

VocalocityPBX | User Guide

WELCOME TO VOCALOCITYPBX

This is an administrator guide that will help you get your system ready for use by your employees. This will also give step by step directions on how to use the Vocalocity system. Many of the features of VocalocityPBX are configured through the online customer portal and therefore this focuses primarily on how to use the portal to configure the features to your liking. Vocalocity has designed this portal for ease of use, but inevitably there will be questions that come up. The account managers hold a training session twice a week for new customers to review how to use the system. Contact your account manager for details.

Step 1: Logging into the system: These credentials are for administrative use only. Later on in the set up process log ins can be created for individuals extensions within the company.

1. Visit my.vocalocity.com
2. Use the following credentials to log in:

Username (case sensitive):

Password (case sensitive):

Step 2: Creating Users: In the Vocalocity system there is a concept of users. A user should be created for each person in the company because extensions/phones are assigned by user and it will help you identify which employee is assigned to which phone. It will also give employees access to the Vocalocity customer portal so that they can configure their own extensions. There are several extension features that are dependent on having a user assigned to an extension.

1. Click the Account Tab on the top navigation bar.
2. Click the User Information option on the left hand navigation bar.
3. Click the "New" button located in the top right corner of the page.
4. Click on the "Add/Remove" button and select what kind role this user will have:
 - a. END USER – This permission level should be selected for users who will be logging in and administering their own extensions.
 - b. ACCOUNT ADMINISTRATOR – This permission level should be selected for users that will have access to configure any feature on the PBX as well as the ability to create additional end users.
5. Select from the Available List and use the arrows to move the desired role to the Granted Column on the right.
6. Click the Update button.
7. Enter the first and last name of the user.
8. Create a user ID for the user (this is the username that users will use when logging into my.vocalocity.com) some suggestions are:
 - a. First name.last name – John.Doe
 - b. First initial last name – jdoe
 - c. First name last name – johndoe

9. Enter a password for this user, for security purposes the user should change this password after the first login.
10. Enter an email address for the new user. (NOTE: This will be used for notification purposes and for some feature configuration in the future)
11. Select a secret question from the drop down and enter an answer. (NOTE: This will be used when users forget their passwords)
12. When all of the info has been verified, press the Save button on the top or bottom right. (a small graphic will pop up that shows that the system is saving your settings)
13. When the settings are saved, click on the User Information button on the left side and repeat this process for each user/employee.

Step 3: Configuring PBX wide settings: The PBX settings can be modified system-wide, therefore saving time when configuring individual user's extensions.

1. Click the Phone System tab on the top navigation bar.
2. Click the PBX Settings option on the left navigation bar.
3. Setting up the Default Time Zone:
 - a. Select the appropriate time zone from the drop down.
4. Customize music on hold
 - a. Select the playback mode for the Hold Music.
 - b. To add custom Hold Music, click the "Add New Audio File(s)" button.
 - c. When the pop up appears, browse for the desired audio files and click the Upload button. (NOTE: After clicking the Upload button, the system will take a couple of minutes to upload the new files)
 - d. To remove the default hold music files, click the red Xs next to the files.
5. Set outbound caller ID: This feature determines what will show up on caller ID when making outbound calls. Select one of the three options:
 - a. For all extensions use the default caller ID: If you select this option, Caller ID on all outbound calls will show up as the number that is listed in the drop down right above this option. You can choose any number in your PBX.
 - b. For each extension display the direct dial number for the extension: This is the default setting that most companies use. This means that when users are making outbound calls, the Caller ID will show up as the direct dial number assigned to their extension.
 - c. Block all outbound caller ID: If you select this option, all outbound calls will have a "unavailable" or "private" caller ID.
6. International Calling: With this option you can select whether or not you want your employees to have the ability to make outbound international calls. (If you disable international calling, no user will be able to make international calls)

Step 4: Setting up your extensions: Assign users to the desired extension numbers and then send individual users their login information. Now each user can set up their own extension settings (i.e. Voicemail to email, Follow Me, Simultaneous Ringing, etc).

1. Click the Phone System tab on the top navigation bar.
2. Click the Extensions option on the left navigation bar.
3. Select the extension that you want to modify.
4. Select the user that you want to assign to this extension from the drop down next to "user name"
5. Click the Save button on the top or bottom right.

Step 4a: Extension Features: All extensions come with a number of advanced features. This section of the help guide is meant to help you understand those features and how to configure them.

1. Click the Extensions option in the left navigation bar.
2. Select the extension you want to configure.
3. Configuring the Never Miss a Call Feature – This feature allows users of the Vocalocity system to ensure that no matter where they are callers can always reach them.
 1. Send Calls to My Voicemail – This will send all calls to your voicemail box after the duration that you select from the drop down.
 2. Enable Call Forwarding – This will forward all of the incoming calls to a different extension in the PBX or to an external phone number.
 1. Select where you would like the calls to be forwarded, by selecting an extension from the drop down.
 2. To forward calls to an outside number, select the Add Personal Number option.
 1. When the dialogue box pops up, enter a 10 digit number to include in your personal phone book and have the ability to forward calls to.
 2. Select the type of number.
 3. Enable Follow Me – This features makes incoming calls ring sequentially to users/phones in the PBX as well as phones/ phone numbers outside of the system.
 1. Select where incoming calls to this extension should ring first.
 2. Select the duration that the calls should ring at that location.
 3. To add additional items, click the Add a Follow Me icon to the right of ring time.
 4. Select which voicemail box the calls should be forwarded to.
 4. Enable Simultaneous Ring – This feature makes incoming calls ring simultaneously to users/phones in the PBX as well as phones/phone numbers outside of the system simultaneously.
 1. Select where you would like incoming calls to ring.
 2. To add more options, click the Add a Simultaneous Ring Location.
 3. Select the duration of the call before it goes to voicemail.
4. Set up the extension voicemail settings.
 1. Select the Voicemail PIN - This is the pin that is used for checking voicemail over the phone.
 2. Set up Voicemail to Email – If you enable voicemail to email, all voicemails will be sent to the desired email address with the voicemail attached as a .wav file.
 1. Check the box next to Send Voicemail to Email and enter the email address that you want the messages forwarded to.
 2. To delete all voicemails after being sent to email, check the box next to Delete Voicemail Automatically After Sending to Email.
 3. Record or Upload Voicemail Greetings
 1. Name – This is the recording that will play when people search the company directory (accessible through the company auto attendant).
 2. Unavailable Greeting – This greeting will play when the user does not answer and the caller is sent to voicemail.
 3. Busy Greeting – This plays when the user is on the phone or Do Not Disturb is enabled (this is a setting on the phone) and the caller is sent to voicemail.

4. Recording greetings:
 1. To record a custom greeting, click the red record button.
 2. Enter a number for the system to call to record a greeting. Enter any 10 digit number and press the dial button.
 3. Follow the prompts to record a greeting. Save the recording over the phone when finished.
5. Using the Device Profile Section – Provisioning your phone
 1. Select the phone model purchased to use with this extension.
 2. Enter the MAC address of the phone. The MAC address can be found on the back side of the phone, it is 12 characters.
 3. Click the Save icon on the top right or bottom right of the screen.
6. Click the Save icon on the top right or bottom right of the screen.

Step 5: Setting up Auto Attendants: Auto attendant is the feature that lets you route incoming calls to desired locations. The majority of our customers set up a simple phone menu that plays 24 hours a day/ 7 days a week and routes calls based on department or employees. To set up a basic auto attendant complete the following steps.

1. Click the Auto Attendants option on the left navigation bar.
2. Click the Add New button on the top right and select Auto Attendant wizard.
3. Enter a name for the Auto Attendant (this is just used for identifying the Auto Attendants when they are in the list.)
4. Select the numbers to assign to this Auto Attendant. When the selected numbers are called, the caller will be routed to this Auto Attendant and have the option to choose from the custom menu.
5. Select whether the call rings first at a designated extension before going to the Auto Attendant.
6. Click the Next button.
7. On the Create Greeting page, a greeting script can be entered to set guidelines for the person creating the greeting. (NOTE: This will not read the recording, you will still have to do a recording)
8. Select what each option should be. (i.e. For Sales Press 1, For Support Press 2, For an Operator press 0). These options can be selected from the drop down lists on the left. To add an option that doesn't appear in the drop down, select Add Your Own Prompt from the drop down and enter the name of the option.
9. On the bottom of the page you will see an option to record your Auto Attendant greeting. Click on the red button and a dialogue box will pop up.
10. Enter the number where the system can call to record your greeting. Enter any 10 digit number and click the Dial button.
11. Follow the prompts to record the greeting. When you are finished recording and have saved the greeting over the phone, click the Next button.
12. Step 3 of the Auto Attendant set up is used to determine where the different options, created in the last step, will be routed.
13. Select from the drop down menu on the right side of the page where each option will ring. Calls can be routed to any extension or add on in the system.
14. When all selections have been made, click the Finish button.

Step 6: Setting up Conference Bridges: A conference bridge is an Add On feature that is considered a virtual conference room (max capacity is 30 participants), where the conference participants enter the room through a phone call. A conference bridge is most commonly used for training meetings, large conference calls, webinars, etc.

1. Click the Conference Bridge option on the left navigation bar.
2. Select the conference bridge to configure. (NOTE: If you don't have a conference bridge in your account, you can add one by contacting your account manager)
3. Enter a name for the Conference Bridge. This will be used for identification purposes in lists throughout the customer portal.
4. Select the direct dial number/s that should be assigned to this conference bridge.
 1. Click the Add/Remove button and select a number from the available pool.
 2. Click the Update button.
5. Enter the conference pass code. This is the code that participants will be required to enter before entering the conference bridge. This code can be changed at any time.
6. Click the Save icon in the top or bottom right.

Step 7: Setting up Call Groups: A Call Group is an Add On feature that is used to have calls ring on multiples phones at the same time. This is commonly used to create virtual departments where a group of people are designated to receive a call at the same time.

1. Click the Call Groups option on the left navigation bar.
2. Select the Call Group to configure. (NOTE: If you don't have a call group in your account, you can add one by contacting your account manager)
3. Enter a name for the Call Group (i.e. Sales Department, Support Department, etc). This will be used for identification purposes throughout the customer portal.
4. Select the direct dial number/s that should be assigned to this call group.
 1. Click the Add/Remove button and select a number from the available pool.
 2. Click the Update button.
5. Select the Users/Extensions to be part of this Call Group.
 1. Click the Add/Remove button next to Call Group Extensions.
 2. Select the users to include in this call group. Use the arrows to move them to the In-Use side of the table.
 3. Click the Update button.
6. Configure the Voicemail options on this Call Group
 1. Select the voicemail box where the voicemails will be deposited. (NOTE: You can select another voicemail box in the system in case there is a manager for the department that should be getting all the voicemails)
 2. To use the Call Groups voicemail box, enter the PIN for that box. (NOTE: if you are forwarding the messages to another voicemail box, that mailboxes options will be used)
 3. If using the Call Groups voicemail box, configure voicemail to email settings.
 1. To activate voicemail to email, select the checkbox next to Send Voicemail to Email and enter the desired email address.
 4. Select the amount of time the caller will hear ringing before going to voicemail. The standard setting is at 30 seconds.

5. Select the greeting that the caller will hear before going to voicemail.
 1. To record a custom greeting, click the red record button.
 2. Enter the number where the system can call to record a greeting. Enter any 10 digit number and click the Dial button.
 3. Follow the prompts to record your greeting. When finished recording, save the recording over the phone.
 4. If forwarding messages to a user's voicemail, you can select to use the greeting that is already on their mailbox.
6. Click the Save icon.

Step 8: Setting up Call Queue: Call Queue is an Add On feature that allows companies to ensure that they are not missing calls in high volume periods and that calls are not going to voicemail. A call queue puts callers in line when they call and then connects them with designated workers as they become available. Prompts and hold music play while the caller is waiting.

1. Click the Call Queue option on the left navigation bar.
2. Select the Call Queue to configure (NOTE: If you don't have a call queue in your account, one can be added by contacting your account manager)
3. Enter a name for the Call Queue (i.e. Sales Department, Support Department, etc).

This will be used for identification purposes throughout the customer portal.

4. Select the direct dial number/s that should be assigned to this call group.
 1. Click the Add/Remove button and select a number from the available pool.
 2. Click the Update button.
5. Note the agent login code. This number will be the code that the users in this queue will use to log in and out of the call queue. This number cannot be changed, it is a random number created by the system.
6. Select the amount of time users will have in between taking calls. This is the amount of time that will elapse between the time that a user hangs up with one caller and the next caller is assigned to them. (NOTE: This time is usually used to finish making notes on the call and prepare for the next call)
7. Configuring Caller Opt-Out handling – The Call Queue allows you to set whether callers can opt of the call queue and what happens to them when they do opt out.
 1. Do Not Allow Calls to Opt-out of the Queue – Ensures that callers stay in the queue until they're assigned to an employee or until they hang up.
 2. When Caller Opts Out of the Queue, Send the Caller to the Queue's Voicemail – When a caller presses any key while waiting to be assigned to an employee, selecting this option will send the caller to the call queue's voicemail.
 3. Forward the Caller to an Extension, Call Group, Call Queue or Auto Attendant – When a caller presses any key while waiting to be assigned to an employee, selecting this option will send the caller to another part of your PBX.
8. Selecting the Agents/Employees included in this Call Queue.
 1. Click the "Assign Agents" button.
 2. Select the users to include in this call group. Use the arrows to move them to the In-Use side of the table.
 3. Click the Update button.
9. Select the Assignment Strategy:
 1. Random – The system will randomly assign callers to the employees/agents that are logged in and available at that time.
 2. In Order of Agent Tier – Callers will be assigned to employees/agents based on the tier that they're assigned to. Callers will be assigned to the lower number tiers first.
 3. Least Recently User – The system assigns callers to the employee/agent who is available and has been idle for the longest period.



Please be aware that placing an agent's phone on DO NOT DISTURB while in the queue is not advised. Doing this may cause calls to get "stuck" in the queue so that available agents are unaware of the call, while the caller remains on hold.

10. Customize Music on Hold
 1. Select the playback mode for the Hold Music.
 2. To add custom Hold Music, click the Add New Audio File(s) button.
 3. When the box pops up, browse your computer for the desired audio files and click the Upload button. (NOTE: After clicking the Upload button the system will take a couple of minutes to upload your new files)
11. Upload your Prompts
 1. Click the Upload New Prompt button.
 2. When the box pops up, browse your computer for the desired audio files and click the Upload button. (Note: After clicking the upload button the system will take a couple of minutes to upload your new files)
12. Record New Prompts
 1. Click the Record New Prompt button.
 2. Enter the number for the system to call to record the greeting. Enter any 10 digit number and click the Dial button.
 3. Follow the prompts to record the greeting. When finished recording be sure to save the recording over the phone.
13. Order the Prompts – These prompts will play in the order that they are listed. In the time between prompts (play interval) the Hold Music will play. If you select to repeat the prompt, it will repeat as many times as you've selected with Hold Music playing.
14. No Agents Available Prompt – This is the prompt that will play when no employees/agents are logged into the queue.

Step 9: Setting up Faxes: Vocalocity offers a paperless fax solution (fax to email, email to fax). This Add On feature allows users of the Vocalocity system to send/receive faxes without a physical fax machine and organize all faxes in an email client.

1. Click the Faxes option in the left navigation bar.
2. Select the Fax to configure. (NOTE: If you do not have a fax in your account, contact your account manager to add one.)
3. Select the fax numbers to assign to this fax. (NOTE: Fax number are a different protocol than phone numbers, therefore only fax numbers will show up in your available pool of numbers)
 1. Click the Add/Remove button and select a number from the available pool.
 2. Click the Update button.
4. Enter a Name for this Fax – This is usually an employee's name or a department name.
5. Enter the desired email address for faxes to be delivered to.
6. Select the delivery format for the incoming faxes. (NOTE: When you receive a fax, it will come as an attachment in an email)
7. Click the Save icon.

Step 10: Phone numbers: Clicking the Phone number option in the left navigation bar, will display all of the phone numbers that are assigned to your account. The status of these numbers is also displayed.

Step 11: Running reports: As a standard feature in the Vocalocity system, reports can be run on inbound and outbound calls.

1. Click the Reports tab on the top navigation bar.
2. Click the Call Log report option on the left navigation bar.
3. Enter the date range for the report that you want to run. (NOTE: This will run a report for all inbound and outbound calls from and to your system in that period of time)
4. Click the Run Report button.
5. You can sort the report by:
 1. Direction
 1. Inbound – All calls made to any of the numbers on your account.
 2. Outbound – All calls made from a phone on your PBX.
 2. Date
 3. Duration
 4. Number Dialed
 1. If the call was an inbound call, this is the number that the person from outside the PBX was calling.
 2. If the call was an outbound call, this is the number that was dialed by a user on your PBX.
 5. Caller ID
 1. If the call was an inbound call, this is the caller ID of the person who was calling into your system.
 2. If the call was an outbound call, this is the Caller ID of the user on your PBX who made that call.
 6. Rate – This is the per minute rate charged for that call.
 7. Charge – This is the total charge for that call.
 8. In Network – This alerts you if the call was inside of the Vocalocity network. (NOTE: All in Network calls are free)
6. To export the report to Excel, click the Export icon in the top or bottom right.

Step 12: Changing billing information. Vocalocity bills all customers on credit card and only allows one credit card per account.

1. Click the Account tab on the top navigation bar.
2. Click the Credit Card Info option in the left navigation bar.
3. Edit your credit card information.
4. Enter your Billing Address/Contact
 1. Use the Company Contact Info as your Billing Address/Contact (NOTE: To see what is being used as the company contact click the Company Contact option in the left navigation bar)
 2. Use a different billing address/contact.
 1. Enter billing address.
5. Click the Save icon.