



ITS Cloud Unified Communications  
Phone Training



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



# BASIC PHONE OPERATION



- 1 Message Indicator Light
- 2 Line Buttons
- 3 Soft Keys (Soft Keys function changes depending on your activity.)
- 4 Screen Navigation Arrows
- 5 Headset Button
- 6 Mute Button
- 7 Hold Button
- 8 Message Button
- 9 Transfer Button
- 10 Redial Button
- 11 Speaker Button
- 12 Volume



# MAKING A CALL

- 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 FEATURE

- 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 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

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.\***



# ACCESSING VOICEMAIL

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.



# HANDLING CALLS

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 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

**Blind Transfer** - Transfers the call directly to the recipient.

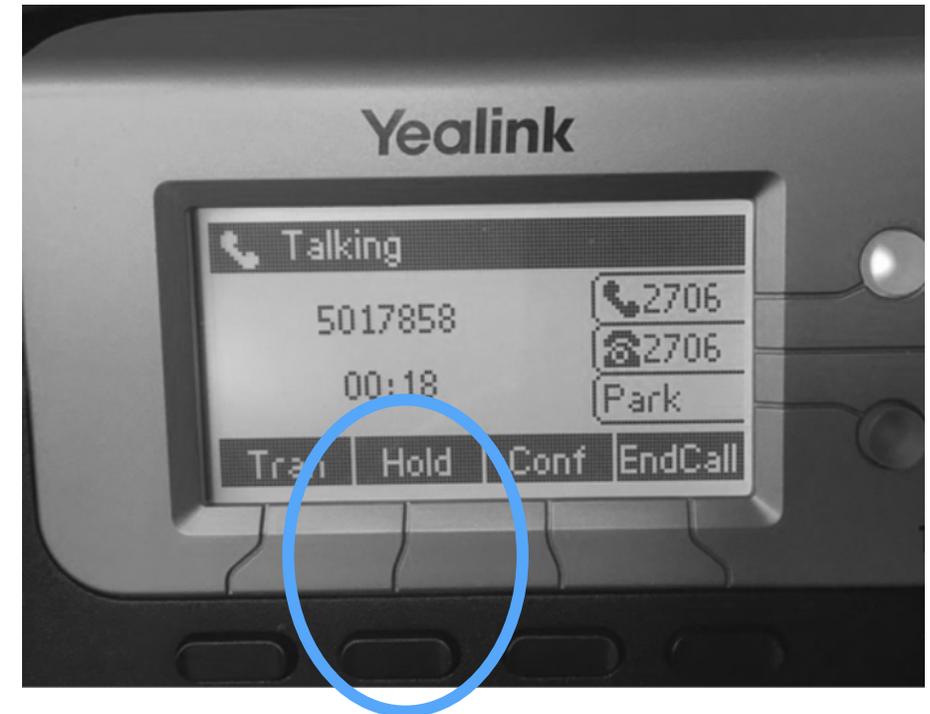
- To perform a blind transfer
  - Press the Trans softkey on your phone
  - Dial the recipient's extension
  - Press the Trans softkey again to complete the transfer

**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.



# 3-WAY CONFERENCE

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>

A screenshot of the ITS web portal login page. At the top is the ITS logo. Below it are two input fields: 'Login Name' and 'Password'. A blue 'Log In' button is centered below the fields. Underneath the button are two links: 'Forgot Login Name' and 'Forgot Password'. A horizontal line with the word 'OR' in the center separates this section from the 'Log in with Office 365' button, which includes the Office 365 logo.

[Are you a new user?](#)

Powered By: ITS Telecom

Manager Portal: Version 42.2.0

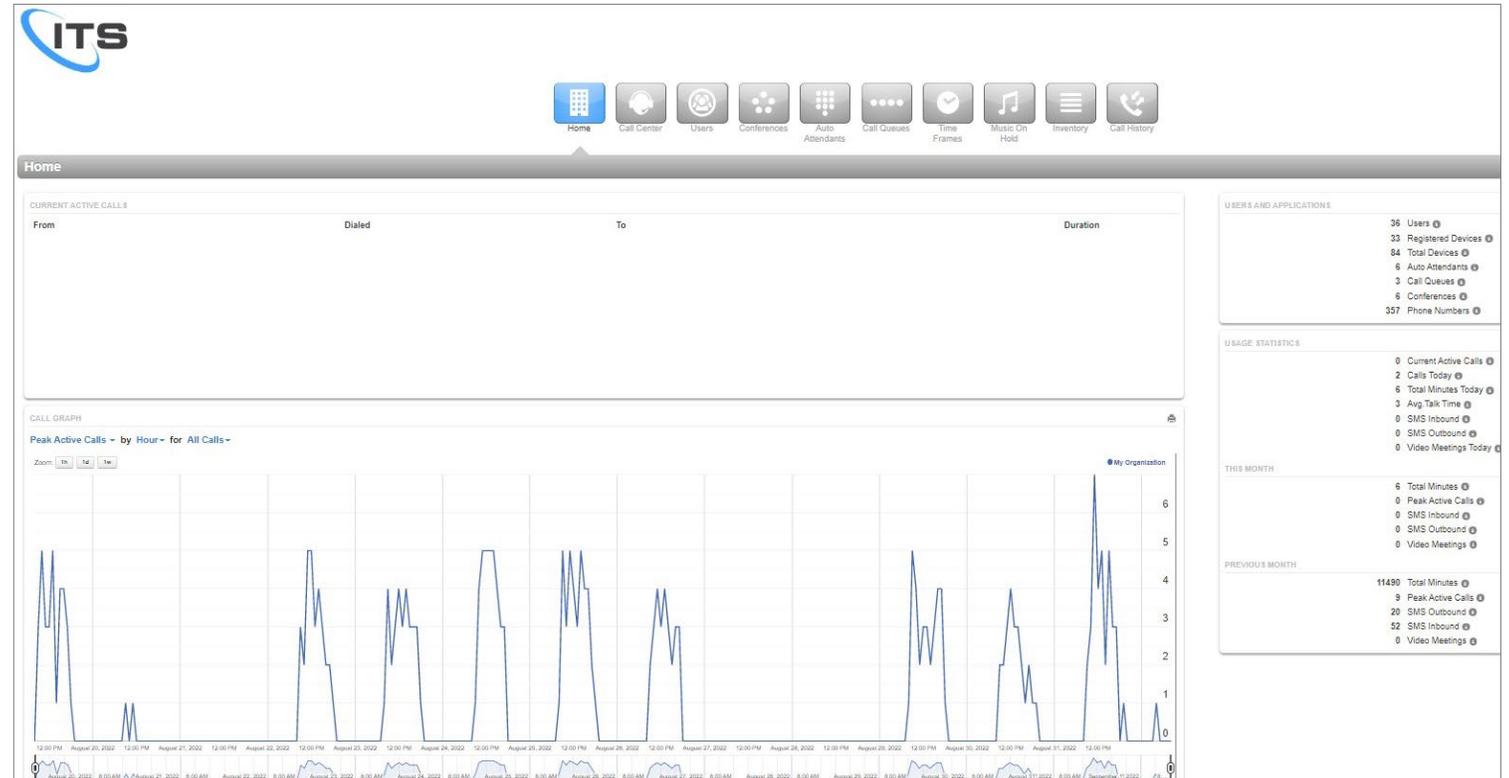


# PORTAL HOME SCREEN

The in depth and informative 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.

- See list of active phone calls
- Utilize the Monitor, Coach, and Join features
- See list of Users and Applications assigned
- See Usage Statistics
- Call Graph - Shows activity for last 2 weeks





# STRATUS CONSOLE

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

ITS

Apps Shilton Hasunuma (2706)

Dynamic Call Parking OFF

Contacts Call Queues Auto Attendants

Park 1 (701)

Park 2 (702)

Park 3 (703)

Search...

Department: All

Sort by: Online

● Charlotte Smith (2728)	Accounting
● David Moro (2712)	Technical...
● Gary Wige (2731)	Technical...
● Joseph Sentner (2723)	Technical...
● Julia Smith (2701)	Accounting
● Marc Monson (2705)	TechOps
● Mariann Tatum (2755)	Client Se...
● Moriah Cipriotti (2720)	Client Se...
● Scott Woods (2707)	Technical...

Make a Call



# STRATUS CONSOLE

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)



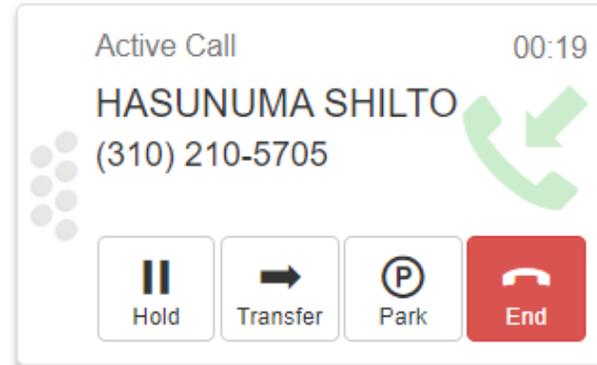
A screenshot of the Stratus Console interface showing call options for Tyler Carr (2717). The interface is divided into two main sections. The top section contains two large blue square buttons. The left button features a white person icon, the text 'Extension 2717', and is highlighted with a white border. The right button features a white voicemail icon, the text 'Voicemail 2717', and is also highlighted with a white border. Below these are three smaller white square buttons with light gray borders. The first button has a briefcase icon and the text 'Work'. The second button has a mobile phone icon and the text 'Mobile'. The third button has a house icon and the text 'Home'. At the bottom right of the interface is a 'Cancel' button.

Cancel

## Call Handling from the Stratus Console

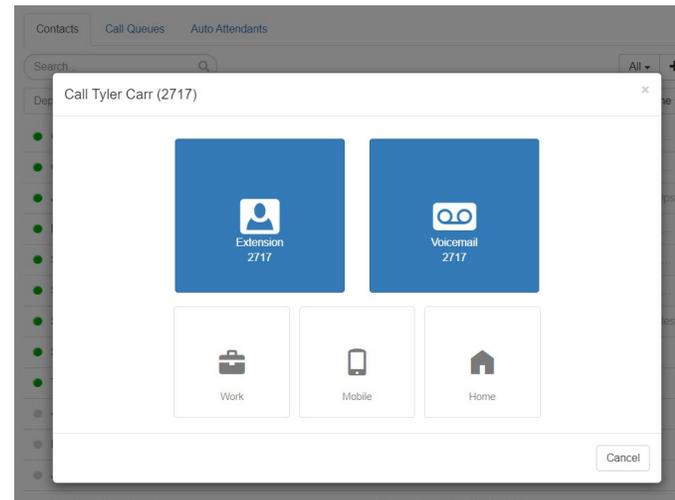
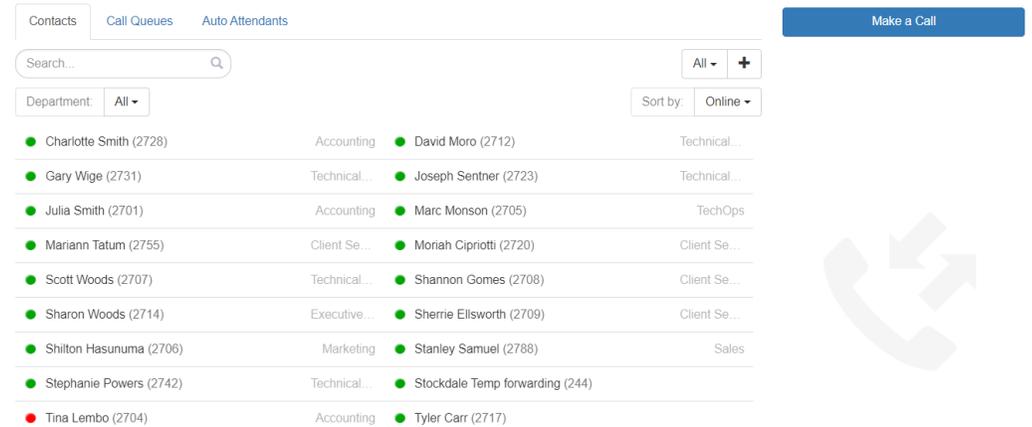
While logged into the Stratus Console and on an active call, the information about the call will be displayed on your screen. You will have the option of:

- 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.





# STRATUS CONSOLE

## 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.

A screenshot of the 'Make a Call' interface. At the top is a dark blue header bar with the text 'Make a Call' in white. Below this is a light gray box containing a text input field on the left with the placeholder text 'Enter Phone number' and a dark blue 'Call' button on the right. Below the input field is a 4x3 grid of buttons representing a dial pad. The buttons are: Row 1: '1', '2 ABC', '3 DEF'; Row 2: '4 GHI', '5 JKL', '6 MNO'; Row 3: '7 PQRS', '8 TUV', '9 WXYZ'; Row 4: '\*', '0', '#'.

Make a Call		
Enter Phone number	Call	
1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0	#



# USER PROFILE

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.

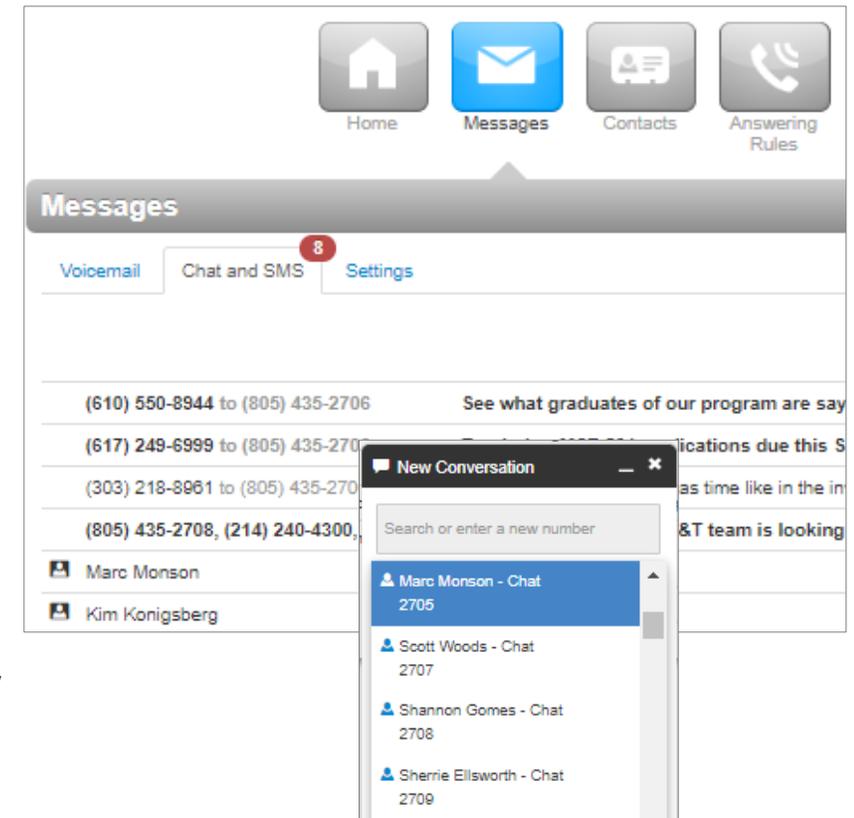
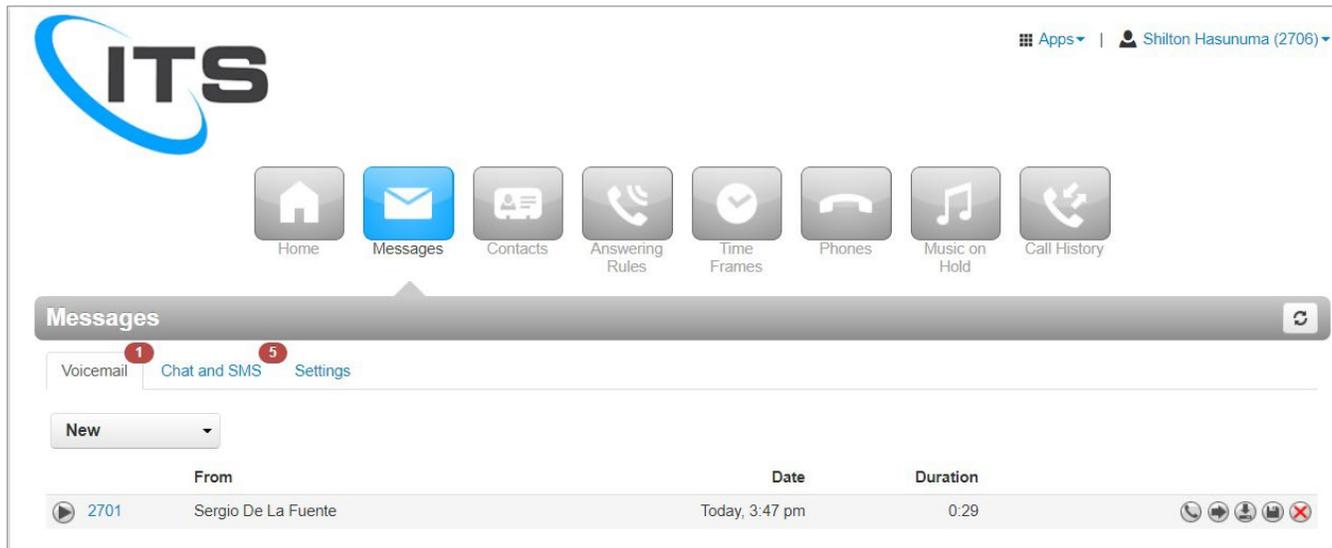
Here you have the ability to:

- 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.
  - Voicemail options include play on the portal, call phone to play voicemail, forward voicemail to another user, download voicemail, etc...
- The [Chat and SMS tab](#) will display all of your Chat messages.
  - Send and receive SMS messages
- The [Settings tab](#) is where you can set up your voicemail.



# CALL CENTER SCREEN

View and manage Call Queues and Hunt Groups

- Stats Grid - view statistics that can be posted on a wallboard showing:
  - How many calls waiting
  - Average Wait Time
  - Average Handling Time
  - Abandoned Rate
  - Calls Answered
  - Call Volume
- Listen in on agent live call
- Create reports on queues and agents

The screenshot displays the Call Center software interface. At the top, there is a navigation bar with icons for Home, Call Center, Users, Conferences, Auto Attendants, Call Queues, Time Frames, Music On Hold, Inventory, and Call History. The main dashboard is divided into several sections:

- CALL QUEUES »**: A table showing call queue statistics.
- ACTIVE CALLS GRAPH**: A line graph showing active calls over the last 8 hours.
- IT Swallboard**: A summary dashboard with key performance indicators.
- AGENTS »**: A list of online agents.

An **Email Reports** dialog box is open in the foreground, allowing users to configure report settings. The dialog has two tabs: **Basic** and **Advanced**. The **Basic** tab is active, showing the following options:

- Select your report types and the frequency they are sent.**
- Types**:  Summary,  Call Queue,  Agent,  Dialed Number
- Frequency**:  Monthly,  Weekly,  Daily
- Monthly Send Day**: 1

Buttons for **Close** and **Next** are visible at the bottom of the dialog.

Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle
Front Door (2000)	0	0	-	8
ITS Main Line Queue (2700)	0	0	-	9
Tech Ops Queue (999)	0	0	-	8

STATS GRID	ALL QUEUES
CW	AWT
0	0:15
AHT	ABN
1:01	0%
CA	CV
1	1

AGENTS » 17 ONLINE

Last Name

- Cristian Berumen
- Moriah Cipriotti
- Sherrie Ellsworth
- Shannon Gomes
- Shannon Gomes
- Traci Laska



# CALL QUEUES SCREEN

Shows call waiting line commonly used for support and sales group.

- Callers hear music while waiting on hold for next agent
- Add music on hold files
- Configure agents assigned to call queues or hunt groups
- Choose different ways to route call queues or hunt groups

The screenshot shows the 'Call Queues' screen in a web application. The top navigation bar includes icons for Home, Call Center, Users, Conferences, Auto Attendants, Call Queues (selected), Time Frames, Music On Hold, Inventory, and Call History. The main content area displays a table of agents assigned to a queue. The table has columns for Agent, Phone/User, Auto Answer, Wrap-up Time, Max Calls, and Max SMS. The agents listed are Marc Monson, David Moro, Joseph Sentner, Gary Wige, Stephanie Powers, and Cristian Berumen. The 'Callers in Queue' section on the right shows a count of 0.

Agent	Phone/User	Auto Answer	Wrap-up Time	Max Calls	Max SMS
Marc Monson	2705	No	-	1	0
Marc Monson	2705m	No	-	1	0
Marc Monson	2705wp	No	-	1	0
David Moro	2712	No	-	1	0
David Moro	2712H	No	-	1	0
Joseph Sentner	2723	No	-	1	0
Gary Wige	2731	No	-	1	0
Gary Wige	2731m	No	-	1	0
Stephanie Powers	2742	No	-	2	0
Stephanie Powers	2742m	No	-	1	0
Cristian Berumen	2751	No	-	1	0

The screenshot shows the 'Edit Tech Ops Queue' configuration form. The form has tabs for Basic, Pre Queue Options, In Queue Options, and SMS. The 'Basic' tab is active. The form fields include:

- Name: Tech Ops Queue
- Extension: 999
- Note: Extension cannot be changed
- Department: [Empty]
- Site: [Empty]
- Type:  Round-robin (longest idle),  Ring All,  Linear Hunt,  Linear Cascade,  Call Park
- Direct Phone Number(s): (805) 435-1292
- Record Calls: Yes
- Statistics: Y1

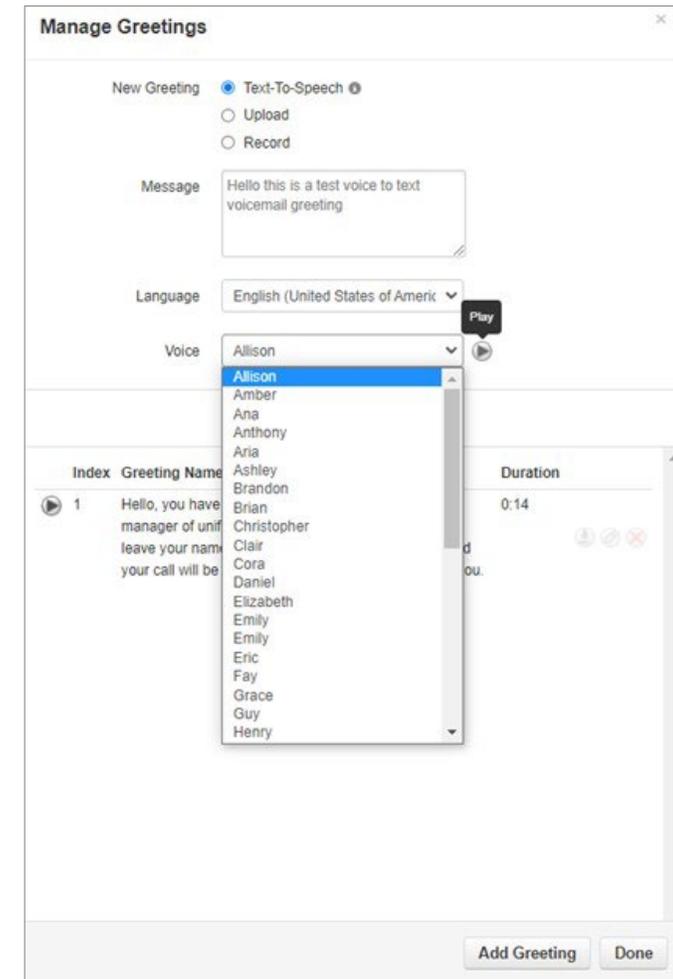
Buttons: Cancel, Save



# MESSAGES SCREEN

Manage greetings with options to upload, record or use Text-To-Speech.

Text-To-Speech voicemail greetings:  
Instead of personally recording your greeting, create an automated personal recording with text to speech by typing your message and having a selected voice say your message.





# ENHANCED VOICEMAIL OPTIONS

Voicemail to email with option transcriptions

**YOU HAVE A NEW VOICEMAIL!**

**2706 (Shilton Hasunuma),**

You have a new voice mail from *(310) 210-5705 (HASUNUMA SHILTO)*.

**Your transcribed message:**

Hi, I'm leaving a test message for a demo test message for a demo.

Listen by opening the enclosed attachment.



# CONTACTS SCREEN

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.

Name	Number(s)	Status	Department	Email
O2 Open 2713	2713	Available (Green dot)		shannon.gomex@itstelecom.com
H9 Hot Desk 1 900	900	Available (Green dot)		900@mail.com
H9 Hot Desk 2 901	901	Available (Green dot)		901@mail.com
4A 4G Overage Alerts	2222	Available (Green dot)	Technical Operations	technicaloperations@itstelecom.com
TC Tyler Carr	2717	Available (Green dot)		tyler.carr@itstelecom.com
MC Moriah Cipriotti	2720	On Call (Red dot)	Client Services	moriah.cipriotti@itstelecom.com
OC Observatory Cisco 508	1200	Off-line (Gray dot)		technicaloperations@itstelecom.com



# CONTACTS SCREEN

Enhanced contacts with imports

- Various choices for viewing contacts including by departments
- See who's available, busy, and offline

Number(s)	Status	Department	Email
2713			shannon.gomex@itstelecom.com
900			900@mail.com
901			901@mail.com
(805) 435-2755, (805) 791-5542			
2222		Technical Operations	technicaloperations@itstelecom.com

Import Contacts

Browse

Outlook, Google, and Apple vCard

Cancel Import



# ANSWERING RULES

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.

Time Frame	Description	Star Codes
ITS Daytime <b>Active</b>	Simultaneously ring, x2706	
Default	Forward always to Auto Attendant- After Hours AA (3010)	

**Edit Answering Rule**

Time Frame: ITS Daytime This is when your answering rule will apply

Enabled

Do not disturb

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

0 +

Just ring user's extension

Cancel Save



# TIME FRAMES

The Time Frames screen allows you to support group services like Auto Attendant and Call Queues. .

A Time Frame establishes a best time slot in which a feature can execute a specific behavior. They are used to route in-coming calls based on the day of the week and time of day.

Time Frames are typically used to send call routing for business hours, after-hours, and holidays.  
*Auto attendant is an automated answering service used with a business phone system that directs inbound calls to the right person or department. An example of an auto attendant would be when you called a company, and you are directed to use your keypad to reach the desired department.*

Name	Description	Owner
3111 Forwarding	Specific Dates ⓘ	Shared
After Hours	Always ⓘ	Shared
Holiday	Specific Dates ⓘ	Shared
ITS Daytime	Days and Times ⓘ	Shared

Add a Timeframe

Name:  Note: Name cannot be changed

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

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

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

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

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

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

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

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

Cancel Save



# PHONES

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.

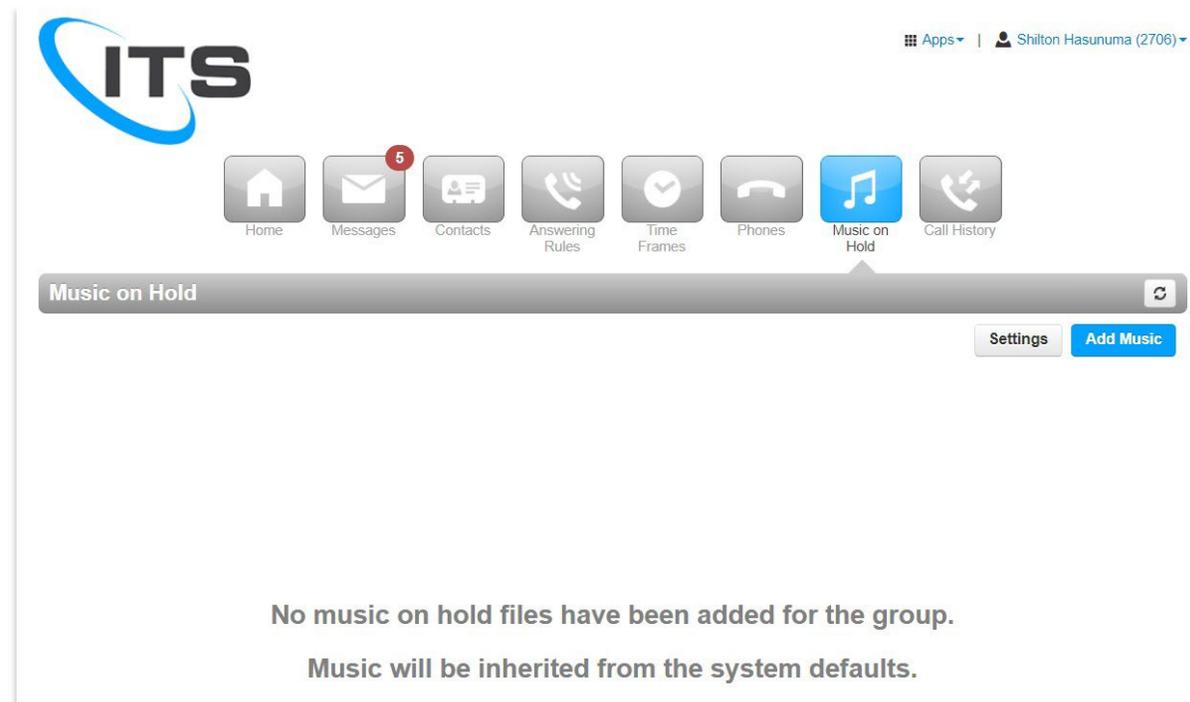
Name	Device Type	IP Address	MAC Address	Line
2706m	SpectrumVoIP Mobile App 3.1.0 Shilton Hasunuma's iPhone	12.124.252.26:62913	-	-
2706	Yealink SIP-T27G 69.84.0.15	12.124.252.26:14890	80:5E:C0:2E:01:F7	3
2706wp	-	-	-	-



# MUSIC ON HOLD

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.





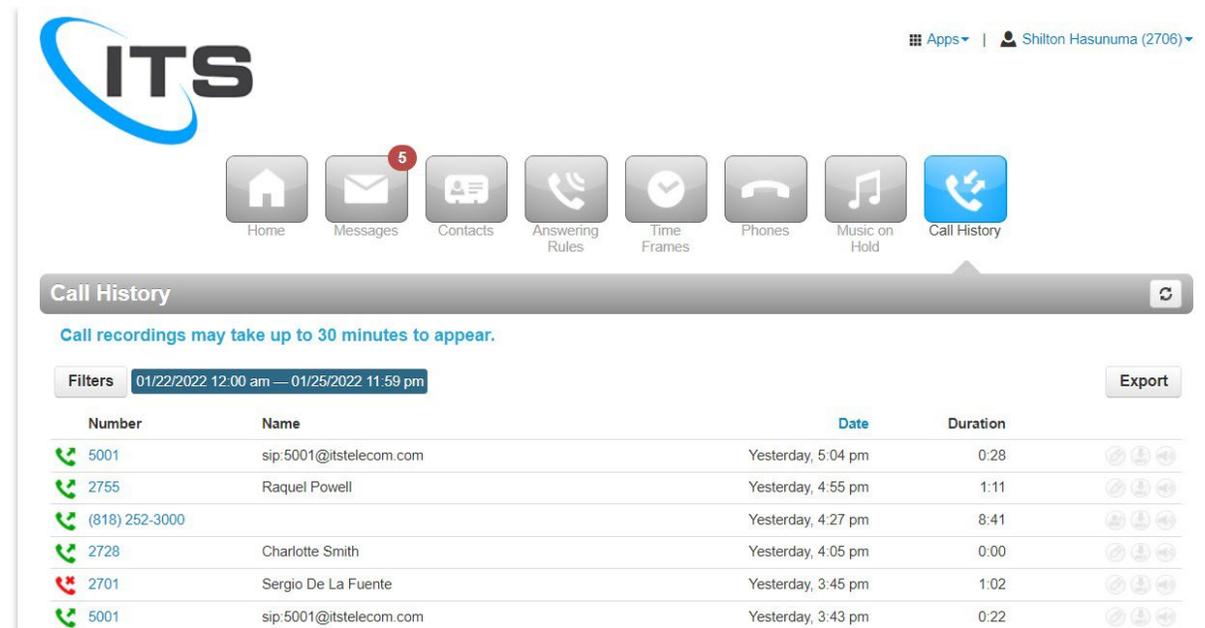
# CALL HISTORY

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.



The screenshot shows the ITS Call History interface. At the top, there is a navigation bar with icons for Home, Messages (with a red notification bubble containing the number 5), Contacts, Answering Rules, Time Frames, Phones, Music on Hold, and Call History. Below the navigation bar, the 'Call History' section is active, displaying a list of calls. A filter bar at the top of the list shows the date range '01/22/2022 12:00 am — 01/25/2022 11:59 pm' and an 'Export' button. The call list has columns for Number, Name, Date, and Duration. Each call entry is preceded by a colored icon: green for outgoing, red for missed, and blue for inbound.

Number	Name	Date	Duration
5001	sip:5001@itstelecom.com	Yesterday, 5:04 pm	0:28
2755	Raquel Powell	Yesterday, 4:55 pm	1:11
(818) 252-3000		Yesterday, 4:27 pm	8:41
2728	Charlotte Smith	Yesterday, 4:05 pm	0:00
2701	Sergio De La Fuente	Yesterday, 3:45 pm	1:02
5001	sip:5001@itstelecom.com	Yesterday, 3:43 pm	0:22



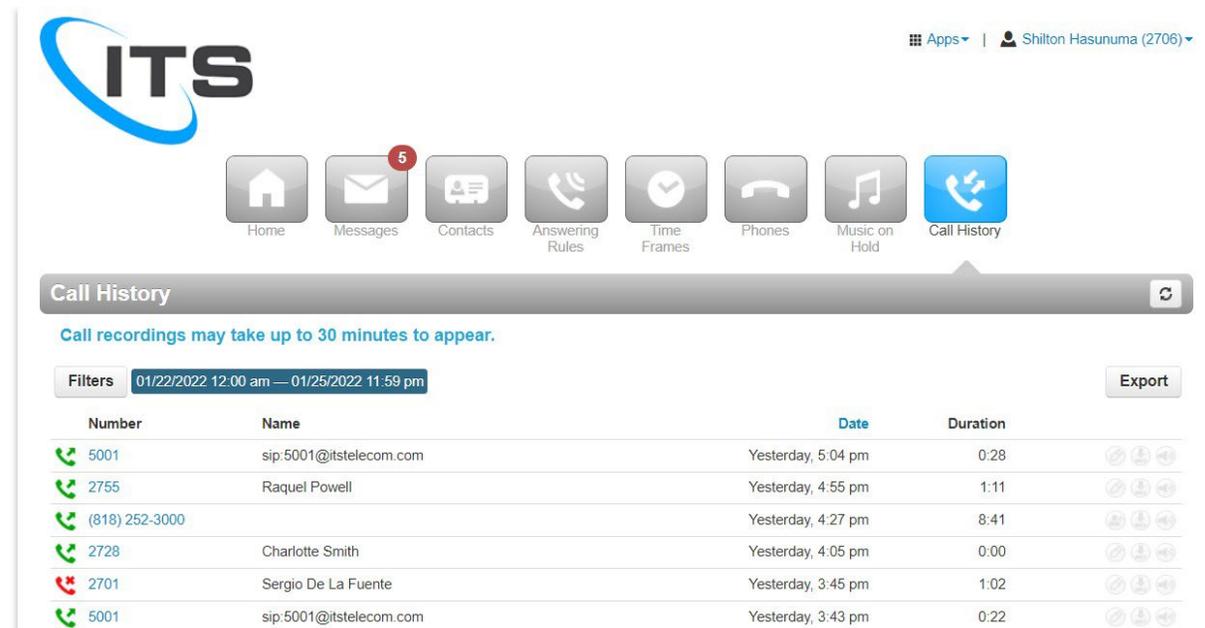
# CALL HISTORY

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.



The screenshot shows the ITS Call History interface. At the top, there's a navigation bar with icons for Home, Messages (with a red notification bubble containing the number 5), Contacts, Answering Rules, Time Frames, Phones, Music on Hold, and Call History. Below the navigation bar, the 'Call History' section is active, displaying a list of calls. A filter bar shows the date range '01/22/2022 12:00 am — 01/25/2022 11:59 pm' and an 'Export' button. The call list includes columns for Number, Name, Date, and Duration, with call icons indicating the direction of the call.

Number	Name	Date	Duration
5001	sip:5001@itstelecom.com	Yesterday, 5:04 pm	0:28
2755	Raquel Powell	Yesterday, 4:55 pm	1:11
(818) 252-3000		Yesterday, 4:27 pm	8:41
2728	Charlotte Smith	Yesterday, 4:05 pm	0:00
2701	Sergio De La Fuente	Yesterday, 3:45 pm	1:02
5001	sip:5001@itstelecom.com	Yesterday, 3:43 pm	0:22



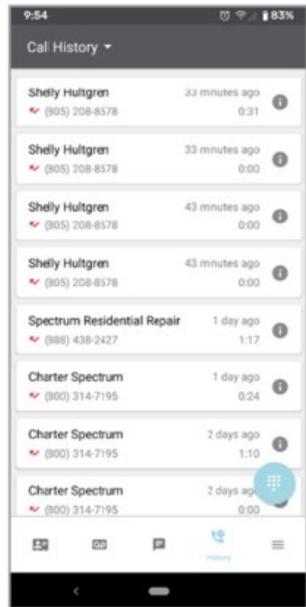
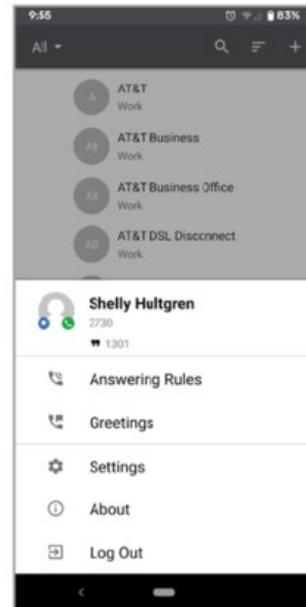
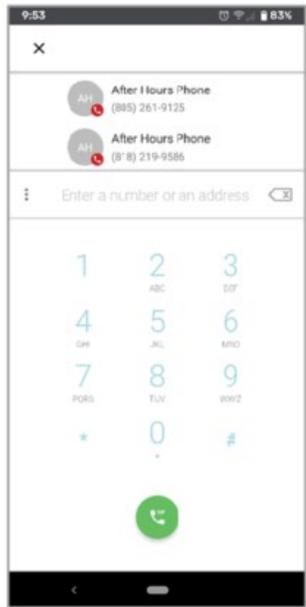
# MOBILE PHONE APPLICATION

Phones / Shilton Hasunuma (2706)

SNAPmobile

← Link to download app is on the portal in the Phones page.

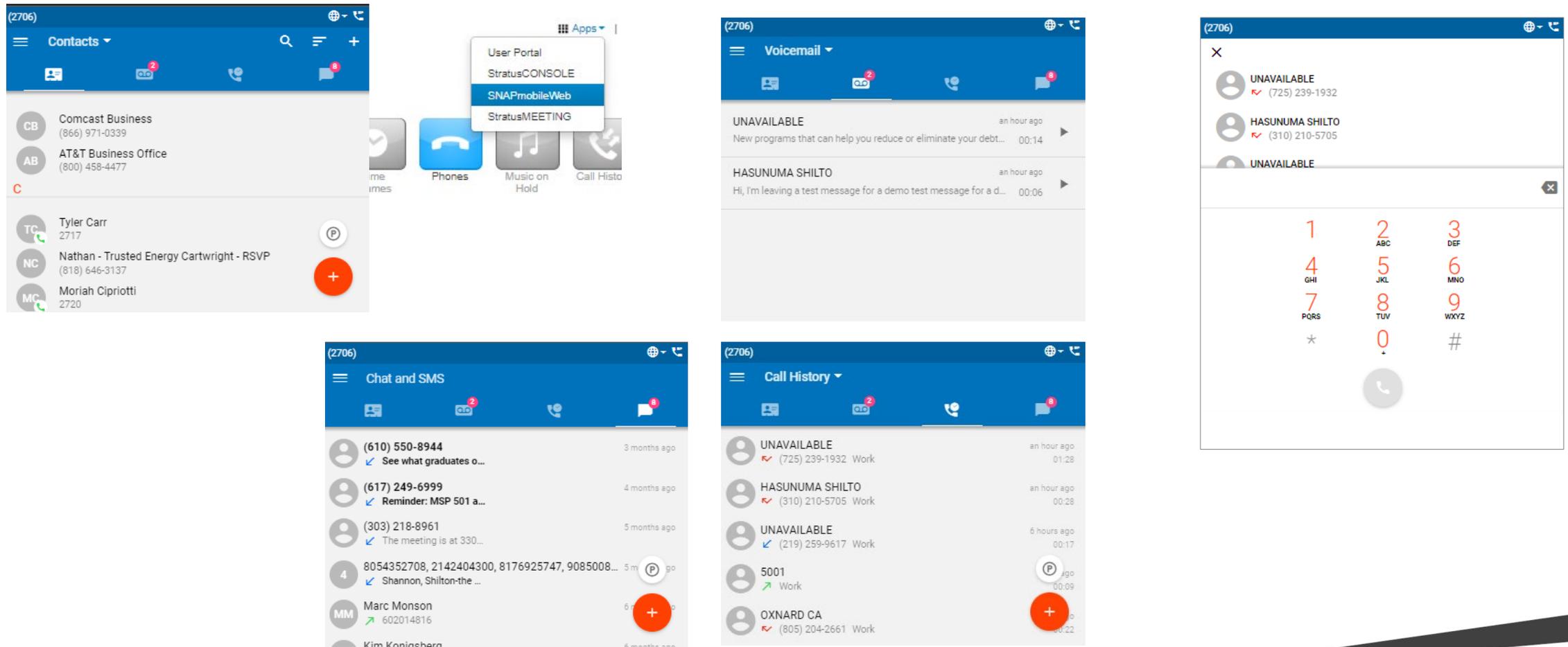
Name	Device Type	IP Address	MAC Address	Line
2706	Yealink SIP-T27G 60.84.0.15	12.124.252.26:14890	80:5E:C0:2E:01:F7	3
2706m	SpectrumVoIP Mobile App 3.2.0 Shilton Hasunuma's iPhone	172.1.124.38:54953	-	-
2706wp	StatusWEB PHONE 42.1.0 (Chrome 99.0.4844.51)	12.124.252.26:33470	-	-





# WEB SOFTPHONE

Make phone calls over the internet through your computer.

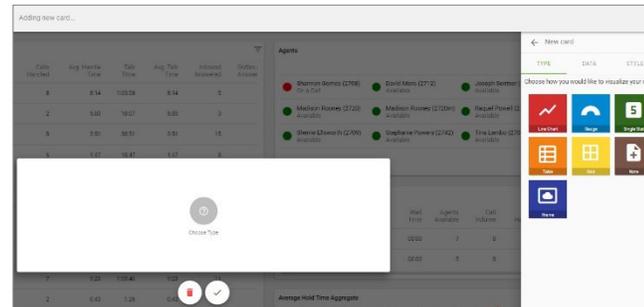
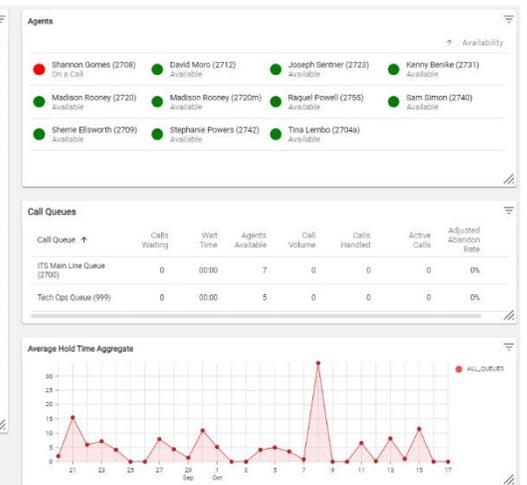
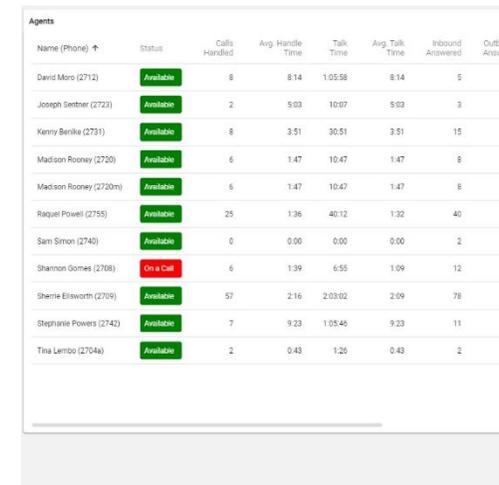
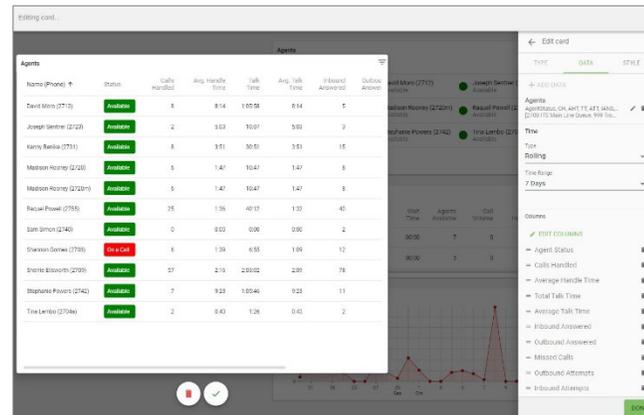




# USERS SCREEN - WALLBOARDS

View real-time statistics on the wallboard:

- Agent statistics
- Agent availability
- How many calls waiting
- Average Wait Time
- Average Handling Time
- Abandoned Rate
- Calls Answered
- Call Volume





# QUESTIONS?

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

805-520-7020

[clientservices@itstelecom.com](mailto:clientservices@itstelecom.com)