **Wait for host** which keeps attendees in the "waiting room".

f. **Record meeting**.

g. **Require passcode** to join.

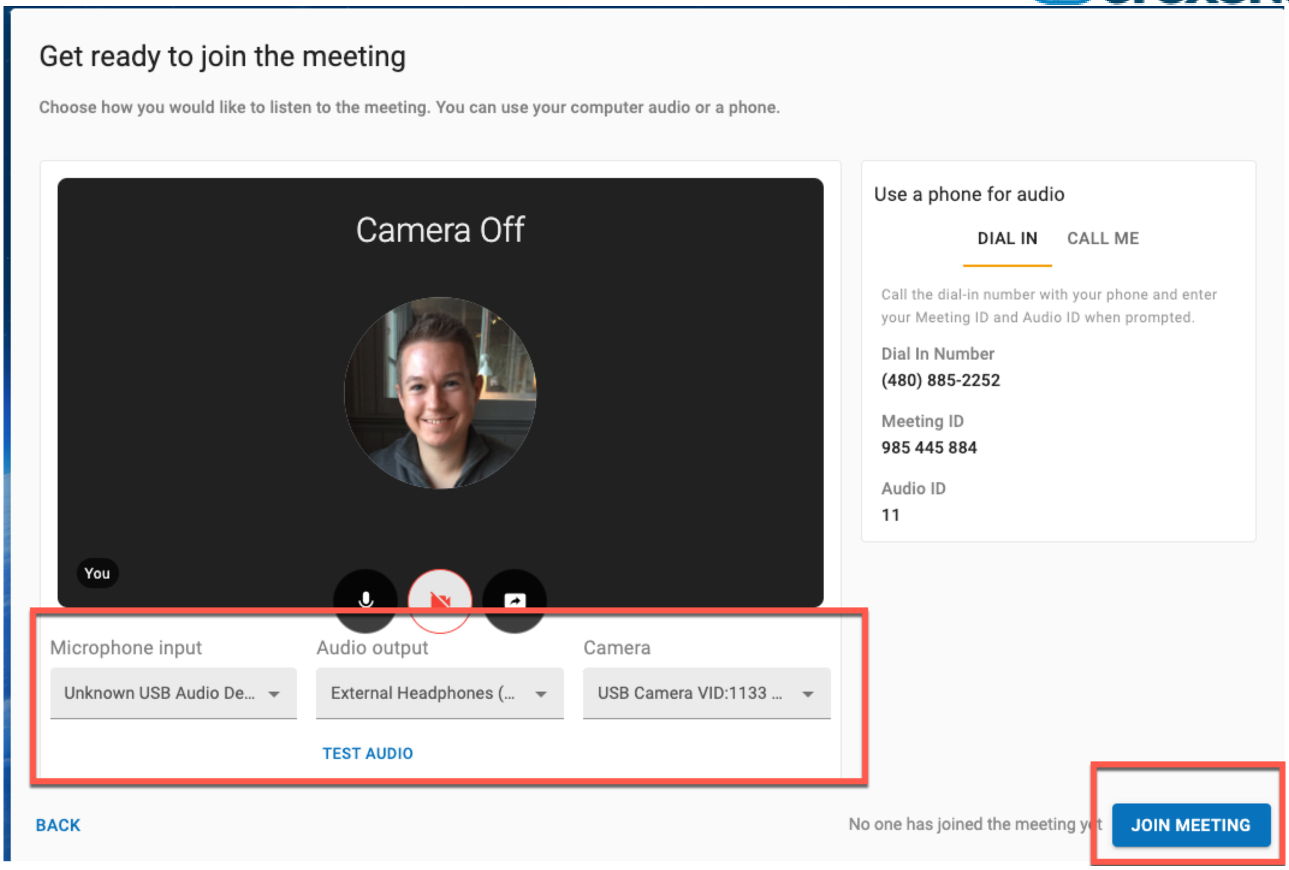
7. The **Join Information** displays the Meeting ID, Meeting URL, and direct dial in number for the meeting. All the meeting information can be copied to your clipboard to paste into an email by selecting "**Copy to Clipboard**" next to "**Join Information**."

8. Select "**Next**" to proceed to joining the meeting.



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.

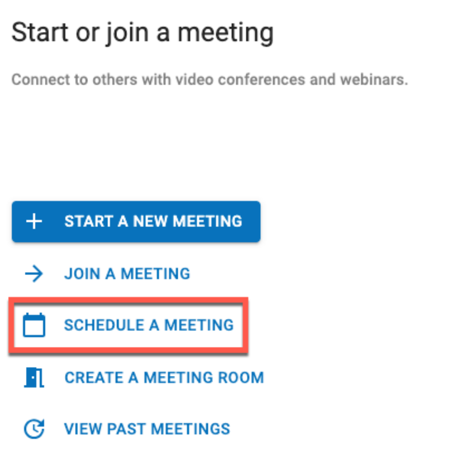
10. If you choose to use a phone for your audio, select either the dial in option and call in using the information provided or select "**Call Me**" and enter your direct phone number to have the platform call you to join the meeting.



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

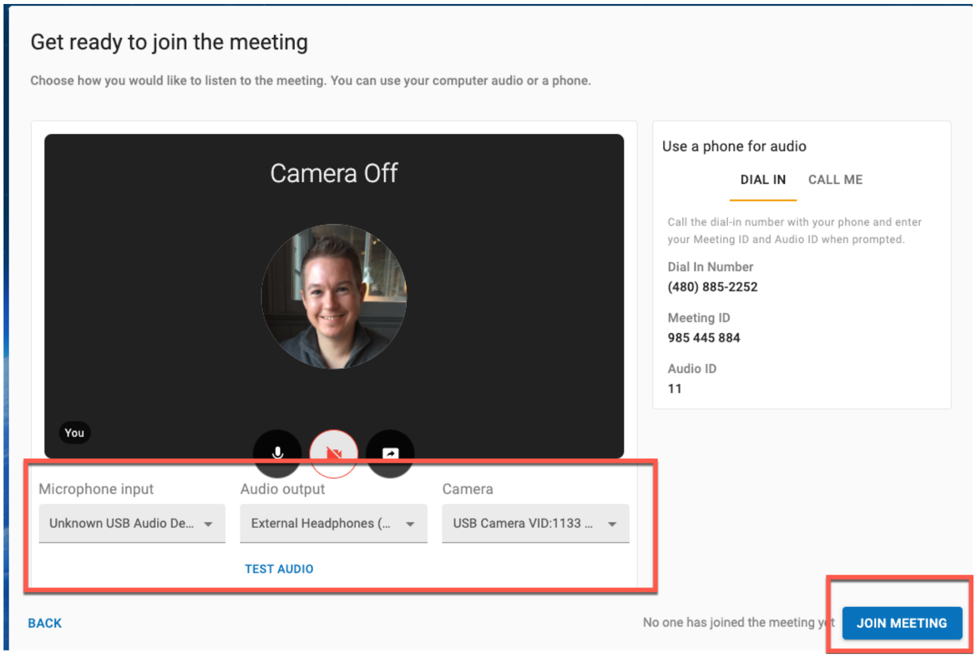
How to Join a Scheduled Meeting

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



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.

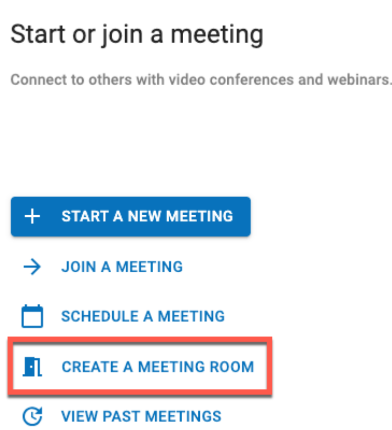
5. If you choose to use a phone for your audio, select either the dial in option and call in using the information provided or select "**Call Me**" and enter your direct phone number to have the platform call you to join the meeting.



6. Select "**Join Meeting**."

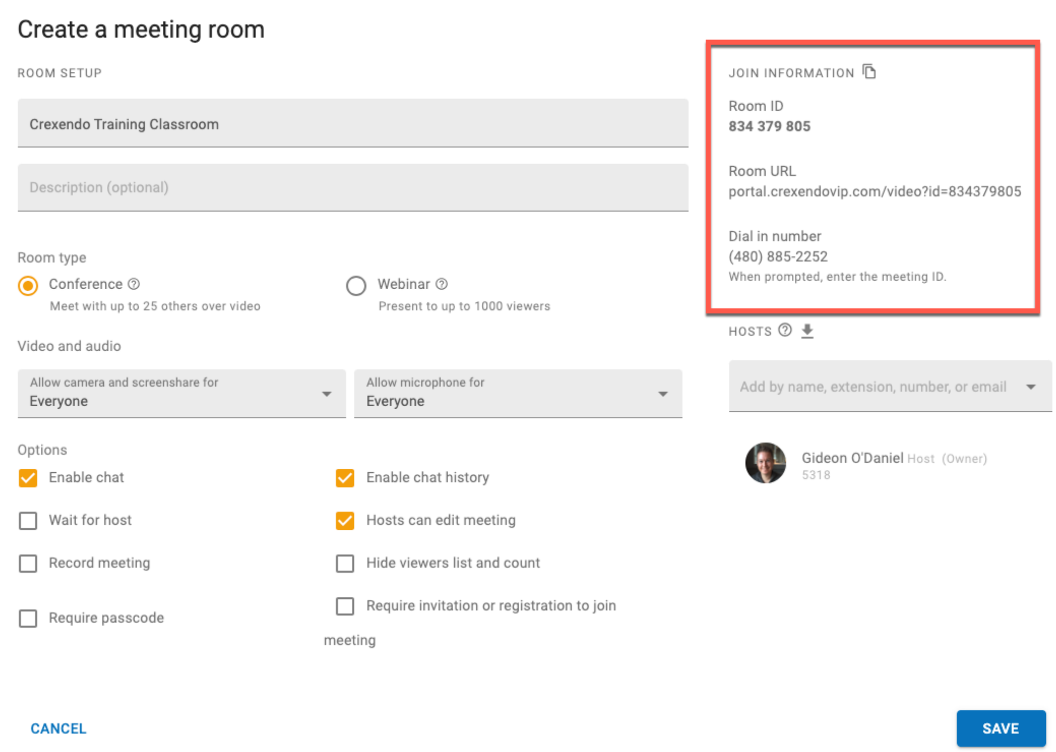
How to Create a Dedicated Meeting Room

1. Login to the HD platform.
2. Select "Create A Meeting Room" from the list.

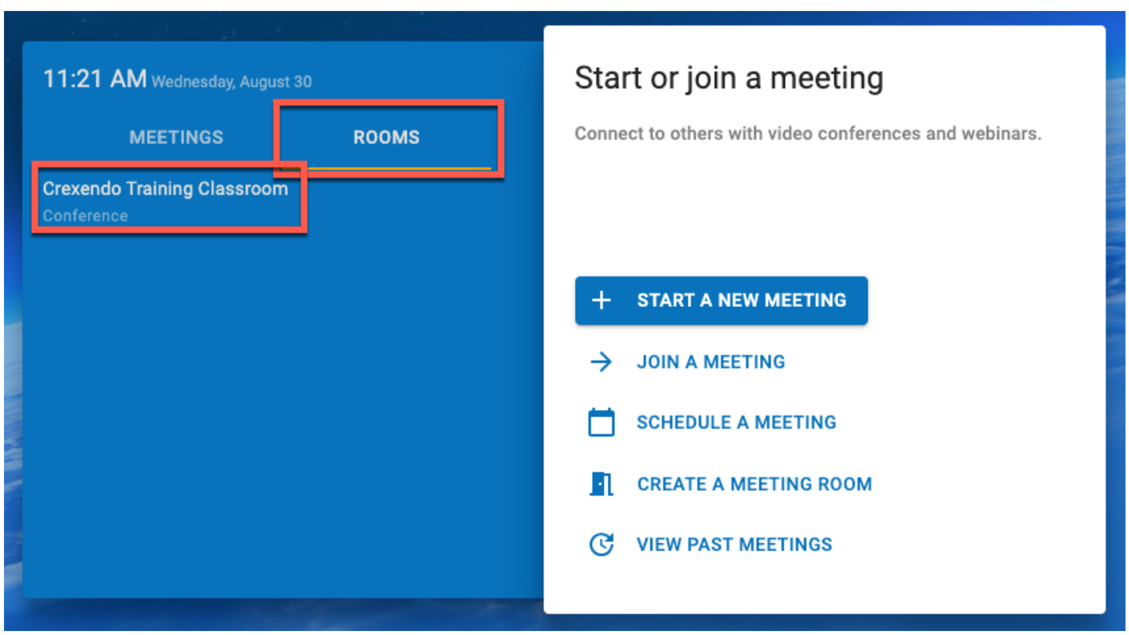


3. Give your meeting room a name and go choose the options you would like enabled in your meeting room. The "**Join Information**" will remain the same which can be sent out in any recurring meeting you may want to setup.

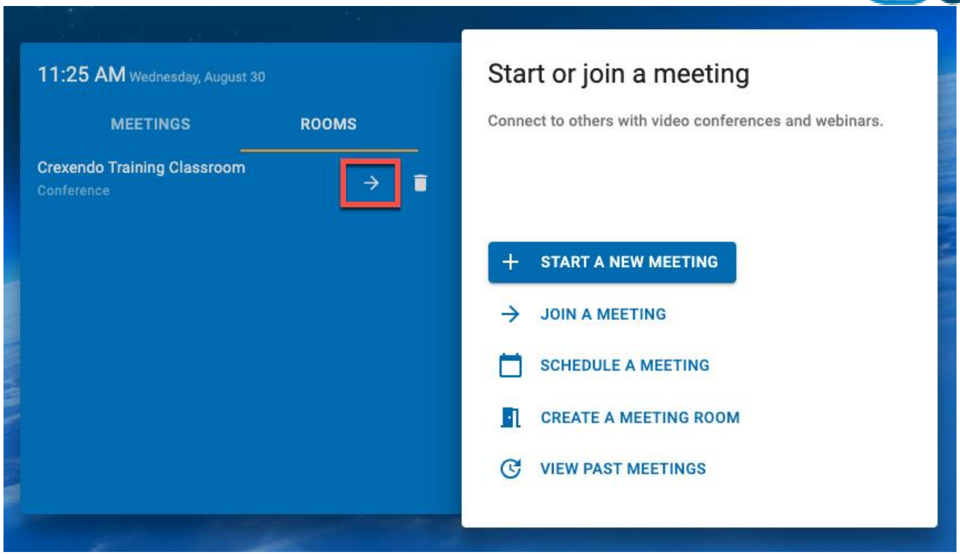
crexendo®



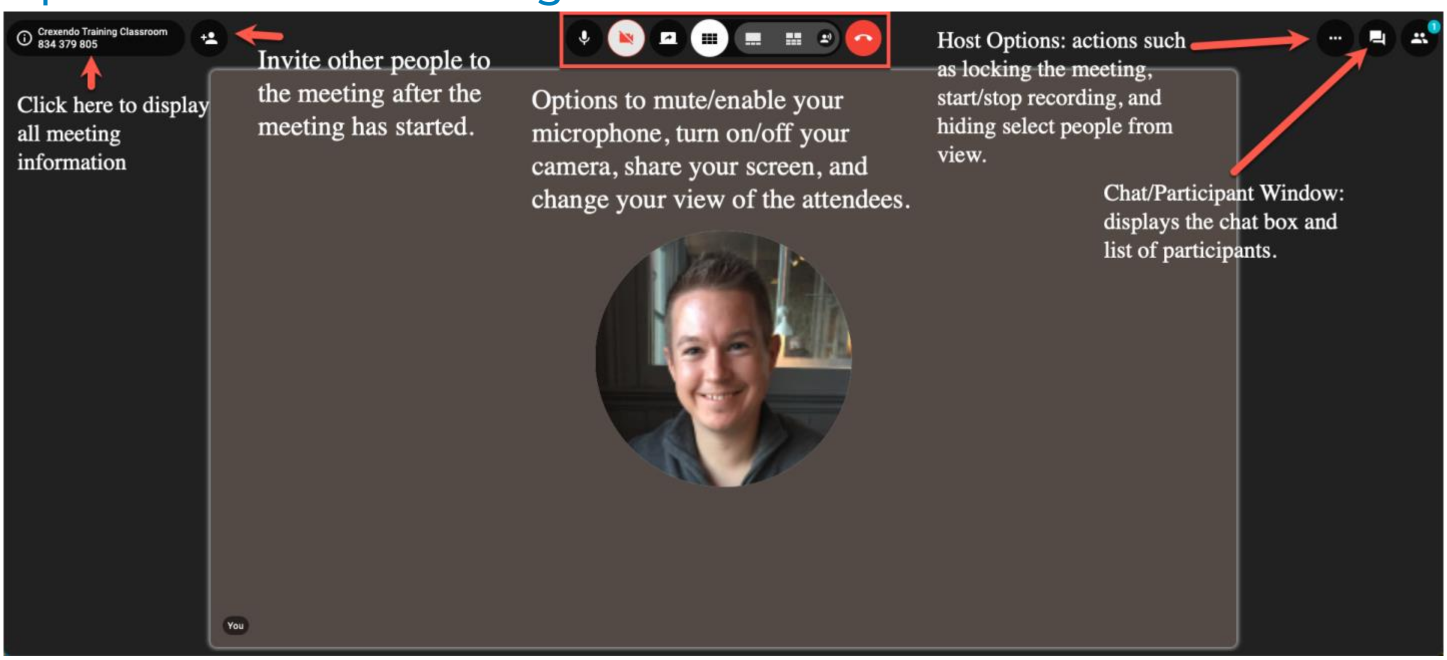
4. Select “**Save**” to complete your **Meeting Room**.
5. Your Meeting Room can be accessed by launching the HD platform and select “**Rooms**”. Any meeting rooms that have been created will appear here.



6. 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.



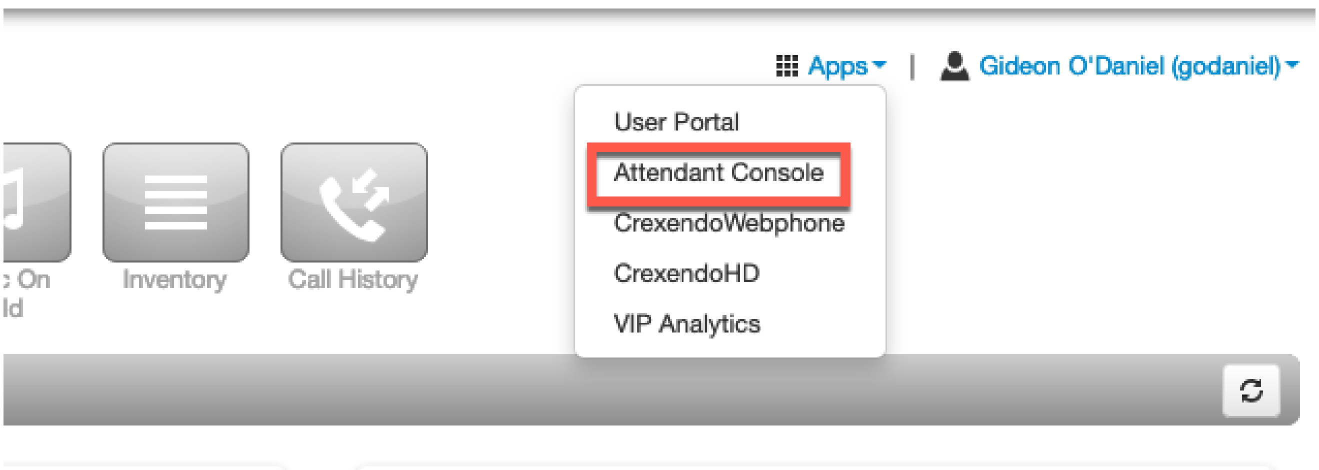
Options Within a Meeting



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**.

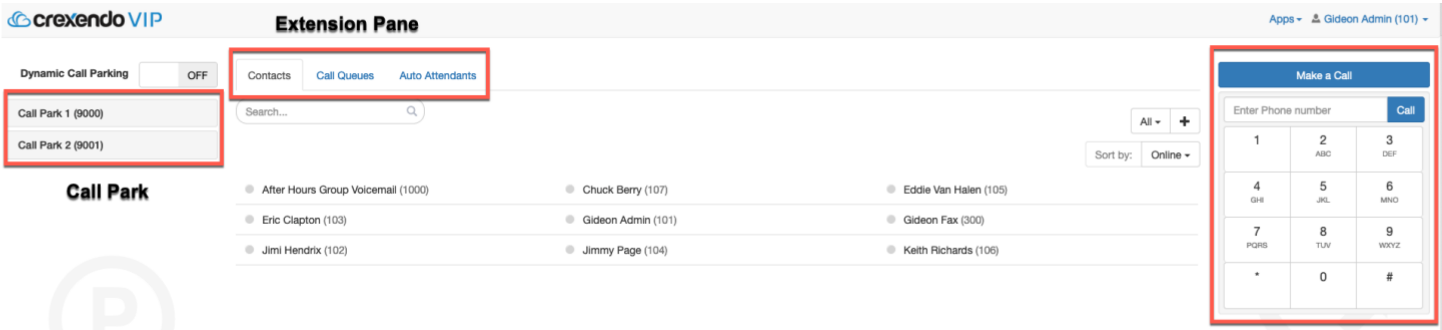


The Console:

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.



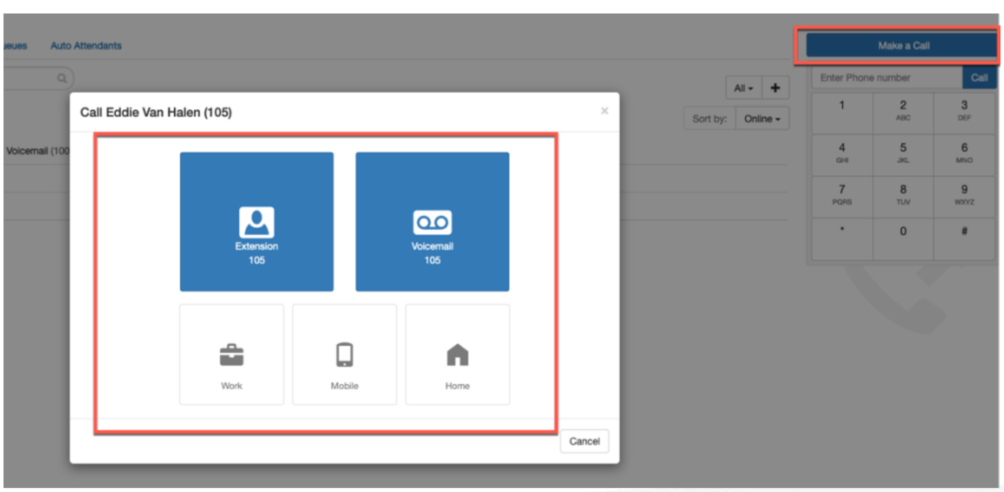
Navigating the Attendant Console:

- **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:

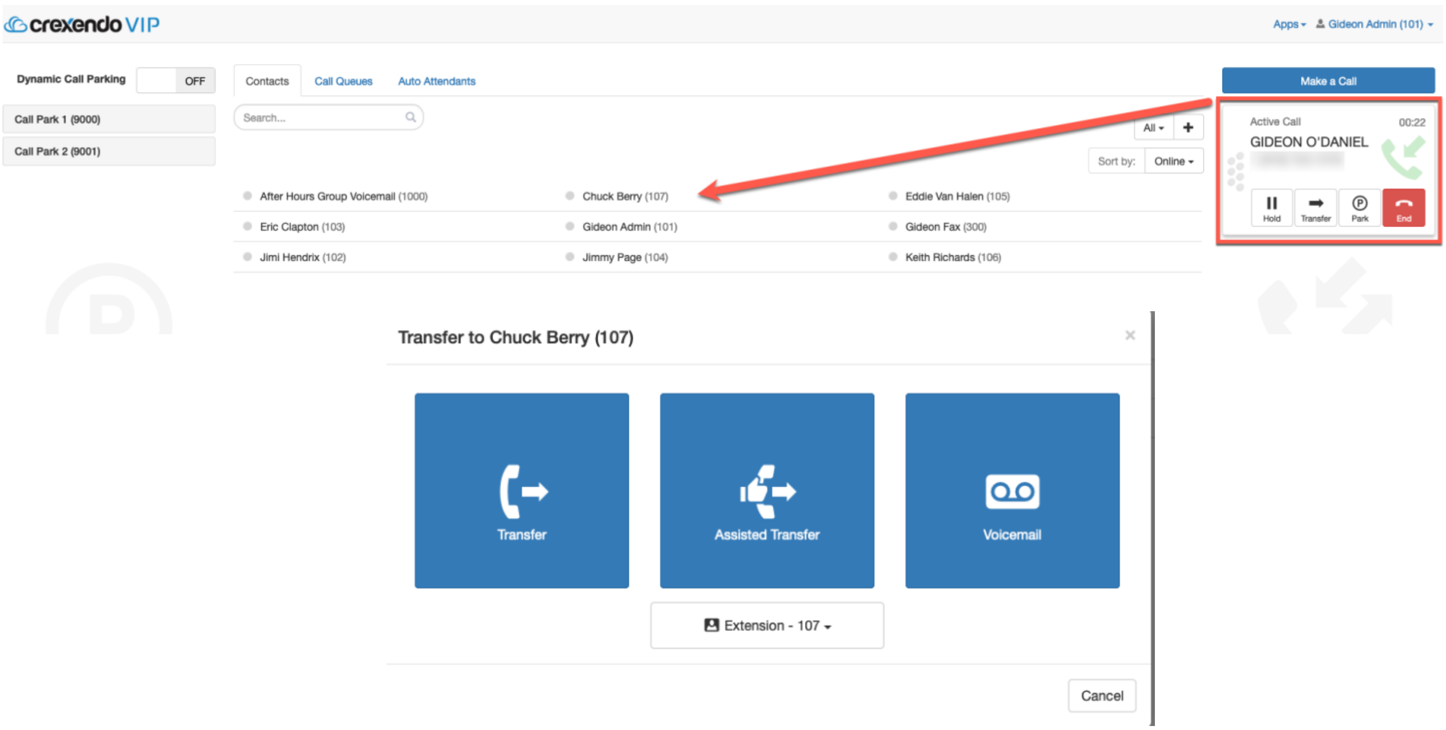
To Make a Call:

- *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.

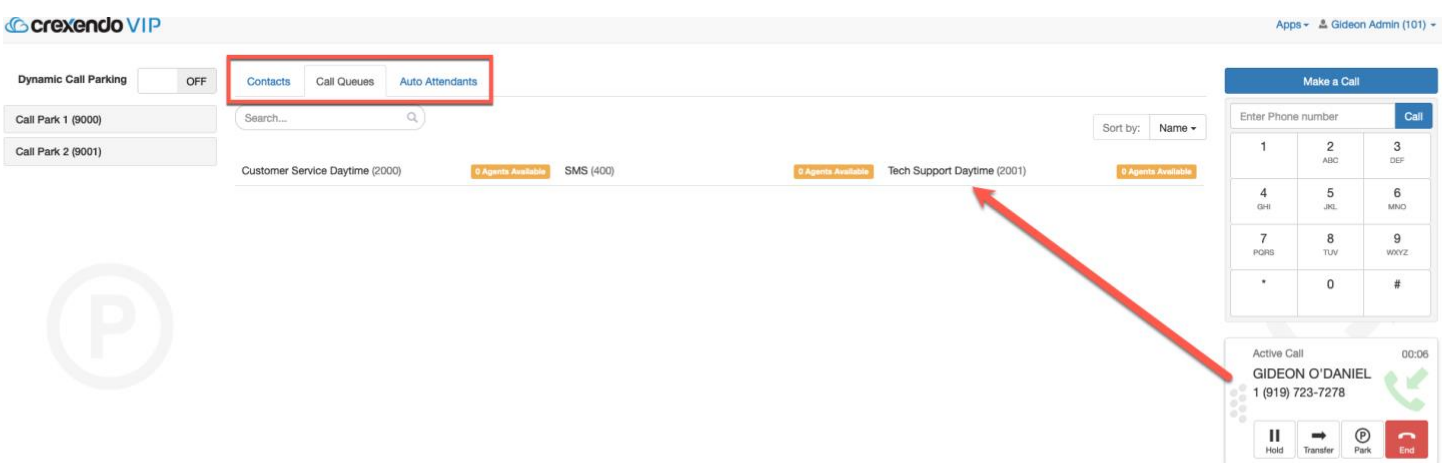


To Transfer a Call:

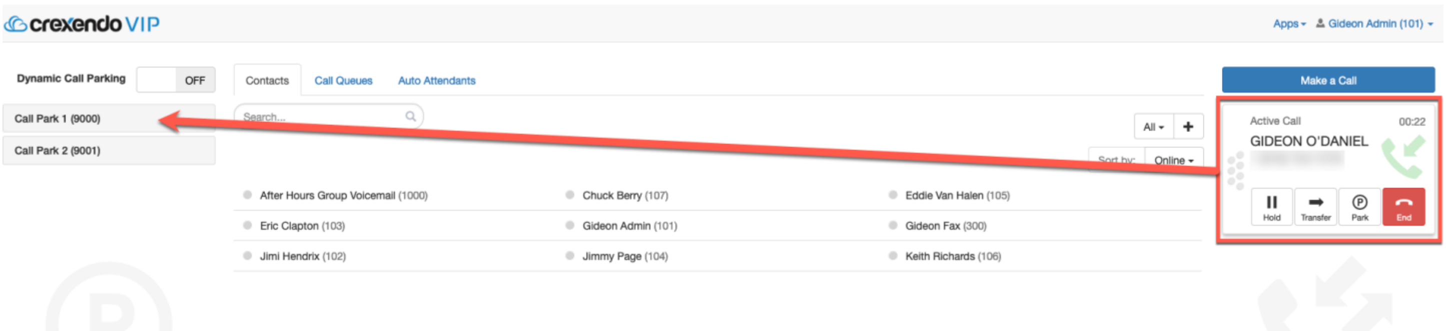
- **To an Internal User:** In the call pane, select "**Transfer**" and drag the call pane to the user the call needs to go to. You can search for the user in the "**Extension Pane**." Once you drag the call to the user, the option to do a blind transfer, an assisted transfer, or transfer the call to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



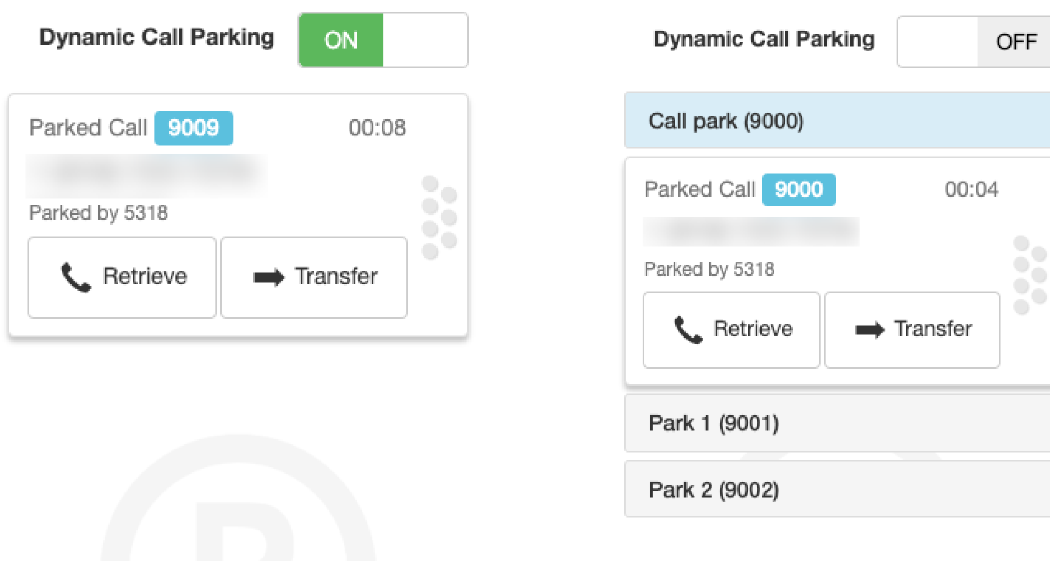
- **To an External Number:** If the number is in your contact list, proceed with the drag and drop function. If it is NOT in your contact list, initiate the transfer from your DESK PHONE by pressing Transfer, the 10-digit number, and Transfer.
- **To a Call Queue or Auto Attendant:** Select the desired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



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



- **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.



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.**

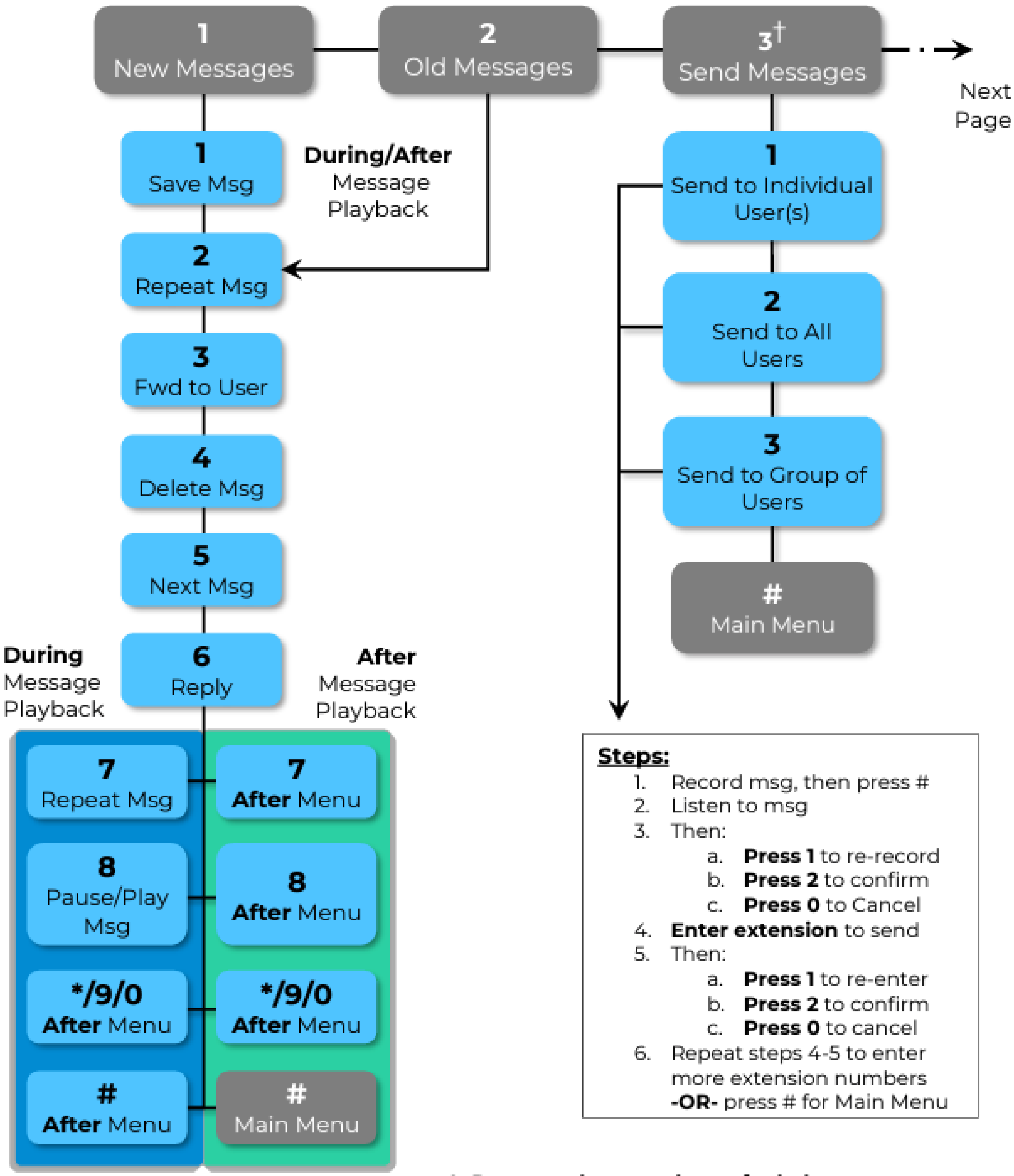
Tips:

- 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**".

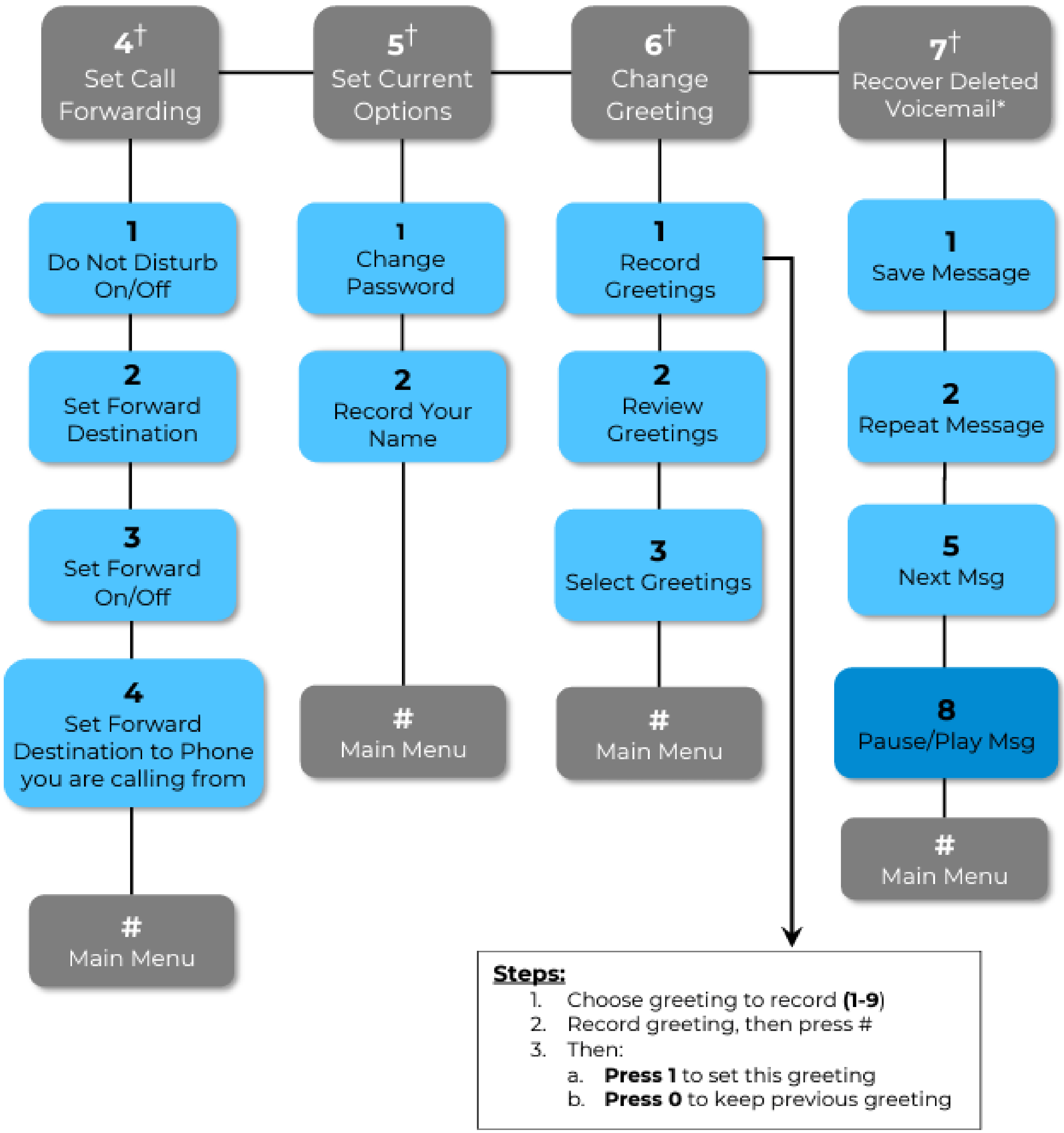
crexendo®

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

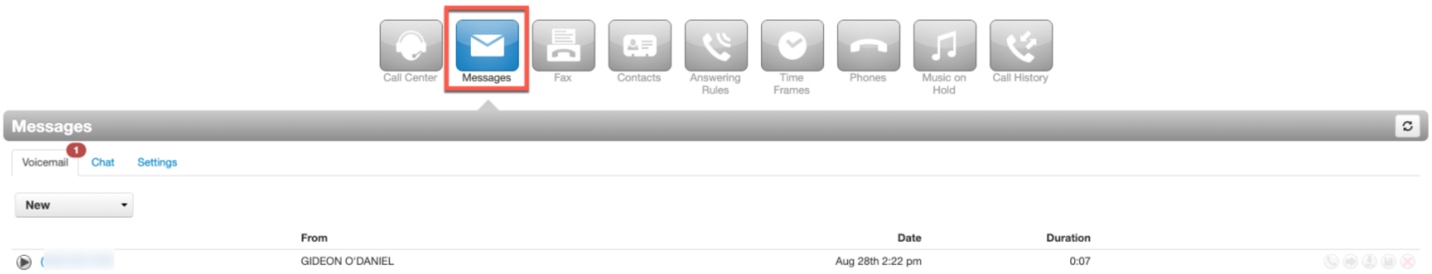
✱ = Recovered voicemails are saved in OLD MESSAGES

crexendo®

How to Check and Manage Your Voicemail Settings – Portal

To check your voicemail:

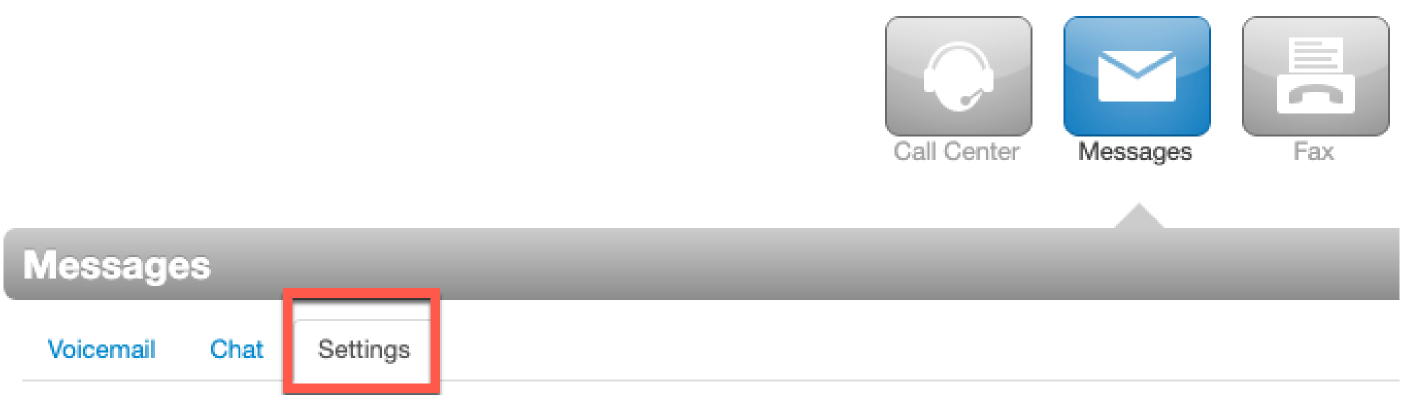
1. Login to your VIP Portal
2. Select the "**Messages**" navigation button at the top of the page.



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.

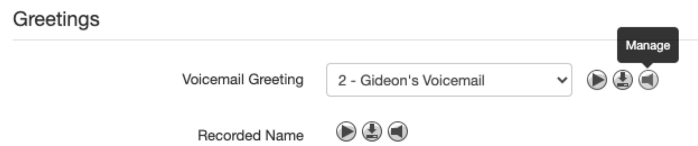
d. **Copy to extension(s)**: If you would like your voicemails to be copied to another user’s voicemail, enter the name or extension you would like this to happen for. **NOTE:** <u>This simply copies the voicemail to another user, but it does NOT mirror the actions that someone takes with that voicemail. If you delete the voicemail, it does NOT delete the voicemail in another user’s voicemail box.</u>

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.



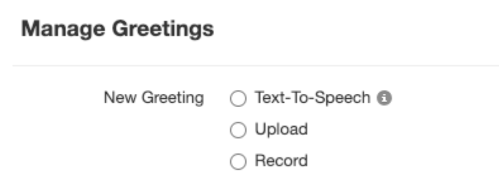
    ii. Select “**Add Greeting**” at the bottom of the window.

    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.

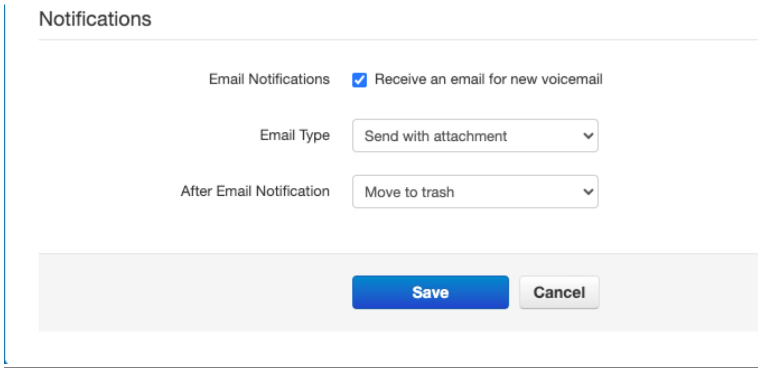
        3. **Record**: Allows you to specify where you would like to be called to record your message.



    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.



How to Check Your Voicemail – Web Phone

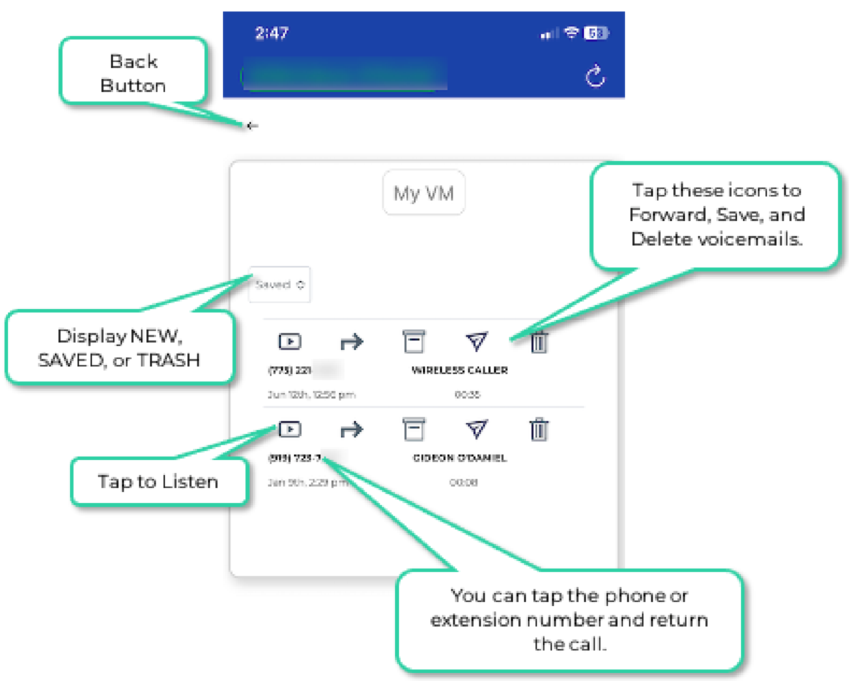
1. Within the Crexendo Web Phone, select "**Voicemail**" from the navigation pane.
2. The Voicemail option displays a list of your voicemails. It displays both new and saved voicemails to which you can listen by clicking the **Play** button. The image below shows voicemail that has been transcribed using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

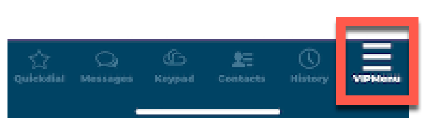
How to Check Your Voicemail – Mobile Application

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 <u>audio</u> 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 remail 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 of 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]

Table of Contents

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.

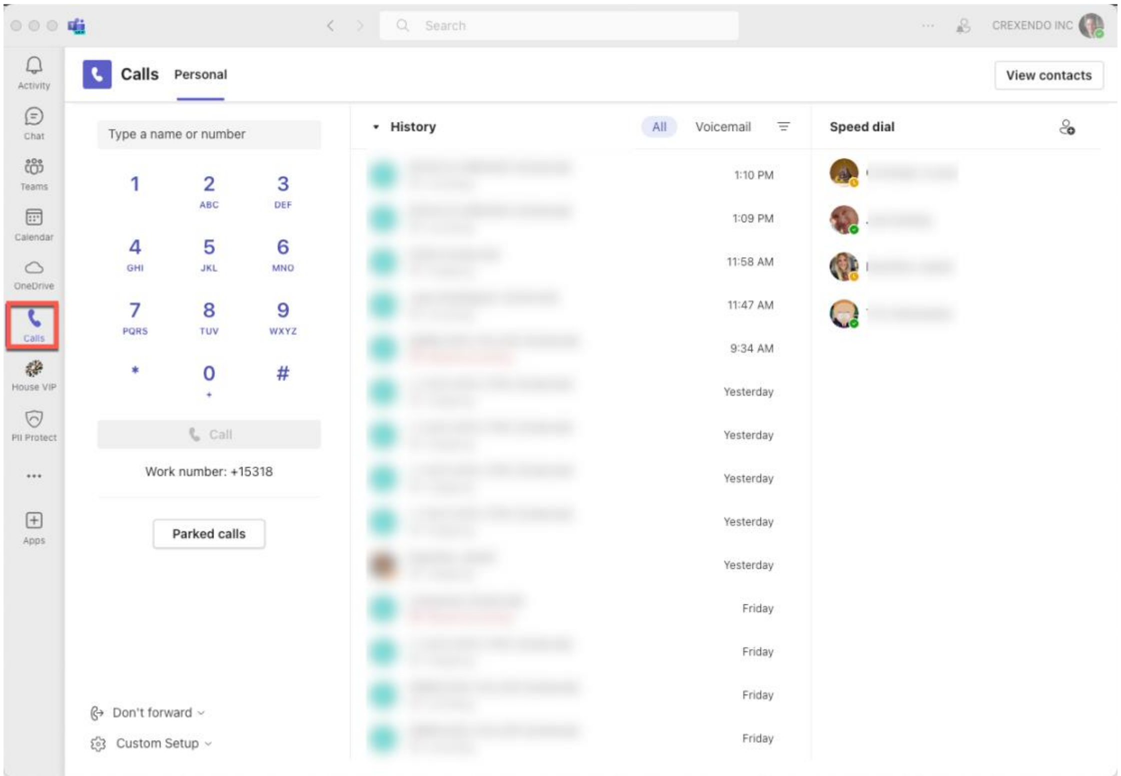
Crexendo Platform Features:	Call Center Agent	Call Center Supervisor	Office Manager	Site Manager
User Portal Access	X	X	X	X
Manager Portal Access			X	X
Call Center Portal Access	X	X	X	X
Call Center Statistics	X	X	X	X
Call Center Reports		X	X	X
SMS/MMS*	X	X	X	X
Fax	Optional	Optional	Optional	Optional
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

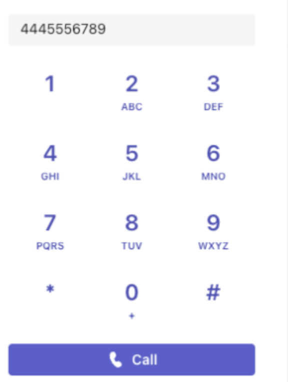
Microsoft Teams can be utilized to make and receive calls on a personal computer or by using the Microsoft Teams application on your mobile device. This guide will illustrate how to make and receive calls, in call options, and how to configure your own settings using both the Microsoft Teams Desktop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

Making and Receiving Calls – Desktop Application



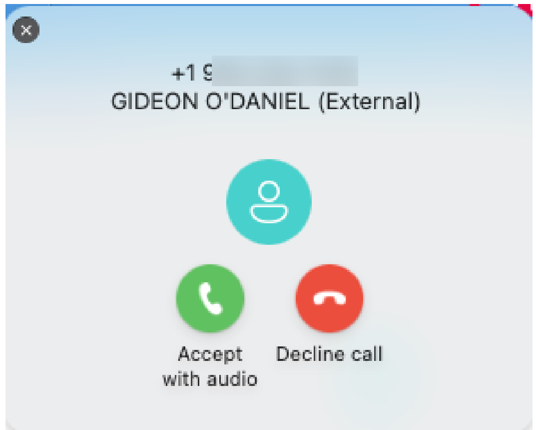
To make a call in the Teams application:

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.



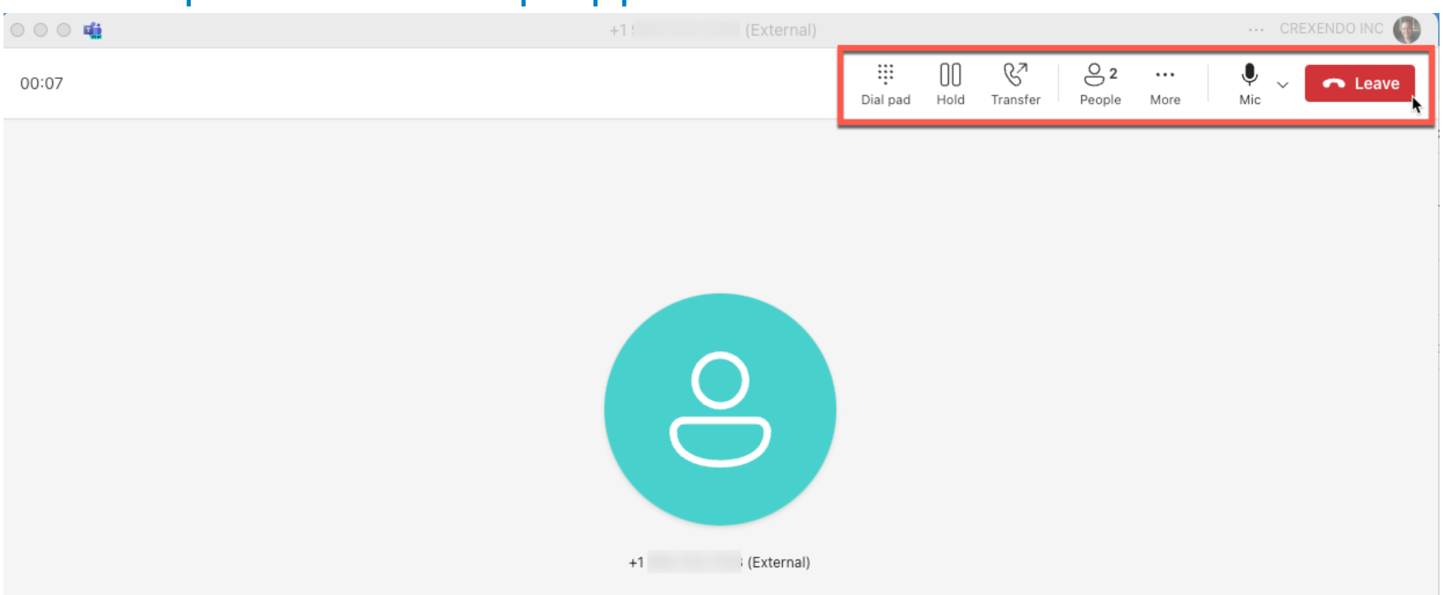
To Receive a Call in the Teams Desktop Application:

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**."



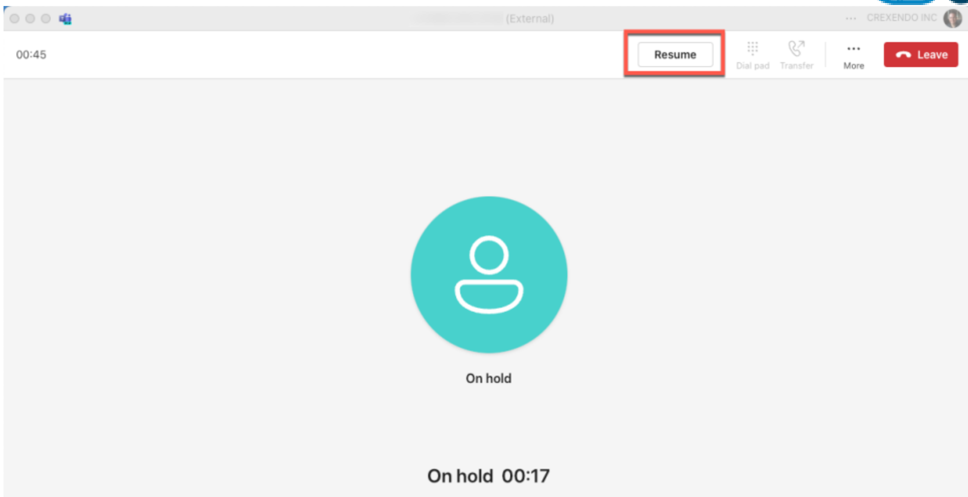
2. Select "**Accept with audio**" to be connected to the call or "**Decline call**" to send the call to voicemail.

In Call Options – Desktop Application

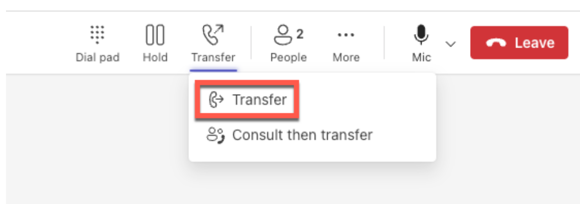


While you are on an active call, you have several options available to you:

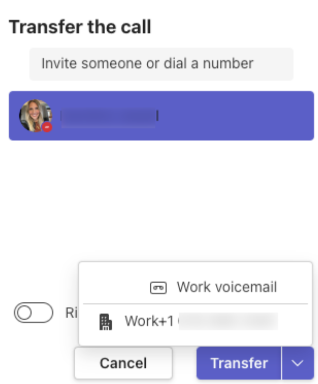
- **Dial pad**: Opens a dial pad to make selections if necessary.
- **Hold**: Select "**Hold**" to place the caller on hold. The option to "**Resume**" the call will appear while the caller is on hold. A timer will also appear at the bottom of screen indicating how long the caller has been on hold.



- **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.

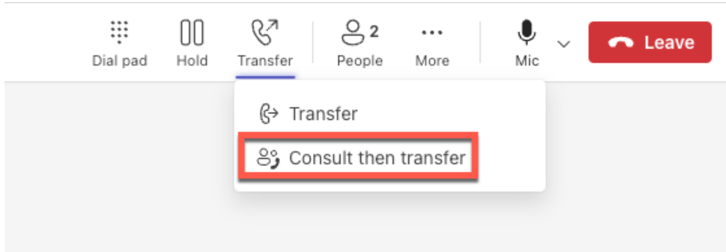


        - Type in the name (if already one of your contacts) or the 10-digit phone number the call will be transferred to. If you are transferring the call to a user with an extension in your company, you can choose to transfer the call to their voicemail or to ring back to you if they do not answer.

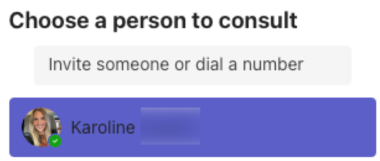


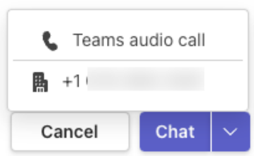
        - Select "**Transfer**" to complete the transfer.

- **To Perform a Warm Transfer**
  - Select the **"Consult then transfer"** option from the transfer list.



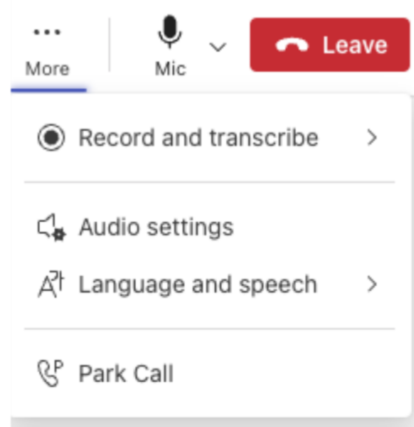
  - Select the person you would like to transfer the call to. You can choose to either call the person or open a chat window with the user.



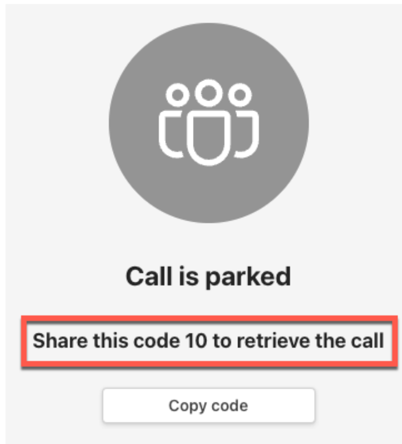


  - Once you have confirmed they are ready for the transfer, select "**Transfer**" at the top of the page which will complete the transfer.

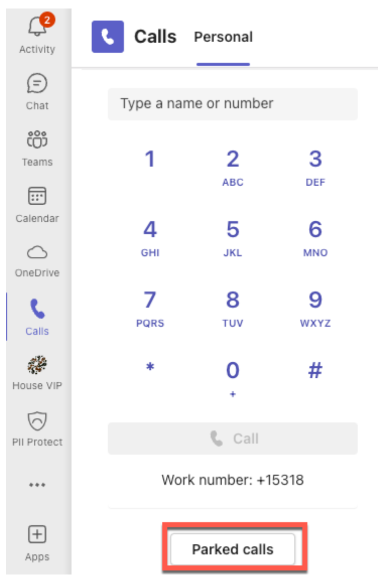
- **People**: This option shows the current participants on the call.
- **More**: provides the options to record the call, audio settings, Language and speech options, and the option to park a call.



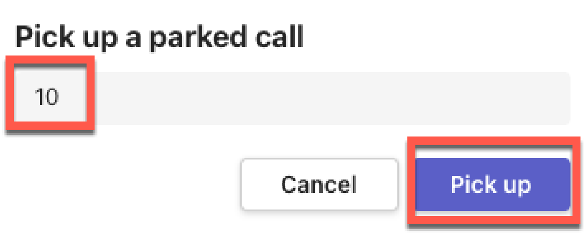
- **To Park a Call**:
  - Select "**Park Call**" from the options. The caller will be placed on hold.
  - Teams will provide a park code that is needed to retrieve the call.



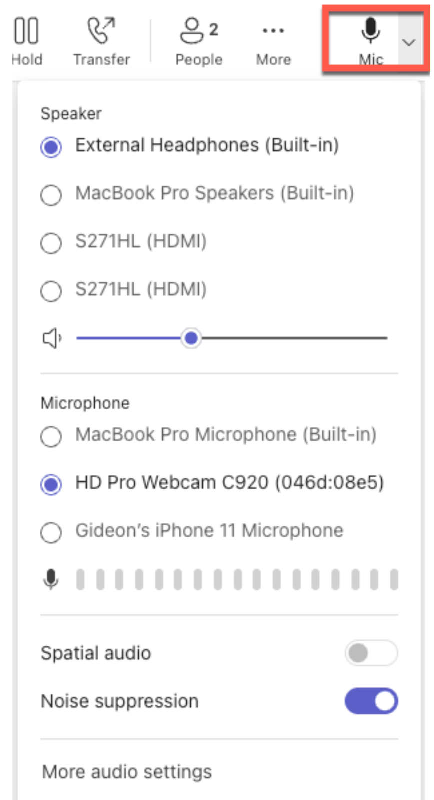
- **To Retrieve a Parked Call**:
  - From the Calls section in Microsoft Teams, select "**Parked Calls**."



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

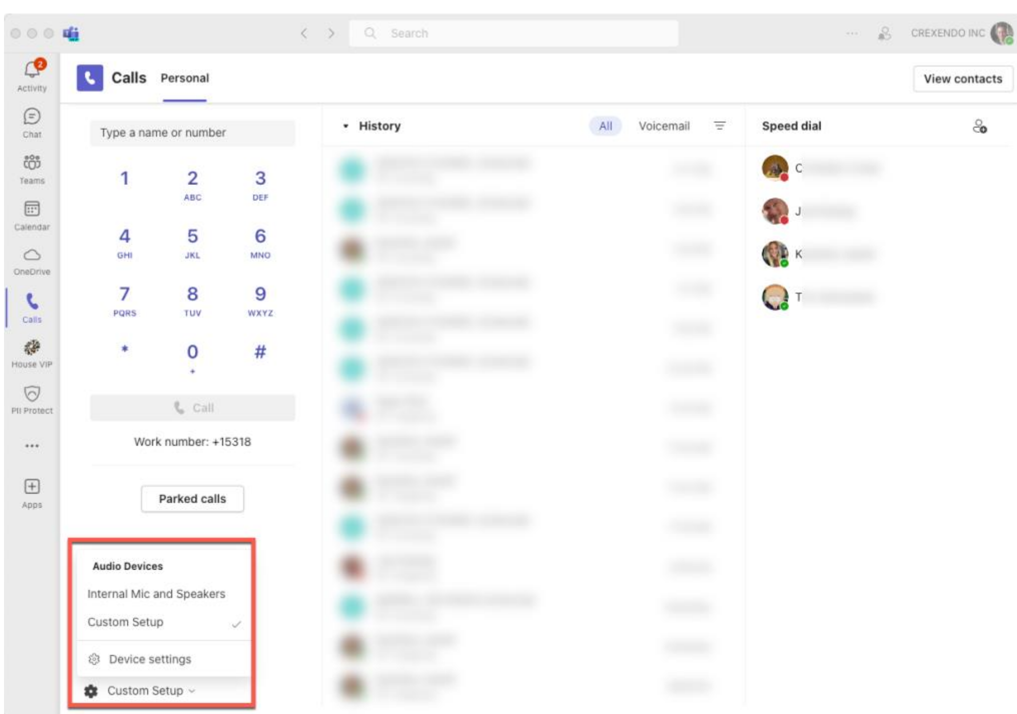


- **Mic**: This option allows you to place yourself on mute or to change your audio settings.

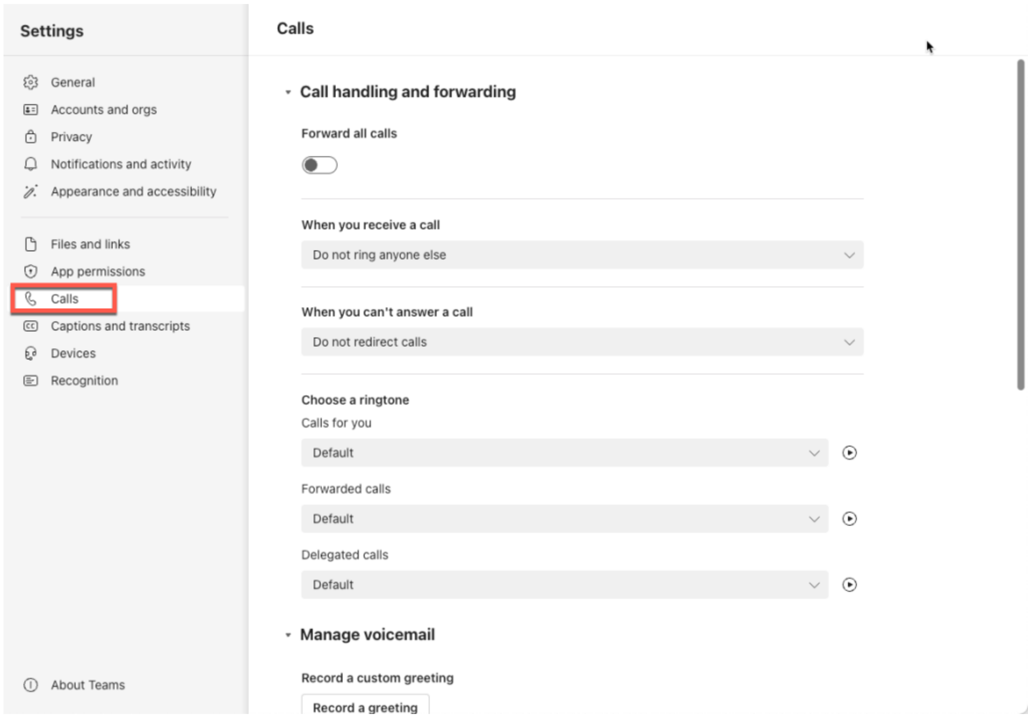


Settings – Desktop Application

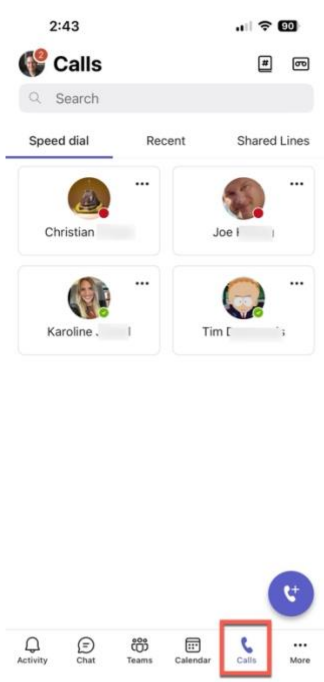
Your settings can be configured and customized by selecting the "**Custom Setup**" option on the bottom left of the screen and select "**Device settings**."

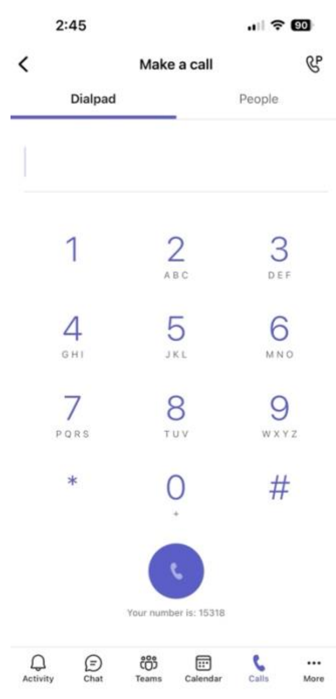


Select the "**Calls**" Option to configure all call settings including **forwarding your calls, answering rules, ringtones, and your voicemail options.**

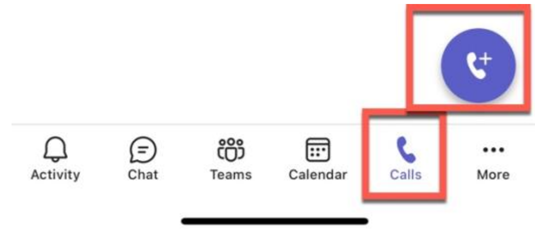


Making and Receiving Calls – Mobile Application





To make a call in the Teams Mobile Application:

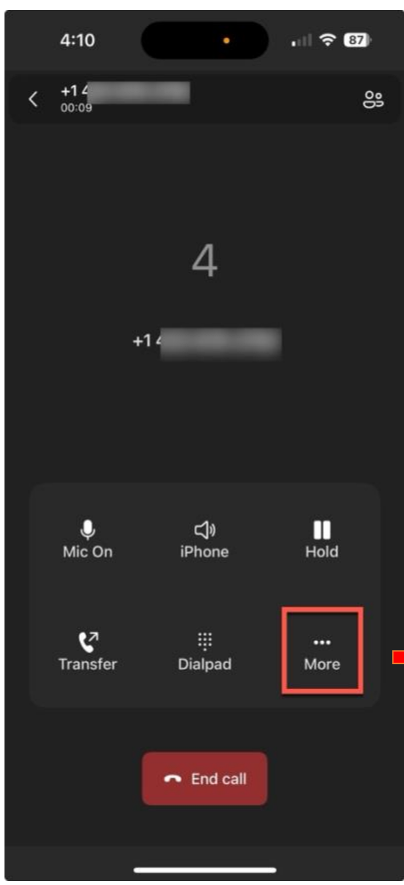


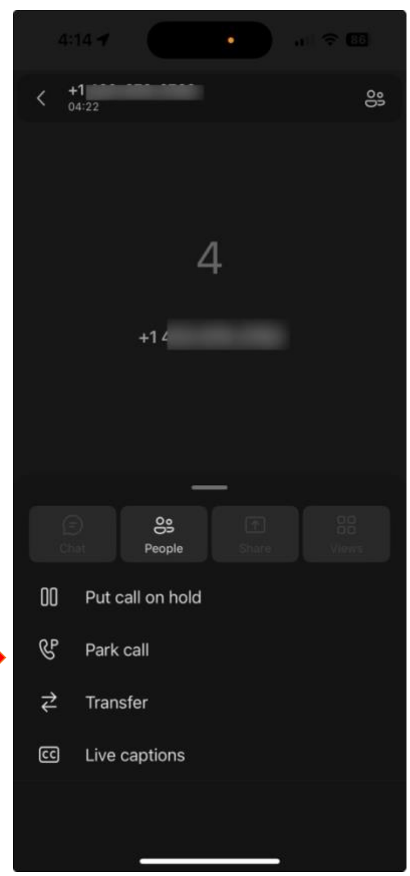
1. Select the "**Calls**" icon on the bottom menu.
2. Select the  icon.
3. In the blank, enter either the 10-digit phone number you would like to call, or if the number is in your contacts, select the "**People**" tab to search your contacts.
4. Press the  icon to place the call.

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.

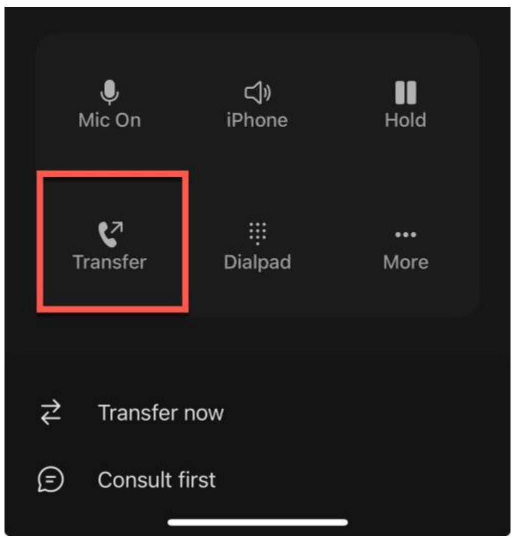
In Call Options – Mobile Application



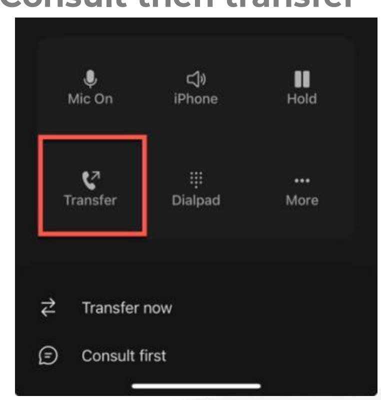


While you are on an active call, you have several options available to you:

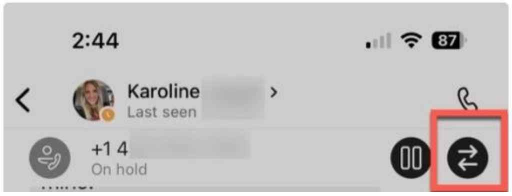
- **Mic On/Off:** This option mutes your microphone.
- **Hold:** This option places the caller on hold.
- **Transfer**: This option allows you to perform a cold or warm transfer depending on your needs. Select the "**Transfer**" button to start the process. You will have two options to transfer the call: ***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.**"

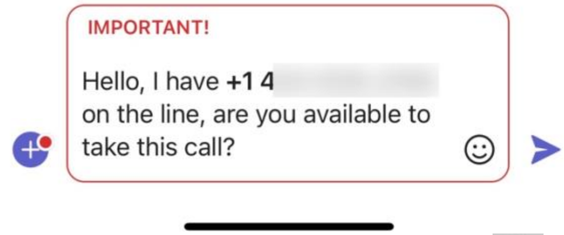


        - Enter and select either the contact or the 10-digit phone number you would like to transfer the call to.
        - The call will be instantly transferred to intended recipient and you can select "**End Call**" to complete the transfer.
    - **To Perform a Warm Transfer:**
        - Select the **"Consult then transfer"** option from the transfer list.

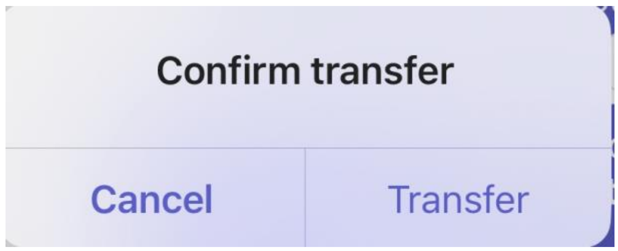


- Select the person you would like to transfer the call to. You can choose to either call the person or open a chat window with the user if they are an internal user.





- 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.