



ITS Cloud Unified Communications/ Phone Training

Agenda

- Basic Phone Operation
- Voicemail
- Call Handling
- WebPortal



Basic Phone Operation



Making a Call

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Making a call with your phone does not require you to dial a leading 9 and you can now dial on-hook or off hook.

- **To Dial on-hook**
 - Dial the phone number
 - Pick up the handset, headset, or push the speaker button
- **To Dial off-hook** (similar to using a cell phone)
 - Pick up the handset, headset or push the speaker button
 - Dial the number
 - There will be a short (3-4 sec.) delay when making calls this way, to eliminate the delay, push the Send SoftKey.
- Extensions on your system can be dialed using the four digit extension
- Calls to the US and Canada are all dialed using 10 or 11 digits.

Intercom Feature

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- Intercom allows you to instantly connect to other phones within your office.
- Ideal for announcing visitors or asking a quick questions.
- When one phone intercoms another extension, it does not ring the other phone, instead the other phone will beep and then its microphone and speaker turn on.
- **To place an Intercom Call**
 - Dial 08 then the extension. For example to intercom extension 1003, dial 081003

Receiving a Call

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Three ways to answer a call:

- **Use the Handset**

- When the phone rings, lift the handset off-hook.

- **Use the Speakerphone**

- Press the Speaker button.

- **Use a Headset**

- In most cases you'll press the button on the headset or press the headset button on the phone, this could vary depending on the model of headset and how it is connected.



Setting up Voicemail

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The first time you log into your mailbox you will be walked through the following:

- Recording your name for the directory - The name recording is for the dial by name directory
- Recording your personal greeting – This greeting plays when your mailbox is reached.

It is very important to record a custom message as many callers won't leave a message in a mailbox with a generic greeting.

Accessing Voicemail

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Voicemail with your new system is accessible from your phone, the web portal and your email.(once you have set it up to go to your email).

- **To accessing Voicemail**

- Press the Message button on your phone to or dial 5001.
- When prompted, enter your voicemail PIN and then press the # key.



Note that voicemail messages are stored for 30-days, then deleted. To download a voicemail your computer using the download feature in the portal (see page 18).

Alternate Voicemail Greeting

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Your mailbox supports multiple greetings for different scenarios like business trips, vacations and holidays.

- **To Record an Alternate Greeting**

- Once logged in, press 6 for greetings and then press 1 to record.
- When prompted for the greeting number, press 2, 3, etc. for your next alternate greeting (#1 is your default greeting).
- After your recording is completed, select the active greeting by selecting option 3 in the greetings menu (located on page 7)

Handling Calls

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The most common way to move calls around are attended transfer, unattended (or blind) transfers, and voicemail transfer.

Attended Transfer - Attended transfer allows you to announce the call prior to transferring it.

- **To perform an attended transfer**
 - Press the **Trans** softkey on your phone
 - Dial the recipient's extension
 - Once the call is picked up, speak to the recipient, and then either press the **Trans** softkey again to complete the transfer or press the **Cancel** softkey to take the call back.

Handling Calls (continued)

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Blind Transfer - Blind transfer allows the transfer of the call directly to the recipient.

- **To perform a blind transfer**
 - Press the Trans softkey on your phone
 - Dial the recipient's extension
 - Press the Trans softkey again to complete the transfer

Voicemail Transfer - Voicemail transfer goes straight to the recipient's voicemail box without ringing the recipient's phone.

- **To perform a voicemail transfer**
 - Press the Trans softkey on your phone
 - Dial 03, then the recipient's extension
 - Press the Trans softkey again to complete the transfer

Call Hold

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On your new phone system, hold is a local function. This means a call held on your phone cannot be picked up at another station.

- **To place a call on hold**
 - Press the Hold softkey while on a call.
 - To pick the call back up press the Resume softkey.



3-Way Conference

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Three way conferencing allows you to add a third participant to a call.

- **To make a 3-Way Conference**
 - Dial the first number you want to conference with or answer the incoming call.
 - Once connected, press the Conf softkey.
 - Dial the second number you want to conference in.
 - When the second call is answered, press the Conf softkey again and all three calls will be connected.
 - To end the call, hang up the handset.





Advanced Training

ITS Cloud UC Web Portal

Web Portal Login

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- Using the Portal is an alternate way to set up how your calls are handled.
- To login to the portal, visit <https://voice.itstelecom.com>

A screenshot of the ITS Technology Simplified login portal. The page has a white background with the ITS logo at the top. Below the logo are two input fields: "Login Name" and "Password", each with a small orange eye icon to its right. A green "Log In" button is positioned below the password field. At the bottom of the login area, there are links for "Forgot Login Name" and "Forgot Password".

ITS TECHNOLOGY SIMPLIFIED

Login Name

Password

Log In

[Forgot Login Name](#) | [Forgot Password](#)

[Are you a new user?](#)

Powered By: ITS Telecom

Manager Portal: Version 37.1.0

Home Screen

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ITS TECHNOLOGY SIMPLIFIED Attendant Console | SNAPmobileWeb | Lisa Atwood (2706) ▾

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

Home

NEW VOICEMAIL MESSAGES »

From		Date	Duration	
(805) 501-7858	INTEGRATED TELE	Today, 9:19 am	0:06	

ACTIVE ANSWERING RULE »

Default ▾

Simultaneously ring:

- x2706

ACTIVE PHONES »

2706 Yealink SIP-T23G...

RECENT CALL HISTORY »

Number	Name	Date	Duration
2707	Alex Islas	Today, 11:36 am	0:00
501-7858		Today, 11:31 am	0:00
(888) 853-9377		Today, 11:03 am	5:51
2709	Sherrie Ellsworth	Today, 10:08 am	0:11
(805) 413-4199	THOUSND OAKS CA	Today, 10:08 am	0:00
(805) 404-8134	WIRELESS CALLER	Today, 10:01 am	4:44
583-4463		Today, 9:48 am	5:52
583-4483		Today, 9:47 am	0:09

- The Home screen shows a summary of your call activity (call history, messages, active rules, devices, etc.). To navigate through the portal, simply click on the buttons across the top.

Questions?



Should you have any questions in the future, please contact us at:

805-520-7020

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