INTELLIGENT **NETWORK** SYSTEM

Switch INS User **MANUAL** 3.2

The easy step guide into using the Switch INS platform - stepping your business into the future

Intelligent, innovative and interactive communications.

www.switchins.com

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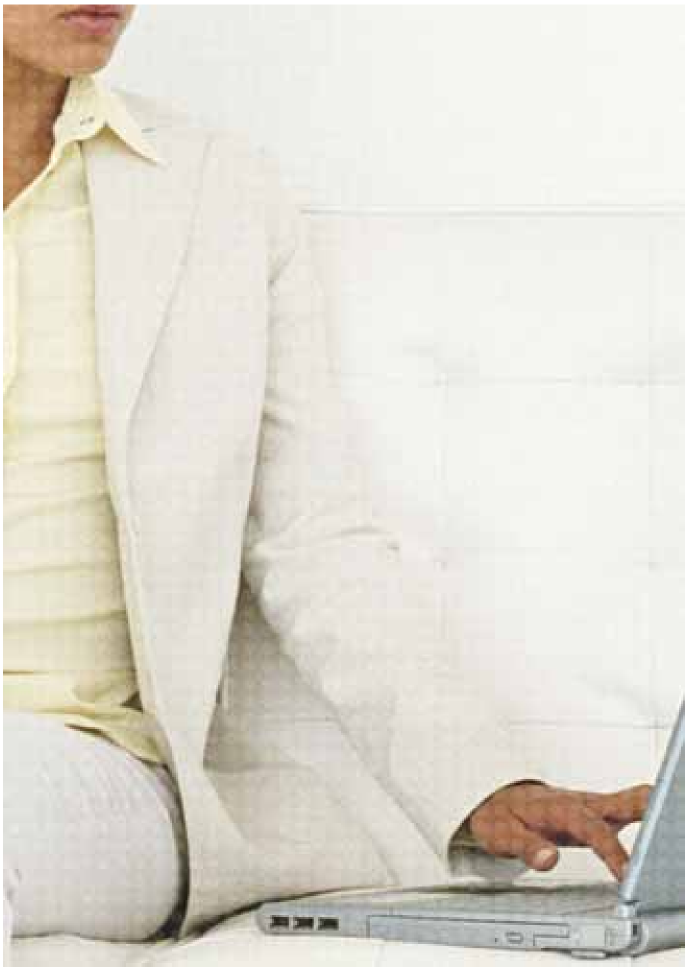
1: Welcome to the Switch INS Platform

Switch Call Limited is one of the fastest growing communications businesses in the UK, with annual revenues increasing year upon year.



Switch is a technologically innovative business specialising in delivering high quality services through its own network infrastructure. Our customers include councils, multi-national corporations, telecoms companies and thousands of other businesses both in the UK and abroad.

Whether you are a small business user, a company or a reseller, Switch Call Ltd not only offers you a new number but also provides excellent customer services. A member of technical support team is always at the end of the phone to answer any questions or help with problems which may occur.

A number with Switch also entitles you access to a virtual office, this facility comes with your number and is of no additional cost. Services include fax to email and voice to email, the ability to create your own audio files with greeting and out of office messages, plus the facility to change routing on three targets which can be routed to a landline or mobile number. Calls can also be routed internationally.

2: Login

Open your default internet browser and visit http://www.switchins.com

When the page has appeared you will see the screen below, in figure 1, enter your username and password to continue, and click on the Login button. If you do not have a username or password, please contact Switch Support on 0845 652 2222. Please note that throughout the site, next to certain fields you may see this symbol - (?) – this means that online help is available for the item you are looking at. Just click on the (?) and interactive help will be opened up in a new window.

Figure 1: Switch INS Opening Page

After you have successfully inputted your username and password, you will see the below screen in figure 2:

Figure 2: Switch INS Login Screen

This is the introduction page to the system. On this page there are 6 shortcuts or quick links to areas of the site that you may use the most. Just click on the appropriate shortcut and you will be taken directly to that section.

- **My Numbers** – clicking on this will take you direct to section 4.1 of this manual.
- **My Services** – clicking on this will take you direct to section 4.3 of this manual.
- **My Statistics** – clicking on this will take you direct to section 5.4 of this manual.
- **My Audios** – clicking on this will take you direct to section 6.1.2 of this manual.
- **My Invoices** – clicking on this will take you direct to section 3.5 of this manual.
- **My Details** – clicking on this will take you direct to section 3.3 of this manual.

To continue, please click on the My Account button on the left hand side.

3: My Account

On clicking the My Account button you will see the below screen in figure 3.

Figure 3: My Account Opening Screen

In My Accounts, you have the following options available:

- Advice Notes
- Customers
- Details
- Downloads
- FTP
- Invoices
- Page Permissions
- Rates & Tariffs

Details on each section are explained below.

3.1: Advice Notes

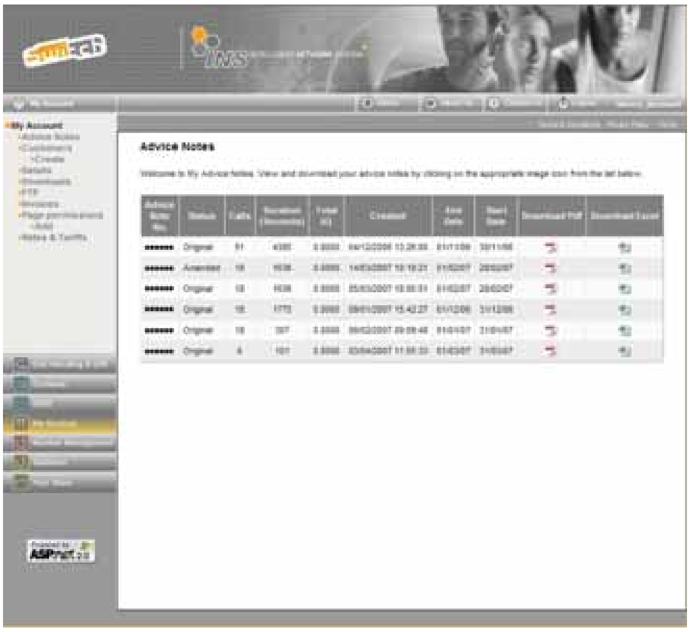
The advice notes section shows you summaries created from your account. An advice note is usually created on a monthly basis and shows you the summary of your account between the first and last day of the month. Any negative values on an advice note relate to a payment **to you**, the customer. Any positive values on the advice note relate to a payment **from you**, the customer.

An advice note can have two statuses, either original or amended. An original advice note is one that was created first, and advice note with a status of amended means this is a reissue of an original advice note that has been changed in some way.

Advice notes can be downloaded in PDF or Excel format by clicking on the relevant link in the advice note screen.

The advice note screen can be seen below in figure 4.

Figure 4: Advice Notes Screen

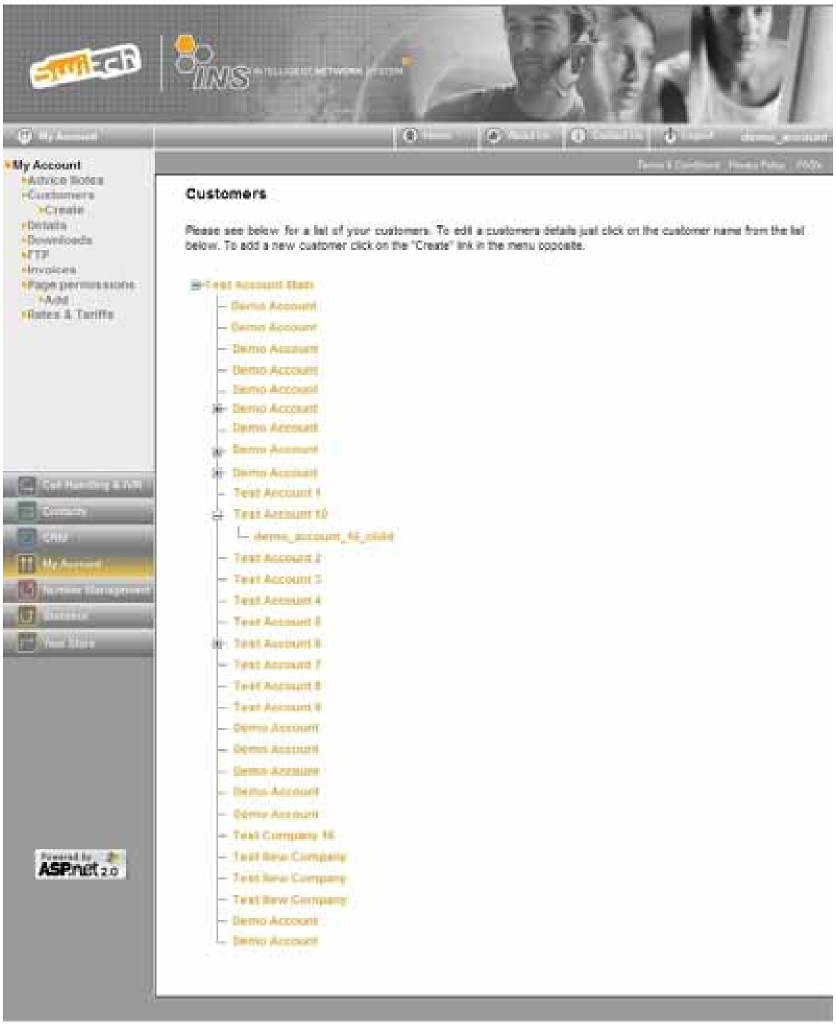


3.2: Customers

The customers section initially shows you a tree view of all your sub customers that you have under your own main account. This view also shows you sub customers of your customers, and their sub customers etc. Clicking on the customers name in this view, will take you into the contacts section, where you can view and alter the contact details including name, address, login, password and details for the main contact for the account.

The customers screen can be seen below in figure 5.

Figure 5: The Customers Screen



3.2.1: Create Customers

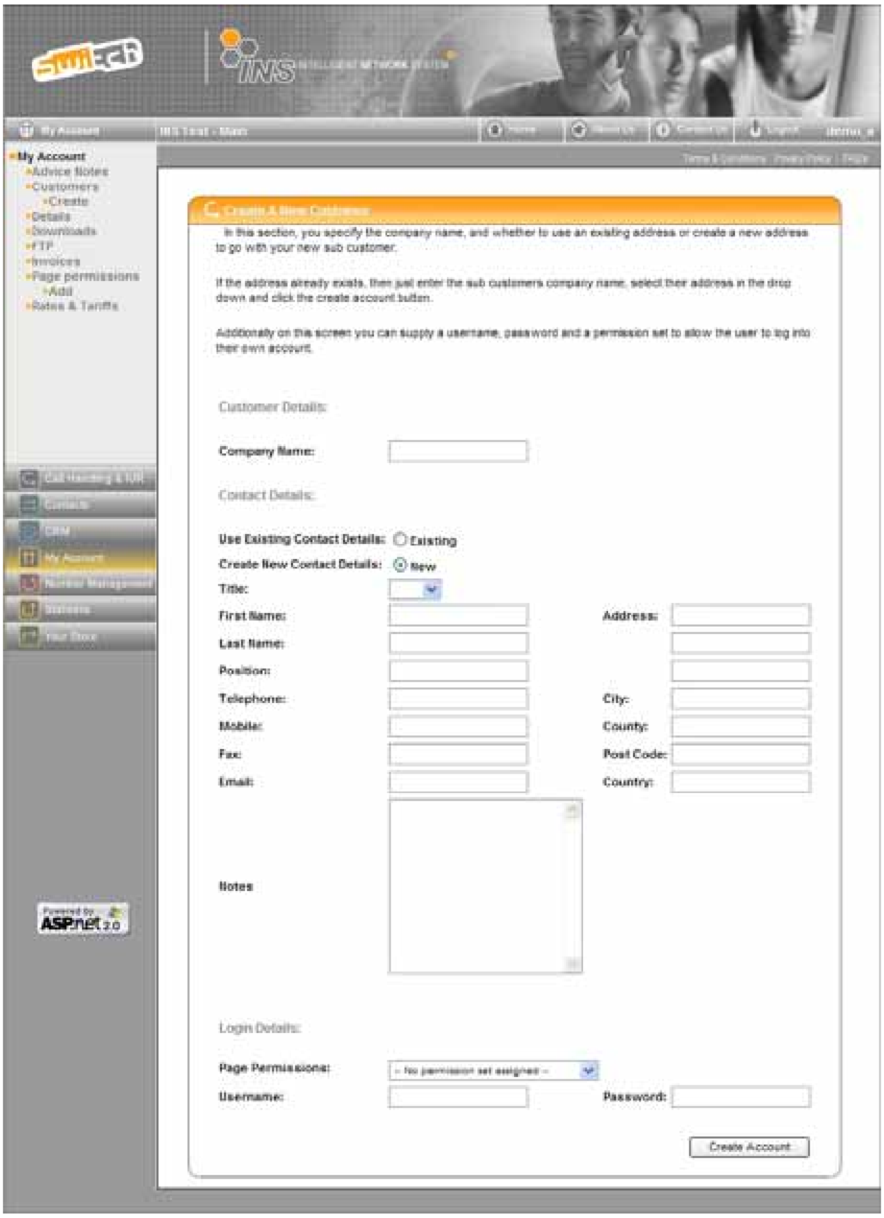
The create link under customers in the My Account section is where you can create a new sub customer. In this section, as can be seen below in figure 6, you specify the company name, and whether to use an existing address or create a new address to go with your new sub customer. If you require giving them access to your account, you can optionally select a username and password to assign to them and a permission set to allow the user to log into their own account. Permission sets are explained in the permissions section of 3.7 of this manual.

If the address already exists, then just enter the sub customers company name, select their address in the drop down and click the create account button.

Figure 6: Customers Create Screen Using Existing Contact Details Screen

If you need to add a new address for your sub customer, then click the new button and the screen will change and will look like figure 7 below. Enter the new companies contact details as before and click the create account button.

Figure 7: Customers Create Screen Using New Contact Details.

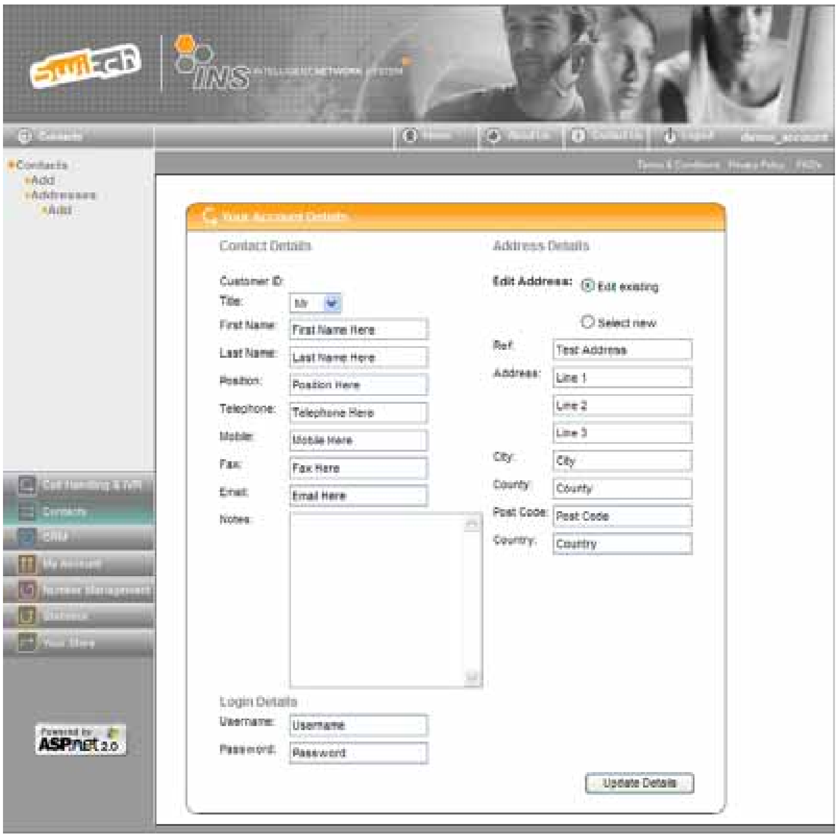


3.3: Details

The details sections lists the current details held on file for your company. Should your name, address or contact details change in any way you can update them in this section. Just alter the desired entries and click on update details and the change will be made straight away.

The details screen can be seen in figure 8 below.

Figure 8: Details Screen



3.4: Downloads

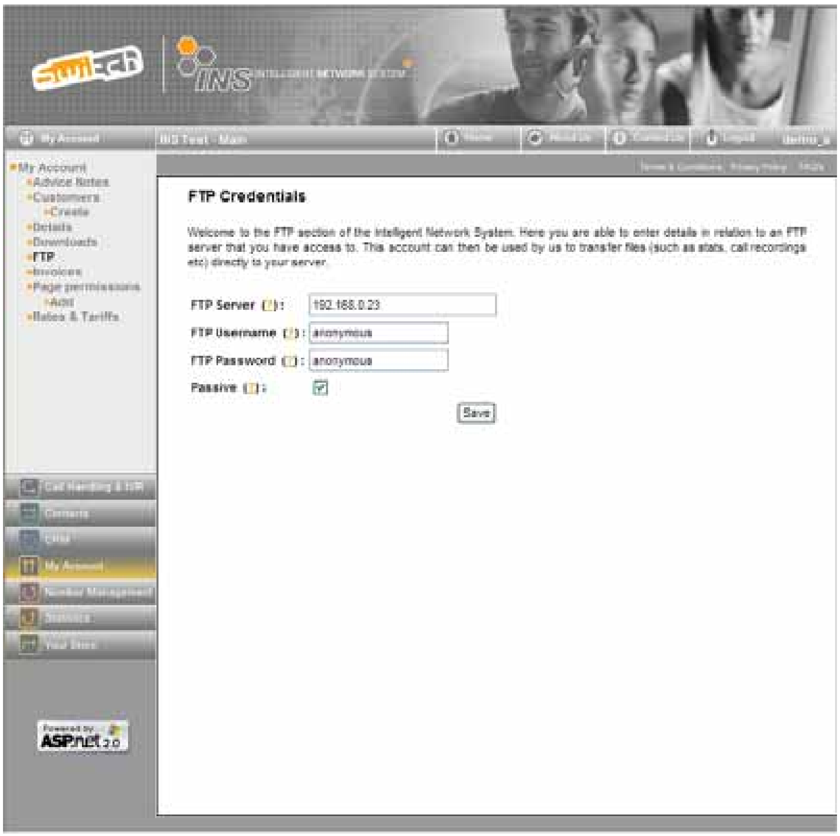
The download screen contains information and articles about INS and products and services for you to download. This includes the latest version of this manual is avialbale to download in this section. The downloads screen can be seen in Figure 9 below.

Figure 9: Downloads Screen

3.5: FTP

The FTP (File Transfer Protocol) section is where you log a global FTP account; this can be used for FTP delivery of Voicemails, Fax's, Call Recordings and Statistics. The FTP screen can be seen below in figure 10. You need to specify the FTP server IP or DNS address, a username, a password and select if you require to use passive FTP or not. The difference being with passive FTP the client initiates both connections to the server, solving the problem of firewalls filtering the incoming data port connection to the client from the server. If find out if you require to use passive contact your FTP Administrator.

Figure 10: FTP Screen



3.6: Invoices

The invoice section shows you invoices created on your account. An invoice can be created daily from purchases made on your account, or monthly, if your account is in debit. This is referred to as the type of invoice which can be seen in figure 11 below.

Invoices can be downloaded in PDF format by clicking on the relevant link in the invoice screen.

The invoice screen can be seen below in figure 11.

Figure 11: Invoice Screen

3.7: Page Permissions

The page permissions section, as can be seen in figure 12 below, allows you to group together page permissions into a friendly text description. On this page, you can edit any of the current permissions sets, or delete any permission set. A permission can be set on a page by page basis, so a permissions group contains all available pages to the site and you can grant access as full, read only or no access. Therefore, you can give your sub customers as much or as little access to the site as you require by creating and then selecting the appropriate permissions set when you create the customers access.

Figure 12: Page Permissions Screen

3.7.1: Add Page Permissions

To create a new set of page permissions, enter a new permissions set name, then select from the permissions list to allow the access you require for this permissions set. When you are satisfied with the permissions for this permission set, click the button marked create permission set.

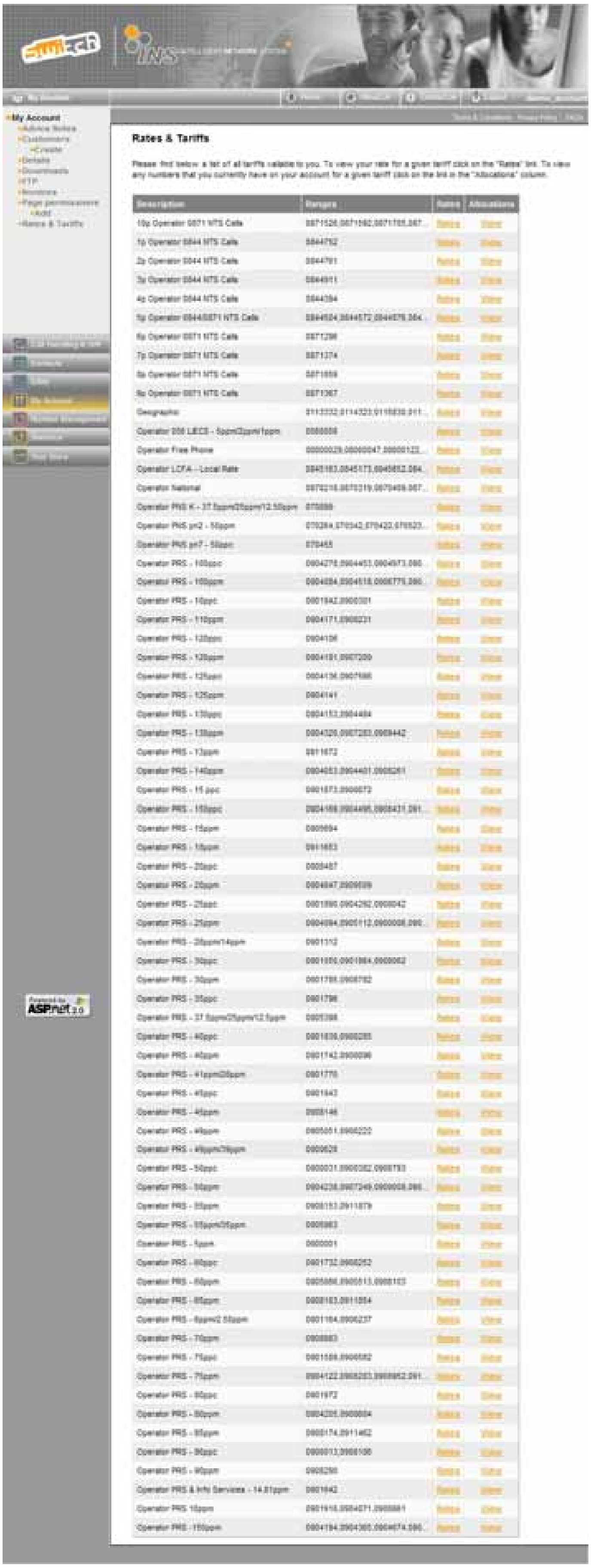
The add page permissions screen can be seen below in figure 13.

Figure 13: Add Page Permissions Screen

3.8: Rates & Tariffs

The Rates and Tariffs sections can be seen in figure 14 below. It contains a list of all the tariffs that are available. To see your rates on each tariff, click on the rates link, which is further explained in 3.8.1 below. To see what numbers are allocated to you on this tariff, click on the Allocations link, which is further explained in 3.8.2 below.

Figure 14: Rates & Tariffs Screen



3.8.1: Rates

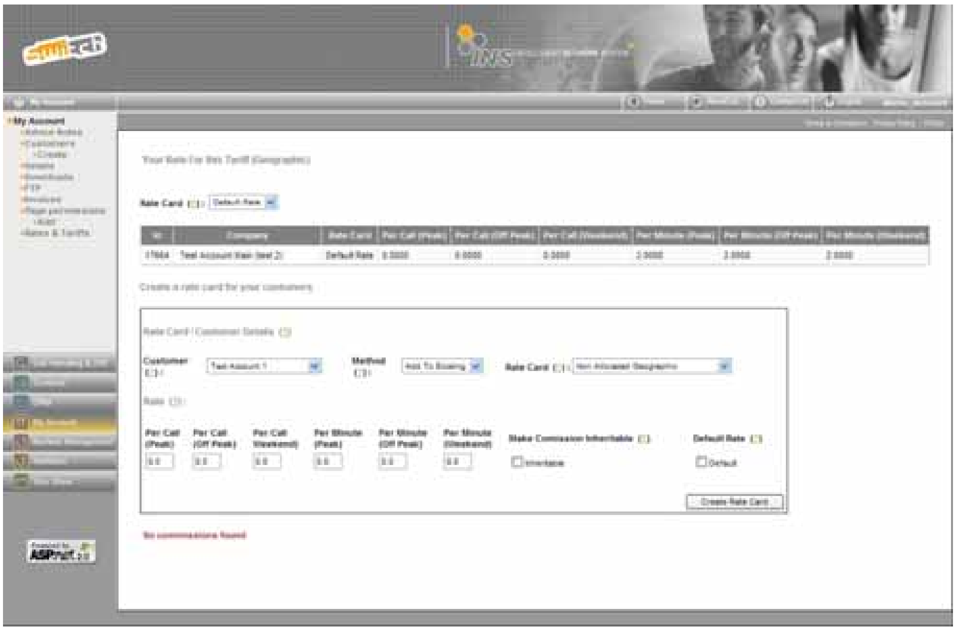
The rates section shows your default rate card assigned to your account at the top of the screen, as can be seen in figure 15 below. If this rate card has a positive value, then you, the customer, have to pay the amount on a per minute or per call basis, if the rate card has a negative value, then you, the customer, obtain a revenue share of the amount on a per minute or per call basis.

If you want to give out all or part of your assigned rate to one or many of your sub customers then you can do this by creating a rate card for your customer in this screen. Firstly, select the sub customer from the drop down list, enter a description or name for your rate card, then enter the rate to give this customer, either a per minute rate, or a per call rate depending on the rate you are receiving. Note you cannot give away to your customer(s) more than you receive. You can then select to make this new rate card for this customer inheritable or not. If you make the rate card inheritable it means the customer can then split out the rate they receive to their other customers if they so wish. Anything left from your rate card after your sub customers commissions have been added, is assigned to your account. Note your sub customer cannot see the rate you get, or any of the other customers you may choose to include in a rate card, they will only be able to see revenue splits to themselves and any of their sub customers. If you wish to set this rate card as the default rate card for the customer then select the default rate card option. When you have done, just click the create rate card button.

On clicking the create rate card button the customers rate card will be displayed as a commission on the tariff you are looking at. You can then add other commissions to the rate card you have selected, by selecting the new customer, then choose the method “Add To Existing”, and the required rate card name and follow the procedure as before. Please note once a rate card is in use, you will no longer be able to add or amend a rate card. Alternatively, you can create a new rate card and series of commissions for this tariff by selecting the sub customer and create new for the method and follow the instructions above.

You can have multiple rate cards, with multiple commissions to multiple sub customers, but you cannot exceed your rate at the very top of the screen.

Figure 15: Rates Screen



3.8.2: Allocations

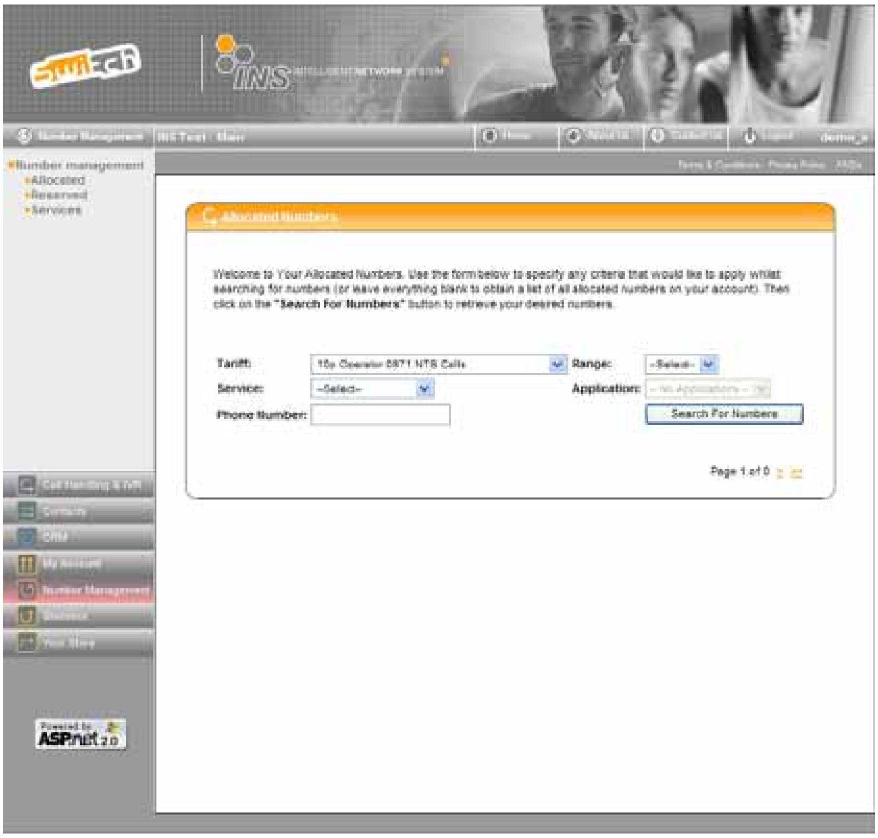
On clicking on Allocations, it takes you to the Number Management section and to the Service Allocations screen as can be seen below in figure 16.

On the Service Allocation screen you can filter the list returned by using the boxes at the top. You can search by service, tariff, range, application or phone number. This will return you a list of all the numbers under these selected criteria on your account.

The list returned will include the phone number, the service on phone number, the date the phone number was put into service, the date when the phone number was put out of service, if it was put out of service, and a link to see statistics on the number.

For more about statistics, please see the statistics section.

Figure 16: Service Allocations Screen



4: Number Management

On clicking the Number Management button you will see the below screen in figure 17.

Figure 17: Number Management Screen

In Number Management, you have the following options available:

- Allocated
- Reserved
- Services

Details on each section are explained below.

4.1: Allocated

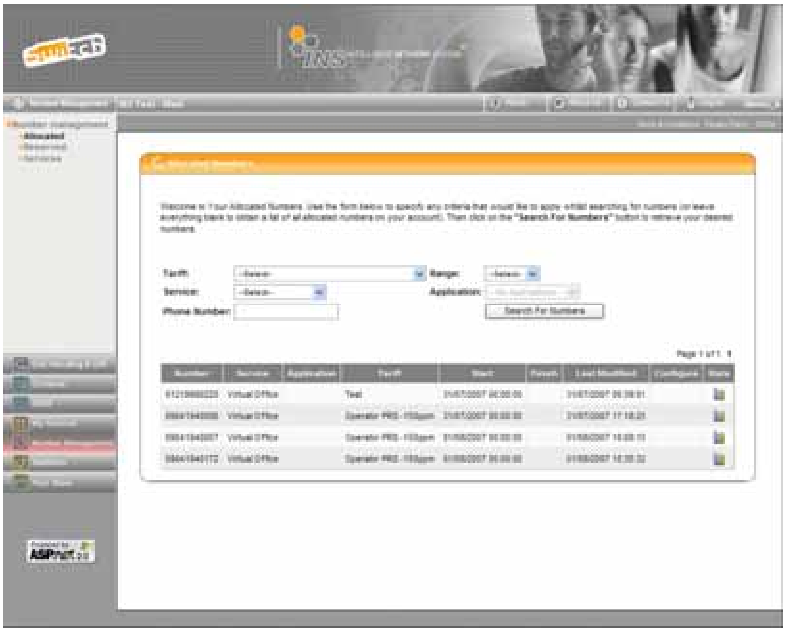
The allocated screen can be seen below in figure 18, this screen shows you any numbers assigned to your account that have been allocated or put into use on a service.

On the allocated screen you can filter the list returned by using the boxes at the top. You can filter by service, tariff, range, application or phone number. This will then return you a list of all the numbers under these selected criteria on your account.

The list returned will include the phone number, the service on the phone number, the date the phone number was put into service, the date when the phone number was put out of service, (if it was put out of service), and a link to see statistics on the number.

For more information on statistics, please see the statistics section.

Figure 18: Allocated Screen

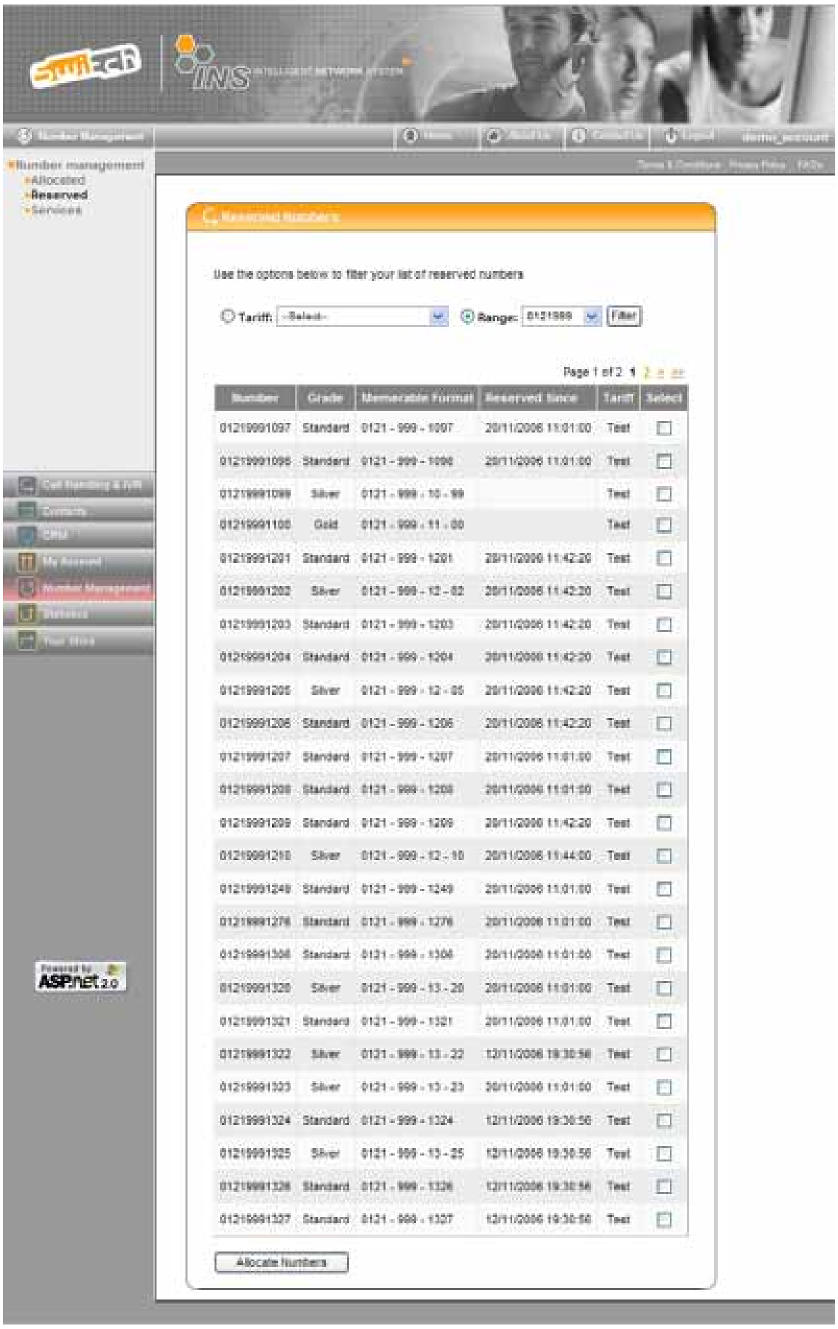


4.2: Reserved

Numbers in a reserved state are numbers that are placed on your account that are currently not in use. These numbers are available to view in this section. To put a reserved number into service, then you need to allocate the number to a service and a rate card, which is discussed in further detail in the Call Handling & IVR section in section 9. However, you can assign reserved numbers to an existing service on this screen, by selecting the numbers you want assigned to one of your services, then click "Allocate Numbers"

The reserved numbers screen can be seen below in figure 19.

Figure 19: Reserved Screen



4.3: Services

The services section can be seen in figure 20 below. The services section lists all the numbers that you have on each service on your account. To see the numbers assigned per service, just click on the numbers link, to create a new IVR on that service click create, or to see current IVRs on that service click view. For more details about Call Handling and IVR see section 9.

Figure 20: Services Screen

4.3.1: Allocations

When you click on the numbers link in the services section, it takes you to the service allocations screen, filtered by service, as can be seen previously in 4.1 and figure 20 above.

5: Statistics

On clicking the Statistics button you will see the below screen in figure 21.

Figure 21: Statistics Screen

In Statistics, you have the following options available:

- Call Summary
- Day Summary
- Geographical
- Global

All statistics reports can be zoomed in or out by utilising the drop down menu and all the reports can be saved as:

- XML
- CSV
- TIFF
- PDF
- MHTML
- XLS

To save a report as one of the formats above, select the desired format from the format box, and then click export. You can directly print any of the reports by pressing the print button.

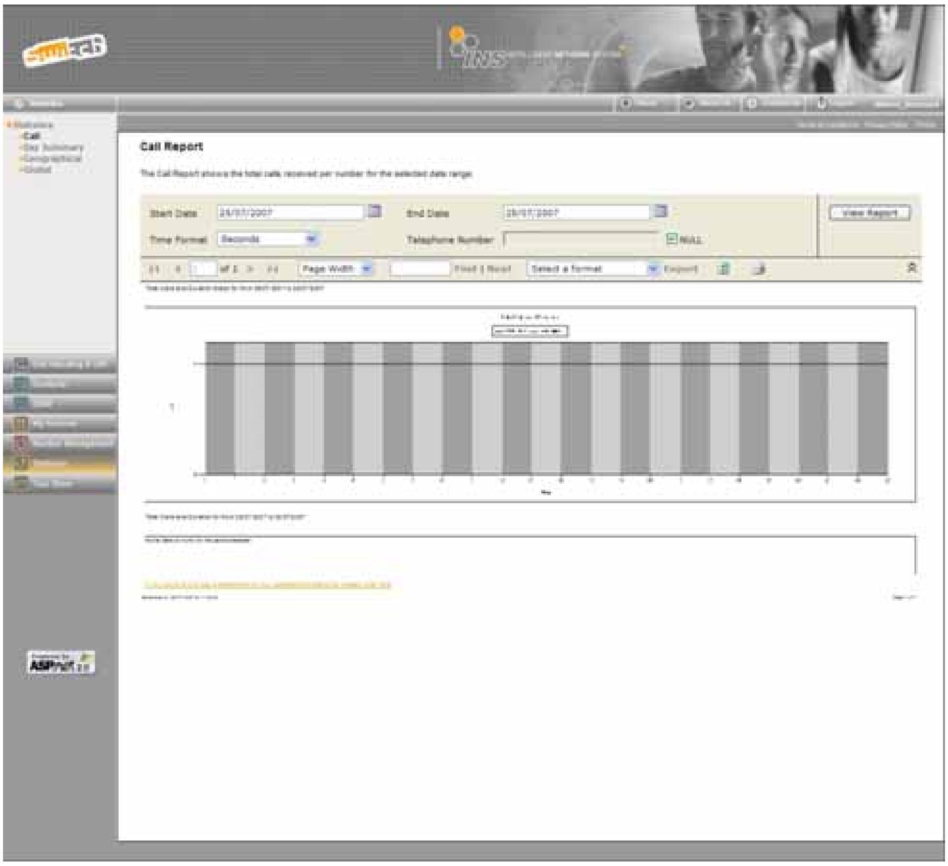
Details on each section are explained below.

5.1: Call Summary

The call summary page shows you for a selectable date range the complete CDRs (Call Detail Records) for traffic received on your numbers for the date period. We suggest that you select a single day at a time for this report. You can select the desired display of the time format for your call durations in seconds, minutes or HH:MM:SS, you can also select all numbers on your account, by clicking the NULL option under Telephone Number, or unclick the NULL option and insert your telephone number without the preceding 0 for the Call Summary just on the number you are interested in.

The day summary statistics page can be seen below in figure 22 below.

Figure 22: Call Summary



5.2: Day Summary

The day summary page shows you for a selectable date range the summary traffic received on your numbers for the date period. We suggest that you select a single day at a time for this report. You can select the desired display of the time format for your call durations in seconds, minutes or HH:MM:SS, you can also select all numbers on your account, by clicking the NULL option under Telephone Number, or unclick the NULL option and insert your telephone number without the preceding 0 for the Day Summary just on the number you are interested in.

The day summary statistics page can be seen below in figure 23 below.

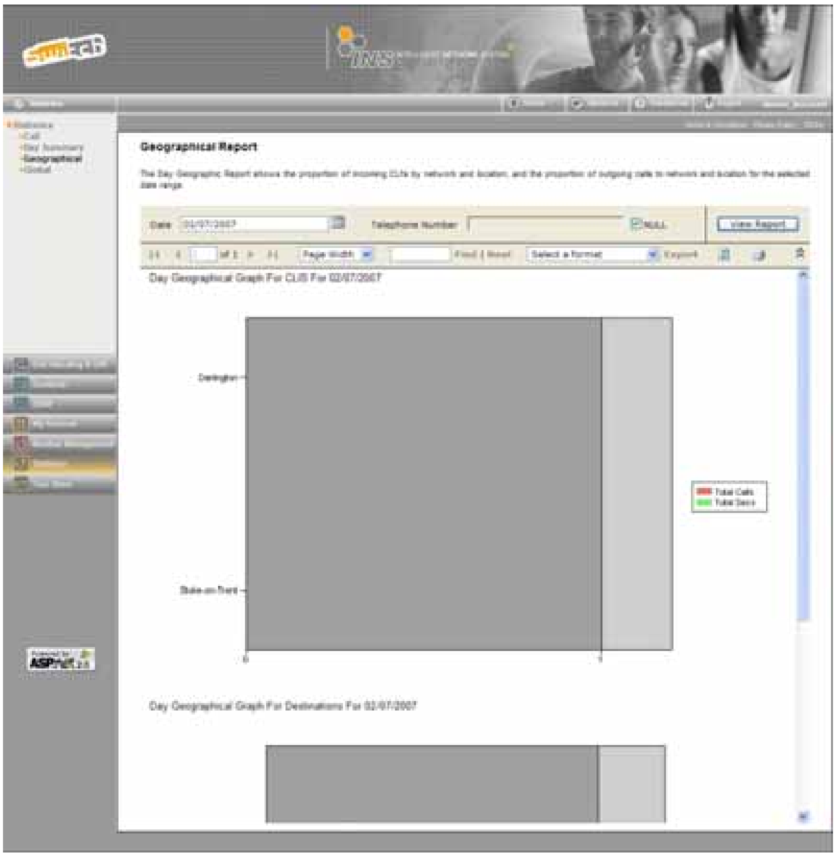
Figure 23: Day Summary

5.3: Geographical

The geographical page shows you for a date the networks that you have received calls from and sent calls in a graphical form. You can select all numbers on your account, by clicking the NULL option under Telephone Number, or unclick the NULL option and insert your telephone number without the preceding 0 for the geographical details just on the number you are interested in.

The geographical page can be seen below in figure 24 below.

Figure 24: Geographical

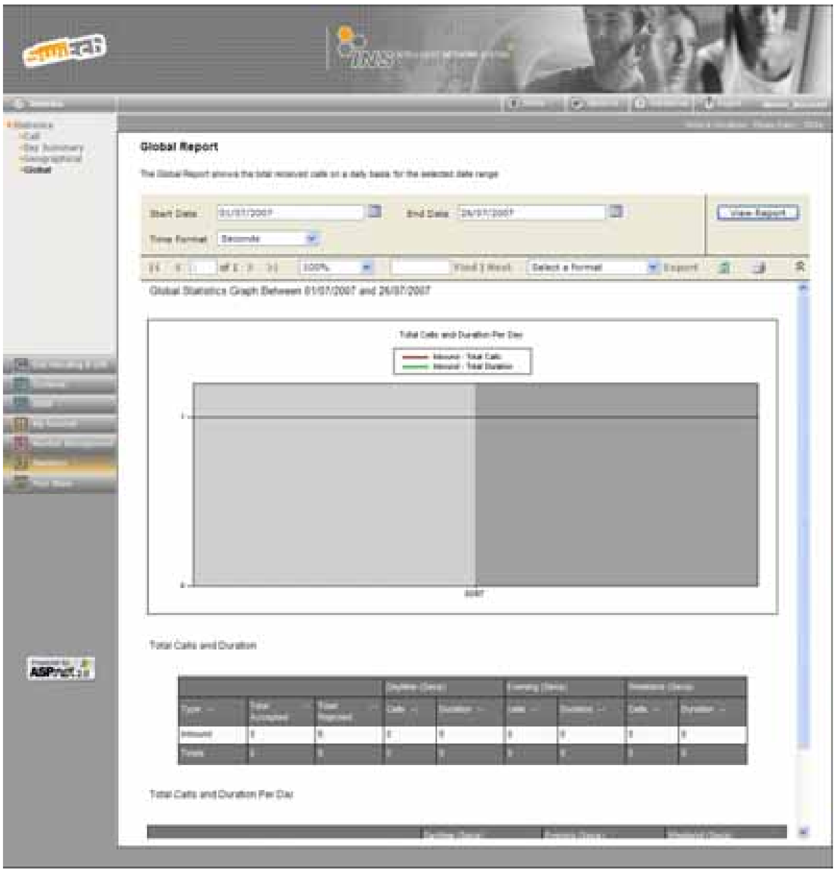


5.4: Global

The global statistics page shows you for a selectable date range the total traffic received per day. By clicking on the date in this report, this will load up the Day Summary report as in 5.2. You can select the desired display of the time format for your call durations in seconds, minutes or HH:MM:SS.

The global statistics page can be seen below in figure 25 below.

Figure 25: Global Statistics Page



6: Your Store

On clicking the Your Store button you will see the below screen in figure 26.

Figure 26: Your Store

In Statistics, you have the following options available:

- Files
    - Faxes
    - Menu Prompt
    - Recording
        - Advanced
    - Voicemail
- Recording Line

Details on each section are explained below.

6.1: Files

The files menu allows you to manage any files that you may be using for your IVRs / SMS applications and also provides a centralised repository for any fax's and emails that you may have received.

Currently files are broken up into 4 sections, these are:

- Faxes

- Menu Prompt
- Recording
- Voicemail

These sections are discussed in further detail below.

6.1.1: Faxes

In the faxes section you can view any faxes received to any of the numbers on your account. The faxes screen is shown below in figure 27. Received faxes can be downloaded as a TIFF file, or can be deleted. The phone number, CLI and date the fax was received is all shown against the fax document.

Figure 27: Faxes

Additionally, you can add, delete or rename folders, by right clicking with your mouse over the directory structure, as shown in figure 28 below. You can then organise faxes into different folders should you so wish.

Figure 28: Add, Delete or Rename Fax Folders

6.1.2: Menu Prompt

The Menu Prompt section is where you can view, download and upload any menu audio for use in any of your IVR services. The Menu Prompt screen is shown below in figure 29. Audio can be downloaded, uploaded or deleted. Audio must be uploaded as a 16 bit, mono, 11,025 KHz WAV file.

Figure 29: Menu Prompt Screen

Additionally, you can upload audio, add, delete or rename folders, by right clicking with your mouse over the directory structure, as shown in figure 30 below. You can then organise audio into different folders should you so wish.

Figure 30: Upload audio and Add, Delete or Rename Menu Prompt Folders

To see what files are placed within each directory, just click on the directory and the list of files in that directory will be shown. These files can then be downloaded; deleted or new files can be uploaded as above. This can be seen in figure 31 below.

Figure 31: View Files in a Created Sub Directory in the Menu Prompt Screen

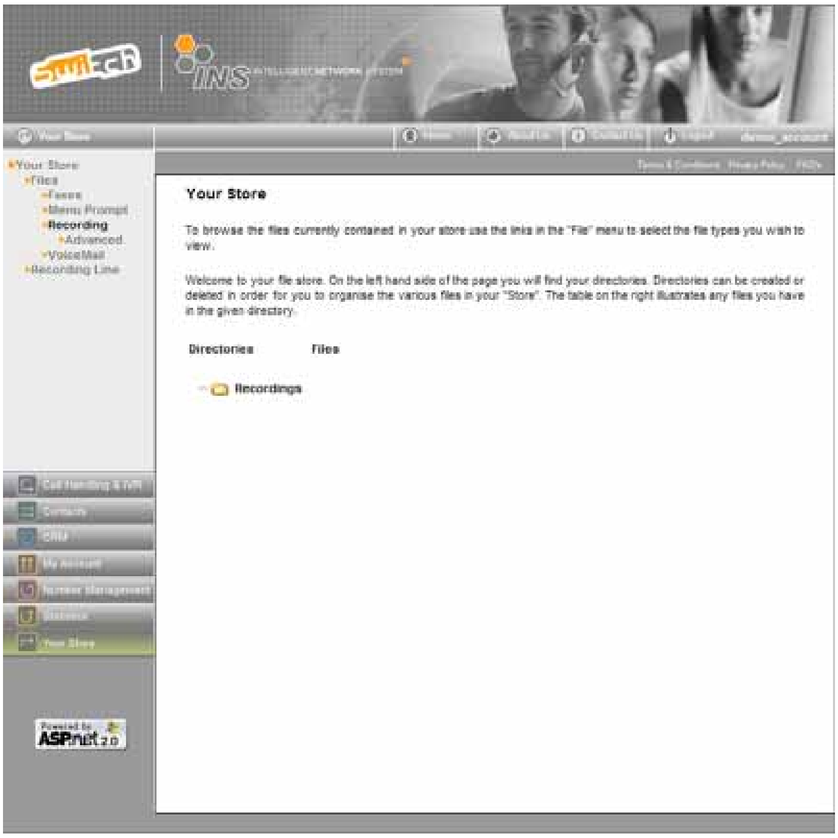
When you have selected the folder you require to upload audio to, right click on the folder and select upload as shown in figure 30 above. You will be taken to the upload page, which can be seen in figure 32 below. This screen allows you to select audio from your local hard drive, give it an informative description, and upload the audio to be used in your IVR applications.

Figure 32: File Upload Screen

6.1.3: Recording

In the recording section you can view any call recordings to any numbers that have call recording assigned to on your account. The recording screen is shown below in figure 33. Received call recordings can be downloaded as a WAV file, or can be deleted. The phone number, CLI and date the call recording was received is all shown against the audio file.

Figure 33: Recording Screen



Additionally, you can add, delete or rename folders, by right clicking with your mouse over the directory structure, as shown in figure 34 below. You can then organise call recordings into different folders should you so wish.

Figure 34: Add, Delete or Rename Recordings Folders

6.1.3.1 Recording Advanced

In the recording advanced section, you can drill down further to view any call recordings you may have. This can be seen in figure 35 below. Firstly, select the service you require to view any call recordings on, then the IVR description for the call recording service you require the recordings for, and finally select the start and end date and time for the range of recordings you require. Just click on get recordings to be then given the recordings that are available from the selection you have made.

Figure 35: Recording Advanced Screen

6.1.4: Voicemail

In the voicemail section you can view any voicemails left to any numbers assigned on your account. The voicemail screen is shown below in figure 36. Received voicemails can be downloaded as a WAV file, or can be deleted. The phone number, CLI and date the voicemail was received is all shown against the audio file.

Figure 36: Voicemail Screen

Additionally, you can add, delete or rename folders, by right clicking with your mouse over the directory structure, as shown in figure 37 below. You can then organise voicemails into different folders should you so wish.

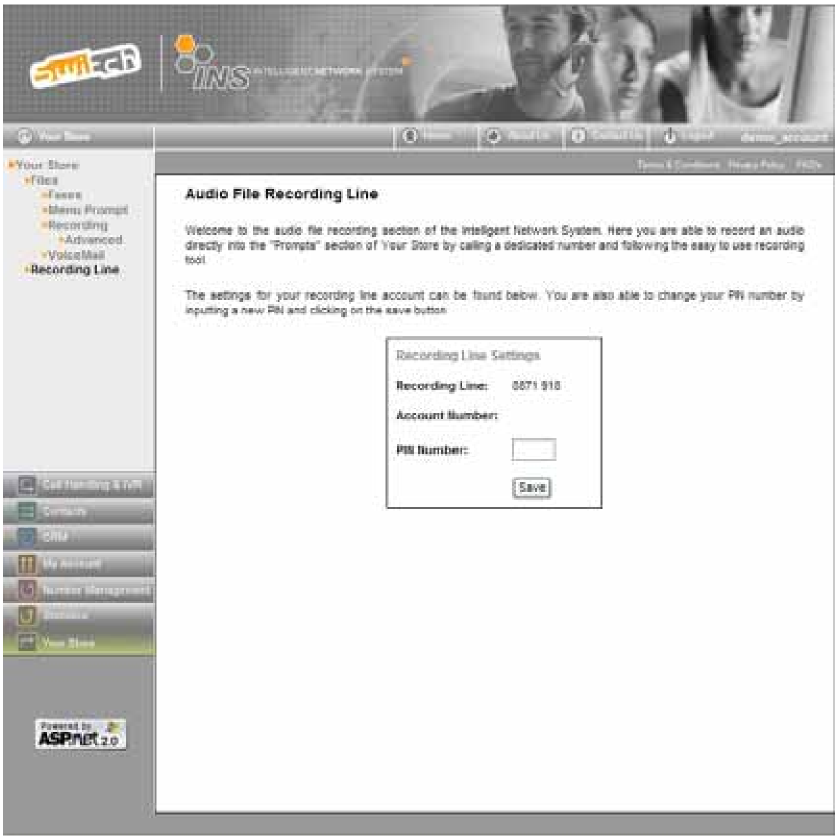
Figure 37: Add, Delete or Rename Voicemail Folders

6.2: Recording Line

The recording line screen gives you a dedicated number to call to record your own menu prompts, these will then appear in the Menu Prompt section of Your Store. You can change the PIN number to be used by entering a new PIN number on the screen and pressing save. To record your prompt, just call the number listed on the page, and follow the instructions.

The Recording Line screen can be seen in figure 38 below.

Figure 38: Call Recording Line Screen



7: CRM (Customer Relationship Management)

On clicking the CRM button you will see the below screen in figure 39.

Figure 39: CRM Screen

In CRM, you have the following options available:

- Support Tickets
    - Add Ticket
- Tracking
    - CLI Trends
    - Duplicate CLIs
    - Incoming Traffic
    - Registrar
    - Registrar (Out)
    - Revenue

Details on each section are explained below.

7.1: Support Tickets

Support tickets are where you can raise any technical questions or gain access to support of any kind that you might require. This section lists all the support tickets you have raised, with the date and time the ticket was raised, the category and the current status of the ticket. This can be seen in figure 40 below.

Figure 40: Support Tickets Screen

To see the details of any support ticket, just click on details by the relevant support ticket, this can be seen in Figure 41 below. This will show you any comments left against the ticket, its progress, and when the ticket was last updated.

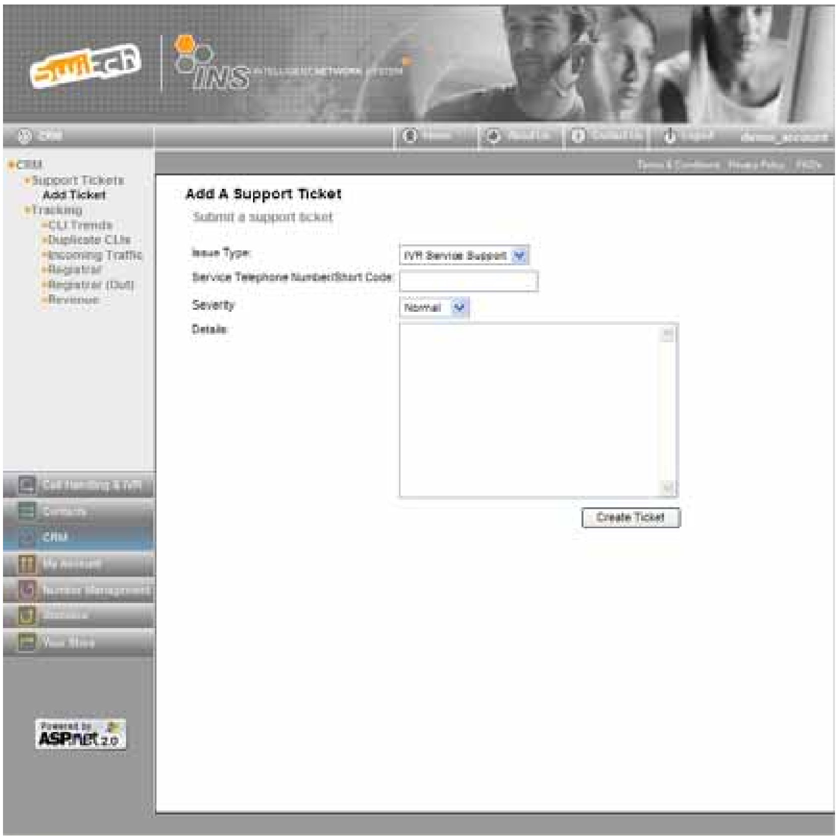
Figure 41: Viewing an Existing Support Ticket

To add a new support tickets please see below in section 7.1.1.

7.1.1: Add an Support Ticket

If you have any technical questions that you need an answer to, then you can add them here. The Add screen can be seen in Figure 42 below. To add a ticket, select the issue type from the drop down box, enter a relevant telephone number or a short code, enter the severity of the issue, and finally enter the full details of the issue in as much detail as you can. Then just click the create ticket button to create your ticket. Your ticket will be assigned to a member of staff and dealt with. You can see the status at any time by visiting the Support Tickets section.

Figure 42: Adding a Support Ticket



7.2: Tracking

The tracking section allows you to easily track aspects of your account and your sub accounts, including incoming and outgoing call patterns and revenues, and much more.

Currently, tracking consists of the following areas:

- CLI trends
- Duplicate CLIs
- Incoming Traffic
- Registrar
- Registrar (Out)
- Revenue

These are discussed in more detail below.

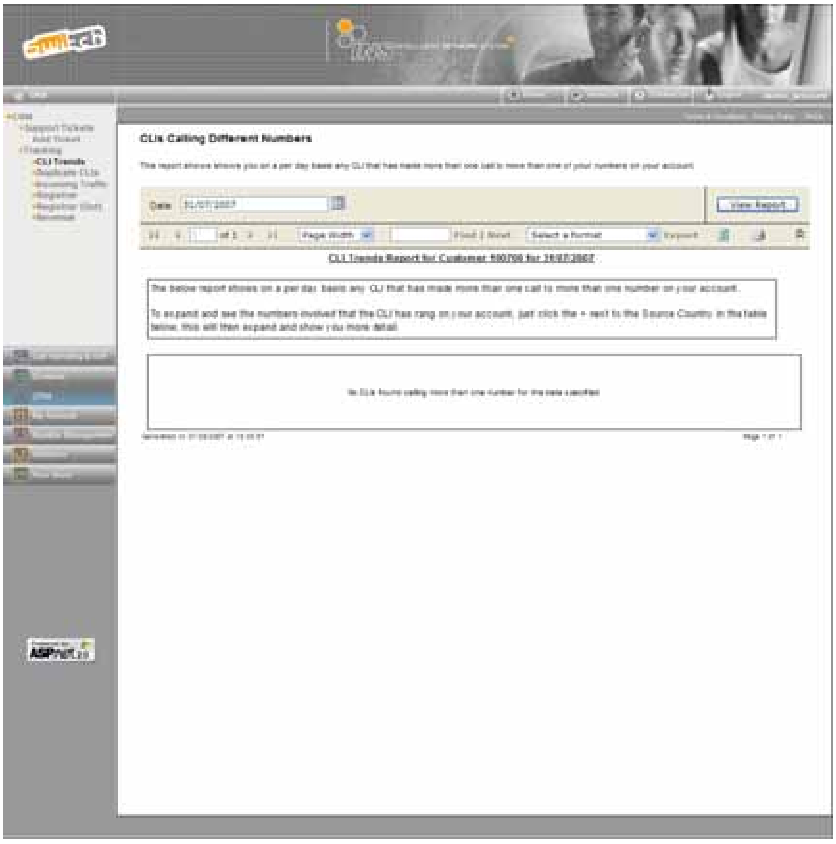
7.2.1: CLI Trends

The CLI trends screen shows on a per day basis any CLI that has made more than one call to more than one number on your account.

The unique CLIs are listed down in a table, with the total amount of calls that CLI has made to your numbers today and the total duration. You can view all the individual calls made by a CLI by clicking on the + in the table, this will expand the table to show you all calls made per number by that CLI.

The CLI Trend screen can be seen below in figure 43.

Figure 43: CLI Trend Screen



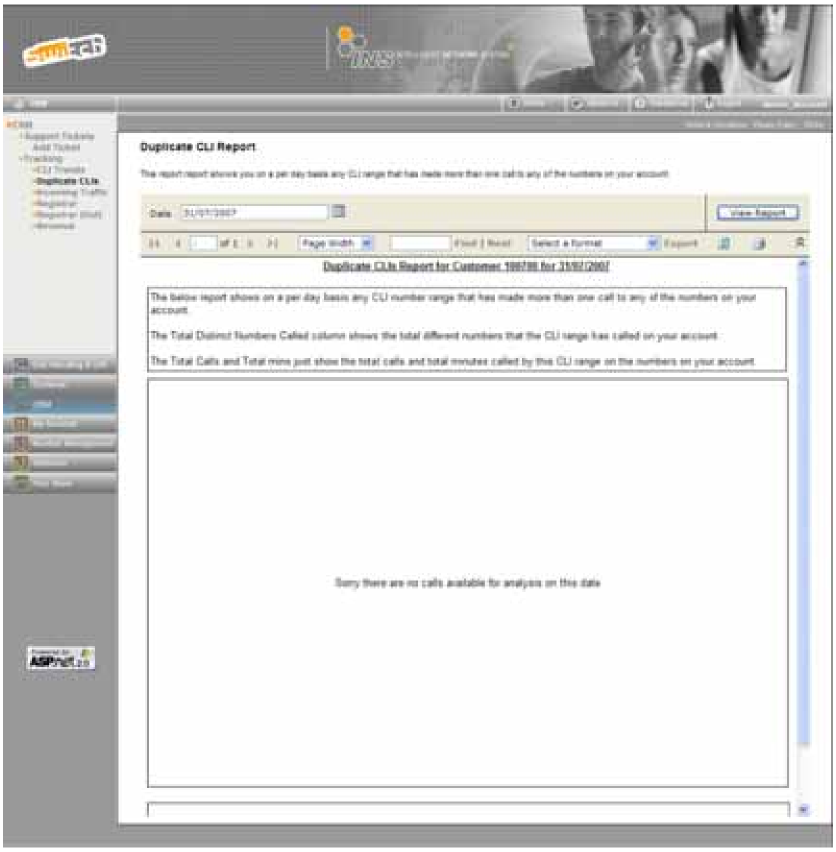
7.2.2: Duplicate CLIs

The duplicate CLIs screen shows you the trends in CLI across all your numbers. This shows you on a per day basis any number range on any network that has made more than one call to any of the numbers allocated on your account.

The graph shows you total calls, total duration, and total unique calls from unique CLI's for the day specified. The table shows you the range of CLIs that have called your numbers, the network they belong too, and the amount of unique CLIs from the range, and the total calls made from the CLI range to your numbers.

The Duplicate CLIs screen can be seen below in figure 44.

Figure 44: Duplicate CLIs Screen

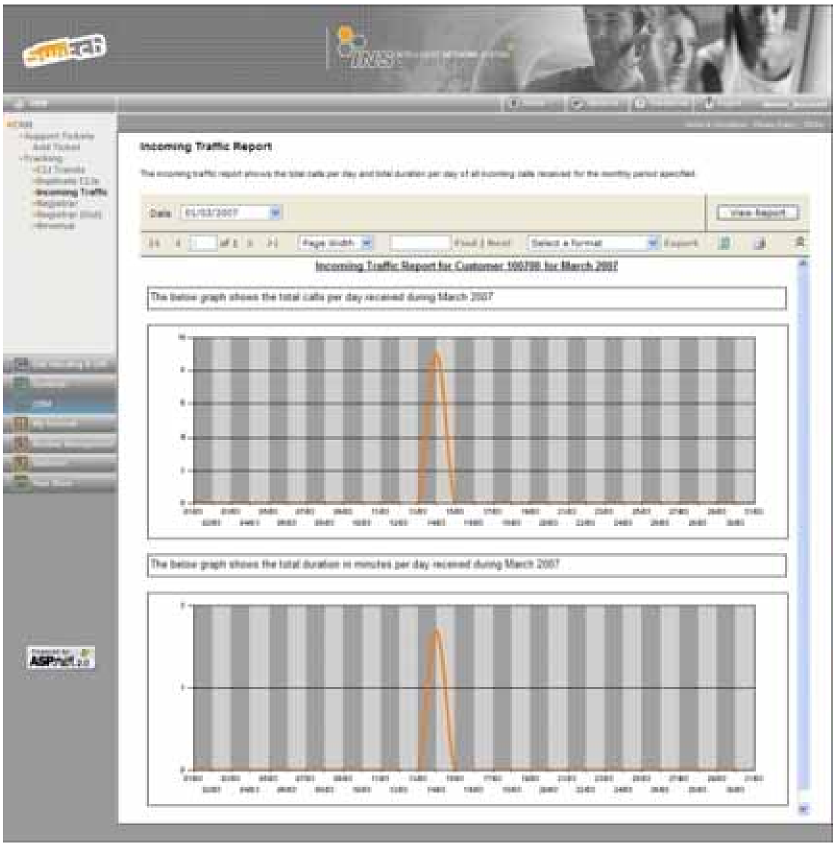


7.2.3: Incoming Traffic

The incoming traffic page shows you over the last month the trend per day in total calls received, and total duration of calls.

The Incoming Traffic screen can be seen below in figure 45.

Figure 45: Incoming Traffic Screen

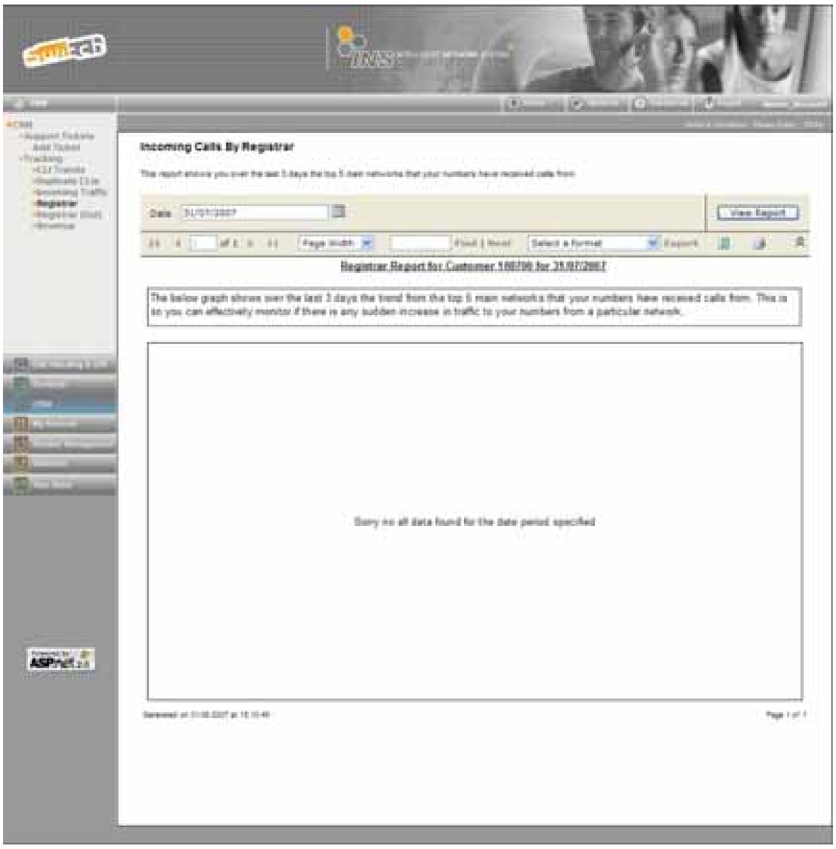


7.2.4: Registrar

The outgoing registrar shows over the last 3 days the top 5 main networks that your numbers have sent calls out too. This is so you can effectively monitor if there is any sudden increase in traffic from your numbers to a particular network.

The Outgoing Registrar screen can be seen below in figure 46.

Figure 46: Registrar Screen



7.2.5: Registrar (Out)

The registrar trends shows over the last 3 days the top 5 main networks that your numbers have received calls from. This is so you can effectively monitor if there is any sudden increase in traffic to your numbers from any particular network.

The registrar (out) screen can be seen below in figure 47.

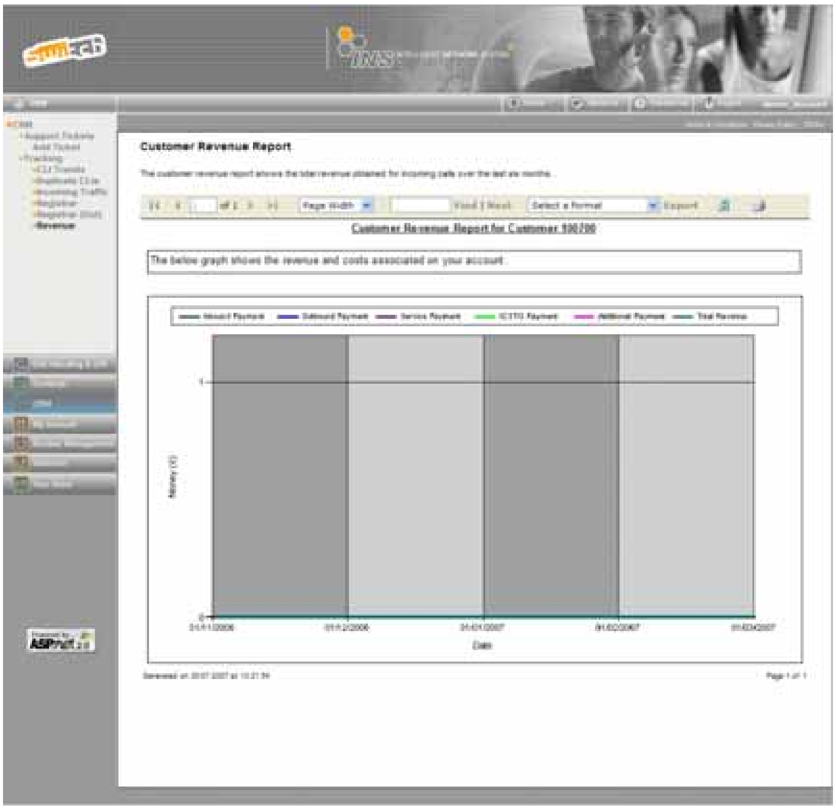
Figure 47: Registrar (Out) Screen

7.2.6: Revenue Report

The revenue report shows you the trends in any incoming, outgoing, service, ICSTIS and additional payments you may have on your account over time.

The revenue screen can be seen below in figure 48.

Figure 48: Revenue Screen



8: Contacts

A contact is someone who is associated with your account and can have login access to your account. On clicking the Contacts button you will see the below screen in figure 49.

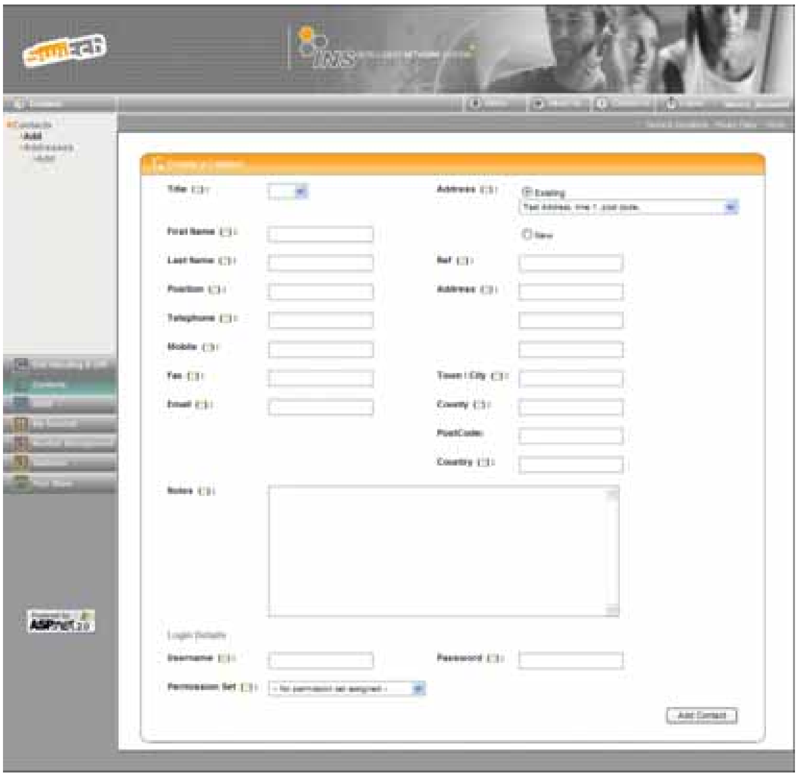
Figure 49: Contacts Screen

You can add a new contact to your account, view all addresses associated with your account, and add a new address to your account, these are explained in more detail below.

8.1: Add

Here you can add a new contact to your account, just fill in the details listed on the page, as can be seen below in figure 50. You can select from an existing address already stored on your account, or enter a new address.

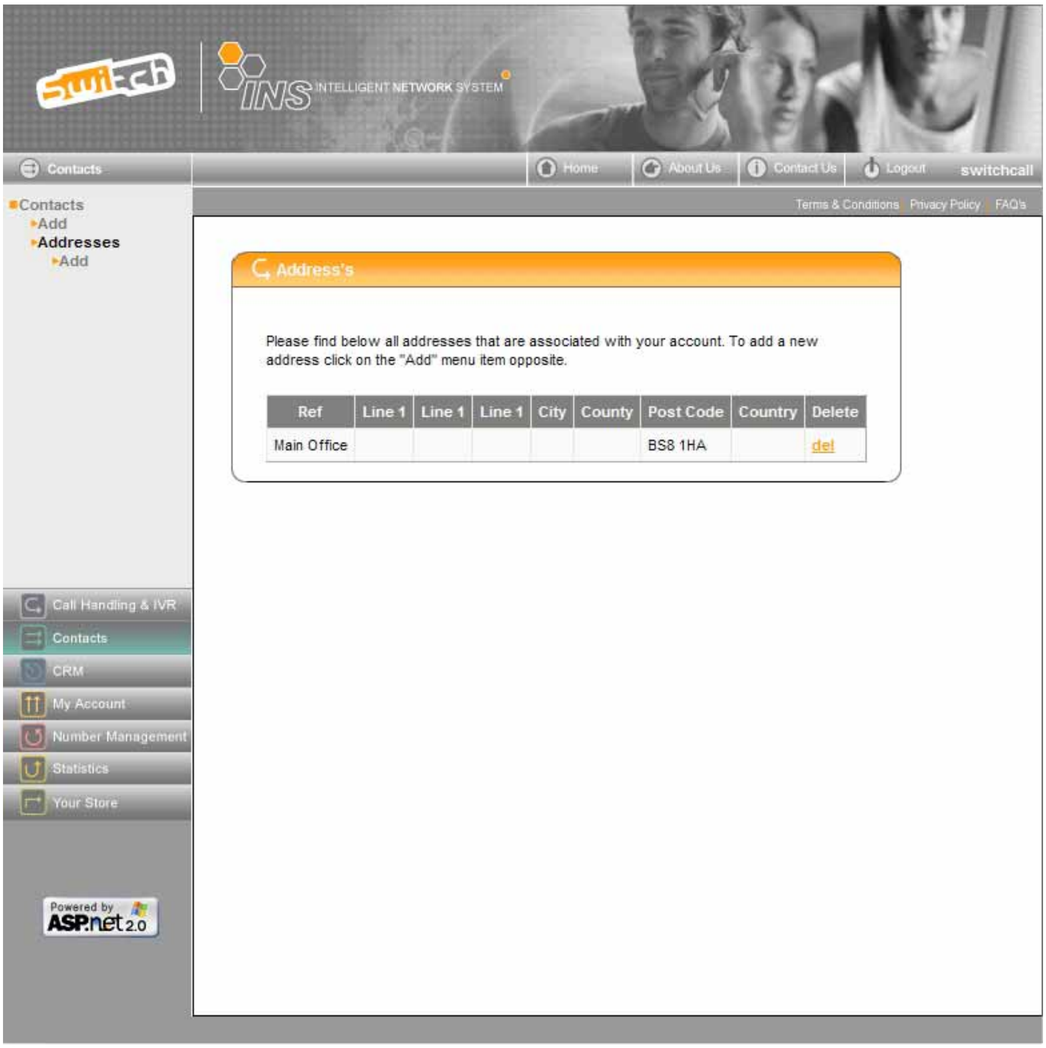
Figure 50: Add Contact Screen



8.2: Addresses

An address is all distinct addresses you have associated to your contacts on your account. On clicking the address button you will see the below screen in figure 51.

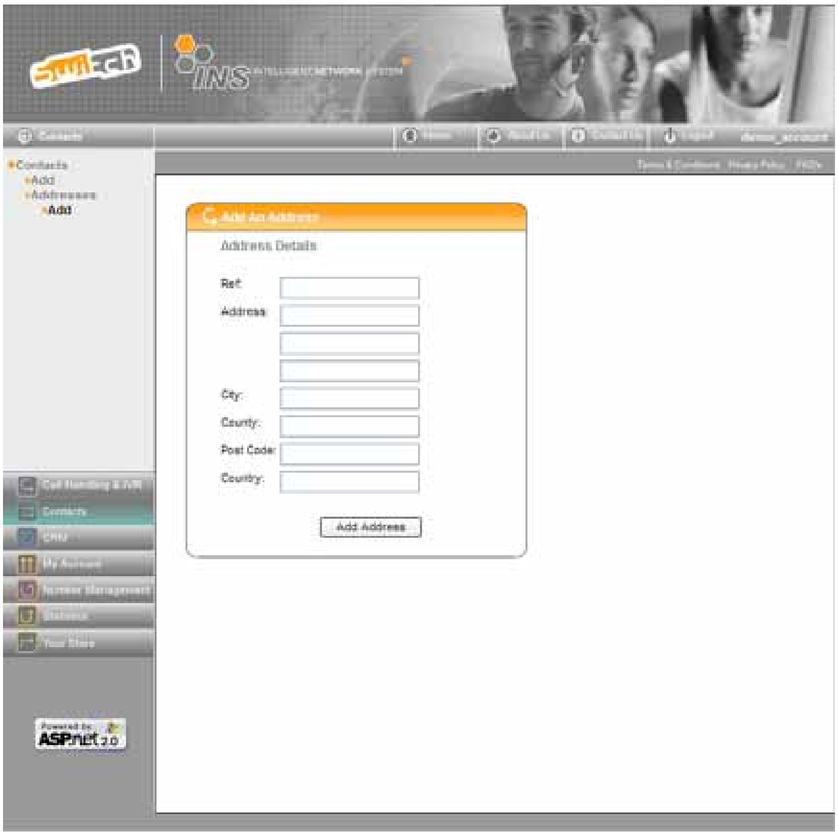
Figure 51: Addresses Screen



8.2.1 Add Address

Here you can add a new address to your account, just fill in the details listed on the page, as can be seen below in figure 52.

Figure 52: Add Address Screen



9: Call Handling & IVR

On clicking the Call Handling & IVR button you will see the below screen in figure 53.

Figure 53: Call Handling & IVR Screen

In Call Handling & IVR, you have the following options available:

- Audio Playback
- Call Manager
- Call Manager (R)
- Competitions
- Fax To Email
- Timesheet
- Virtual Office
- Voicemail To Email

Details on each section are explained below.

9.1: Audio Playback

The Audio Playback service is a system where you can build a complete audio menu from scratch. You can assign an introduction to play, a menu from 0 to 9 and what to play on error – for example if you assign telephone key presses 1 and 2 and a user presses 3, this would be in this case an error and play the error file. You can also within your menu structure assign schedules to the menu key presses. Schedules are controllable by date and time, so you can automatically play different recordings on each menu prompt depending on the schedule you select.

The Audio Playback screen can be seen in figure 54 below.

To understand the list of Audio Playback services, which you will see after you create an Audio Playback IVR, see section 9.9 below.

Figure 54: Audio Playback Screen

9.1.1: Create Audio Playback

Figure 55 below shows how to initially create an Audio Playback IVR. In this screen you will see several fields, these are as follows:

- **Application Description** - This is a useful identifier used to name your services. You can enter up to 100 characters in the naming of your service.
- **Greeting Audio** - This audio is played to the caller when the call is answered and before any menu selections can be made. This audio file is useful for playing any compulsory pricing or company information.
- **Menu Audio** - This audio is used to inform the caller of the menu options available to them.
- **Error Audio** - This audio is used to play a message to the caller when they have selected a menu option that doesn't exist.

Figure 55: Create Audio Playback Screen 1

To select a piece of audio, you need to select the piece of audio from Your Store. For information to how to upload audio to Your Store, see section 6. You need to have the audio required for your Audio Playback IVR already available in Your Store before continuing.

For an Audio Playback IVR you need to enter a description, and upload audio for the menu, any greeting audio if required, and any error audio if required.

To select audio from Your Store, click on select file next to the appropriate prompt.

A completed Create Audio playback screen can be seen in figure 56 below.

Figure 56: Completed Create Audio Playback Screen 1

When you have completed the details for this screen, click save, and you will be taken to a screen like figure 57 below, on this screen click options to continue.

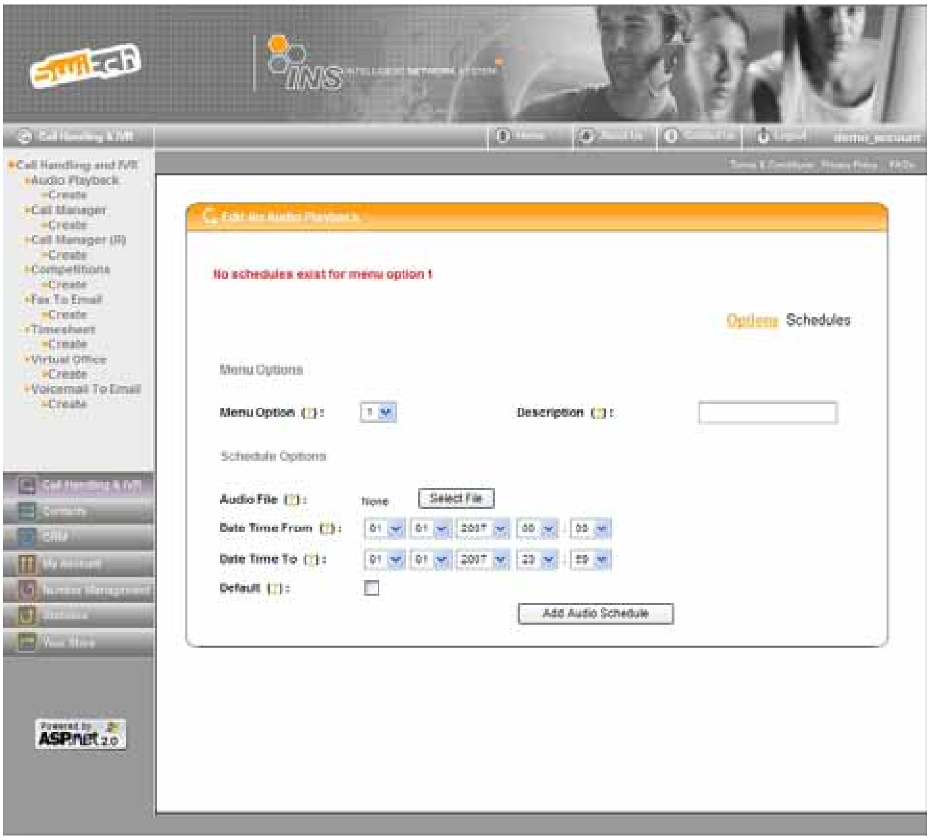
Figure 57: Completed Audio Playback Screen 2

After you have clicked schedules, you will be able to set your schedules for this application. The schedule is controllable by date and time and menu options, so you can select a number from 0 – 9 and assign it an audio file to play between certain dates and times. You can have multiple audio files for the same menu option, playing at different dates and times.

Figure 58 below shows how to initially create schedules in an Audio Playback IVR. In this screen you will see several fields, these are as follows:

- **Menu Option** - This drop down list allows you to see which menu items are configured and live (live menu items have "active" next to them) as well as select an individual menu item to change its settings.
- **Description**- This is a useful identifier used to name your menu items. You can enter up to 100 characters in the naming of your menu items.
- **Audio File** - This option is used to select an audio file from your on-line file store to schedule.
- **Date Time From** - This setting allows you to set the start date and time for the selected audio.
- **Date Time To** - This setting allows you to set the end date and time for the selected audio.
- **Default** - This setting indicates the audio is to be used as a default audio, i.e. if there is no other audio scheduled to play for the current date and time.

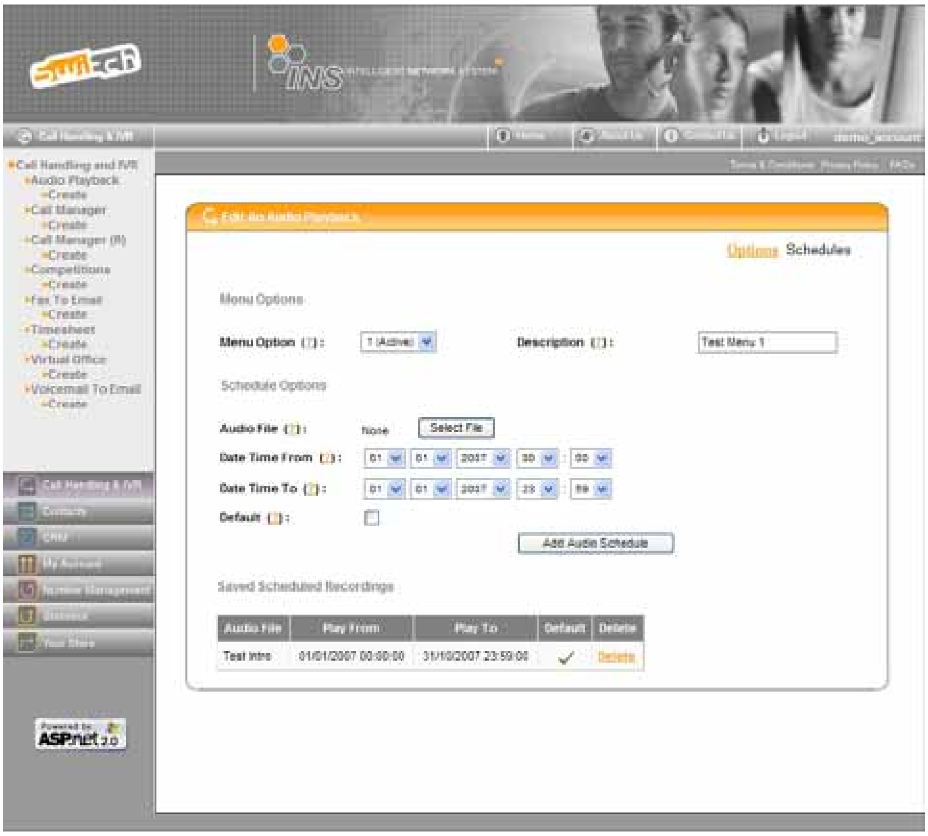
Figure 58: Audio Playback Schedules Screen



To add an audio schedule, just select a menu option 0-9, select a description for this menu item, then select an audio file from Your Store, and the date and time this option is to run from and to. Do not forget to tick default, if you want this file to play outside of the date range you have selected if there is no other schedule present to override it.

An example completed schedule can be seen below in Figure 59.

Figure 59: Example Completed Audio Playback Schedules



9.2: Call Manager

The Call Manager service is a system where you can create a simple IVR system for your business. You can decide if you require to receive faxes and voicemail, and if so you can forward them to an email address of your choice. You can assign an introduction to play, a menu from 0 to 9, and what to do on these menu presses, for example dial out a number. Additionally you can specify what to play on error – for example if you assign telephone key presses 1 and 2 and a user presses 3, this would be in this case an error and play the error file. You can also within your menu structure assign schedules to the menu key presses. Schedules are controllable by date and time, so you can automatically play different recordings or dial different numbers on each menu prompt depending on the schedule you select.

The Call Manager screen can be seen in figure 60 below.

To understand the list of Call Manager services, which you will see after you create a Call Manager IVR, see section 9.9 below.

Figure 60: Call Manager Screen

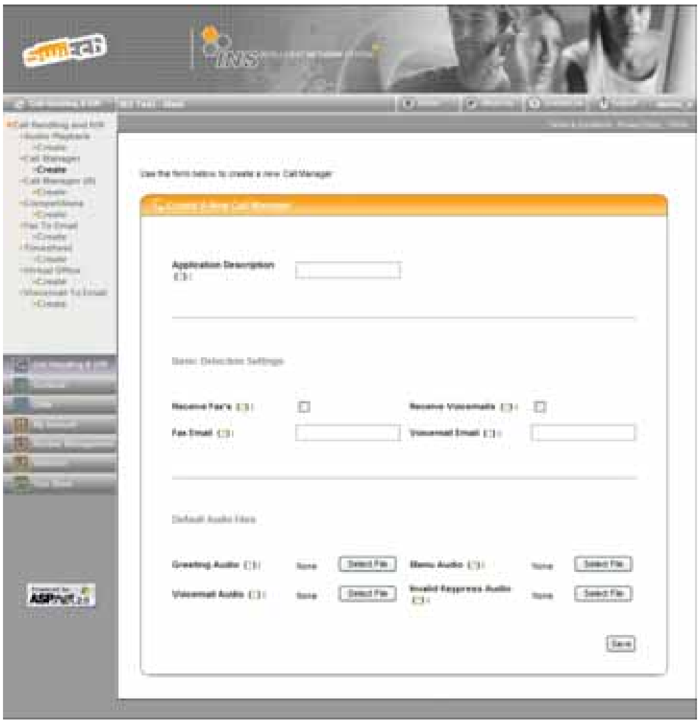
9.2.1: Call Manager Create

Figure 61 below shows how to initially create a Call Manager IVR. In this screen you will see several fields, these are as follows:

- **Application Description** - This is a useful identifier used to name your services. You can enter up to 100 characters in the naming of your service.
- **Receive Fax** - This setting is used to turn on and off fax detection and forwarding to a specified email address. To turn on fax detection ensure the tick box is selected.
- **Fax Email** - This setting is used to define the email account to send faxes to.
- **Receive Voicemails** - This setting is used to turn on and off voicemails to a specified email address. To turn on fax detection ensure the tick box is selected.
- **Voicemail Email** - This setting is used to define the email account to send voicemail audios to.
- **Greeting Audio** - This is the audio file that will be played as a greeting to all callers. This audio cannot be skipped by any key press and therefore is useful when you have information you want the caller to hear each time e.g. the company name, ICSTIS warnings, etc.
- **Voicemail Audio** - This audio is played before the IVR records a voicemail recording; you should include any specific information in the script of this audio including the recording termination instructions (press # key or stay silent for a few seconds).
- **Menu Audio** - This audio contains the menu options available to the caller. The audio can be skipped by pressing a button on the telephone keypad. Any input detected is processed according to predefined menu rules.

- **Invalid Key Press** - This audio is used to play a message to the caller when they have selected a menu option that doesn't exist.

Figure 61: Call Manager Create



To select a piece of audio, you need to select the piece of audio from Your Store. For information to how to upload audio to Your Store, see section 6. You need to have the audio required for your Audio Playback IVR already available in Your Store before continuing.

For a Call Manager IVR you need to enter a description, select if you want to receive voicemails and faxes on the number, and if you do select a valid email address, upload audio for the menu, greeting, voicemail and invalid audio, if required.

To select audio from Your Store, click on select file next to the appropriate prompt, to select the file.

A completed Create Call Manager screen can be seen in figure 62 below.

Figure 62: Completed Call Manager Screen 1

When you have completed the details for this screen, click save, and you will be taken to a screen like figure 63 below, on this screen you have the further configurations options of Menus, Queues, Opening Hours and Date Overrides.

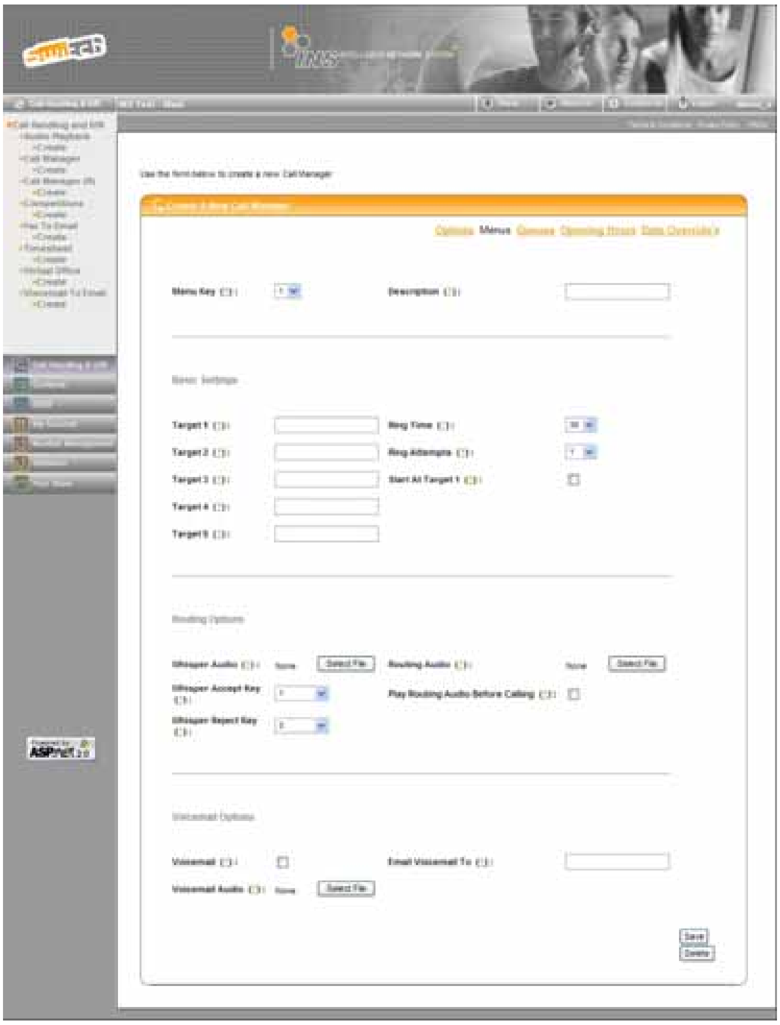
Figure 63: Completed Call Manager Create Screen 2

To continue, click on Menus.

After you have clicked menus, you will be able to set your IVR menus for this application. Here you can specify up to 5 target numbers to ring on a key press of 0-9 or * or #, as well as many other configurable options, these can be seen in figure 64, and are explained below.

- **Menu Key** - This drop down list allows you to select menu key available for configuring options.
- **Description** - This is a useful identifier used to name your menu item. You can enter up to 100 characters in the naming of your menu item.
- **Ringtime** - This is the time allowed for ringing before moving on to the next target/action.
- **Ring Attempts** - The number of times to loop through all targets.
- **Target 1** - The first destination telephone number to call in sequence.
- **Target 2** - The second destination telephone number to call in sequence.
- **Target 3** - The third destination telephone number to call in sequence.
- **Target 4** - The fourth destination telephone number to call in sequence.
- **Target 5** - The fifth destination telephone number to call in sequence.
- **Start At Target 1** - If checked the call will always start at target 1, if unchecked the IVR will remember who took the last call and start at the next target (looping back to Target 1 if necessary).
- **Whisper Audio** - This audio is played to the person who answers the call, this is often used for call centres or remote workers to inform them of where the call has come from.
- **Routing Audio** - This audio is played to the caller before the IVR starts to call the first Target (e.g. “Please wait while we connect you to the sales department”). If there are no targets for the menu option the routing audio can also be used to play pre-recorded informational options for the caller to listen to.
- **Play Routing Audio Before Dialling** - This setting plays the entire routing audio before dialling the target telephone numbers.
- **Whisper Key Accept** - This option defines which key is to be used to accept the call after the whisper has played.
- **Whisper key Reject** - This option defines which key is to be used to reject the call after the whisper has played.
- **Voicemail** - This tick box turns the voicemail functionality on and off for your service.
- **Email Voicemail To** - This option allows you to specify an email address for this specific menu option only, it will override any IVR level email address allowing you to direct voicemails for this menu option to the correct person. This is useful when you want most voicemails to be sent to a catch all voicemail address and specific requests, such as sales enquiries to be sent to a dedicated email address.
- **Voicemail Audio** - This audio will override any IVR level audio for a menu option, this allows you to ask the caller to leave specific information or have a customised message for a menu option. Please ensure that in any voicemail audios that you ask the caller to stay silent for a few seconds or press the # key to terminate the recording.

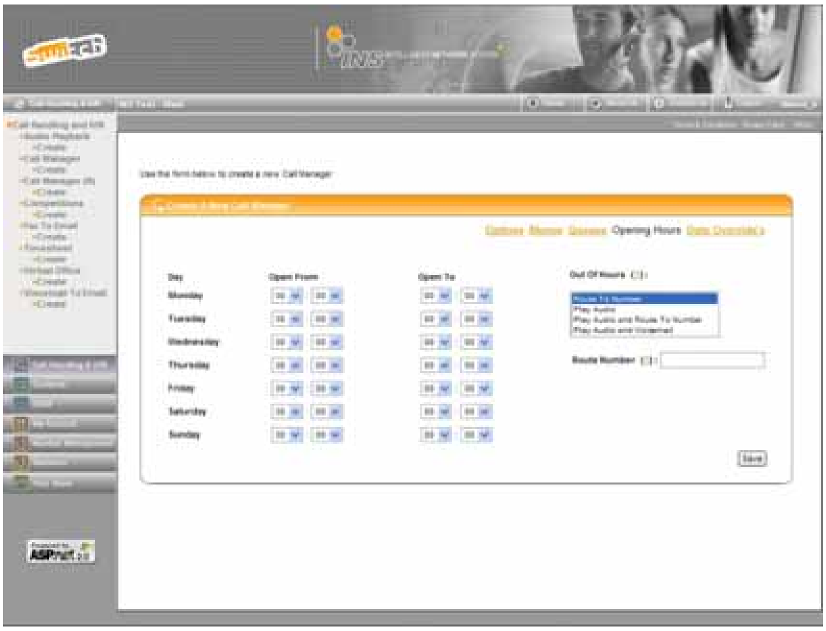
Figure 64: Menus Screen



To continue, click on queues. In Queues, you can manage call queuing. Call Queuing is as a default not enabled. To get Call Queuing enabled please call support on 0845 652 2222.

Next, click on Opening Hours. The Opening Hours screen can be seen below in figure 65.

Figure 65: Opening Hours Screen



In this screen you can set the opening hours for your organisation and set what to do if a call is received out of those hours, these options are explained below.

- **Day** - This setting allows you to set the opening times for different days of the week.
- **Open From** - This setting allows you to set the desired start time for the service.
- **Open To** - This setting allows you to set the desired finish time for the service.

Finally click on the Date Override's screen. This screen can be seen below in figure 66.

Figure 66: Date Override's Screen

In the Date Override screen you can specify a particular or a range of dates where you can override what your service does, and instead it will play an audio file that you specify. This page is usually used to specify bank holidays when your office may be closed, or any other special dates you may have. The options are explained in more detail below:

- **Description** - An override schedule allows you to schedule non-standard periods you're your service should be closed e.g. during bank holidays and festive holidays. The description field is a useful identifier used to name your override schedule. You can enter up to 50 characters in the naming of your override schedule.
- **Audio** - This setting allows you to select the appropriate audio file from your store to play to the caller during the selected date range.
- **From** - This setting allows you to set the desired start time for the override schedule.
- **To** - This setting allows you to set the desired finish time for the override schedule.

9.3: Call Manager (R)

The Call Manager (R) service is a system where you can create a simple IVR system for your business; it differs from the above Call Manager service, as this service also includes the ability to record calls. You can decide if you require receiving faxes and voicemail, and if so you can forward them to an email address of your choice. You can assign an introduction to play, a menu from 0 to 9, and what to do on these menu presses, for example dial out a number. Additionally, you can specify what to play on error – for example if you assign telephone key presses 1 and 2 and a user presses 3, this would be in this case an error and play the error file. You can also within your menu structure assign schedules to the menu key presses. Schedules are controllable by date and time, so you can automatically play different recordings or dial different numbers on each menu prompt depending on the schedule you select.

The Call Manager (R) screen can be seen in figure 67 below.

To understand the list of Call Manager services, which you will see after you create a Call Manager (R) IVR, see section 9.9 below.

Figure 67: Call Manager (R) Screen

9.3.1: Call Manager (R) Create

Figure 68 below shows how to initially create a Call Manager (R) IVR. In this screen you will see several fields, these are as follows:

- **Application Description** - This is a useful identifier used to name your services. You can enter up to 100 characters in the naming of your service.
- **Receive Fax** - This setting is used to turn on and off fax detection and forwarding to a specified email address. To turn on fax detection ensure the tick box is selected.
- **Fax Email** - This setting is used to define the email account to send faxes to.
- **Receive Voicemails** - This setting is used to turn on and off voicemails to a specified email address. To turn on fax detection ensure the tick box is selected.
- **Voicemail Email** - This setting is used to define the email account to send voicemail audios to.
- **Greeting Audio** - This is the audio file that will be played as a greeting to all callers. This audio cannot be skipped by any key press and therefore is useful when you have information you want the caller to hear each time e.g. the company name, ICSTIS warnings, etc.
- **Voicemail Audio** - This audio is played before the IVR records a voicemail recording; you should include any specific information in the script of this audio including the recording termination instructions (press # key or stay silent for a few seconds).

- **Menu Audio** - This audio contains the menu options available to the caller. The audio can be skipped by pressing a button on the telephone keypad. Any input detected is processed according to predefined menu rules.
- **Invalid Key Press** - This audio is used to play a message to the caller when they have selected a menu option that doesn’t exist.

Figure 68: Call Manager (R) Create

To select a piece of audio, you need to select the piece of audio from Your Store. For information to how to upload audio to Your Store, see section 6. You need to have the audio required for your Audio Playback IVR already available in Your Store before continuing.

For a Call Manager (R) IVR you need to enter a description, select if you want to receive voicemails and faxes on the number, and if you do select a valid email address, upload audio for the menu, greeting, voicemail and invalid audio, if required.

To select audio from Your Store, click on select file next to the appropriate prompt, to select the file.

A completed Create Call Manager (R) screen can be seen in figure 69 below.

Figure 69: Completed Call Manager (R) Screen 1

When you have completed the details for this screen, click save, and you will be taken to a screen like figure 70 below, on this screen you have the further configurations options of Menus, Queues, Opening Hours and Date Overrides.

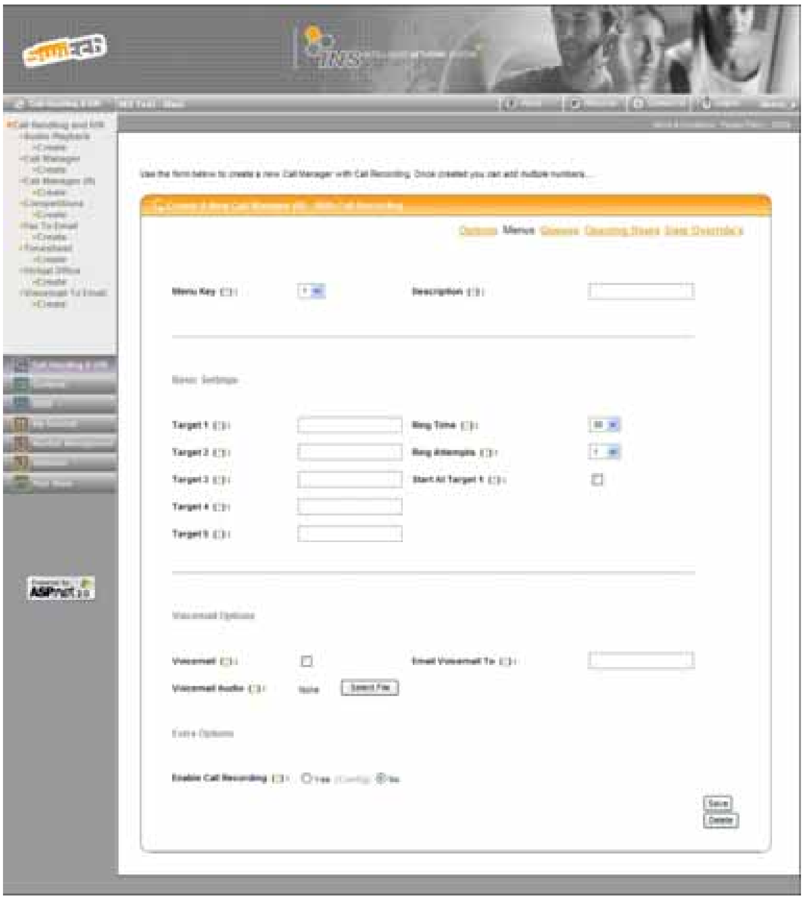
Figure 70: Completed Call Manager (R) Create Screen 2

To continue, click on Menus.

After you have clicked menus, you will be able to set your IVR menus for this application. Here you can specify up to 5 target numbers to ring on a key press of 0-9 or * or #, as well as many other configurable options, these can be seen in figure 71, and are explained below.

- **Menu Key** - This drop down list allows you to select the menu key available for configuring options.
- **Description** - This is a useful identifier used to name your menu item. You can enter up to 100 characters in the naming of your menu item.
- **Ringtime** - This is the time allowed for ringing before moving on to the next target/action.
- **Ring Attempts** - The number of times to loop through all targets.
- **Target 1** - The first destination telephone number to call in sequence.
- **Target 2** - The second destination telephone number to call in sequence.
- **Target 3** - The third destination telephone number to call in sequence.
- **Target 4** - The fourth destination telephone number to call in sequence.
- **Target 5** - The fifth destination telephone number to call in sequence.
- **Start At Target 1** - If checked the call will always start at target 1, if unchecked the IVR will remember who took the last call and start at the next target (looping back to Target 1 if necessary).
- **Whisper Audio** - This audio is played to the person who answers the call, this is often used for call centres or remote workers to inform them of where the call has come from.
- **Routing Audio** - This audio is played to the caller before the IVR starts to call the first Target (e.g. “Please wait while we connect you to the sales department”). If there are no targets for the menu option the routing audio can also be used to play pre-recorded informational options for the caller to listen to.
- **Play Routing Audio Before Dialling** - This setting plays the entire routing audio before dialling the target telephone numbers.
- **Whisper Key Accept** - This option defines which key is to be used to accept the call after the whisper has played.
- **Whisper key Reject** - This option defines which key is to be used to reject the call after the whisper has played.
- **Voicemail** - This tick box turns the voicemail functionality on and off for your service.
- **Email Voicemail To** - This option allows you to specify an email address for this specific menu option only, it will override any IVR level email address allowing you to direct voicemails for this menu option to the correct person. This is useful when you want most voicemails to be sent to a catch all voicemail address and specific requests, such as sales enquiries to be sent to a dedicated email address.
- **Voicemail Audio** - This audio will override any IVR level audio for a menu option, this allows you to ask the caller to leave specific information or have a customised message for a menu option. Please ensure that in any voicemail audios that you ask the caller to stay silent for a few seconds or press the # key to terminate the recording.
- **Enable Call Recording -** This option turns the call recording functionality on and off for your service. If you turn on call recording a “config” option will appear next to the option which when selected will take you to the configuration page for call recordings, which can be seen in figure 70.

Figure 71: Menus Screen



If you enable call recording and click config, you see the screen in figure 72 below.

Figure 72: Call Recording Screen

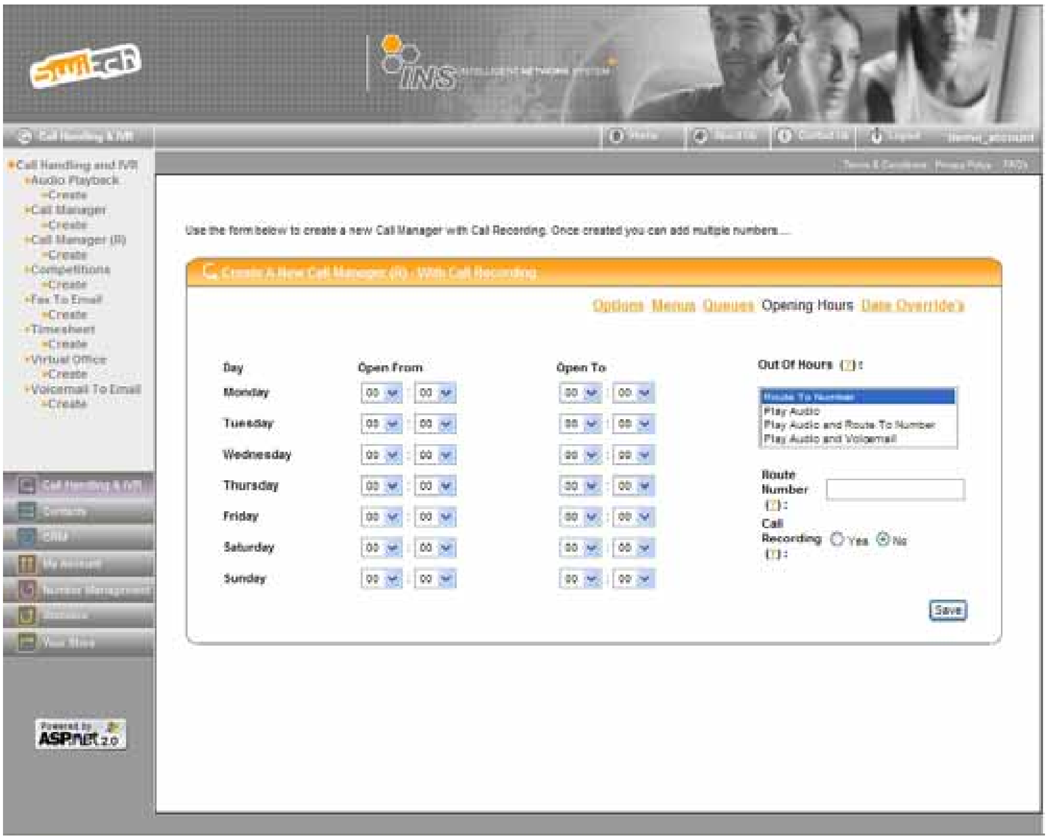
The call recording screen has the following options:

- **Menu Option** - This control is used to view recording options on the selected menu item. You can switch between menu options from this drop down list and change the details without having to navigate back to the menu screens (Call Recording must be “turned on” before the menu item will appear in the drop down list.)
- **Save To (Your Store Directory)** - This selects the directory in your file store that you want to store your call recordings in.
- **Email Recording** - This control is used to turn on and off the use of email to transfer the call recordings.
- **FTP Recording** - This control is used to turn on and off the use of FTP to transfer the call recordings.

To continue, click on queues. In Queues, you can manage call queuing. Call Queuing is as a default not enabled. To get Call Queuing enabled please call support on 0845 652 2222.

Next, click on Opening Hours. The Opening Hours screen can be seen below in figure 73.

Figure 73: Opening Hours Screen



In this screen you can set the opening hours for your organisation and set what to do if a call is received out of those hours, these options are explained below.

- **Day** - This setting allows you to set the opening times for different days of the week.
- **Open From** - This setting allows you to set the desired start time for the service.
- **Open To** - This setting allows you to set the desired finish time for the service.

Finally click on the Date Override's screen. This screen can be seen below in figure 74.

Figure 74: Date Override's Screen

In the Date Override screen you can specify a particular or a range of dates where you can override what your service does, and instead it will play an audio file that you specify. This page is usually used to specify bank holidays when your office may be closed, or any other special dates you may have. The options are explained in more detail below:

- **Description** - An override schedule allows you to schedule non-standard periods your service should be closed e.g. during bank holidays and festive holidays. The description field is a useful identifier used to name your override schedule. You can enter up to 50 characters in the naming of your override schedule.
- **Audio** - This setting allows you to select the appropriate audio file from your store to play to the caller during the selected date range.
- **From** - This setting allows you to set the desired start time for the override schedule.
- **To** - This setting allows you to set the desired finish time for the override schedule.

9.4: Competitions

The Competitions service is a system where you can create a competition IVR service. Your competition can have one question, with various answer options; multiple data captures and is fully configurable.

The Competitions screen can be seen in figure 75 below.

To understand the list of Competitions services, which you will see after you create a Competitions IVR, see section 9.9 below.

Figure 75: Competitions Screen

9.4.1: Competitions Create

Figure 76 below shows how to initially create a Competition IVR. In this screen you will see several fields, these are as follows:

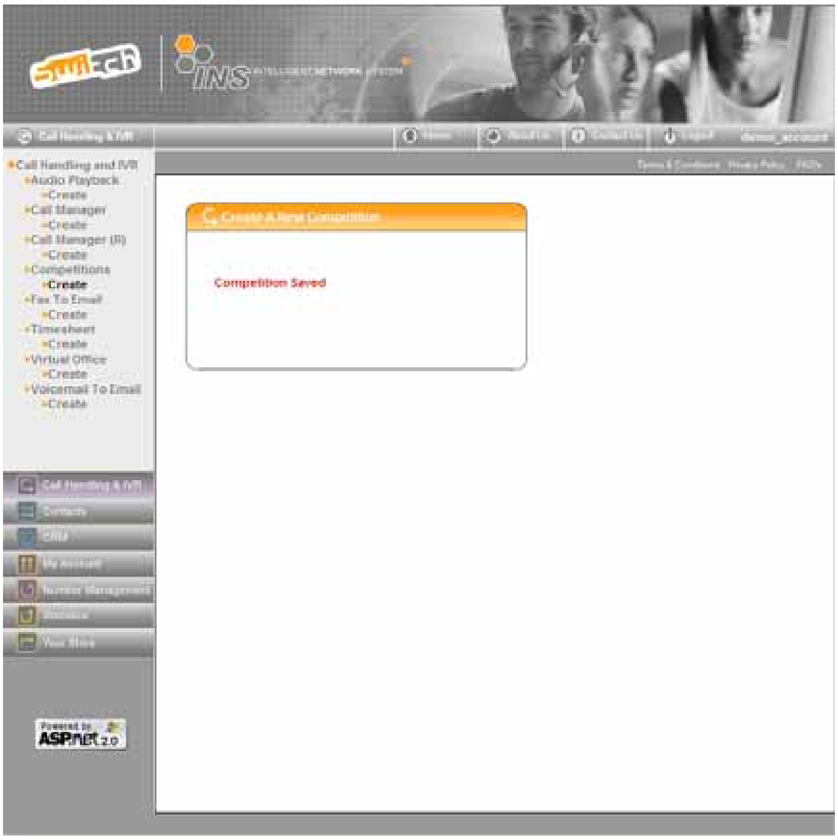
- **Application Description** - This is a useful identifier used to name your services. You can enter up to 100 characters in the naming of your service.
- **Email Entries To** - This option is used if you want to receive individual entries via email by entering your email address into the text box.
- **ICTIS Compliant Audio** - This setting is used to play pricing and company/service information at the start of the call. It is your responsibility to ensure all services are compliant with current ICSTIS and OFCOM rules for your service.
- **Marketing Opt in Audio** - This option if used will ask the caller if they wish to opt in or out of a marketing list by pressing 1 to opt in or 2 to opt out, please ensure your audio quotes the correct numeric keys for each option.
- **Pre-Question Audio** - This option is used to inform the caller of any competition rules or any other relative information prior to asking the competition question.
- **Dates Audio** - This option is used to play an audio to the caller indicating the competition has either not started or has finished.
- **Question Audio** - This audio is used to ask the caller the competition question and provide instructions on how to select each option. Each option must be numeric number from 1 to 9 and only consecutive numbers are allowed.
- **Invalid Entry Audio** - This audio is used to inform the caller they have pressed a key that doesn't correspond to an entry option and asks them to try again.

- **"Confirm" or "Incorrect Audio"** - This audio has two uses; firstly it can be used to simply confirm the service has accepted the caller's entry if you are not using a "correct audio", this is for services which do not inform the caller if they are correct or not when they choose an option. The second use is to inform the caller they have not chosen the correct answer, this can only be done if there is a corresponding correct audio selected.
- **Error Audio** - This audio is used to inform the caller there has been a system error and give out details of any customer services contact details.
- **Correct Audio** - This audio is used to inform the caller they have selected the correct answer.
- **Number of Answers** - This setting is used to define the number of possible answers the competition question has.
- **Thank You Audio** - This audio is played at the end of the call to thank the customer for entering the competitions and relaying any further information
- **Correct Answer** - This option is used to identify which of the possible answers is correct for the selected question.
- **From** - This option is used to set the start date and time for the service to start taking entries.
- **To** - This option is used to set the end date and time for the service to stop taking entries.
- **Reference Numbers** - This option is used to turn on and off the reading of unique entry reference numbers to the caller.
- **Prefix Audio** - This option is used to play instructions about the reference number and prefix needed prior to the numeric reference (e.g. "Thank you please make a note of this reference number… Your reference number is ABC…").
- **Start Number** - This setting is used to the starting reference number; the number is incremented by one with each call.

Figure 76: Competition Create Screen

When you have completed the details for this screen, click save, and you will be taken to a screen like figure 77 below, on this screen you have the further configurations options of Data Capture and Stats.

Figure 77: Competition Create Screen 1

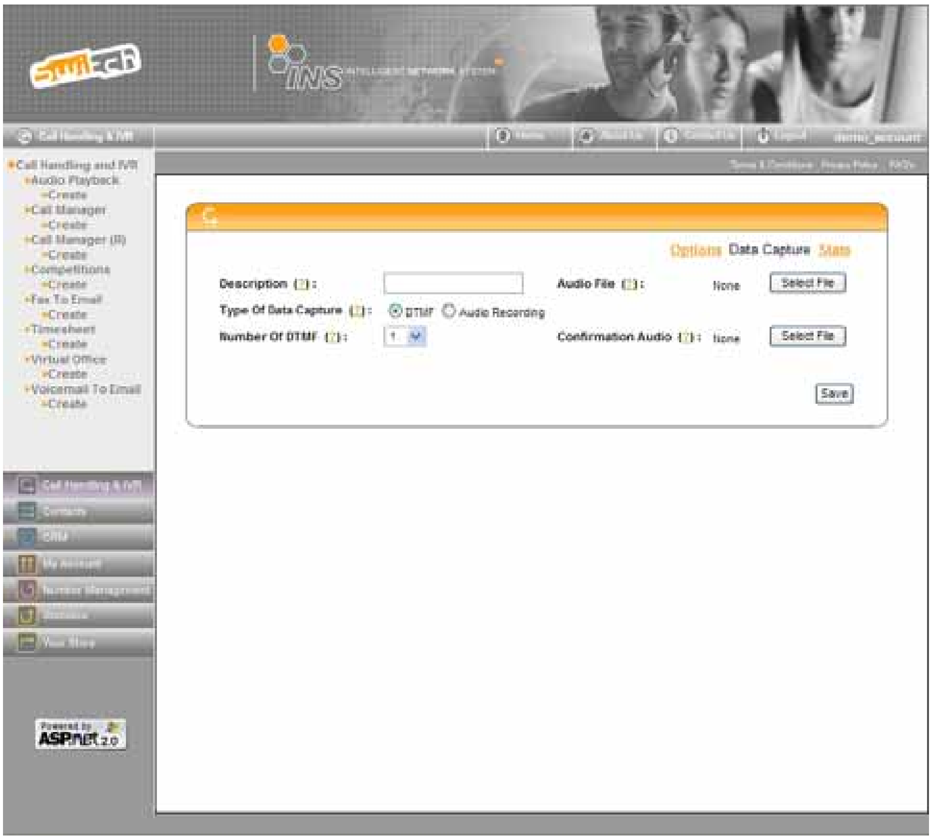


Next, click on the Data Capture option.

The Data capture option allows you to specify a series of DTMF (telephone key presses) digits to capture or capture information to an audio file. You can specify an audio file to play before the data capture, and one to play after if you desire, this can be seen in figure 78 below. You can specify as many data capture elements as you desire, each element you specify will be listed on the screen. In this screen you will see several fields, these are as follows:

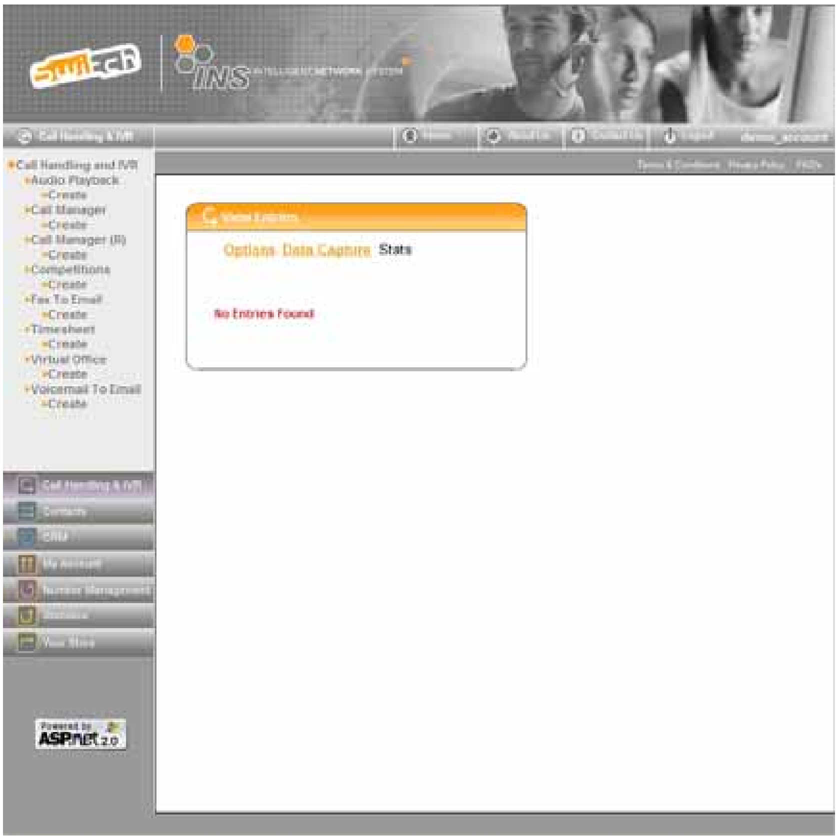
- **Description** - This is a useful identifier used to name your data capture. You can enter up to 100 characters in the naming.
- **Type of Data Capture –** You can specify if you want to capture DTMF (telephone button number pushes) or an audio recording i.e. capture to an audio file.
- **Number of DTMF** – This specifies the numbers of DTMF digits that the service should look for, for example if you wanted to capture the users mobile number, you would select 11 digits from the drop down list.
- **Audio File** – This is the file to be heard before the DTMF or audio capture.
- **Confirmation Audio** – This is the audio to be heard after successful capture of the information required.

Figure 78: Data Capture Screen



Finally, click on the stats section. The stats section can be seen in figure 79 below. In the stats section you can view the entries recorded for your competition line.

Figure 79: Stats Section



9.5: Fax to Email

The Fax to Email service is a system where you can create a simple IVR that will become a fax line, will receive faxes and directly forward them to email addresses of your choice.

The Fax to Email screen can be seen in figure 80 below.

To understand the list of Fax to Email services, which you will see after you create a Fax to Email IVR, see section 9.9 below.

Figure 80: Fax to Email Screen

9.5.1: Fax to Email Create

Figure 81 below shows how to initially create a Fax to Email IVR. In this screen you will see several fields, these are as follows:

- **Email Address** - This setting is used to enter the email address you wish the faxes to be delivered to.
- **Fax Detection Time** – This setting is used to select the amount of time for the line to wait for fax tones.

Figure 81: Fax to Email Create

There are no other sections or options to this IVR service.

9.6: Timesheet

The Timesheet service is an IVR service where you can track employees working hours by utilising the telephone.

The Timesheet screen can be seen in figure 82 below.

To understand the list of Timesheet services, which you will see after you create a Timesheet IVR, see section 9.9 below.

Figure 82: Timesheet Screen

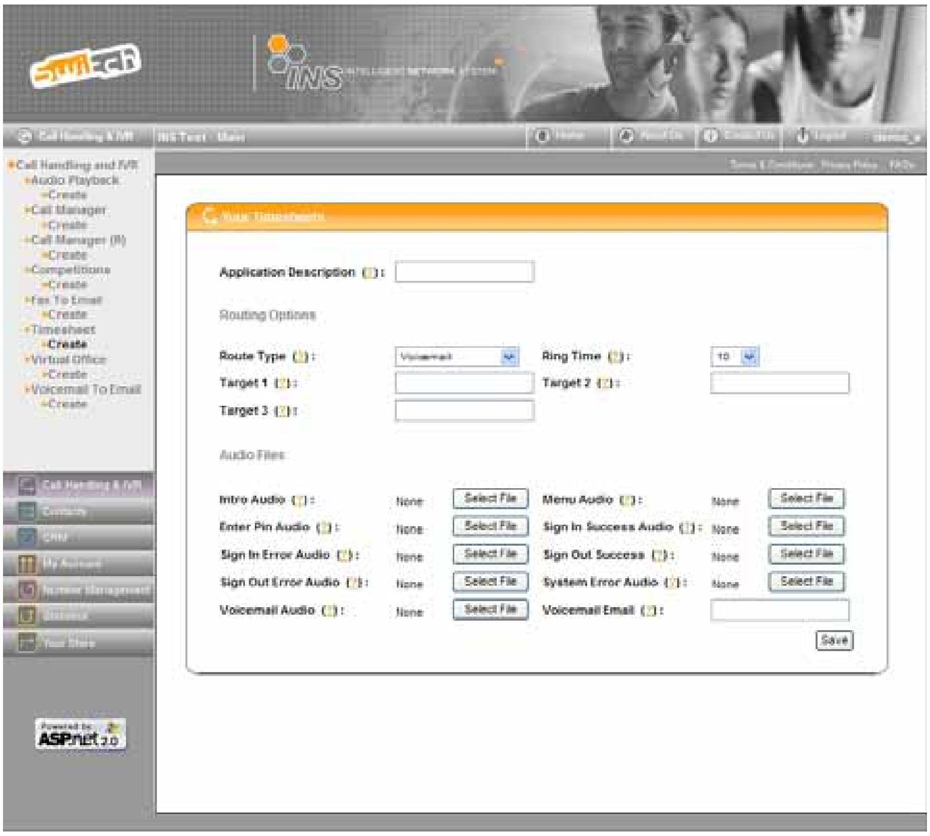
9.6.1: Timesheet Create

Figure 83 below shows how to initially create a Timesheet IVR. In this screen you will see several fields, these are as follows:

- **Application Description** - This is a useful identifier used to name your services. You can enter up to 100 characters in the naming of your service.
- **Route Type** - This option is used to route calls to voicemail, a number or to try a number and take voicemail if unsuccessful.
- **Ring Time** - This setting is used to set the ring time when making calls to the target numbers. There is a minimum of 10 seconds and a maximum of 100 seconds.
- **Target 1** - This option holds the first telephone number to dial.
- **Target 2** - This option holds the second telephone number to dial.
- **Target 3** - This option holds the third telephone number to dial.
- **Intro Audio** - This audio is used to greet the caller and provide any company details.
- **Menu Audio** - This audio is used to inform the caller of the menu options available.
- **Enter PIN Audio** - This audio is used to ask the caller to enter their unique PIN number in order to sign in and out of the service.
- **Sign In Success Audio** - This audio is played when the caller signs into the service successfully
- **Sign In Error Audio** - This audio is played when the caller has not signed into the service successfully.
- **Sign Out Success Audio** - This audio is played when the caller signs out of the service successfully
- **Sign Out Error Audio** - This audio is played when the caller fails to sign out of the service successfully.

- **Voicemail Audio** - This audio is used to give the caller instructions on how to leave a voicemail (e.g. “please leave a message after the beep and we will get back to you as soon as possible”).
- **Voicemail Email** - This setting is used to define the email account to send voicemail audios to.

Figure 83: Timesheets Create



After you have completed this page, click on save and you will be taken to a screen like Figure 84 below.

Figure 84: Completed Timesheets

Next click on users to add an employee to the system, this can be seen in Figure 85 below. In this screen you will see several fields, these are as follows:

- **Name** - Enter the employee's name
- **Address** - Enter the employee's address
- **Post Code** - Enter the employee's post code
- **Town/City** - Enter the employee's postal town
- **Phone** - Enter the employee's contact telephone number
- **Email** - Enter the employee's email address
- **Pin** - Enter the PIN number you wish to allocate to the employee.

You can add as many users or employees as you like.

Figure 85: Users Screen

Next, click on the stats section. The stats section shows you the statistics details of each employee added in figure 85 above.

The stats section can be seen in Figure 86 below, it contains the following options:

- **Format** - This setting allows you set the format of the results you want to search for.
  - **HTML –** this option will display the results in the web browser.
  - **CSV –** this option will download the results in a comma separated value format (a text file that uses commas to separate the information which is readable by excel and other spreadsheets)
  - **XML –** this option will download the results in an XML format which can be read by many applications and other web services.
- **Employee** - This drop down list allows you to filter your results by a specific employee or view all of the employees' time sheets.
- **From** - This setting is used to filter results by setting the earliest date and time to include in the results.
- **To** - This setting is used to filter results by setting the latest date and time to include in the results.

If you get a successful result from the search, you will see the below information:

- **PIN** - This item shows the PIN number used to sign in and out of the service
- **Employee** - This item shows the employee name associated with the PIN
- **Hours** - This item shows the total number of hours worked by an employee.
- **Logged In** - This item shows the date and time that the employee signed into the service for a given shift.
- **Logged Out** - This item shows the date and time that the employee signed out of the service for a given shift.
- **Hours** - This item shows the total number of hours worked by an employee.

- **CLI In** - This item shows the telephone number used to sign into the service.
- **CLI Out** - This item shows the telephone number used to sign out of the service.

Figure 86: Stats

9.7: Virtual Office

The Virtual Office service is a system where you can create an office for your business. The Virtual Office is built up from schedules; a schedule is a day of the week, all weekdays, weekends or every day. On each type of schedule you can divert your number to up to 3 different numbers, you can specify voicemail audio, and you can specify, if you wish, a fax machine number to forward any faxes too, or faxes can be received and sent to an email address.

The Virtual Office screen can be seen in figure 87 below.

To understand the list of Virtual Office services, which you will see after you create a Call Manager IVR, see section 9.9 below.

Figure 87: Virtual Office Screen

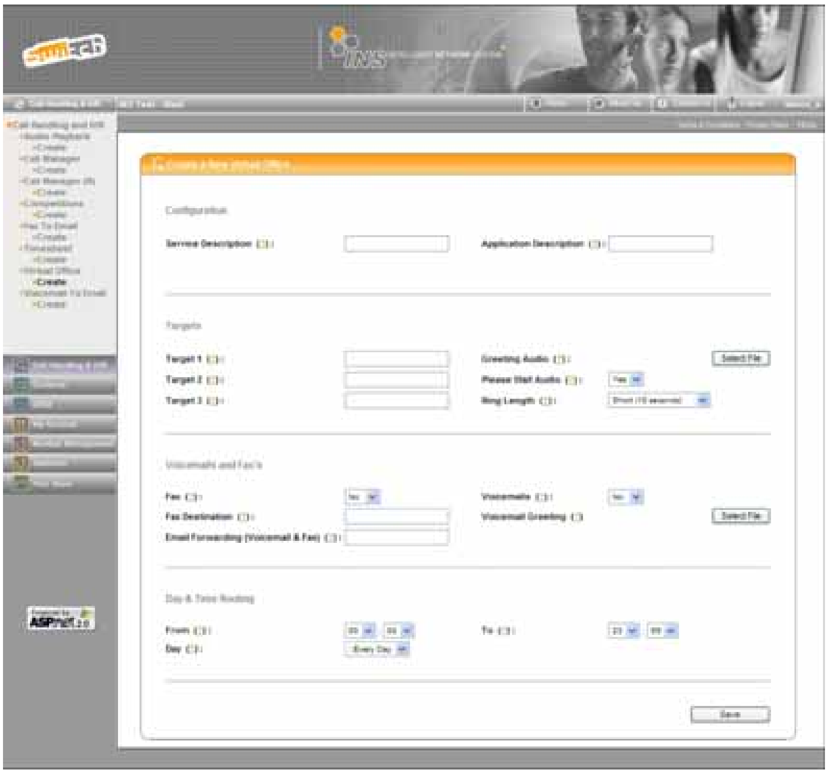
9.7.1: Virtual Office Create

Figure 88 below shows how to initially create a Virtual Office IVR. In this screen you will see several fields, these are as follows:

- **Service Description** – This is a useful identifier used to name your services. You can enter up to 100 characters in the naming of your service
- **Application Description** –. This is the friendly name for the schedule you are setting up for the time period specified in the day and time routing options.
- **Target1** - This setting is used to enter the first telephone number to be dialled
- **Target2** - This setting is used to enter the second telephone number to be dialled
- **Target3** - This setting is used to enter the third telephone number to be dialled
- **Greeting Audio** - This audio is used to greet the caller and provide any pricing or company information.
- **Please Wait Audio** - This option will ask the caller to wait while the next target telephone number is dialled. The audio is played once for each target entered.
- **Ring Length** - This option allows you to select the amount of time to dial the entered target telephone numbers. Three settings are available Short (10 seconds), Medium (20 seconds) and Long (30 seconds).
- **Fax** - This option turns on and off fax detection on your service, if the fax detection is turned on the fax detection is done during the playing of the greeting audio. If there is no greeting audio the detection is done prior to routing calls to targets and may result in some silence before attempting to dial.
- **Fax Destination** - This option is used to enter a fax number to have faxes call forwarded on to.
- **Email Forwarding (Voicemail & Fax)** - This setting is used to enter the email address you wish the faxes and voicemails to be delivered to.

- **Voicemails** - This option turns on and off voicemail on your service.
- **Voicemail Greeting** - This audio is used to override the default voicemail audio.
- **From** - This setting allows you to set the desired start time for the schedule.
- **To** - This setting allows you to set the desired end time for the schedule.
- **Day** - This setting allows you to set the desired day settings for the schedule. Options are individual days of the weeks, weekdays, weekends, every day.

Figure 88: Virtual Office Create



When you have completed this screen, and clicked save you will be taken to figure 89 below. On this screen you can configure or add any other schedules for this service. A schedule is a period of time, it can be a day of the week, all weekdays, all weekends or every day, and against each of these periods you can have a time from midnight to 23:59, so you can select any particular time, of any particular day, weekday, weekend, or every day and have a different set of rules for that schedule. To add a new schedule for a particular day, weekend, weekday and time just click on add new schedule, and this will take you to figure 86 again, where you re-enter what you want to do for this new schedule, give this schedule a description in the Application Description field, and click save to add the new schedule. To edit an existing schedule just click on the configure icon next to the schedule you wish to change, and this will again take you to the configured schedule screen which will look like figure 88 above.

Please note all Virtual Office schedules have automatically set-up a default schedule that runs every day from 00:00 to 23:59, and this will as a default go to voicemail. This is to ensure that your virtual office application is always live, as if you have a schedule to run say from 9am to 5pm on all weekdays only, then outside of this schedule your line would cease to become available, the default rule ensures that a call always gets through to your line. You can alter the default rule if you require, just click configure next to the default schedule, as can be seen in figure 89 below.

Figure 89: Virtual Office Schedules

The Voicemail PIN screen can be seen below in figure 90. In this screen you can select a voicemail PIN for accessing your voicemail by dialling your service telephone number and pressing the * key whilst the greeting audio is played, this option is useful for customers who need to listen to voicemails when they don't have access to the internet or email.

Figure 90: Virtual Office Voicemail PIN screen

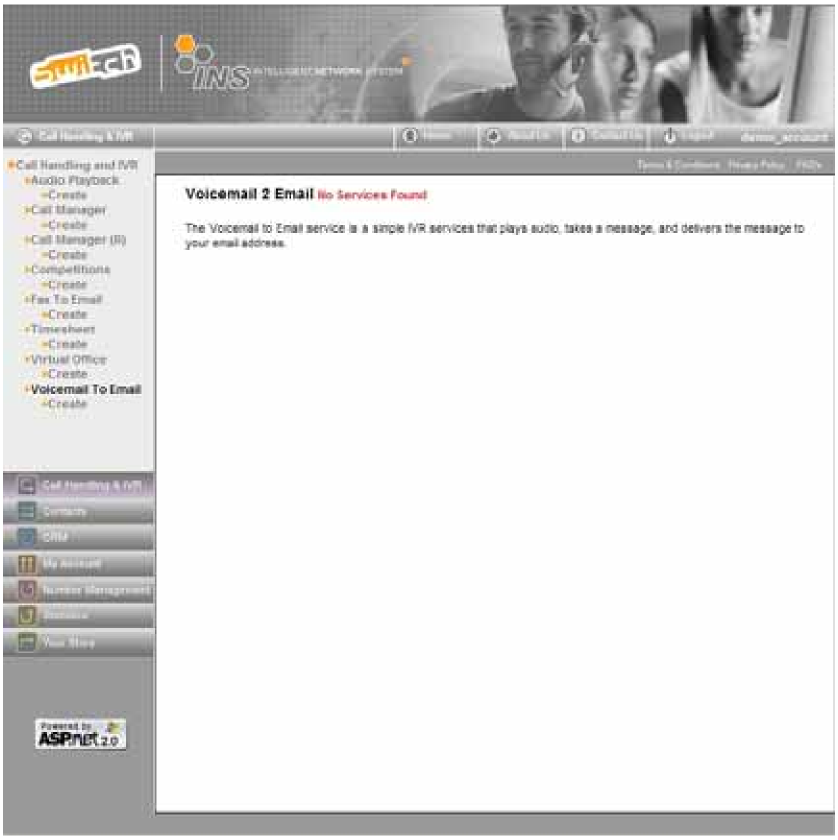
9.8: Voicemail to Email

The Voicemail to Email service is a simple IVR services that plays audio, takes a message, and delivers the message to your email address.

The Voicemail to Email screen can be seen in figure 91 below.

To understand the list of Voicemail to Email services, which you will see after you create a Voicemail to Email IVR, see section 9.9 below.

Figure 91: Voicemail to Email Screen



9.8.1: Voicemail to Email Create

Figure 92 below shows how to initially create a Virtual Office IVR. In this screen you will see several fields, these are as follows:

- **Email Address** - This setting is used to enter the email address you wish the voicemails to be delivered to.
- **Fax Detection Time** – This setting is used to select the amount of time for the line to wait for fax tones.

Figure 92: Voicemail to Email Create

There are no further options to configure for the Voicemail to Email IVR.

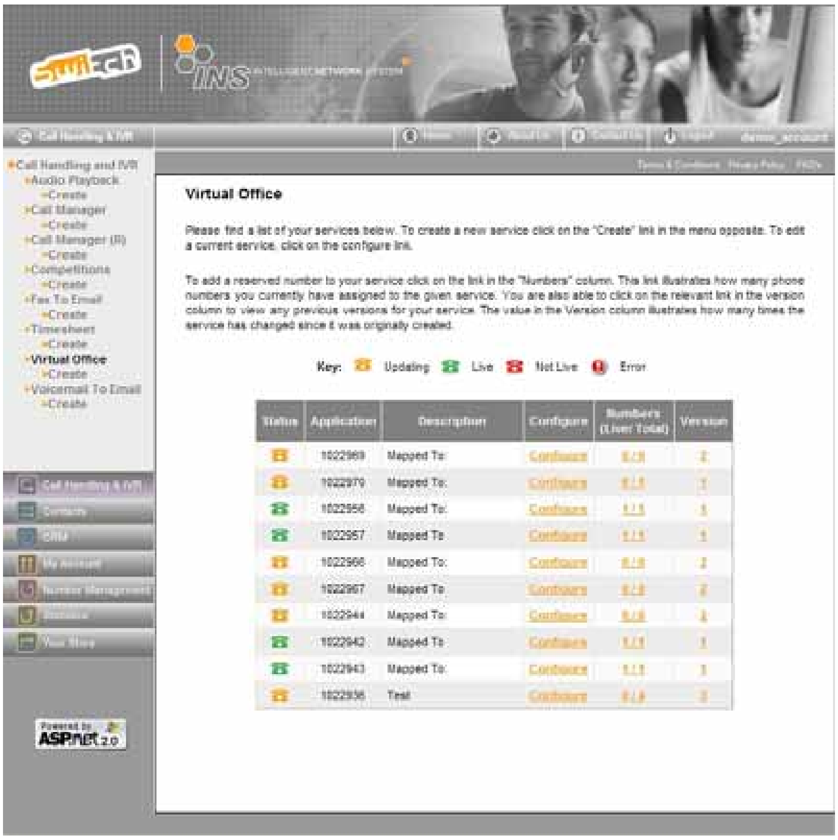
9.9: Understanding Services you have created

With each of the IVR services listed above in section 9 you can have as many different variations of these services as you want, or iterations. When you first create a new iteration of an IVR service, it will be listed on the main screen for that service, as below in figure 93. Each iteration has a status, a description, and three options, numbers, configure and version, this is explained below:

- **Status** – This shows the current status of the IVR iteration, the status is divided into four types, namely:
    - **Not Live** - Service is configured but has not been activated or "turned on", no calls will be accepted by the service.
    - **Updating** - Service is configured and is awaiting activation thus no calls will be accepted; updating in the vast majority of cases should only take a few minutes. If for any reason your service status has not changed within 60 minutes of its original publishing please contact customer support.
    - **Live** - Service is configured and is activated and will accept calls
    - **Error** – An error has occurred whilst trying to publish the iteration.
- **Description** - This is the identifier used to name your services.
- **Configure** - This menu option will take you to the main configuration page for your service, by selecting this option you will be able to complete the set up of your service in preparation for publishing.
- **Numbers** - This menu option will take you to the number allocation page for your service, by selecting this option you will be able to view any currently allocated telephone numbers as well as attaching additional numbers to your service ready for publishing.
- **Version** - This menu option allows you to "Roll back" configuration settings to previous published versions of your service. Please be aware multiple versions may appear due to minor changes to your service, this is

because every change is stored as a new version and will be applied to the live service in sequence. If you “Roll back” to a previous version the older version will be copied and become the highest version number.

Figure 93: Service Iterations



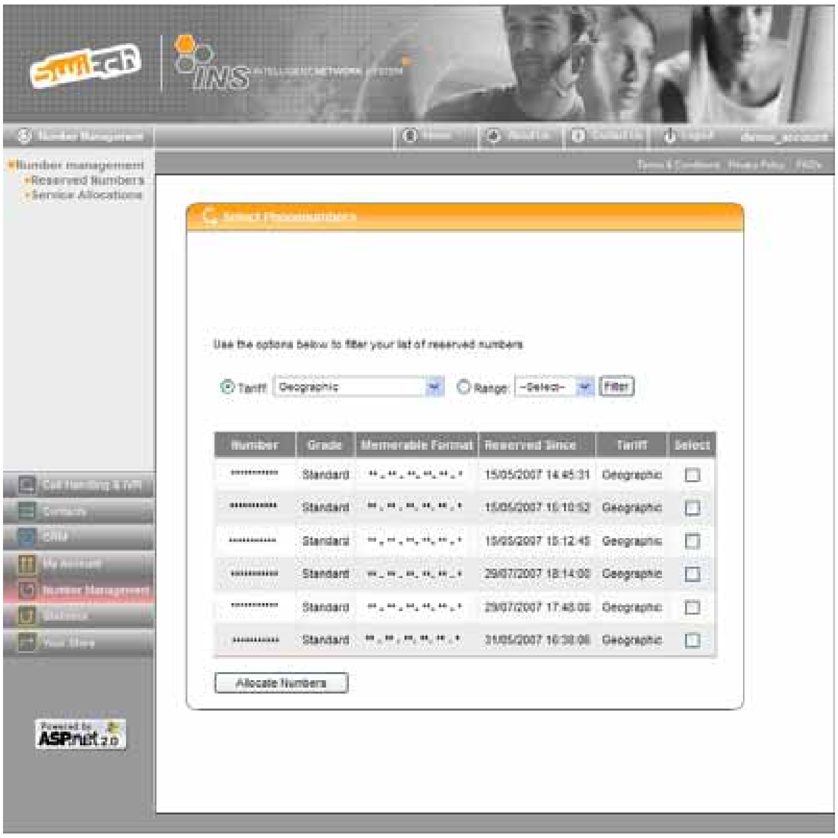
So, when you have successfully created an iteration of one of the IVR services, you then need to allocate a number or several numbers to it. This would be done by clicking on the numbers link next to the relevant IVR iteration in the IVR service that you want to add numbers to. This will take you to the screen seen in figure 94 below.

On this screen you can see any active numbers that are setup on this IVR iteration, and you can un-publish the service from that number, or remove the service from that number.

Figure 94: Numbers Assigned to an Iteration of an IVR Service

To allocate more numbers, all you have to do is click on the allocate button at the top, this will take you to the screen seen below in figure 95. On this screen you can select from the tariffs or number ranges and display numbers that you have reserved to your account. Firstly, select from either of the drop downs what you wish to filter on, then click filter and you will be returned a list of numbers that you can use that are reserved to your account. To assign the number to the iteration, just place a tick in the select box next to the desired numbers. You can select as many numbers as you want to make live on this iteration of the service. Note that one number can have one service on it at any one time, but a service iteration can have many different numbers assigned to it.

Figure 95: Selecting Tariff and/or Number Range of a Number to Allocate to an Iteration of a Service



When you have selected all the numbers you wish to allocate to this service iteration, then click allocate numbers, and you will see the screen like figure 96 below.

Figure 96: Number Allocations

In this screen, you can select which rate card you require to be applied onto this number allocation, if you have more than one. For details on rate cards see section 3.8. Then select your start date, this is the date that the numbers will become active from, this will default to today's date but if you wanted a number to become live in the future, then you would set the date to become active here. If no finish date is ticked, when you click allocate numbers those numbers selected will become live, if you un-tick no finish date, another date box will be displayed, in this box you would specify the date that you wish the number to be disconnected off the service iteration. Finally, you can select the status of the service iteration for these selected numbers to be live or not live.

When you click on allocate numbers, your numbers will be assigned to the service iteration and put live.

If we click on versions from Figure 91, a screen is seen as below in figure 97.

Figure 97: Versions

This screen shows you each different version or history held on file for the service iteration you are looking at. Each time you change or edit an existing service iteration a new version will be created. This means that you can track all changes made to your services. The top version listed will be the current version of the iteration. A click on the description will show you how your service was configured at that time.

INTELLIGENT NETWORK SYSTEM

Contacts

If you have any problems, we can help you with our technical support team. Giving you all the up to date information to make your INS experience a successful one:

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