Cloud PBX Quick Start Guide

port
networks

Table of Contents

Making Domestic Calls

Making a call with your phone does not require a leading number. You can dial on-hook or off-hook.

➢ To dial on-hook
1. Dial the phone number.
2. Pick up the handset, headset, or speaker.

➢ To dial off-hook
1. Pick up the handset, headset, or speaker.
2. Dial the phone number.

Calls to the US and Canada are all dialed using 10 or 11 digits. Local calls can be dialed using 7 digits.

Extension Dialing

Extensions on your system can be dialed using their 3-to-4 digit extension or by pressing the button on your phone corresponding to the desired extension.

Receiving Calls

When a call comes in, you can answer it via a headset, speakerphone, or handset.

➢ To answer a call using a handset
1. Lift the handset off-hook.

➢ To answer a call using a speakerphone
1. Press the **Speaker** button.

➢ To answer a call using a headset
1. Usage depends on how the headset is connected. Often, you'll press the button on the headset or press the headset button on the phone.

Voicemail

➣ To access voicemail
1. Press the **Messages** button on your phone to access your voicemail box or dial **5001** if you cannot identify the voicemail button.
2. If you subscribe to multiple mailboxes, a list of mailboxes may appear. Select the mail box you want to access.
3. When prompted, enter your voicemail pin, and then press **#**.

➣ To access your mailbox from another user's phone
1. Dial **5000**.
2. When prompted, enter the other person's extension number.
3. Enter the voicemail PIN of the other person's mailbox, followed by **#**.
4. Setting Up Your Mailbox
5. The first time you log in to your mailbox you are walked through recording your name for the directory and recording your personal greeting.
6. The name recording is for the dial-by-name directory, so when someone enters the first three letters of your last name, it will play back your name recording.
7. The greeting plays when your mailbox is reached. It is very important to make a custom message, as many callers will not leave messages at mailboxes that have generic greetings.
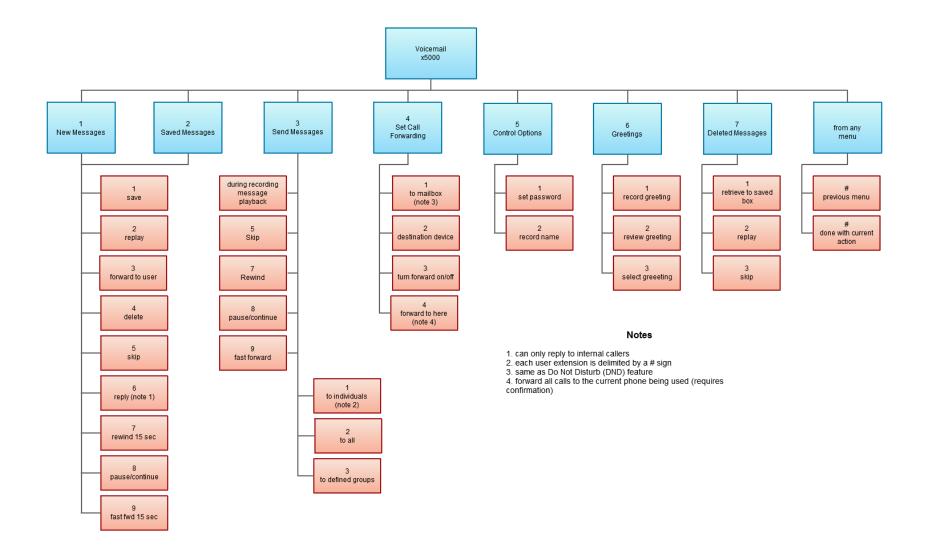
Alternate Greetings

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

➣ To record an alternate greeting
1. From your mailbox, press **6** for greetings, and then press **1** to record an alternate greeting.
2. When prompted for the greeting number press **2** for your next alternate greeting (1 is your default greeting).
3. After your recording is completed, select the active greeting by selecting option **3** in the greetings menu.

Voicemail Tree

On the next page you'll find a voicemail tree showing what to dial for each option in your mailbox.

Voicemail
x5000

1 New Messages

2 Saved Messages

3 Send Messages

4 Set Call Forwarding

5 Control Options

6 Greetings

7 Deleted Messages

from any menu

1 New Messages
- 1 save
- 2 replay
- 3 forward to user
- 4 delete
- 5 skip
- 6 reply (note 1)
- 7 rewind 15 sec
- 8 pause/continue
- 9 fast fwd 15 sec

2 Saved Messages
during recording message playback
- 5 Skip
- 7 Rewind
- 8 pause/continue
- 9 fast forward

3 Send Messages
- 1 to individuals (note 2)
- 2 to all
- 3 to defined groups

4 Set Call Forwarding
- 1 to mailbox (note 3)
- 2 destination device
- 3 turn forward on/off
- 4 forward to here (note 4)

5 Control Options
- 1 set password
- 2 record name

6 Greetings
- 1 record greeting
- 2 review greeting
- 3 select greeeting

7 Deleted Messages
- 1 retrieve to saved box
- 2 replay
- 3 skip

from any menu
- # previous menu
- # done with current action

Notes

1. can only reply to internal callers
2. each user extension is delimited by a # sign
3. same as Do Not Disturb (DND) feature
4. forward all calls to the current phone being used (requires confirmation)

Handling Calls

Your Cloud PBX features various ways to move calls around, including attended transfer, unattended (blind) transfer, voicemail transfer, park, and more. In this section, references to BLFs are the 1-touch buttons on your phone (if equipped).

Attended Transfer

Attended transfer allows you to speak to the transfer recipient prior to completing the transfer while the caller is on hold.

➤ To perform an attended transfer using Polycom/Poly and Yealink phones
1. Press the **Transfer** key/softkey on your phone.
2. Dial the recipient's extension or press their BLF.
3. Speak to the recipient, and then either press **Transfer** again to complete or cancel if the recipient cannot take the call.

Blind Transfer

Blind transfer goes straight to the recipient.

➤ To blind transfer using Polycom/Poly phones
1. Press and hold the **Transfer button**.
2. Select Blind from the on-screen menu
3. Enter the extension of the recipient or the recipient's BLF.

➤ To blind transfer using Yealink phones
1. Press **Transfer**.
2. Dial the extension of the recipient
3. Press Transfer.

Transfers to External Numbers

A transfer can also go to an external number such as a cell phone. Follow the transfer directions above but instead of dialing an extension, dial a 10-digit phone number.

Park and Hold

On your phone system, hold is a local function. This means a call held on your phone cannot be picked up at another station. Park is a system-wide function. This means a call parked at one phone may be picked up by any phone. Please see your system administrator to make sure call parking has been enabled for your company.

➤ To park a call
1. Dial ******* in an active call from any phone. The system says, "The call is parked at **xxxx**."
2. Hang up.

➤ To retrieve the parked call
1. Dial **xxxx** where **xxxx** is the extension stated by the system.

Directed Call Pickup

Directed call pickup (DCP) allows you to answer a call ringing at another station.
To perform a directed call pickup
1. Dial ***35xxxx**. If 111 is ringing, for example, dial ***35111** to pick up that call.
2. Phones with BLFs to the ringing station can also press the corresponding BLF.

3-Way Conference

➤ To make a 3-way conference
1. Call or be called by the first participant in the conference.
2. Press the **Conference** key/softkey, and then dial the second participant.
3. After the second participant picks up, press **Conference** again to connect everyone.