ITS Cloud Unified Communications
Phone Training

- Basic Phone Operation
- Voicemail
- Call Handling
- Web Portal

1 Message Indicator Light

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GO BACK

2 Line Buttons

GO BACK

BASIC PHONE OPERATION

Soft Keys

Soft Keys function changes depending on your activity.

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GO BACK

BASIC PHONE OPERATION

Screen Navigation Arrows

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BASIC PHONE OPERATION

Headset Button

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6 Mute Button

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Hold Button

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Message Button

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Transfer Button

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10 Redial Button
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GO BACK

Speaker Button

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Volume

GO BACK

- Making a call with your phone doesn't require you to dial a leading 9
- You can now dial on-hook or off hook.
- 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.

- **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.

- 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 its microphone and speaker will turn on.

- **To place an Intercom Call**
  - Dial 08 then the extension.
    For example, to intercom to extension 1003, dial 081003

Three ways to answer a call:

- **Use the Handset**
  - When the phone rings, lift the handset off-hook.
- **Use the Speakerphone**
  - Press the <u>Speaker</u> 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.

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

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 access 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 up to 30-days, then deleted.
To download a voicemail, on your computer, use the download feature in the portal.

ALTERNATE VOICEMAIL GREETING

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.

The most common way to move/transfer calls 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 <u>Trans</u> softkey on your phone
  - Dial the recipient's extension
  - Once the call is picked up, speak to the recipient, and then either press the <u>Trans</u> softkey again to complete the transfer or press the <u>Cancel</u> softkey to take the call back.

Blind Transfer - Transfers 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

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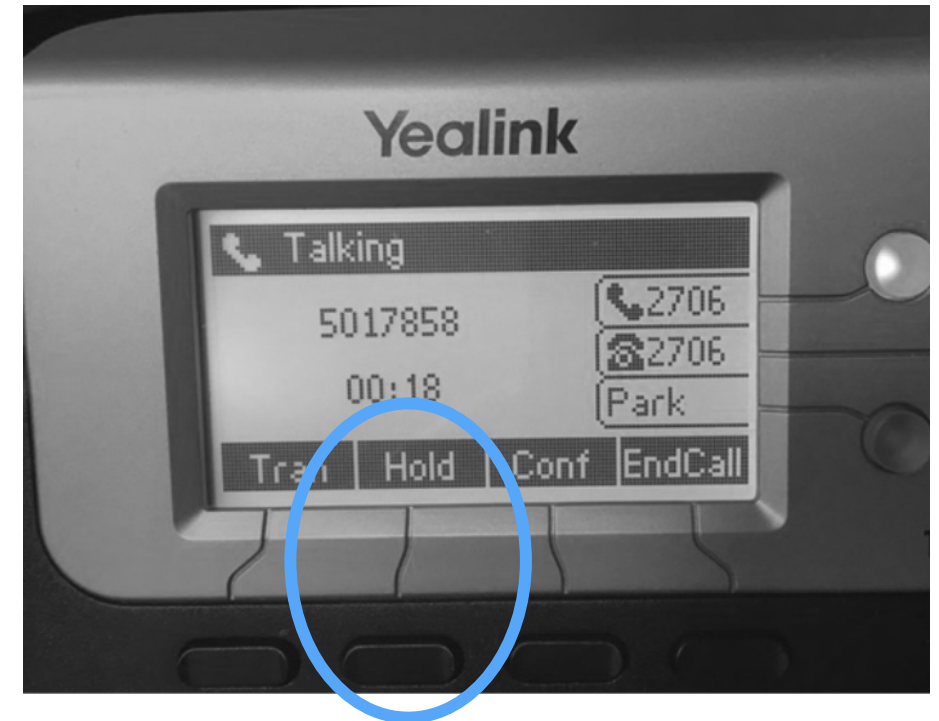
Three-way conferencing allows you to add a third participant to a call.

- **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

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

ITS

Login Name

Password

Log In

Forgot Login Name | Forgot Password

OR

Log in with Office 365

Are you a new user?

Powered By: ITS Telecom

Manager Portal: Version 42.2.0

PORTAL HOME SCREEN

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.

The Stratus Console (under "Apps" top right drop down) gives you visibility of calls and a more intuitive way to handle them all from your PC.
This is very useful for receptionists and administrative personnel who are responsible for handling calls for others. The Stratus Console allows you to easily identify if someone is available to take a call.

- Green indicates they are available
- Red indicates they are on a call
- Grey indicates they are not logged into the system
- A Green dot with a blue mark in it indicates an incoming call

The Stratus Console also allows you to dial someone right from the Console.

To make a call to a Contact from the Stratus Console
- Click on the name of the person you want to call.
- When the Call window pops up you have the option of selecting their extension or voicemail.
  If you have their detailed contact information, you also have the option of calling them at another work number, on their mobile device or at home.
- Once you select the number you want to call them at, click the number and your phone will ring.
- When the handset is picked up the call will go through.

Call Tyler Carr (2717) ✕

| Extension 2717 | Voicemail 2717 |

| Work | Mobile | Home |

Cancel

Call Handling from the Stratus Console

While logged into the Stratus Console and on an active call,
the information about the call will be displayed on your screen.
You will have the option of:

a. Putting the call on hold.
b. Transferring the call.
c. Parking the call.
d. Ending the call.
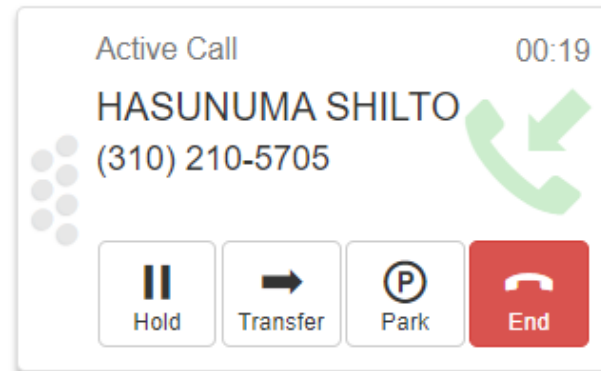
To Transfer a Call With Auto-Attendant

a. Click the Transfer button
b. A new window will open allowing you to select the person you would like to transfer the call to
c. Click on the name of the person to transfer the call to.
d. Another window will open allowing you to select the type of transfer you would like to do:
    i. Transfer immediately transfers the call from your number and releases it.
    ii. Assisted Transfer allow you to announce the caller.
    iii. Voicemail allows you to transfer the caller directly to the person's voicemail box.
    iv. You also have the option to choose another extension or cancel.
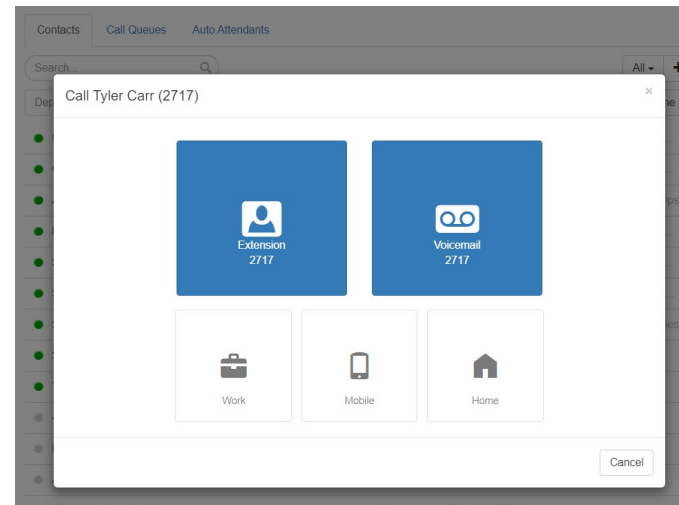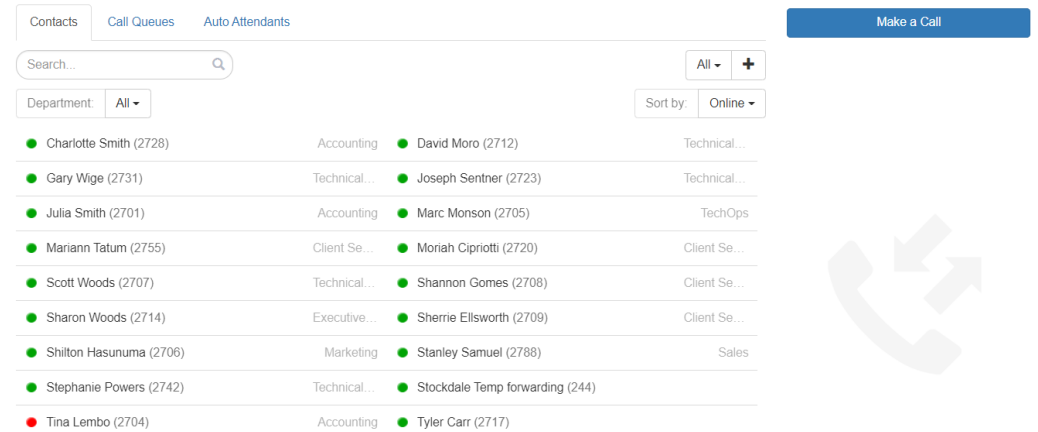
Make a Call to Any Number From The Stratus Console

- Select the Make Call button on the top right.
- When the dial pad opens, dial the number you want to call.
- Click the call button.
- Your phone will ring and when you pick it up the call will go through.

At the top right of the window, you will see your name and extension.
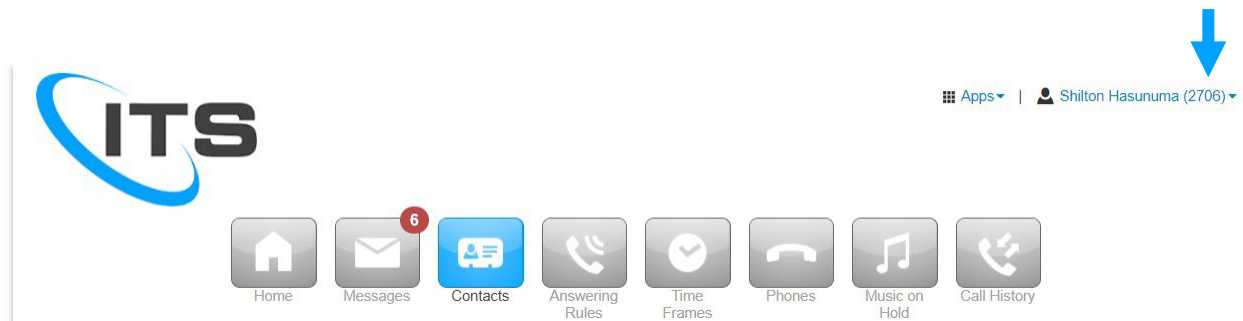
If you click your name, then select Profile, your user profile screen will open up.
Here you have the ability to:
- Change the name displayed.
- Change your time zone.
- Determine if your name is announced in the audio directory.
- Determine if your name it appears in the directory.

You can also view the caller ID information that callers will see when you call them from your extension.
NOTE: You cannot change this information as it is maintained by the system administrator.

The Message screen allows you to view and manage messages and messaging options.
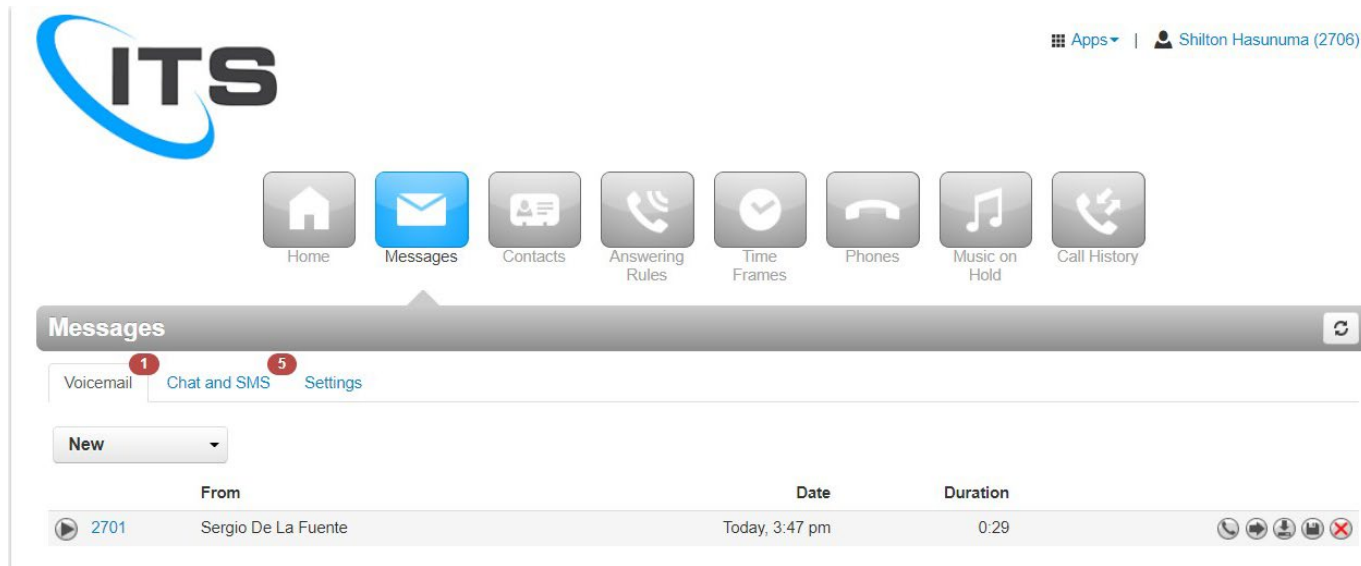
- The Voicemail tab will display all of your voicemail messages.
- The Chat and SMS tab will display all of your Chat messages.
- The Settings tab is where you can set up your voicemail.

The Contacts screen allows you to easily see who is on a call, dial their extension or start a chat.

- Green dot indicates they are not on a call and are available.
- Red dot indicates they are on a call.
- Gray dot indicates they are off-line.

The Answering Rules screen allows you to easily set up rules for how your calls are handled. The default rule is to ring your phone when there is an incoming call.

To change or add the rule, click the Add Rule button on the top right.

The Time Frames screen allows you to easily set up time frames that are pertinent to your business and can be used in other areas of the system.

The Time Frames that are defined in this screen below are used in the Answering Rules screen and the Music on Hold screens allowing you to specify how calls and recordings are handled based on defined timeframes.

The Phones screen displays all phones, mobile apps and other devices that you have been configured to receive calls when your number is dialed. These devices will ring simultaneously and behave as your extension by default.

The Music on Hold screen allows you to set up music that will play when your calls are put on hold.

This is controlled by the system administrator because most businesses prefer to have consistent music or messaging played when anyone is put on hold.
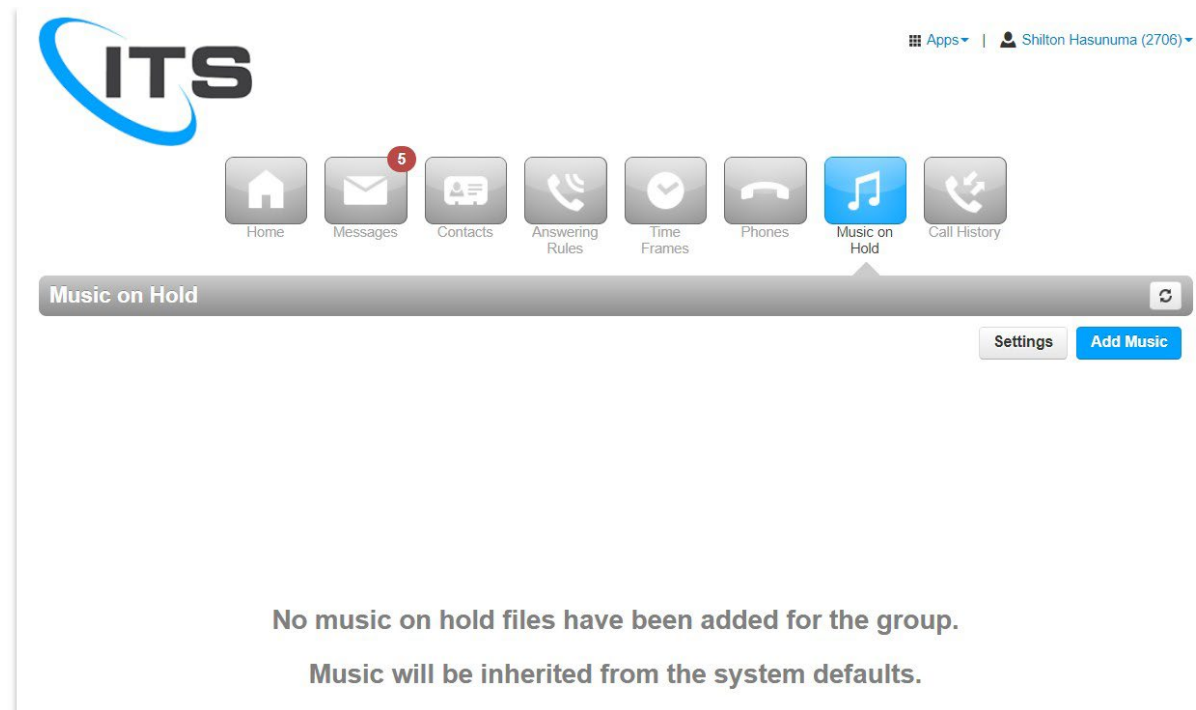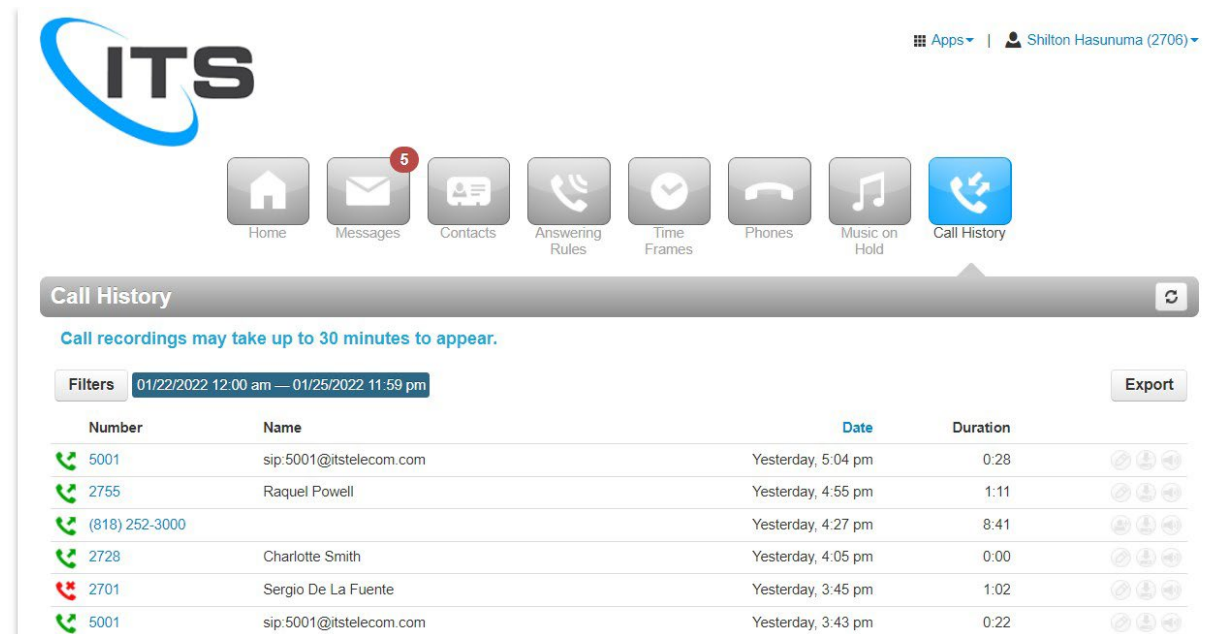
The Call History screen displays all of the inbound and outbound calls that have come to your number.

The color and icon shows how the call was handled.

Outgoing Call

Missed Call

Inbound Call

It also shows the phone number, Caller ID if available, Date, Time and Duration of call.

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

805-520-7020

Support@itstelecom.com