



The Platform for How
You Work Today



Crexendo® Guidebook *for Users*

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 your Crexendo phone system.

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:

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

Crexendo Training YouTube Channel

For demonstration videos for all aspects of the VIP Portal, you can visit the Crexendo Training YouTube playlists.

Crexendo Portal YouTube Playlist

https://www.youtube.com/playlist?list=PLXADOLtuavV9jC_HL7NiOiBoKA9VZIBxm

Crexendo Device Training YouTube Playlist

<https://www.youtube.com/playlist?list=PLXADOLtuavV8LpKEyp4ngZBGdVYdarXmZ>

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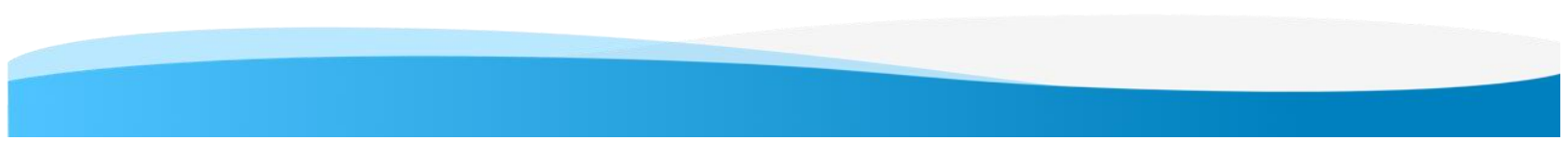
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Introduction

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

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



Key Terms:

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

Crexendo Device Videos

For a quick start guide video on your Crexendo desk phone, please visit our Device Training Playlist at:

<https://www.youtube.com/playlist?list=PLXADOltuavV8LpKEyp4ngZBGdVYdarXmZ>

Answering a Call

When not on another call:

- Lift the handset.

When on another call:

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

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

Making a Call

Internal Call:

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

External Call:

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

Transferring a Call

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

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

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

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

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

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

Hold Function

To place a call on hold:

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

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

Conference Call

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

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

Park Function

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

To place a call in a Call Park:

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

To Retrieve a Call from the Call Park:

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

Phone Feature Codes

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

Dialing/Calling Out

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

† = Web phone does not auto-answer

Receiving Calls

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

Forwarding/Transferring

Code	Name	Description	Usage
*10	Transfer to Voicemail	Transfer caller directly to voicemail.	[Transfer] + *10 + [destination extension #] + [Transfer]
*80	Move Call	Move a call from one of your phones to the phone you're on (other party not aware)	*80 + [SEND]
*72	Call-Forward <u>Always</u> Set/Activate	Enter a phone number and activate call forwarding to that number. Forwarding will trigger in all situations	*72 + [forward destination number]
*40	Call-Forward <u>Always</u> Activate	Activate call-forwarding to a previously set number (*72). Forwarding will trigger in all situations.	*40 + [SEND]
*73	Call-Forward <u>Always</u> Deactivate	Deactivate Forward-Always Mode only (*40 & *72). Other modes are unaffected.	*73 + [SEND]
*41	Call-Forward <u>Busy</u> Set/Activate	Enter a phone number and activate call forwarding to that number. Forwarding will trigger only when you are on the phone (Busy).	*41 + [forward destination number] + [SEND]
*90	Call-Forward <u>Busy</u> Activate	Activate call-forwarding to a previously set number (*41). Forwarding will trigger only when you are on the phone (Busy).	*90 + [SEND]

*91	Call-Forward- <u>Busy</u> Deactivate	Deactivate Forward-Busy Mode only (*41 & *90). Other modes are unaffected.	*91 + [SEND]
*42	Call-Forward <u>No-Answer</u> Set/Activate	Enter a phone number and activate call forwarding to that number. Forwarding will trigger only when you do not answer incoming call (No Answer).	*42 + [forward destination number] + [SEND]
*92	Call-Forward <u>No-Answer</u> Activate	Activate call-forwarding to a previously set number (*42). Forwarding will trigger only when you do not answer incoming call (No Answer).	*92 + [SEND]
*93	Call-Forward <u>No-Answer</u> Deactivate	Deactivate Forward-No-Answer Mode only (*42 & *92). Other modes are unaffected.	*93 + [SEND]

Call Recording

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

Feature Codes for VIP Call Center Agents

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

All Feature Codes in Numerical Order

Code	Name	Description	Usage
088	Call Monitoring	Allows a manager to listen to and barge into calls	088+Extension + [SEND]
*10+Ext	Send To voicemail	Send active call to designated extensions voicemail	*10 +Extension + [SEND]
*40	Activate-Forward	Activate call forwarding	*40 + [SEND]
*41+Ext	Set-Forward-Busy	Enter a phone number and activate call forwarding to that number. Forwarding	*41 + [forward destination number] + [SEND]

		will trigger only when you are on the phone (Busy).	
*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	*90 + [SEND]

		trigger only when you are on the phone (Busy).	
*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]

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:

Voicemail Header	Voicemail Message
------------------	-------------------

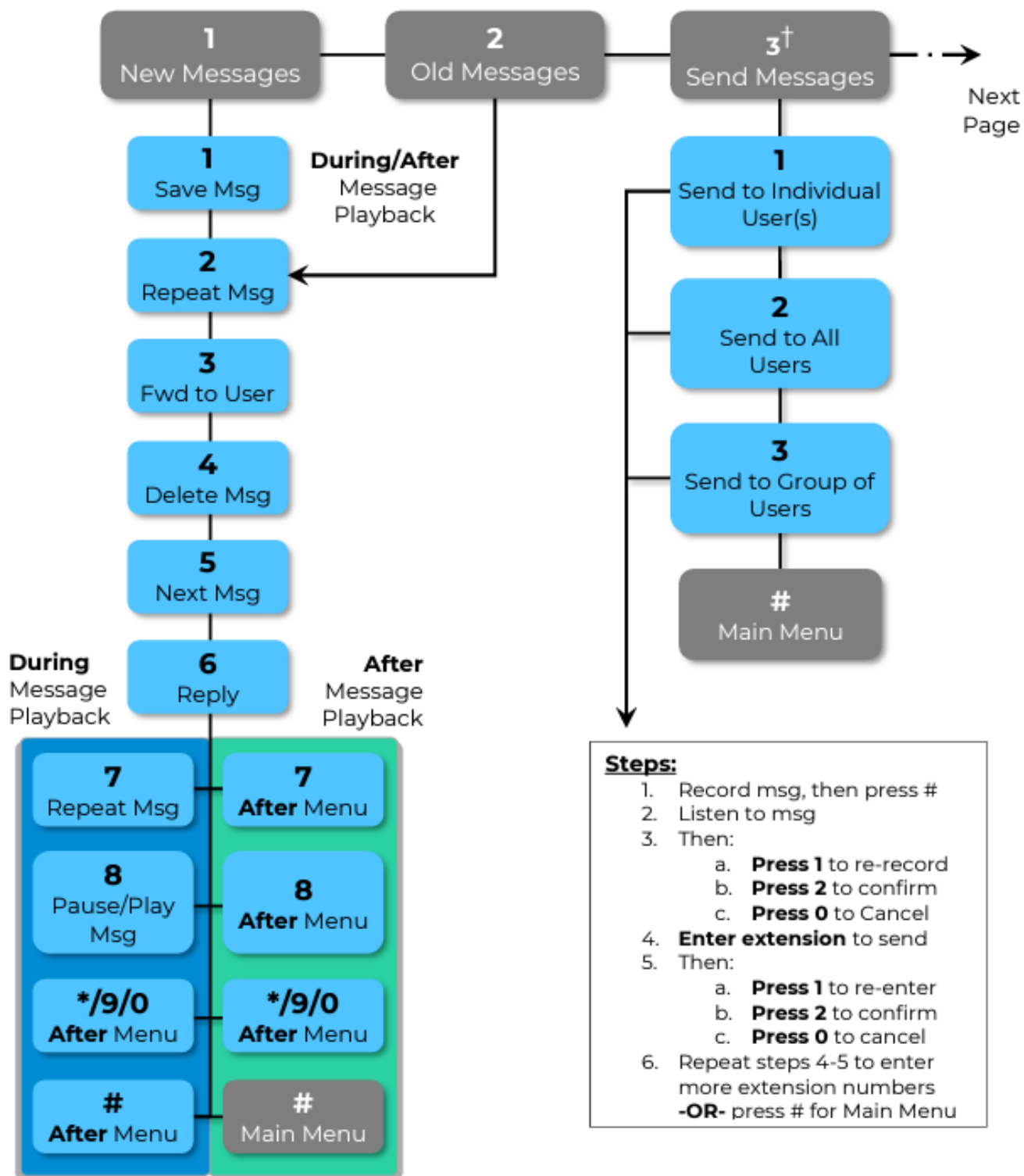
The Voicemail Header Includes: **Message received on [day or date] at [Time] am/pm.**

Tips:

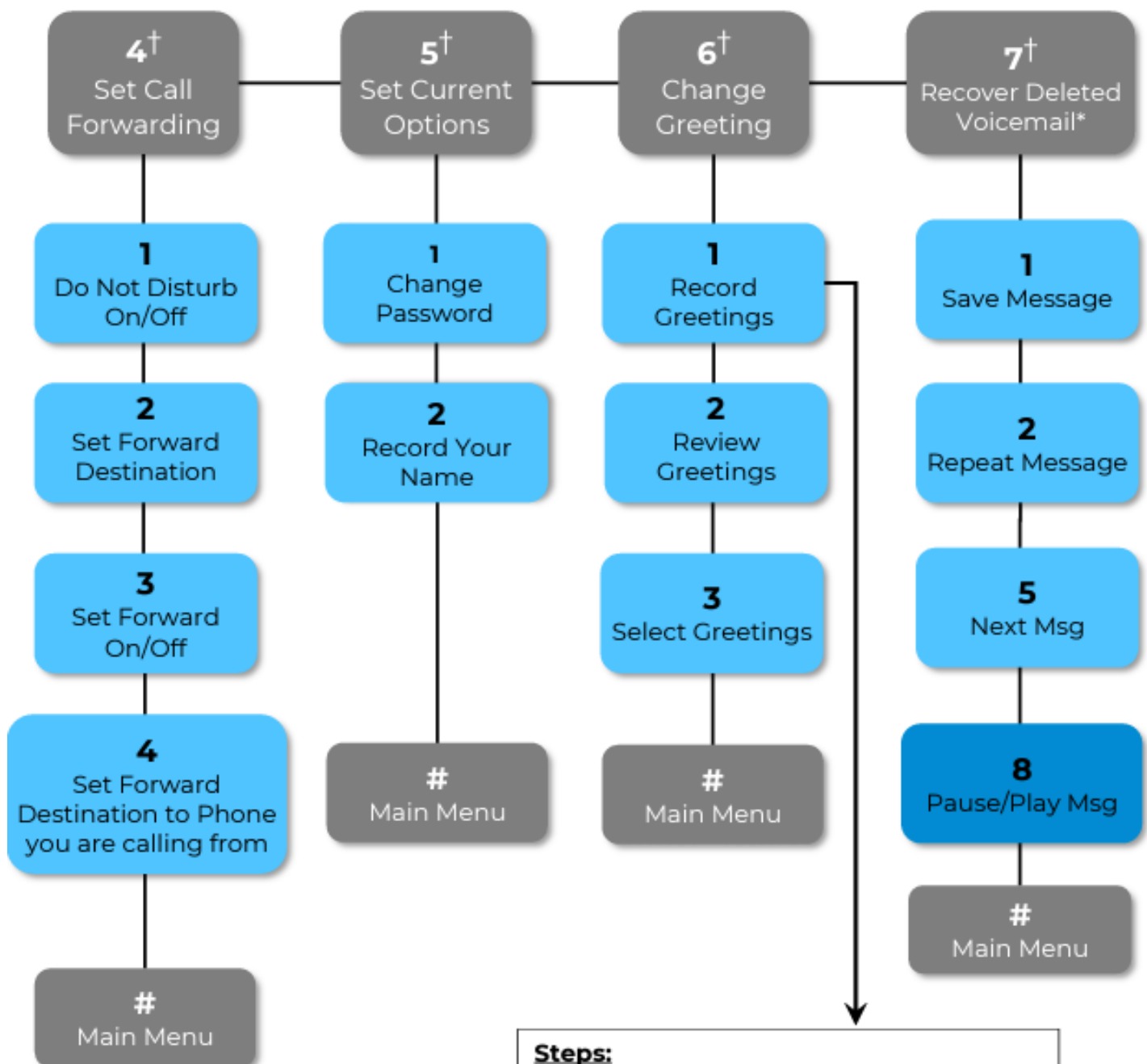
- To skip the header and go directly to the voicemail message, **press any key**.
- While listening to any voicemail message, the Playback Menu is in effect which is shown on the next page. Some options in that menu will cause the system to jump to the end of the message and play the “**After Menu**”.

To manage your voicemail settings:

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



†=Press any key not shown for help

**Steps:**

1. Choose greeting to record (1-9)
2. Record greeting, then press #
3. Then:
 - a. **Press 1** to set this greeting
 - b. **Press 0** to keep previous greeting

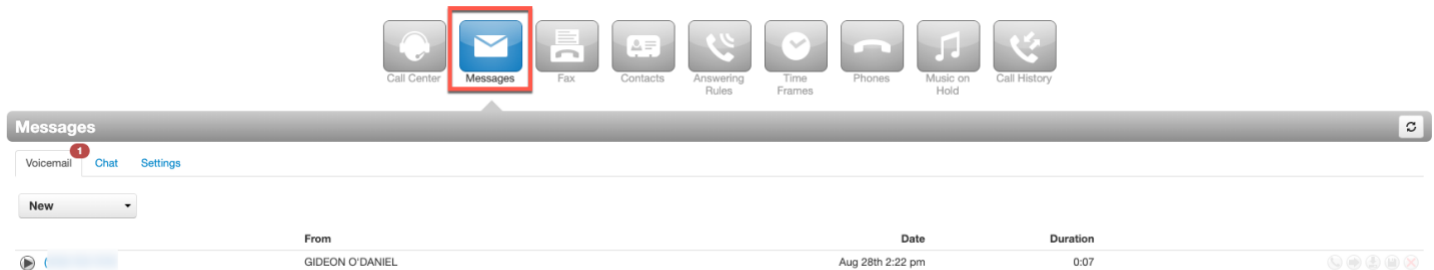
†=Press any key not shown for help

* = Recovered voicemails are saved in OLD MESSAGES

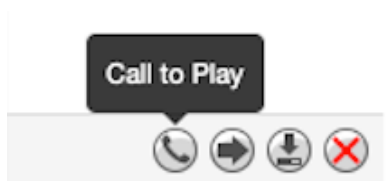
How to Check and Manage Your Voicemail Settings – Portal

To check your voicemail:

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

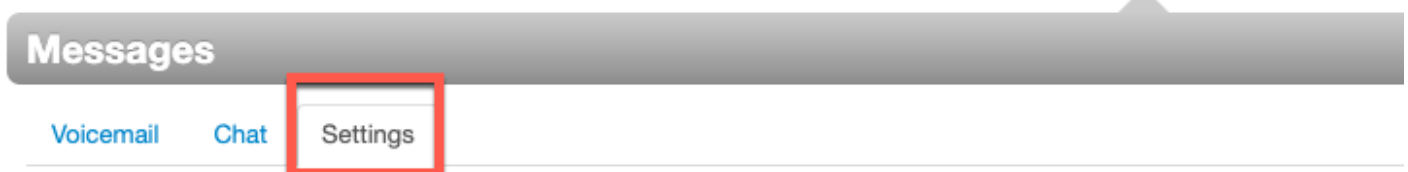


3. Your new voicemails will be displayed and can be played through your computer's speakers or headset. Select the **drop-down arrow** to access any saved messages.
4. To the right of each message, you have the options to **play your message on your primary phone, forward the voicemail to another user's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



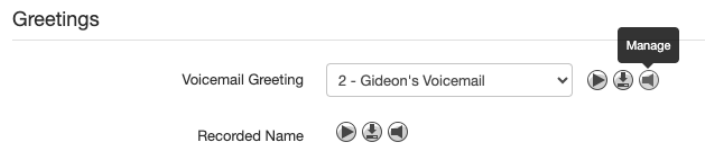
To manage your voicemail settings:

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



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

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



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

Manage Greetings

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

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

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

Notifications

Email Notifications ☒ Receive an email for new voicemail

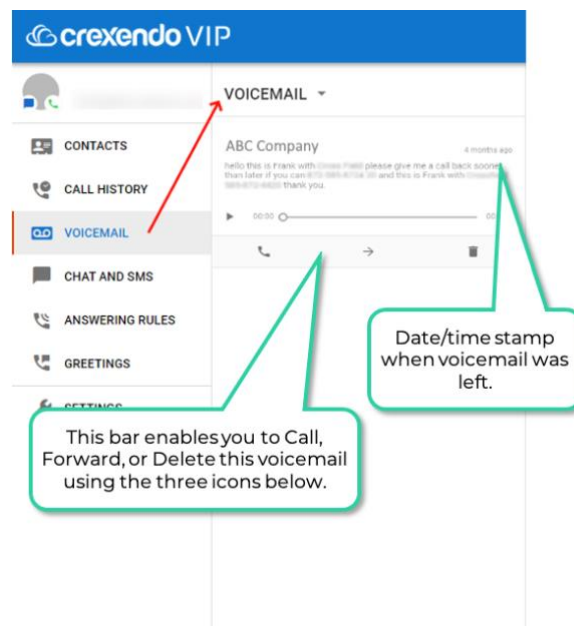
Email Type Send with attachment

After Email Notification Move to trash

Save Cancel

How to Check Your Voicemail – Web Phone

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



How to Check Your Voicemail – Mobile Application

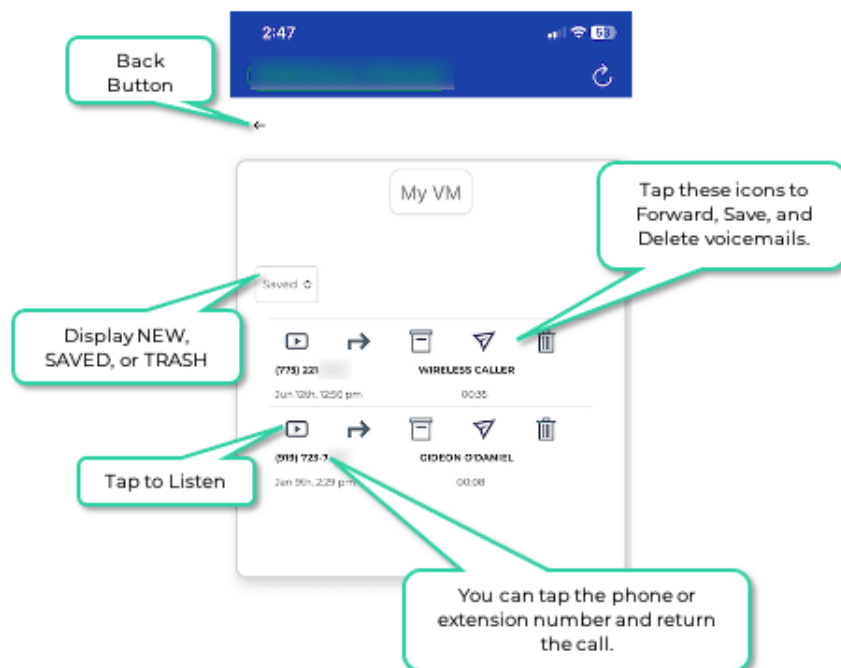
1. If you have missed a call or received a new voicemail, you will receive a notification on your phone and the app icon will notify you.



2. There are two ways to check your voicemail from your mobile application:
- 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.



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



Introduction

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**.

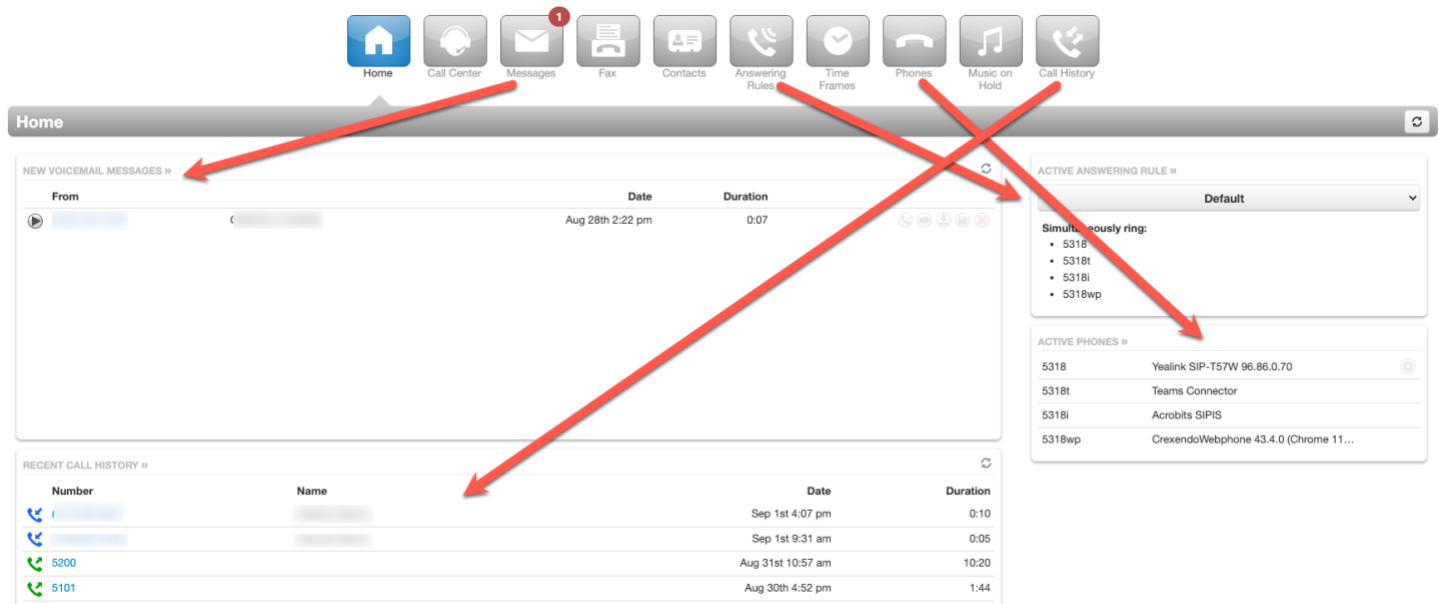
For a video demonstration, go to:

https://www.youtube.com/watch?v=Iprw3iYzzHQ&list=PLXADOLtuavV9jC_HL7NiOiBoKA9VZlBxm&index=4



Home

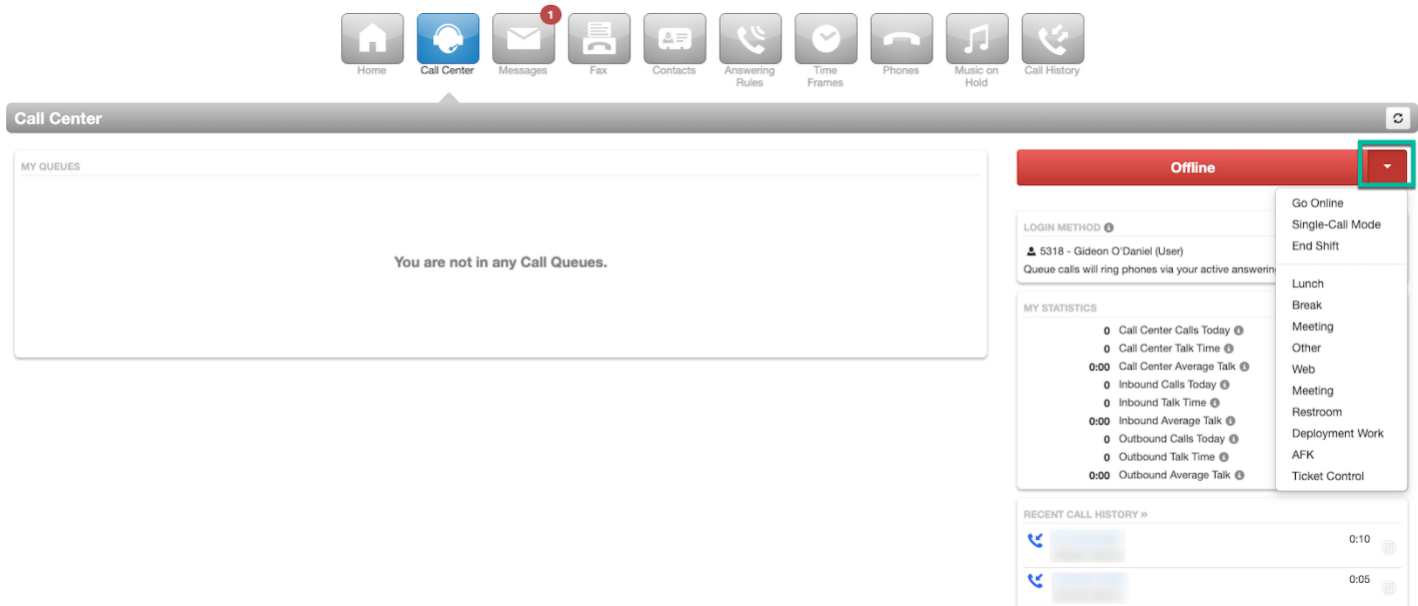
The **Home** screen displays a quick at-a-glance view of the other areas of the portal including **New Voicemail Messages, Active Answering Rule, Active Phones, and Recent Call History**.



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

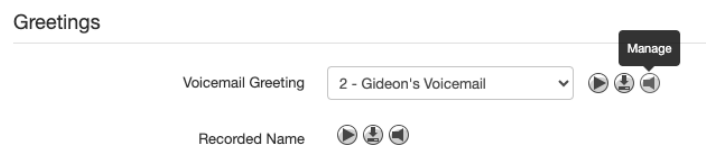
The Message Center is where you can manage voicemails, chat/SMS messages, and voicemail settings which are grouped into three tabs:

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

Manage Greetings

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

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

Notifications

Email Notifications ☒ Receive an email for new voicemail

Email Type

After Email Notification

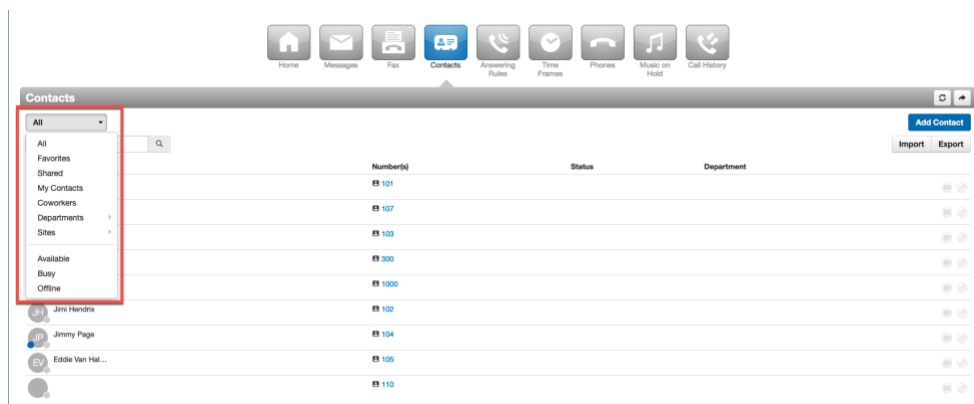
Fax

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

Contacts

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

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



Internal contacts are marked with colored dots:



Green: They are available for a call



Red: They are not available for a call



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

To add a new contact:

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

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

Add Contact ✕

First Name

Last Name

Work number

Mobile number

Home number

Fax number

Email

Time Frames

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

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

To Create a new Answering Rule:

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 scheduler will open to set that schedule accordingly.

Add a Timeframe ✕

Name Note: Name cannot be changed

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

☐ Sunday ☐ Monday ☒ Tuesday ☐ Wednesday

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

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

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

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

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

Add a Timeframe

Name Note: Name cannot be changed

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

Specific dates or ranges

to  

to  

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

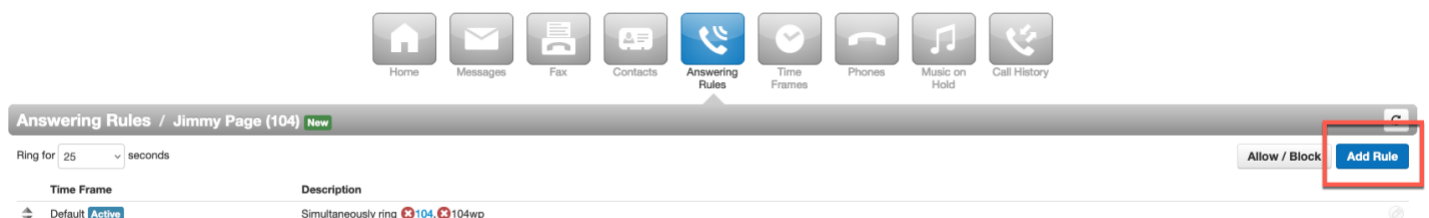
Answering Rules

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.



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

Answering Rules / Jimmy Page (104) **New**

Ring for 25 seconds

Time Frame	Description
Default Active	Simultaneously ring 104, 104wp

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

Add an Answering Rule

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

This is when your answering rule will apply

☐ Call screening

Call Forwarding

☐ Always

☐ On Active

☐ When busy

☐ When unanswered

☐ When offline

☐ Simultaneous ring

☒ Include user's extension

☐ Ring all user's phones

☐ Answer confirmation for offnet numbers

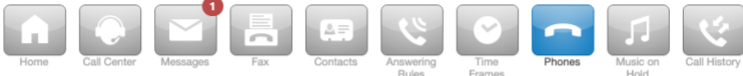
00 

☒ Just ring user's extension

- 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.
- Select **"Save"** to complete your answering rule.

Phones

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



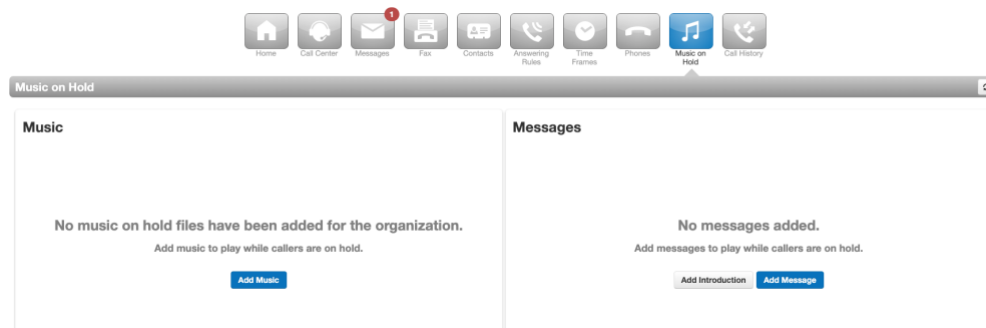
Name	Device Type	IP Address	MAC Address	Line
5318i	Acrobats SIPIS		-	-
5318	Yealink SIP-T57W 96.86.0.70			3
5318t	Teams Connector		-	-
5318wp	CrexendoWebphone 43.4.0 (Chrome 116.0.0.0)		-	-

SNAPmobile

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.

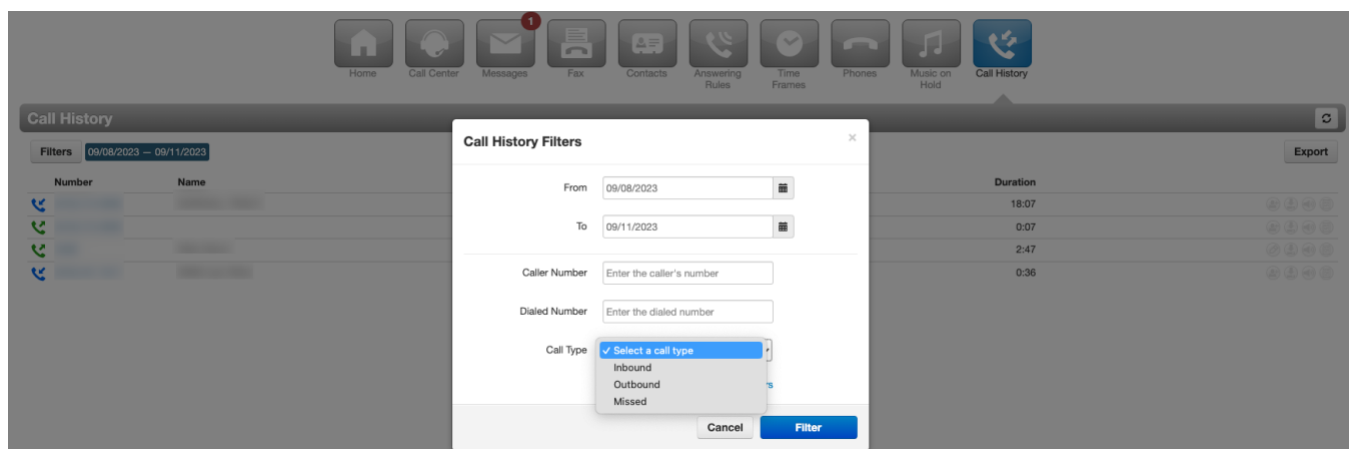


Call History

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.

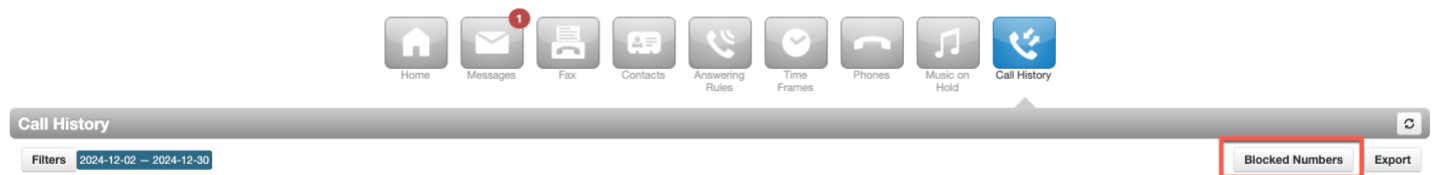
To block SPAM or Robo Calls:

For a video demonstration, go to:

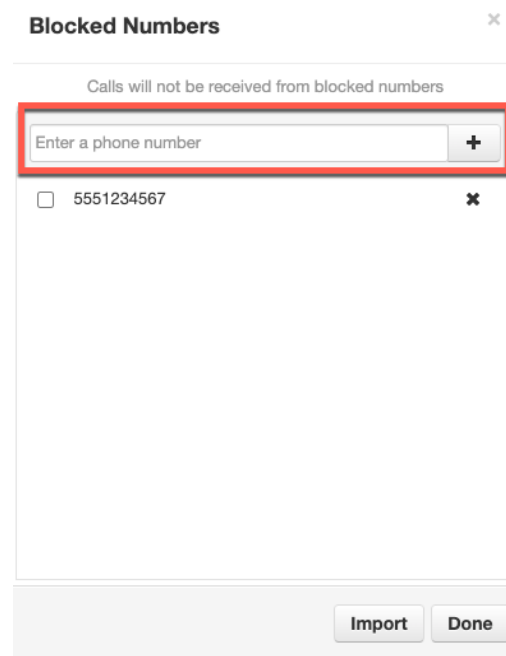
https://www.youtube.com/watch?v=LKZBrCKiHVV&list=PLXADoltuavV9jC_HL7NiOiBoKA9VZIBxm&index=18&t=2s

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

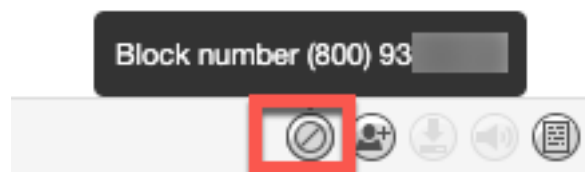
1. Select the “**Blocked Numbers**” button.



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



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



Introduction

This guide 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

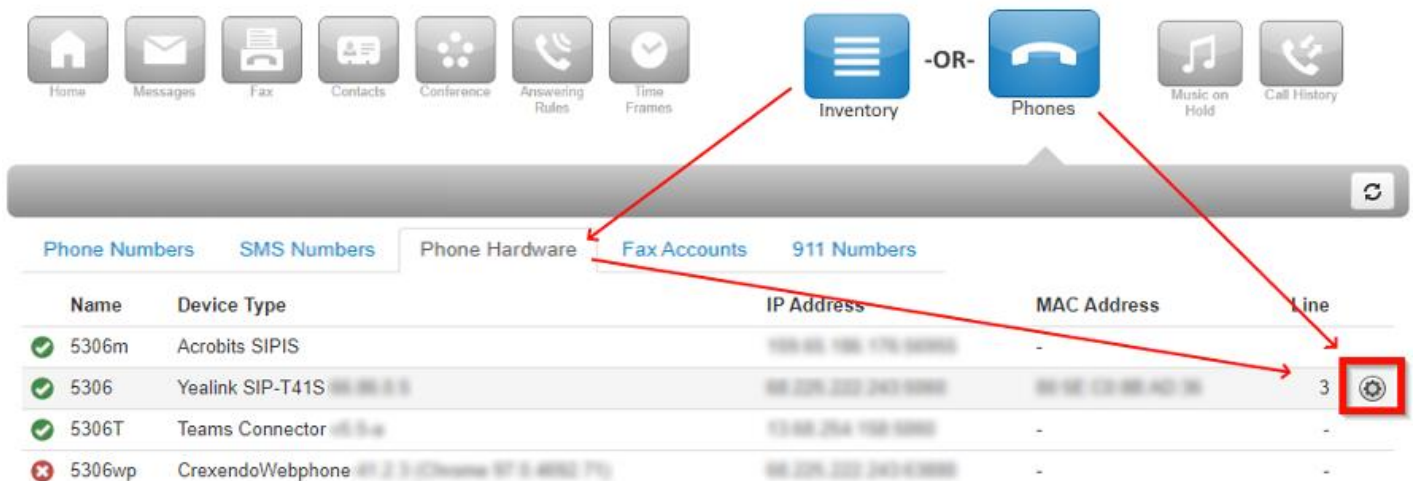
NOTE: *SNAPbuilder is only used for feature buttons (not Soft Keys). Feature/line buttons are located on the left and right side of your desk phone display screen.*

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.

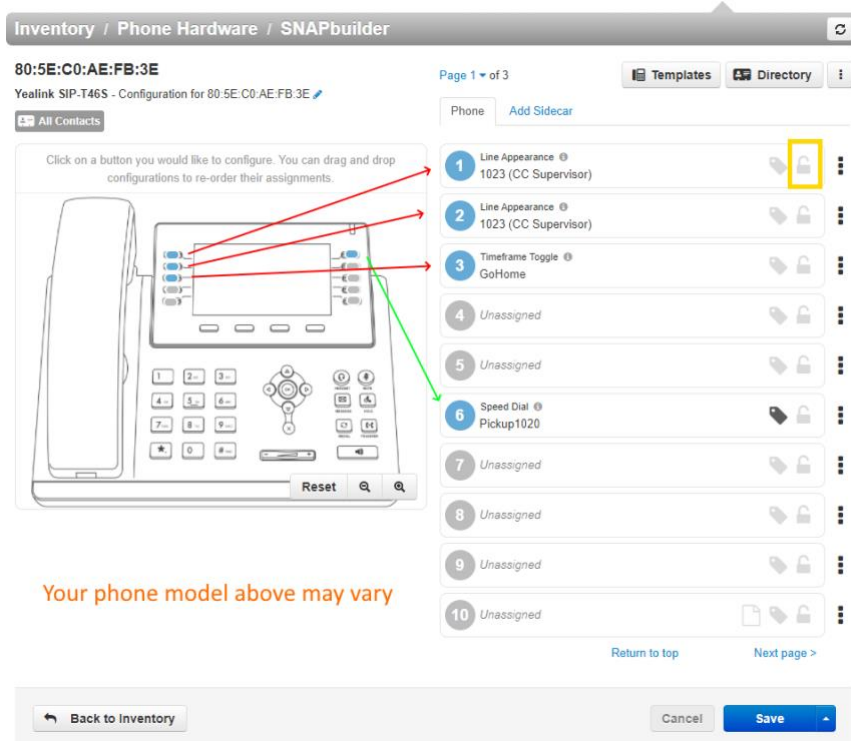
If you have user permissions in the portal, SNAPbuilder is in the “**Phones**” center. Then find the desk phone entry you are looking for. Click the “**gear**” icon on the right side of the phone entry to launch the SNAPbuilder by selecting “**Yes**” to configure button configuration.



Name	Device Type	IP Address	MAC Address	Line
✓ 5306m	Acrobats SIPIS	100.100.100.170 (100.100.100.170)	-	3
✓ 5306	Yealink SIP-T41S	100.100.100.170 (100.100.100.170)	00-1E-1C-00-4D-3E	3
✓ 5306T	Teams Connector	10.100.100.170 (100.100.100.170)	-	-
✗ 5306wp	CrexendoWebphone	100.100.100.170 (100.100.100.170)	-	-

Inside SNAPbuilder

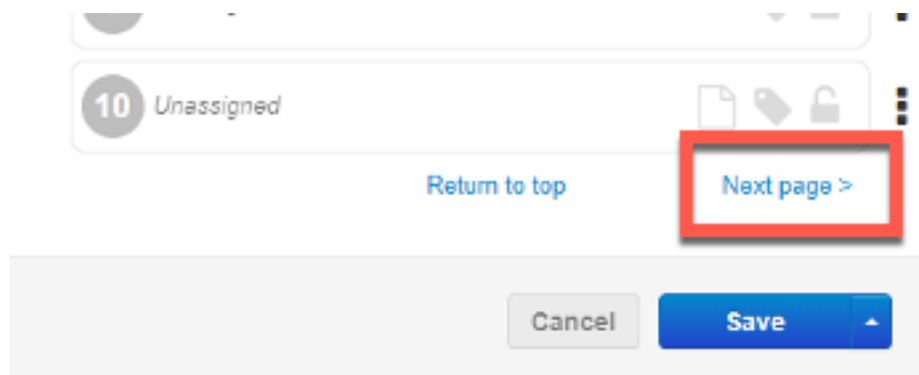
After launching SNAPbuilder, you will see a screen like what is shown below with a diagram of your desk phone on the left and a list of buttons on the right (blue and gray numbered circles).



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



Editing Your Phone

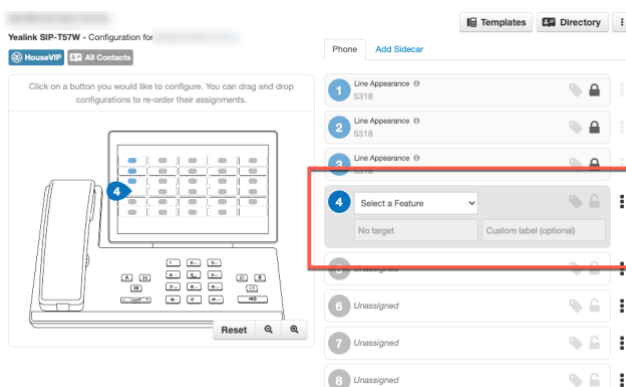
You can either add a new button or change an existing button on any page.

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:

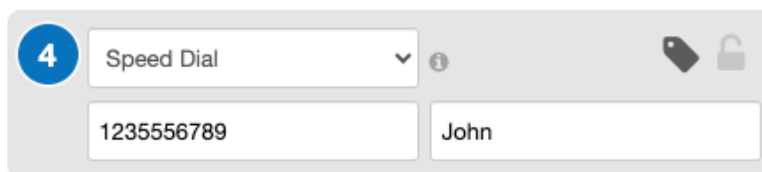
Navigate to the desired page and click on any unlocked button entry. It will expand and allow you to modify it as shown below.



- **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.

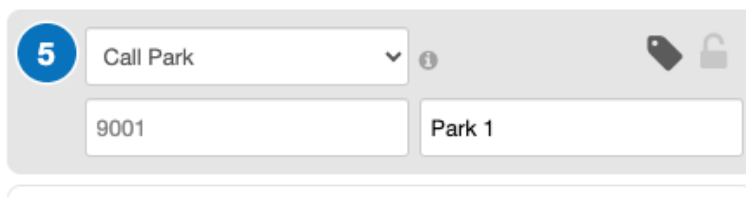
Example #1

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

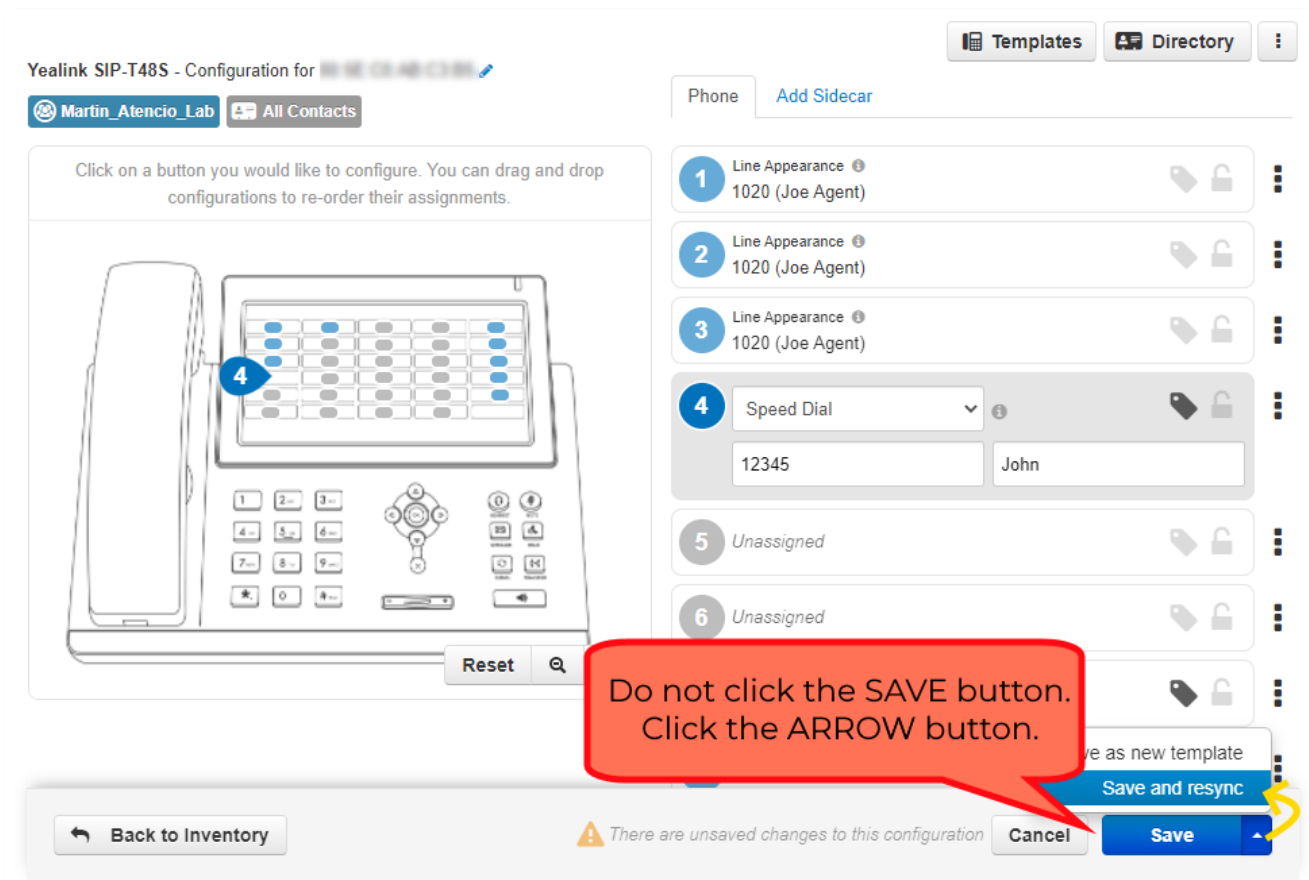
Set button #5 to the **Call Park** feature. The target will be a call park extension number that your organization has already set up. The custom label can say: “**Park 1.**” Now you can park and unpark calls in and out of that parking spot.



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.



The screenshot displays the configuration page for a Yealink SIP-T48S phone. The page includes a top navigation bar with 'Templates' and 'Directory' tabs. Below this, there are tabs for 'Phone' and 'Add Sidecar'. The main content area shows a list of configurations for the phone, including 'Line Appearance' and 'Speed Dial'. A red callout bubble with the text 'Do not click the SAVE button. Click the ARROW button.' points to the 'Save and resync' button in the bottom right corner. The 'Save' button is also visible, and a yellow arrow points to the 'Save and resync' button. A warning message at the bottom states 'There are unsaved changes to this configuration'.

Yalink SIP-T48S - Configuration for  

 Martin_Atencio_Lab  All Contacts

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

1 Line Appearance  1020 (Joe Agent)   

2 Line Appearance  1020 (Joe Agent)   

3 Line Appearance  1020 (Joe Agent)   

4 Speed Dial    
12345 John

5 Unassigned   

6 Unassigned   

Available Features

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

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

Introduction

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

- Make and receive 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 login and operate the VIP Mobile App**.

For a video demonstration, go to:

<https://youtu.be/UnuQ5wfkC3c?si=clqOxDFpe9hESTWj>

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



Logging into your VIP Mobile App

After downloading and installing VIP Mobile from your app store, you will be able to launch the app and sign in by either using your VIP username and password or Single Sign-On.

NOTE: If you're using **VIP Group Messaging**, you must continue logging in with your VIP Portal credentials. This is required to support secure authentication for that service.

VIP Credentials

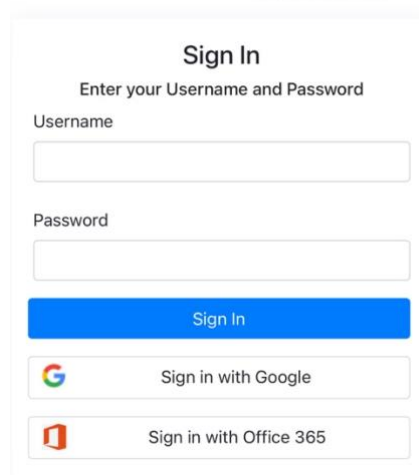
From the login screen, enter your username (extension@domain) and your password.

Single Sign-On

You will need to complete a one-time SSO setup through the VIP Web Portal before signing in via Google or Microsoft.

If you prefer to use your Microsoft or Google credentials to login to the mobile app and VIP Portal, please see the following guides based on which credentials you will be using:

- **Sign in with Google:** <https://support.crexendo.com/hc/en-us/articles/10016887033495-VIP-Single-Sign-On-GSuite-Google>
- **Sign in with Office 365:** <https://support.crexendo.com/hc/en-us/articles/10121000585623-VIP-Single-Sign-On-Office-365>

A screenshot of the VIP Sign In screen. At the top is the crexendo VIP logo. Below it is the heading "Sign In" and the instruction "Enter your Username and Password". There are two input fields: "Username" and "Password". Below the "Password" field is a blue "Sign In" button. At the bottom, there are two buttons for single sign-on: "Sign in with Google" (with the Google logo) and "Sign in with Office 365" (with the Office 365 logo).

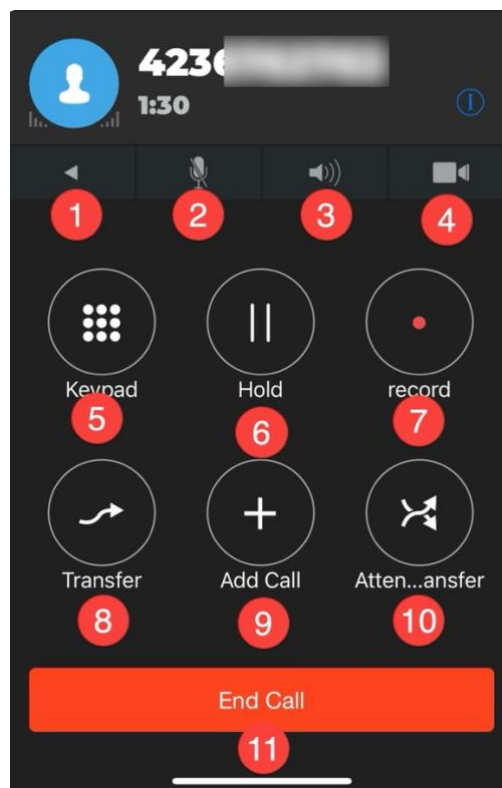
Making a Call

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 and click the desired entry to return the call.
- **Through Voicemail:** If you wish to call someone who has left you a voice mail, click the **"Call button"** (phone icon) that appears on the voicemail entry.
- **Manual Entry:** Click the **"Keypad"** option and enter the number you wish to dial.

Options During a Call

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



1. **Back to Phone:** keeps the call active but, allows you to access the other areas of the mobile app.
2. **Mute:** this option mutes your microphone so the caller cannot hear you. You will still be able to hear the caller speaking.
3. **Speaker:** enables you to use the speaker phone option of the mobile app.
4. **Camera Options:** this option allows you to use your camera function for video calls with other internal users with video capabilities.

5. **Keypad:** reveals a dial pad to make selections. Select “**X**” to go back to the in-call options.
6. **Hold:** places the caller on hold. Select the “**Hold**” button again to resume the call.
7. **Record:** allows you to record all or part of the conversation which is accessed from your phone’s local storage. Any call recordings set by the domain can be accessed by the administrator from the VIP Portal.
8. **Transfer:** this option transfers the call directly to the number or contact you choose. To perform this action:

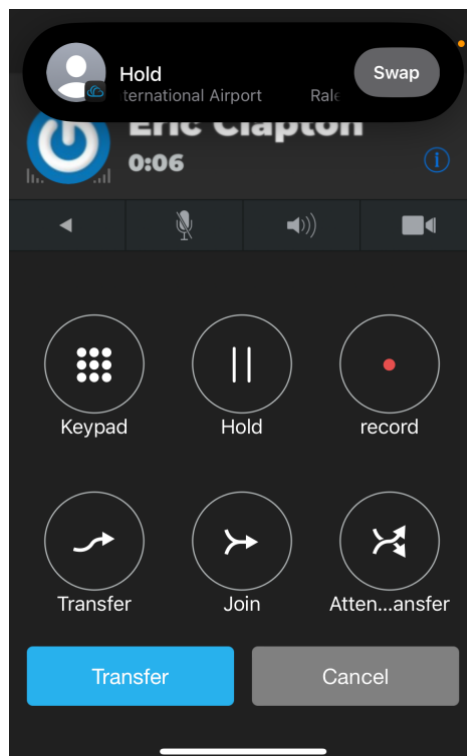
1. Select “**Transfer.**”
2. Dial the number or extension you would like to transfer the call to and press the green call button to complete the transfer.



3. If you would like to transfer the call to one of your contacts, select “**Transfer**” and choose “**Contacts.**” Navigate to the contact you would like to transfer the call to and select the phone icon to complete the transfer.



9. **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 “**Join Calls**” to activate the conference call.
10. **Attended Transfer:** this transfer option allows you to speak with the person you want to transfer the call to before transferring the call.
- Select “**Attended Transfer.**” (This may appear as “**Atten...ansfer.**”) This action will place the caller on hold.
 - Dial the number, extension, or choose “**Contacts**” to dial the number of the person you would like to transfer the call to.
 - Once you speak to the person and they accept the transfer, select “**Transfer**” to connect the caller to the person they would like to speak to.
 - Select “**Cancel**” to return to the original caller.



11. **End Call:** ends the current call.

A Quick Tour



Android

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

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

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

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



iPhone

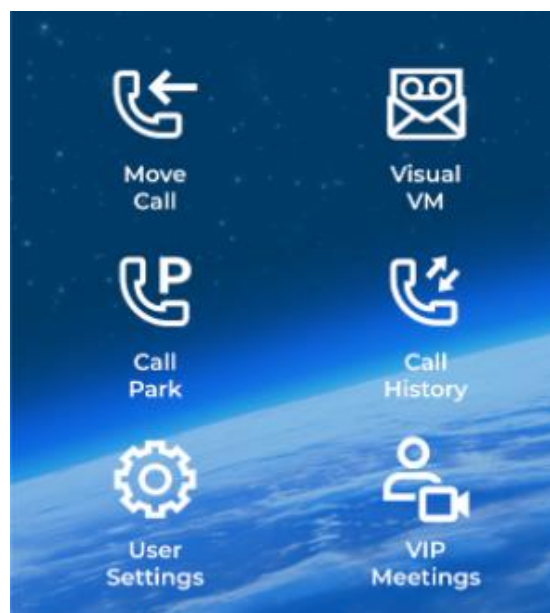
VIP Mobile Navigation Bar



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

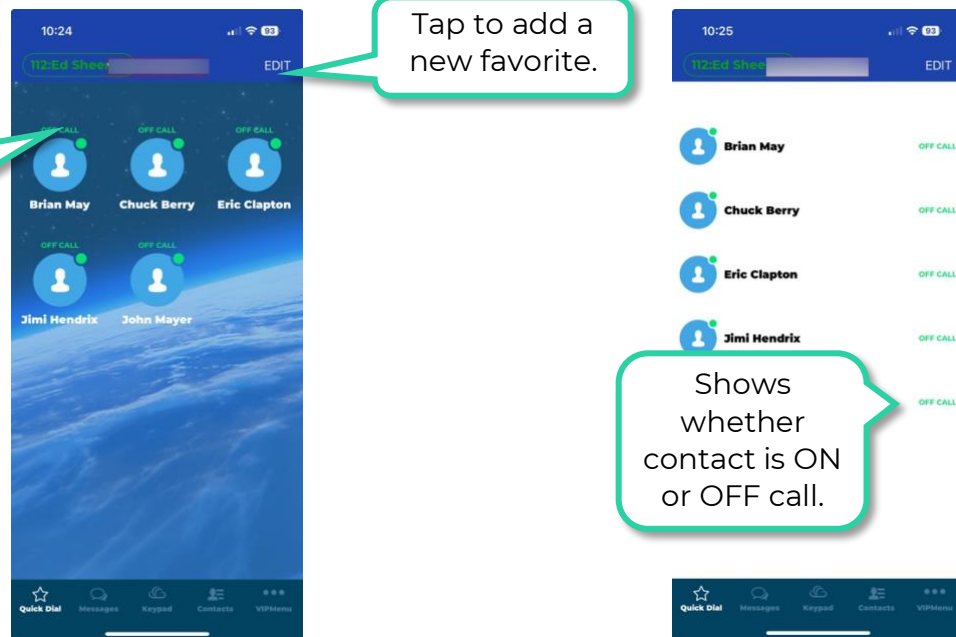
- **Quick Dial:** Indicated by the “**Star**” icon, this is a fully customizable speed dial list.
- **Messages:** Indicated by the “**Chat Bubble**” icon, this is where all text messages and internal conversations are conducted. **This is NOT where voicemails are checked.**
- **Keypad:** Indicated by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

NOTE: You may have other options based on your account.



Quick Dial

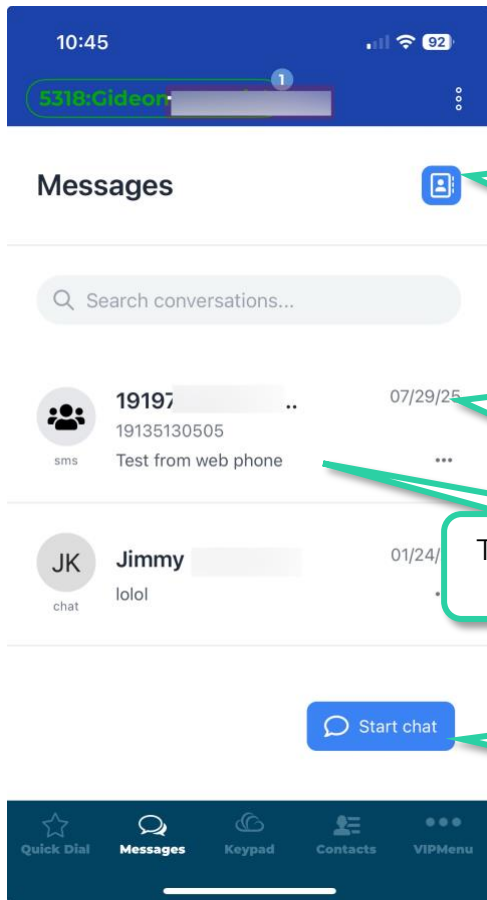
Your favorite contacts can be added from your internal company directory, your cell phone contact list, or be manually entered. You can see if your colleagues are talking on the phone or if they're even online at all. You can search, sort, and filter this list. Pull the screen down and hold to display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



Messages

As stated earlier, the Messages section 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. Other valuable features that can be configured are:

- One-on-one and group SMS/MMS
- Switch between multiple SMS numbers assigned to your account
- Send/receive from shared SMS numbers (set up via MAMT/Support)
- Smart contact identification using your VIP/NS contact list and local address book
- Enhanced "New Message" with secure search of VIP contacts
- Add, edit, or call contacts directly from Messages (VIP User Contacts)
- Send media: Images (png, jpg, gif), audio (mp3), emojis, and doc, docx, xls, xlsx, txt, PDFs
- Messages from shared numbers are fully accessible to all assigned users, though only the number owner can delete them.

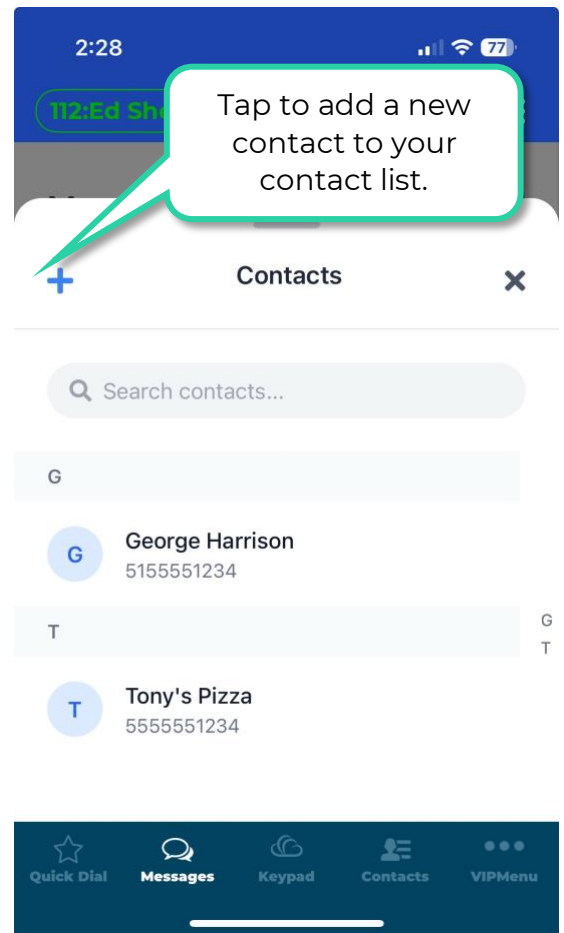


Tap to access your VIP contacts.

Displays date/time of last activity.

Tap once to open the conversation.

Start a new conversation

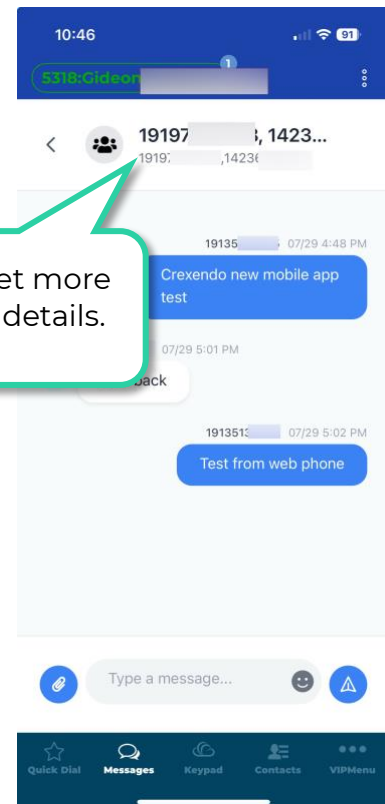


Tap to add a new contact to your contact list.

NOTE: The VIP Mobile App will only show your Crexendo VIP contacts and NOT your personal cell phone's contact list unless you allow it.

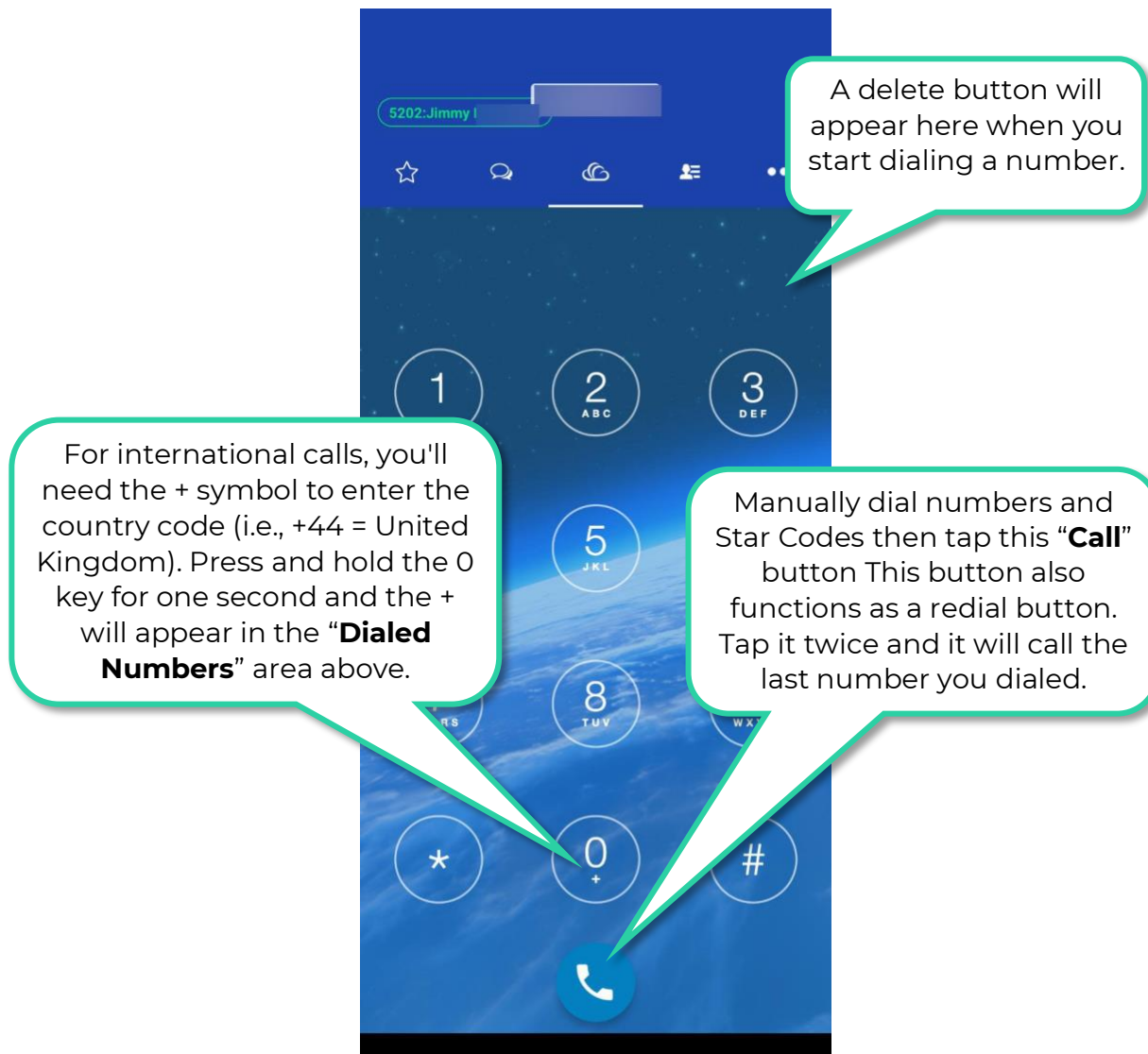
Names displayed in your messages are attempted based on your company contacts and local address book of allowed contacts.

Tap to get more contact details.



Keypad

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



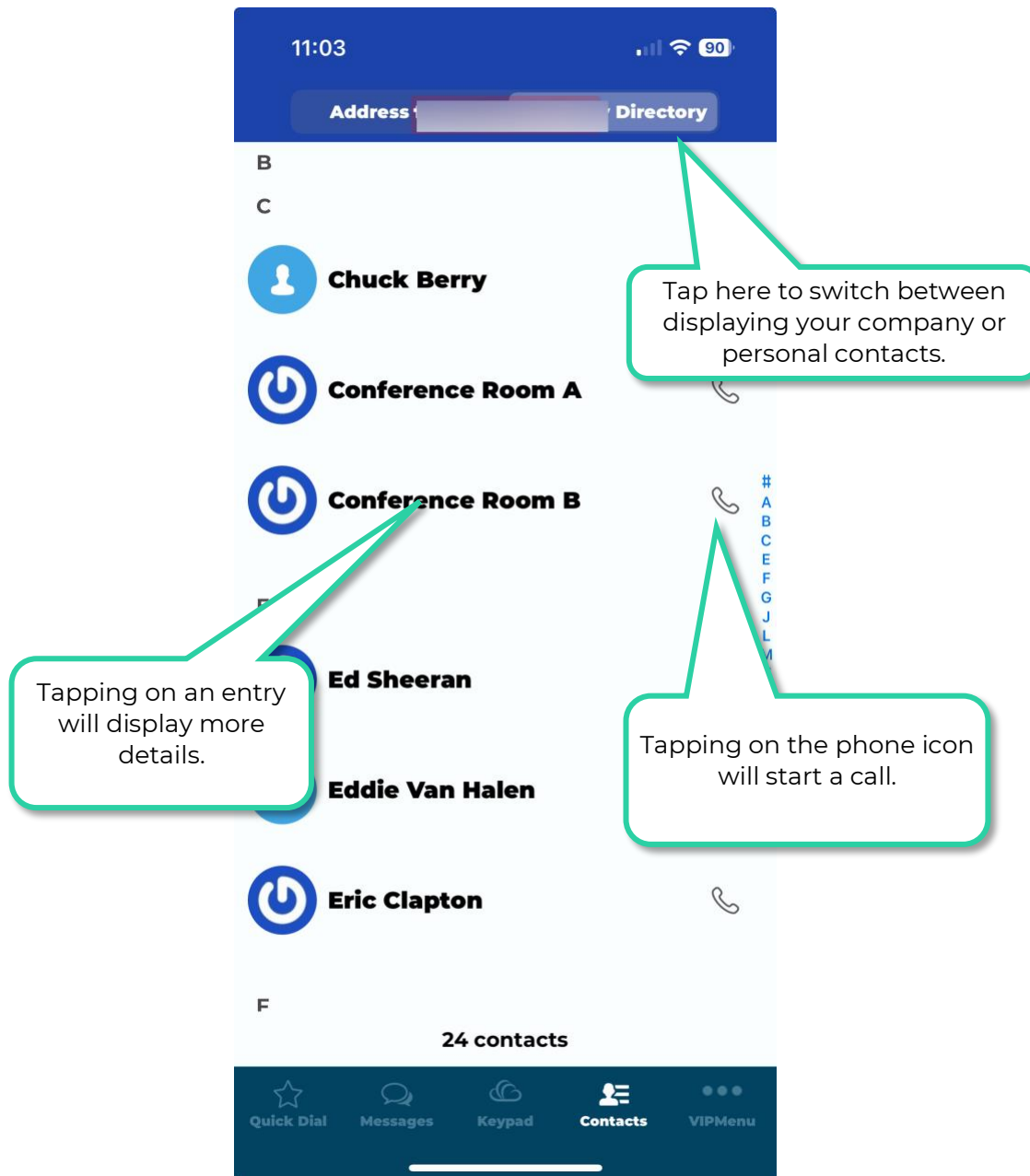
If you have new voicemails waiting, a voicemail button will appear on this screen. Tapping this button will call the Voicemail [audio](#) menu system, or you can access the voicemail through the **\"Visual Voicemail\"** option in the **\"VIP Menu.\"**

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.

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

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.



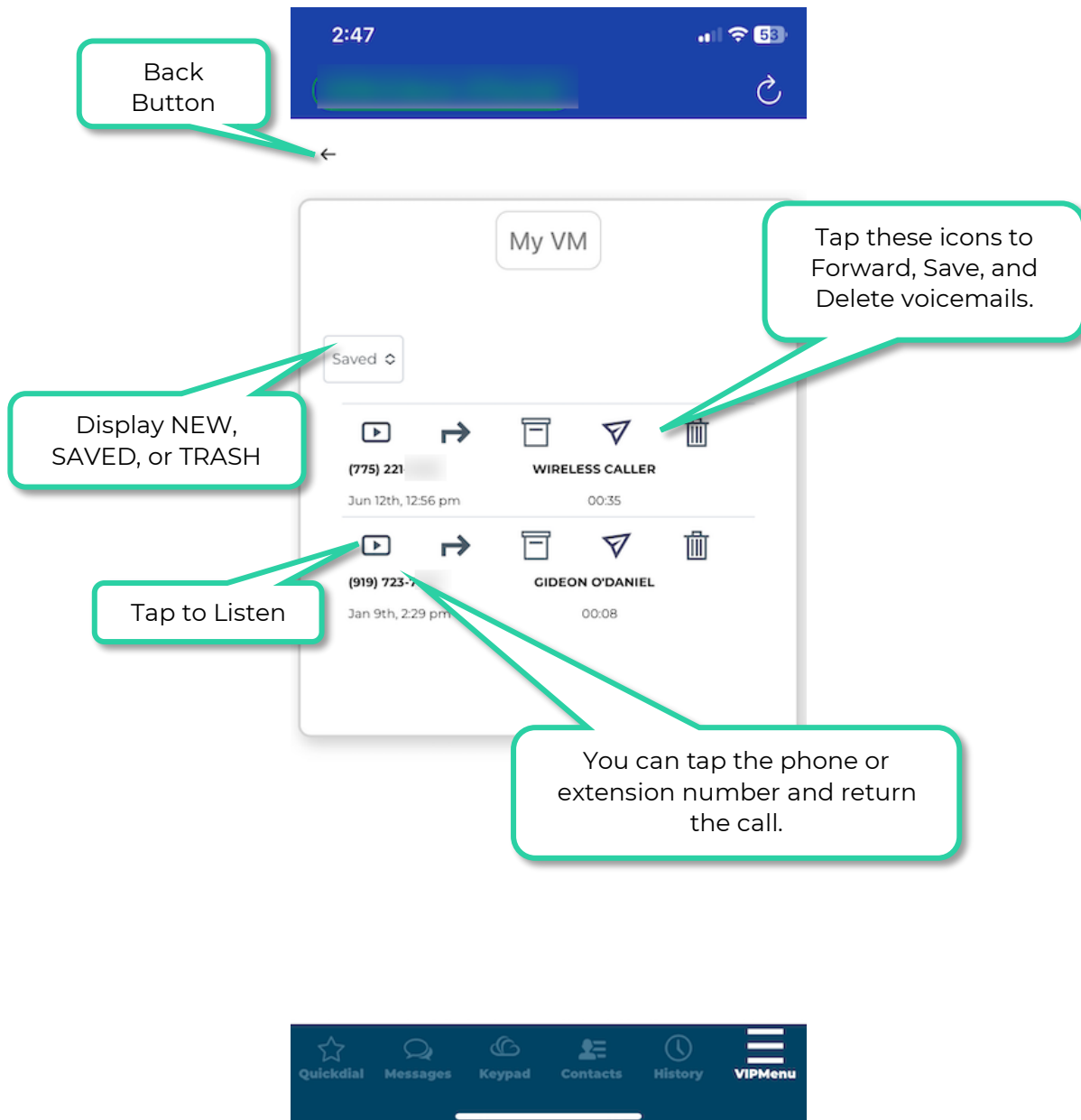
VIPMenu

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.



History

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

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

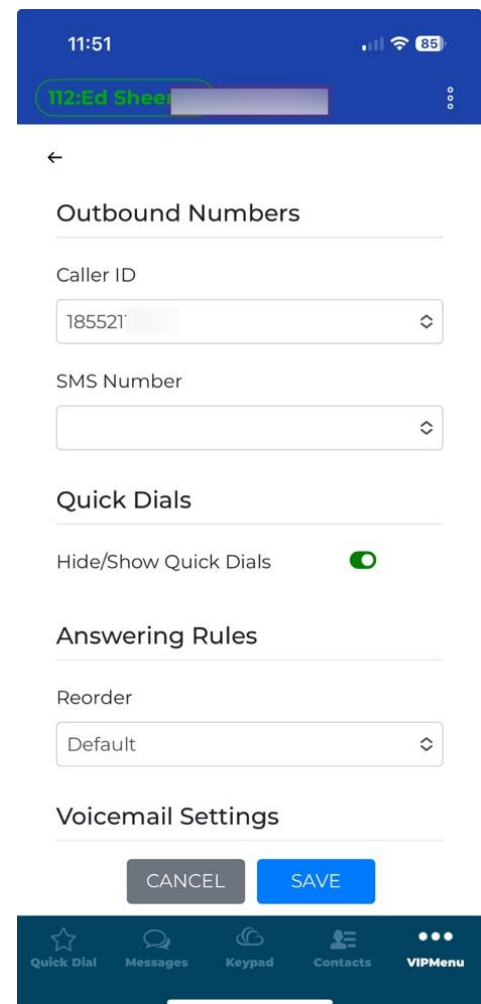
Tap the magnifying glass icon (upper right) to search your call history. To save space, multiple calls to/from the same user are added into one line and can be viewed individually by tapping on the **i** icon to the right.



User Settings

The User Settings section allows you to make the following changes:

- **Outbound Numbers:** if you have access to multiple phone numbers, you can adjust what your caller ID number shows including your SMS number if configured.
- **Enable/Disable Quick Dials:** this will create or disable your favorites list in the Quick Dial section.
- **Answering Rules:** you can change your active answering rules that have been configured in the VIP Portal.
- **Voicemail Settings:** allows you to customize your voicemail settings in the following ways:
 - Sorting Options
 - Record a new voicemail greeting
 - Choose your active voicemail greeting if you have created more than one
 - Voicemail to email settings to receive your voicemail in your default email inbox
 - Enable/Disable Voicemail transcription



The screenshot shows a mobile app interface for user settings. At the top, the status bar displays the time 11:51, signal strength, Wi-Fi, and battery at 85%. Below the status bar, a header bar shows the name '112:Ed Shee...' with a three-dot menu icon on the right. A back arrow is located below the header. The settings are organized into sections: 'Outbound Numbers' with 'Caller ID' (set to 185521) and 'SMS Number' (empty); 'Quick Dials' with a 'Hide/Show Quick Dials' toggle switch turned on; 'Answering Rules' with a 'Reorder' dropdown set to 'Default'; and 'Voicemail Settings'. At the bottom of the settings list are 'CANCEL' and 'SAVE' buttons. A bottom navigation bar contains icons for 'Quick Dial', 'Messages', 'Keypad', 'Contacts', and 'VIPMenu'.

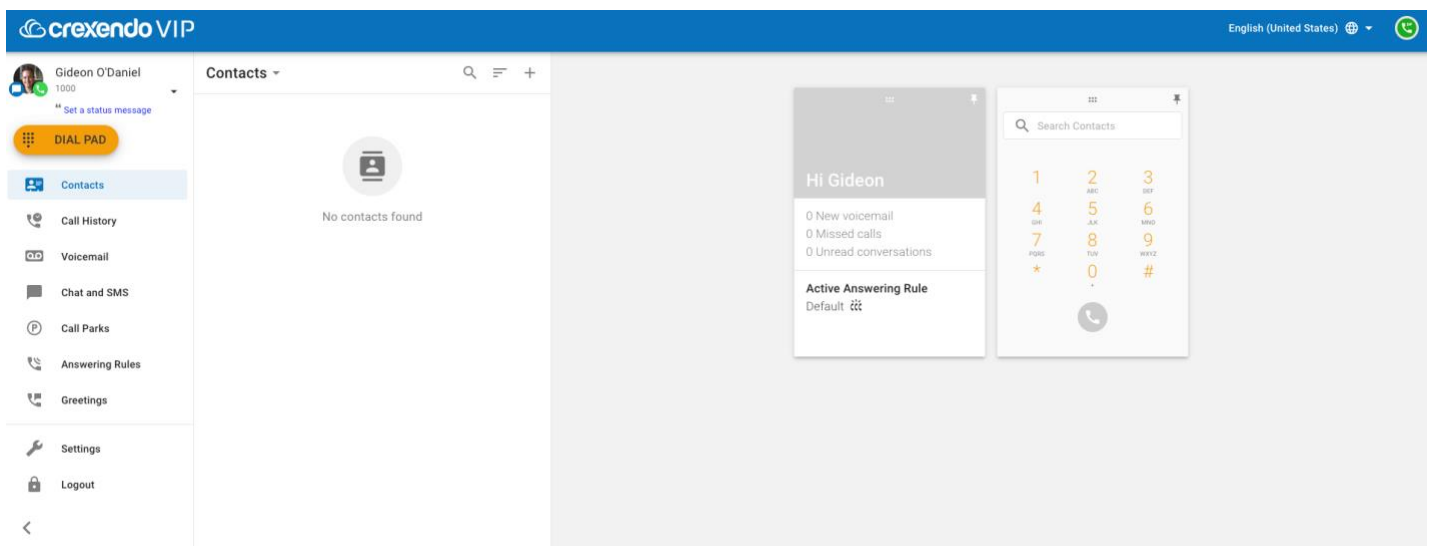
Introduction

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

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

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

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



Accessing the VIP Web Phone

There are three ways to access the VIP Web Phone:

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

1. Web Browser

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



Login Name *

Password *

LOG IN

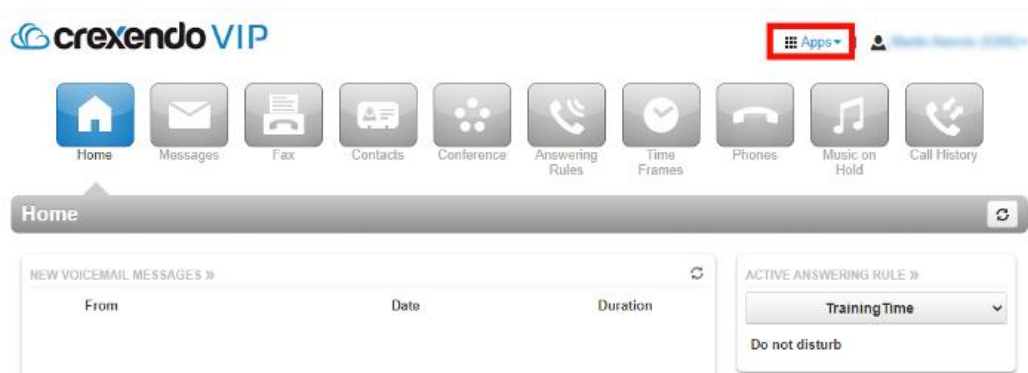
[Forgot login name](#) | [Forgot password](#)

OR

 LOG IN WITH OFFICE 365

2. VIP Portal

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

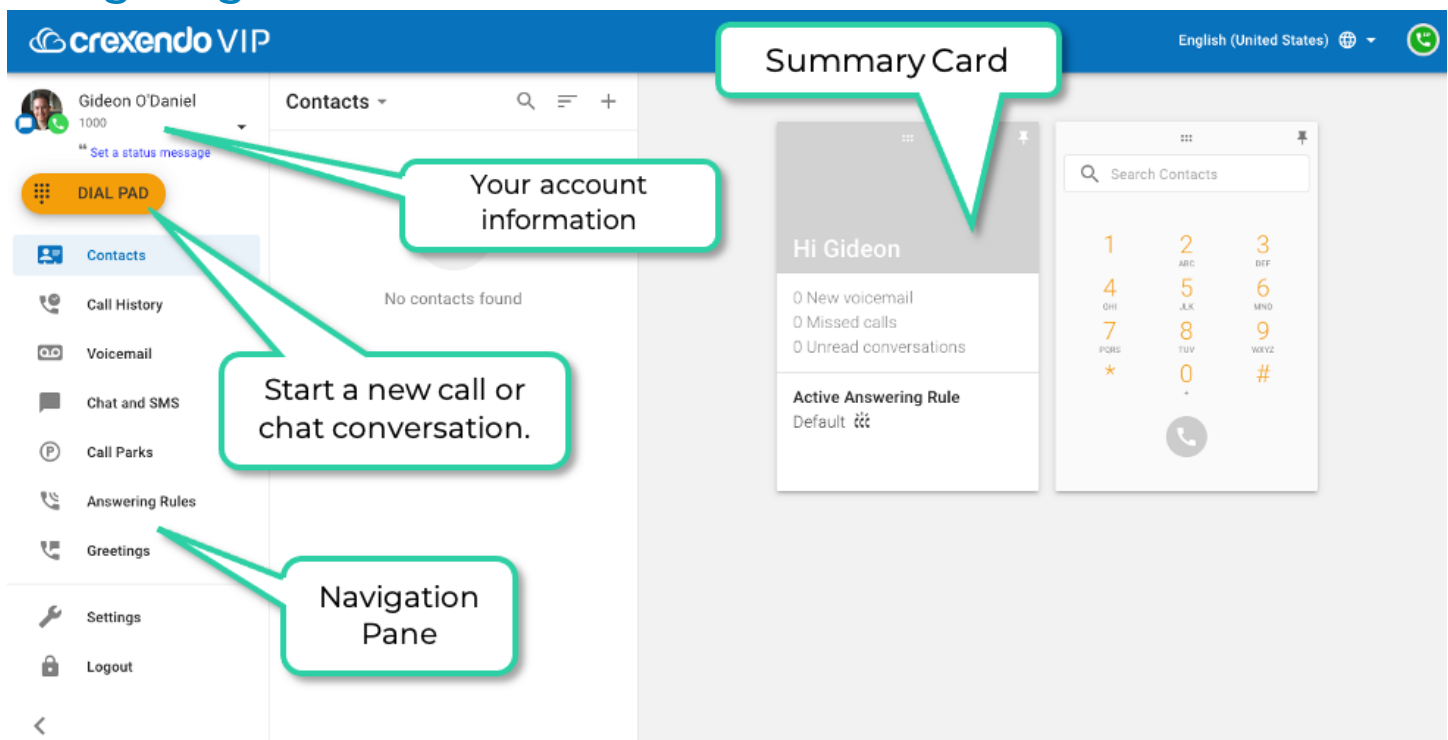


3. Progressive Web App (PWA)

- **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



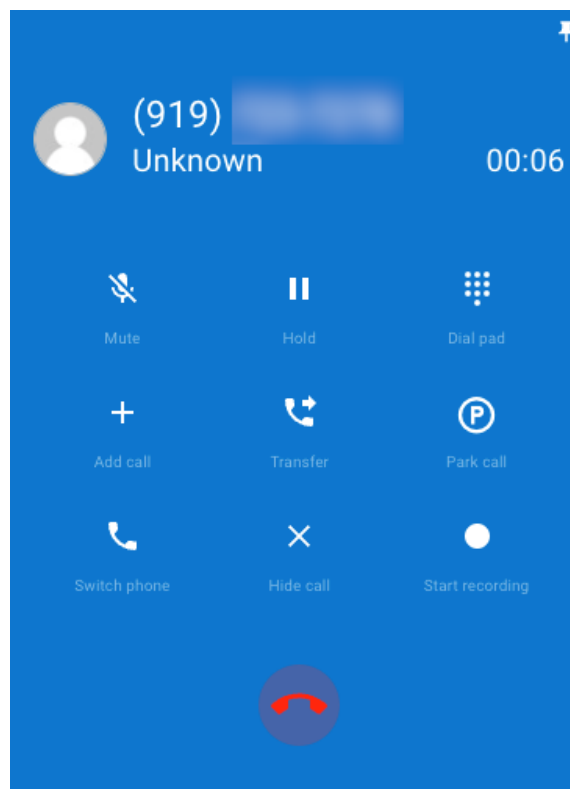
Making a Call

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.

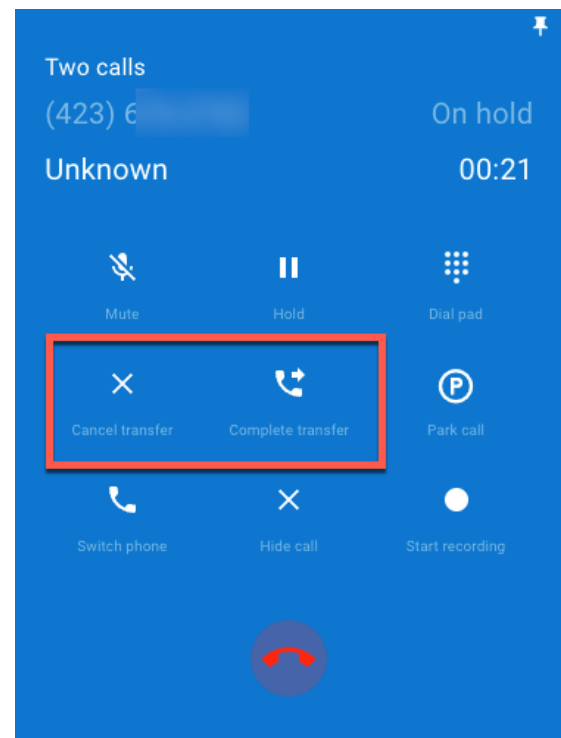
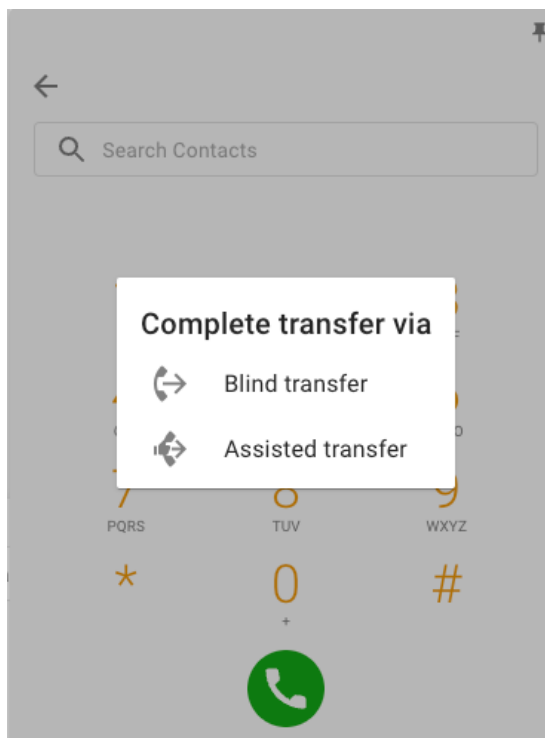
Options During a Call

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

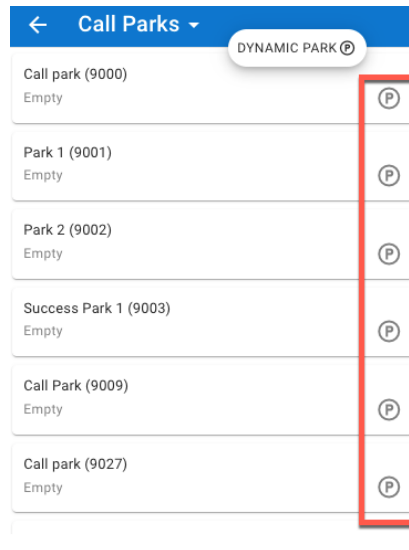


- **Mute:** mutes your microphone so that the caller will not hear you, but you will still be able to hear the caller.
- **Hold:** places the caller on hold. Select the **“Hold”** button again to resume the call.
- **Dial pad:** reveals a dial pad to make selections. Select **“Back”** to go back to the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

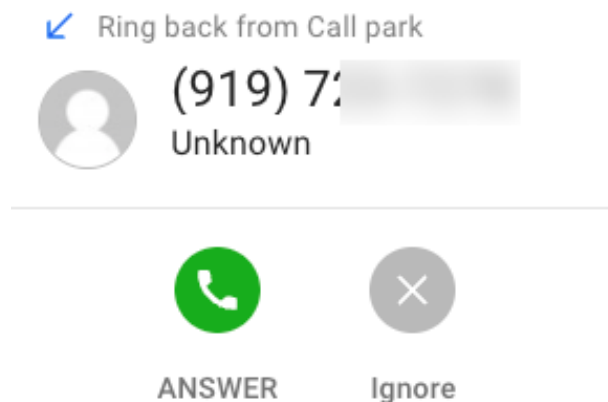
- **Add Call:** allows you to bring in another caller for a conference or three way call.
 - Select “**Add call**” which will place the first caller on hold.
 - Choose the number to add to the call from your contacts or dial a new number.
 - Once you have the second caller on the phone, select “**Merge 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 “**Answer**” to retrieve the call or ignore to send it to voicemail.

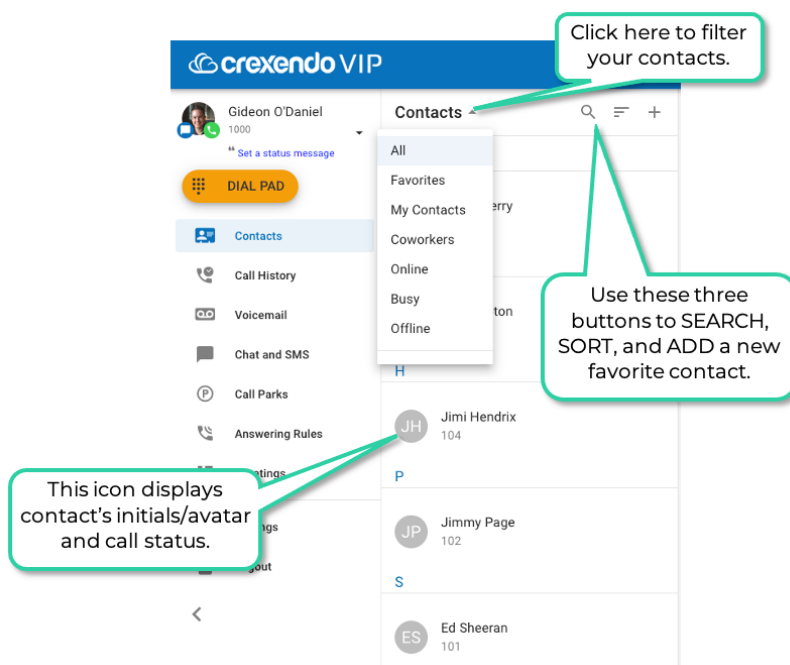


- **Switch Phone:** gives you the option to send this call to one of your other Crexendo phones such as a desk phone or VIP Mobile App.
- **Hide call:** pins the active call to your available workspace to allow you to multi-task.
- **Start recording:** records the active call which will be available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

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

Contacts

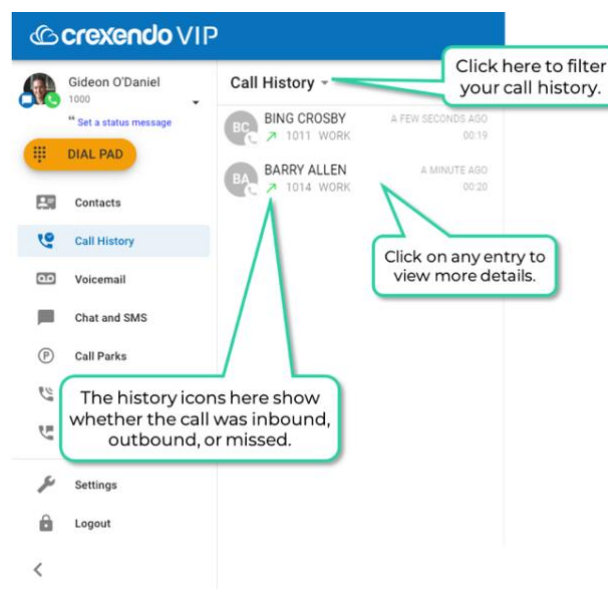
This displays a customizable list of contacts within your organization. You can search, sort, and filter this list. In addition to what is shown below, you can click on any contact entry to display its details and initiate any kind of phone call.



Call History

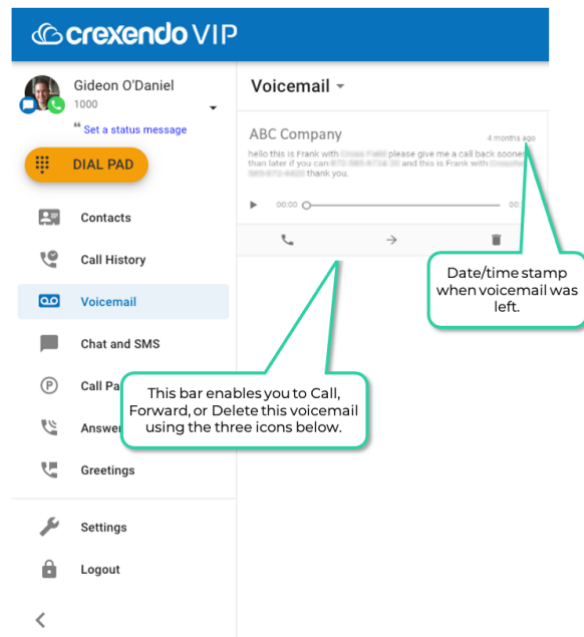
This displays a list of your call activity. In addition to what is shown below, you can click on any entry to display all related history, initiate contact, and add this person as an entry in your “**Contacts**.” Each call entry is shown with history icons:

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



Voicemail

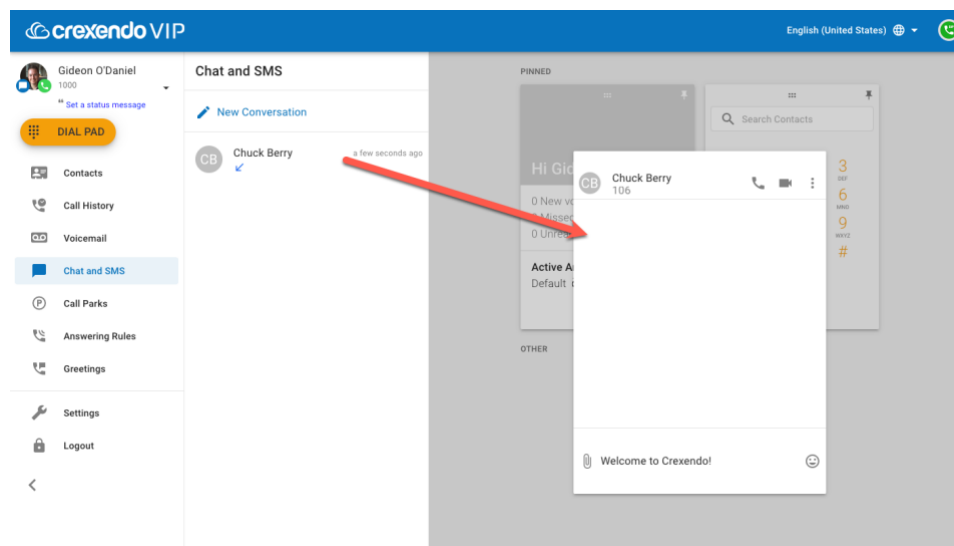
This displays a list of your voicemails. It displays both new and saved voicemails to which you can listen by clicking the Play button. The image below shows voicemail that has been transcribed using our premium transcription feature.



Chat and SMS

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

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

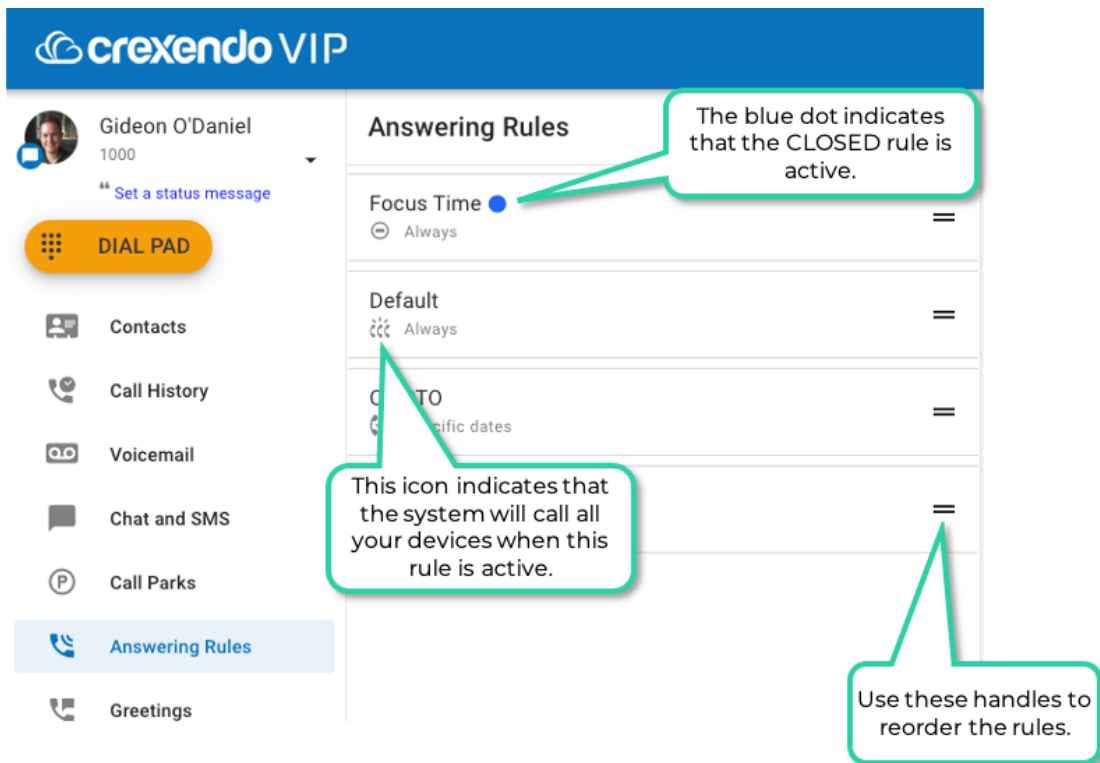


As shown above, for each conversation you have, by default, a conversation card is placed on the grid. You can close any of these cards and delete them. Deleting a card from the grid does not delete the conversation itself.

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

Answering Rules

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



crexendo VIP

Gideon O'Daniel
1000
Set a status message

DIAL PAD

Contacts

Call History

Voicemail

Chat and SMS

Call Parks

Answering Rules

Greetings

Answering Rules

Focus Time ● Always

Default Always

C TO
Specific dates

This icon indicates that the system will call all your devices when this rule is active.

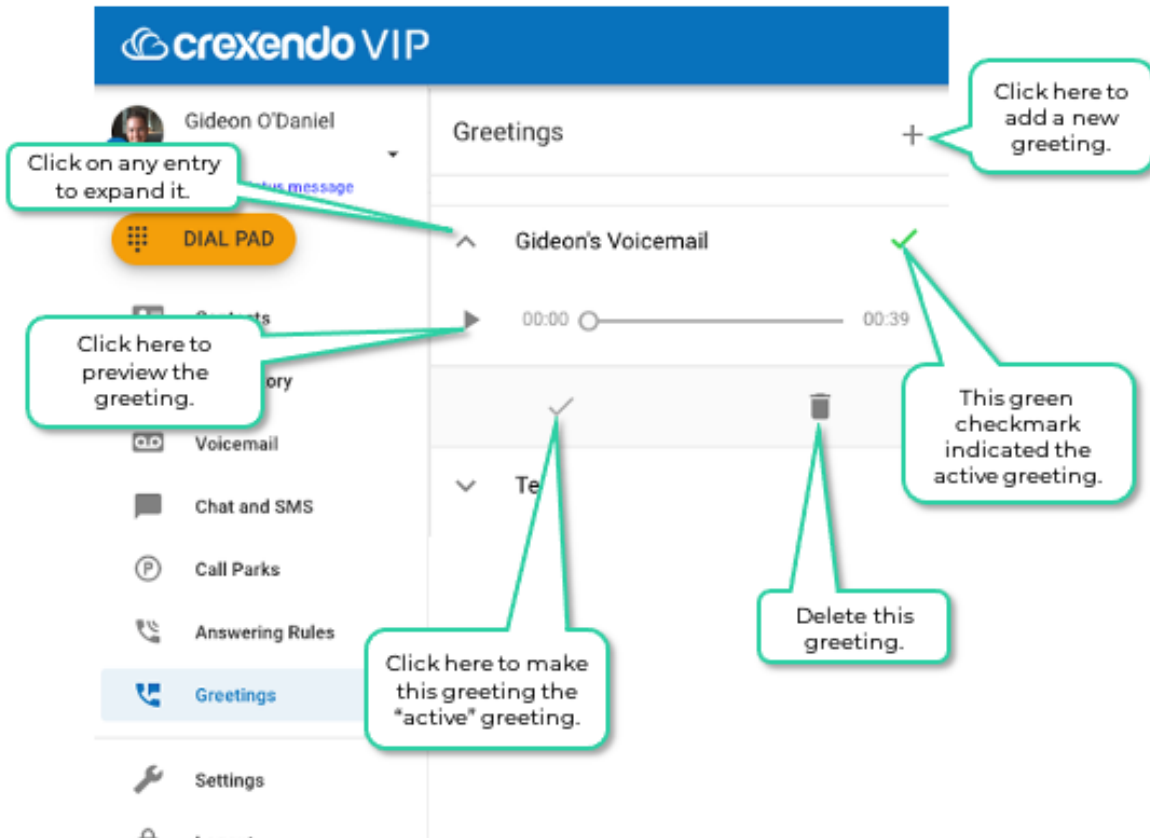
The blue dot indicates that the CLOSED rule is active.

Use these handles to reorder the rules.

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

Greetings

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



The screenshot shows the 'Greetings' section of the Crexendo VIP interface. The left sidebar contains navigation options: DIAL PAD, Contacts, Call History, Voicemail, Chat and SMS, Call Parks, Answering Rules, Greetings (selected), and Settings. The main content area displays 'Greetings' for 'Gideon O'Daniel'. It shows a list of greetings, with 'Gideon's Voicemail' selected. A play button icon is next to the selected greeting, and a green checkmark indicates it is the active greeting. A duration slider shows 00:00 to 00:39. A plus icon in the top right corner allows adding a new greeting. A trash can icon allows deleting a greeting. A play button icon allows previewing a greeting. A checkmark icon allows making a greeting the active one.

Click on any entry to expand it.

Click here to preview the greeting.

Click here to make this greeting the "active" greeting.

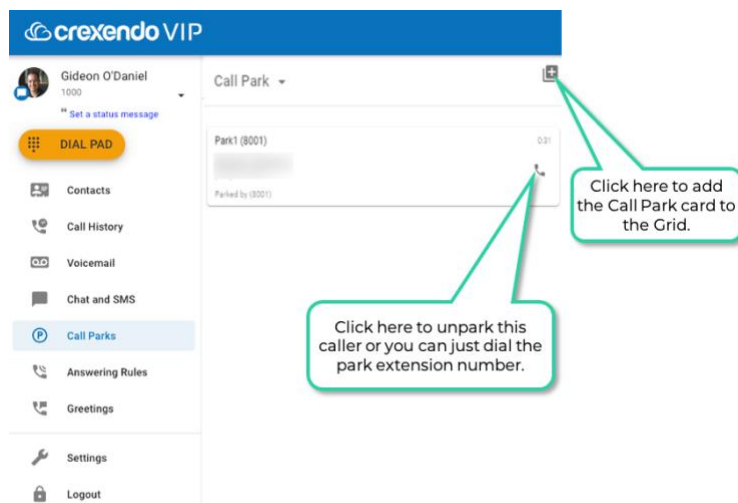
Click here to add a new greeting.

This green checkmark indicated the active greeting.

Delete this greeting.

Call Park

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



The screenshot shows the 'Call Park' section of the Crexendo VIP interface. The left sidebar contains navigation options: DIAL PAD, Contacts, Call History, Voicemail, Chat and SMS, Call Parks (selected), Answering Rules, Greetings, Settings, and Logout. The main content area displays 'Call Park' for 'Gideon O'Daniel'. It shows a list of call parking spots, with 'Park1 (8001)' selected. A play button icon is next to the selected spot. A plus icon in the top right corner allows adding a new call park card to the grid. A play button icon allows unparking a call.

Click here to unpark this caller or you can just dial the park extension number.

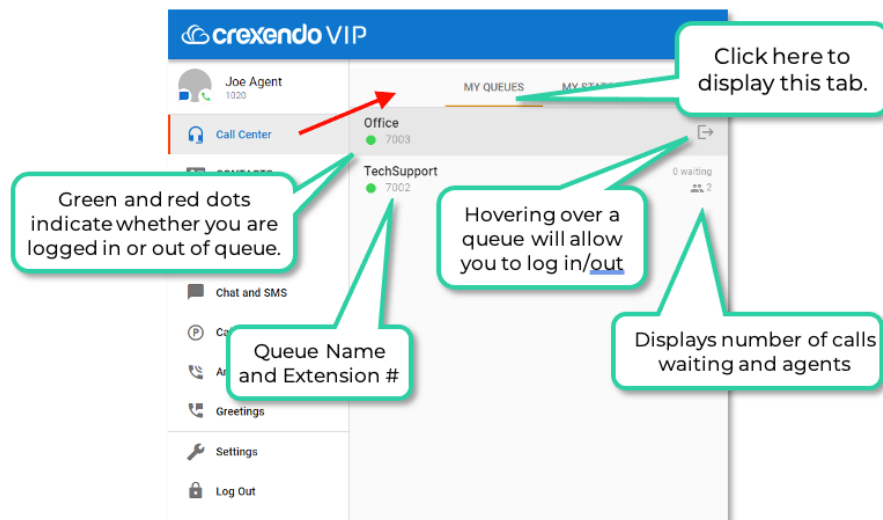
Click here to add the Call Park card to the Grid.

Call Center

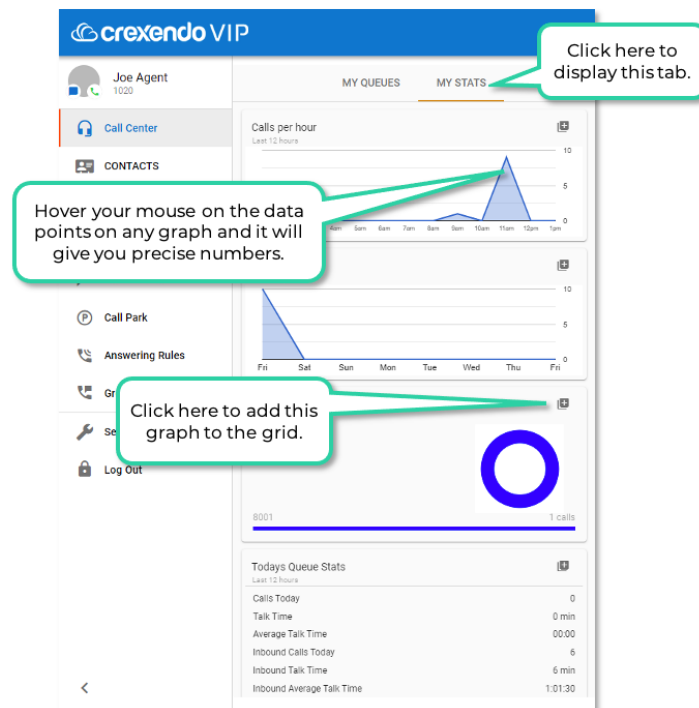
This area displays information for your call center on two tabs:

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

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

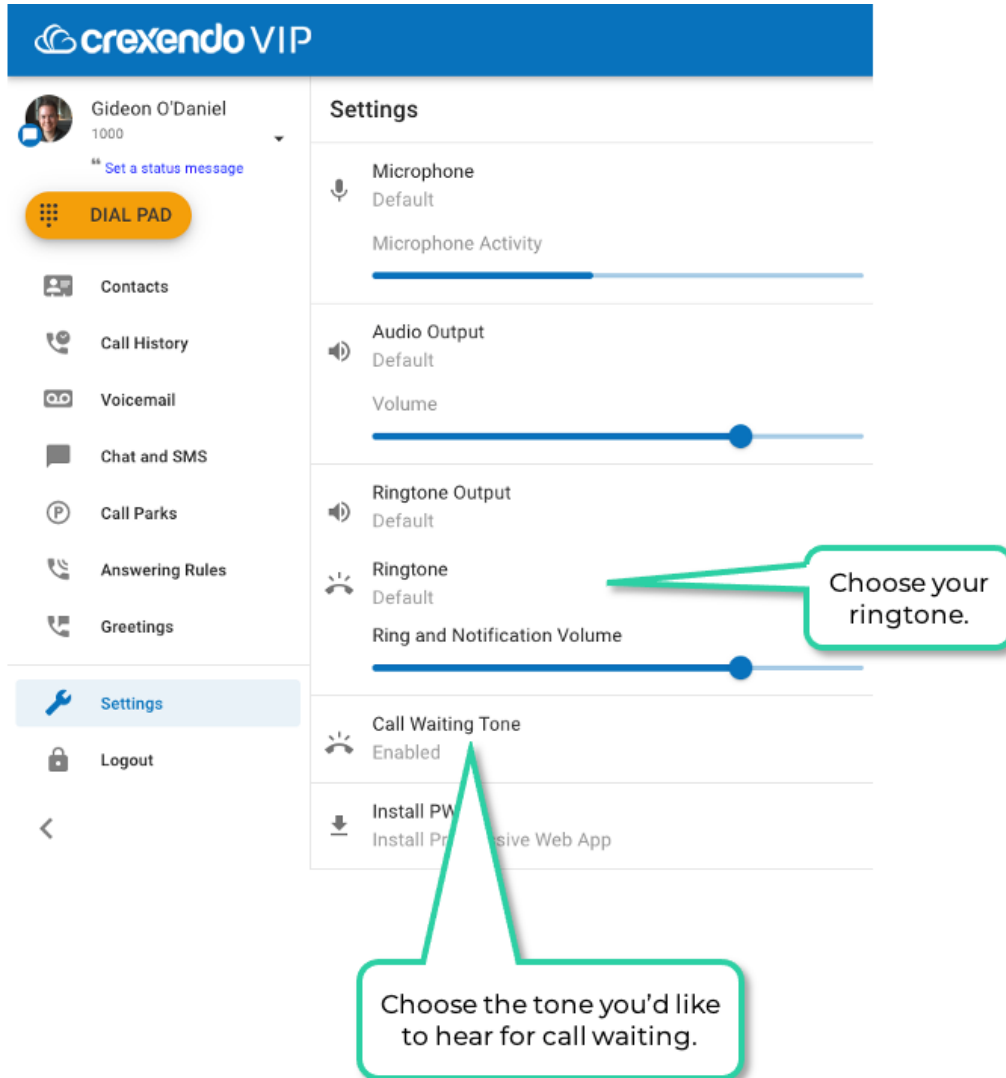


My Stats Tab: This tab displays an assortment of useful statistics for all your queues. The example below shows statistics for today.



Settings

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



crexendo VIP

Gideon O'Daniel
1000
[Set a status message](#)

DIAL PAD

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

Settings

- Logout

Settings

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

Choose your ringtone.

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

Introduction

This 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.

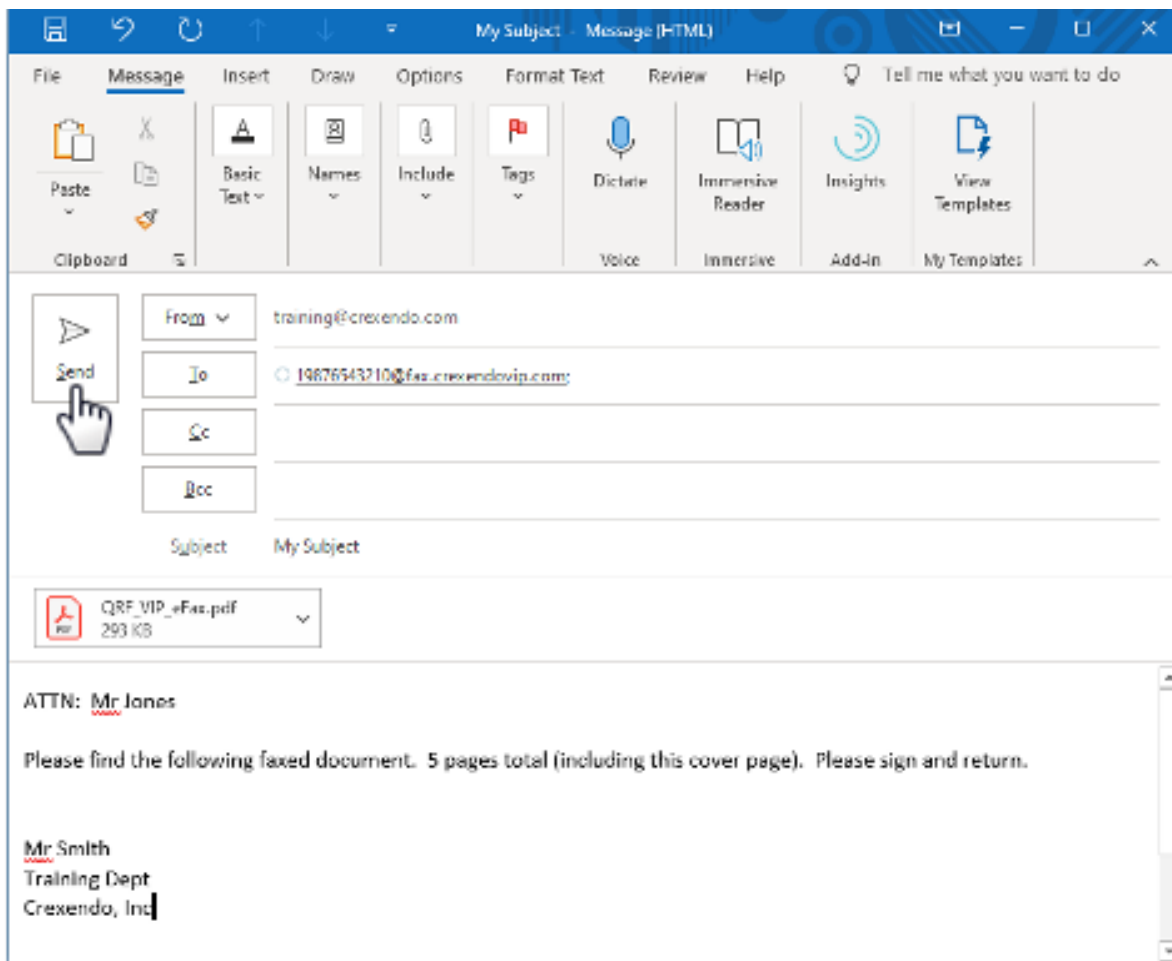
Outbound Faxes – Email

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.

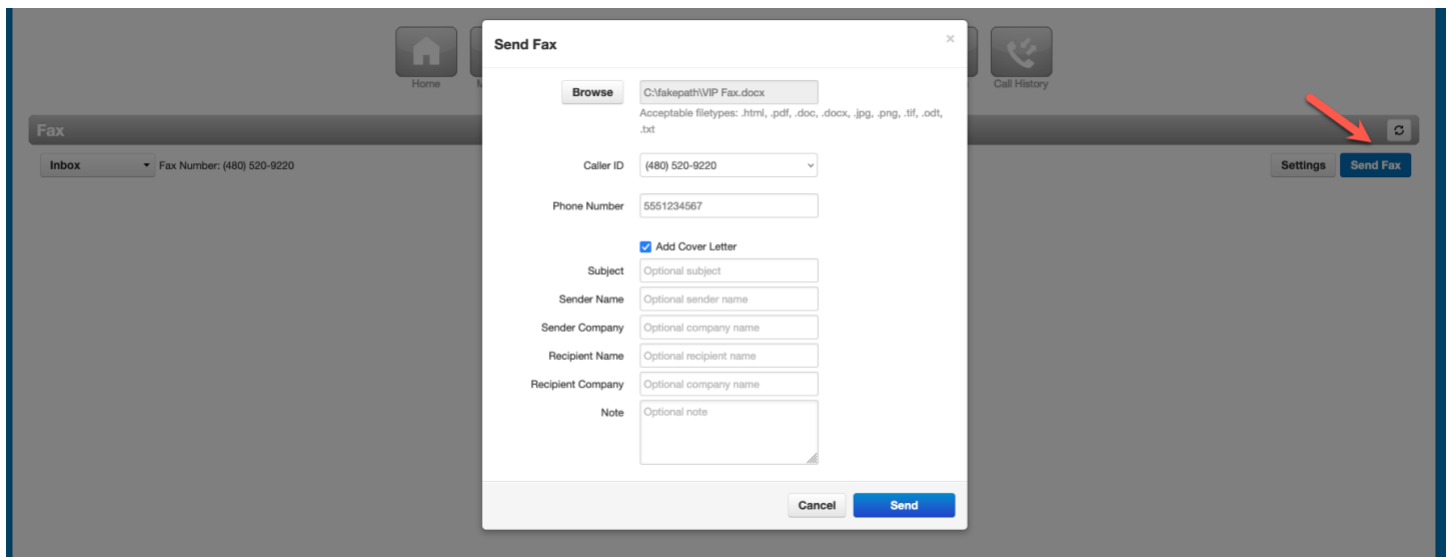


After the email has been sent, you will receive an email with a delivery confirmation.

Outbound Faxes – VIP Portal (If configured)

To Send an Outbound Fax from the Portal:

1. Login to your VIP Portal.
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.