AT&T Office@Hand®

Admin Guide

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Getting Started

Introduction

AT&T Office@Hand is a business phone system that connects employees with one solution. It offers enterprise-grade features, including auto receptionist, multiple extensions, and more.

This guide will help system administrators set up and access the following Office@Hand features:

- Auto-Receptionist
- Multi-level IVR (Auto-Attendant)
- Visual IVR Editor
- Company directory
- Company numbers
- Call groups
- Presence
- Call queues
- Call monitoring
- Call handling and forwarding
- Call recording on demand and automatic
- Audio conferencing
- Paging
- Hot Desking
- Reports
- Roles and Permissions
- User Groups
- Templates
- Multi-Account Access
- Corporate email as user ID
- Gmail (or G Suite) email as user ID
- Single sign-on

How to Access Your Account

If you have created but not set up your administrator account, see Appendix A: Express Setup for Admins to learn how to set up your account first. Log in to your online account at https://service-officeathand.att.com. The default method of account access is by using your main Office@Hand phone number and password.

Email or Google as User ID

You may optionally configure users to log in with a unique corporate email address or Google (Gmail or G Suite) account. See Use a Corporate Email Address to Log In and Use a Google Account to Log In.

Single Sign-on

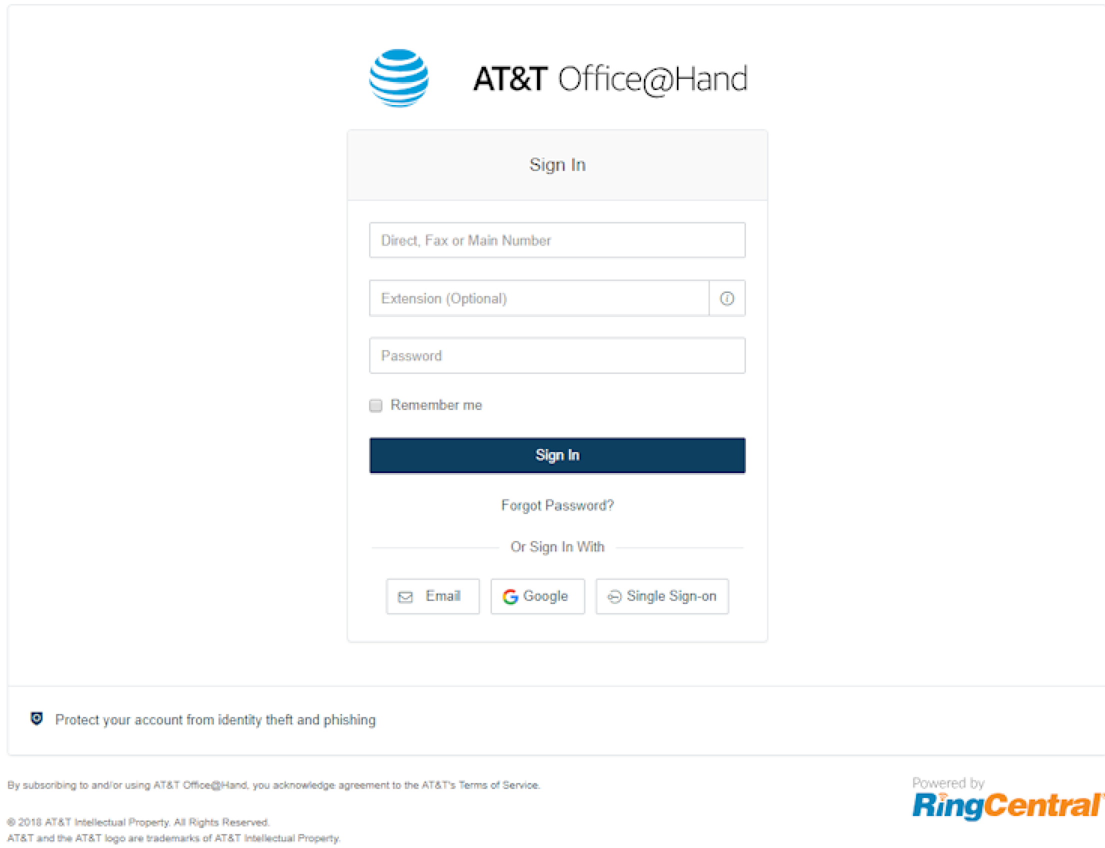
If Single Sign-on is set up for your account, click **Single Sign-on** at the bottom of the screen. Enter your email address, then log in with your corporate credentials. See in the Tools section of this guide.

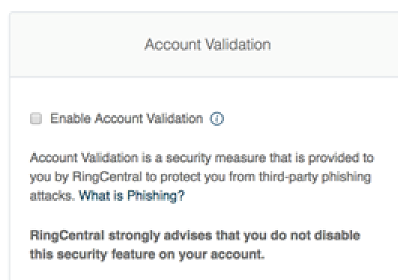
TLS v1.0 and 1.1 Deprecation

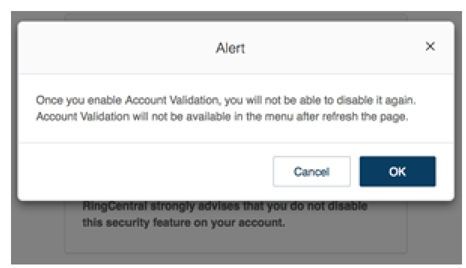
Browsers and devices attempting to connect to Office@Hand servers using a TLS v1.0 or TLS v1.1 connection are rejected to protect customer privacy and align with industry standards.

Account Validation

Account Validation is a security feature that helps protect against fraudulent activity on your account. You're asked for a security validation code when you log in from an unrecognized computer for the first time. You may need to check your phone or email for the security code and enter it in the box before logging in.







Use a Corporate Email Address to Log In

The Email as User ID feature allows users to log in using a unique email address. When users log in to an account, they receive a notification about the feature, and can enable the feature by specifying a unique email address.

This feature applies to accessing your Office@Hand online account, Office@Hand Meetings, endpoints such as the Office@Hand Mobile App and Office@Hand for Desktop, and integration applications. This feature can also be configured during the Express Setup of your Office@Hand account.

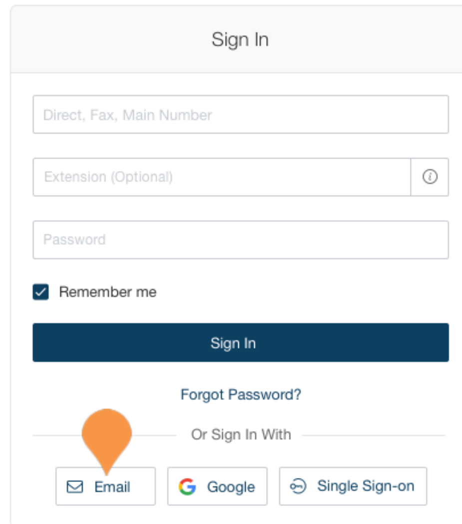
For information on automatically provisioning users from your corporate directory, see “Directory Integration” on page 188.

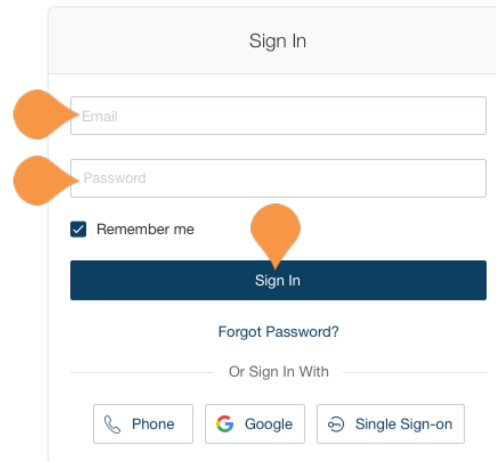
If not already configured, enable the feature:

1. Log into your account using your Office@Hand credentials.
2. Enable the feature as follows:
   a. In the popup, select **Enable now**, and click **OK**.
   b. Or, in **User Settings**, select **Use email to log in**.
3. Verify the uniqueness of the email address.
4. Edit any duplicate email addresses.
5. Click **Save** and log out.

To Log In Using Email as User ID:

1. In the login screen, click **Email**.
2. Enter the unique Email address and Password that has been associated with your Office@Hand account.
3. Click **Sign In**.





Use a Google Account to Log In

The Google login feature allows users native support for logging in using a Google email address and password. This feature requires a unique Google email address (Gmail or G Suite email). The admin configures a Google email address when assigning an extension, and verifies the uniqueness of the email address. By default, users can log in with their Google email address or Office@Hand credentials.

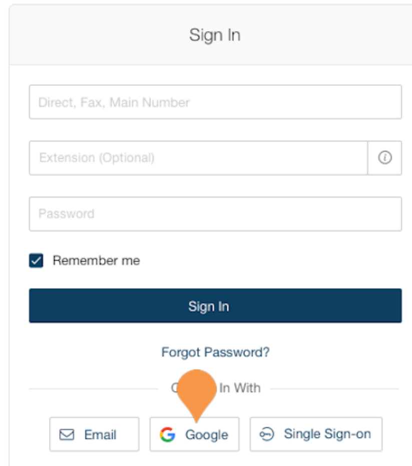
This feature applies to accessing your Office@Hand online account, Office@Hand Meetings, endpoints such as the Office@Hand Mobile App and Office@Hand for Desktop, and integration applications. You can configure Google Email addresses during the Express Setup of your Office@Hand account.

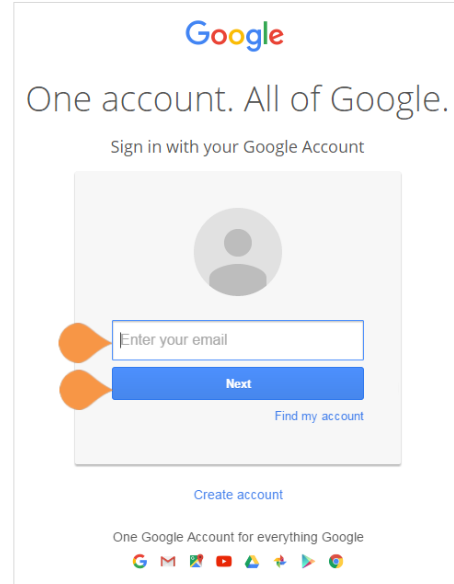
If not already configured, set a Google email address.

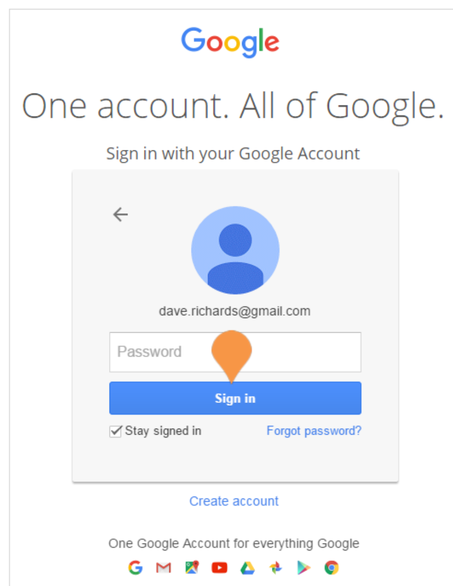
1. Log in using your Office@Hand credentials.
2. Select **Users**.
3. Select a user. The user settings page is displayed.
4. In the **Email** field, specify a unique email address.
5. Click **Verify email uniqueness**; resolve duplicates.
6. Click **Save** and log out.

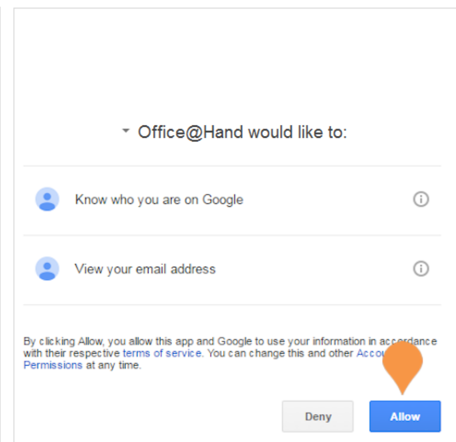
To Log In using Google:

1. In the login screen, click **Google**.
2. Enter your unique Gmail **Email** address and **Password**.
3. Edit any duplicate email addresses.
4. Click **Allow** to allow the application access.



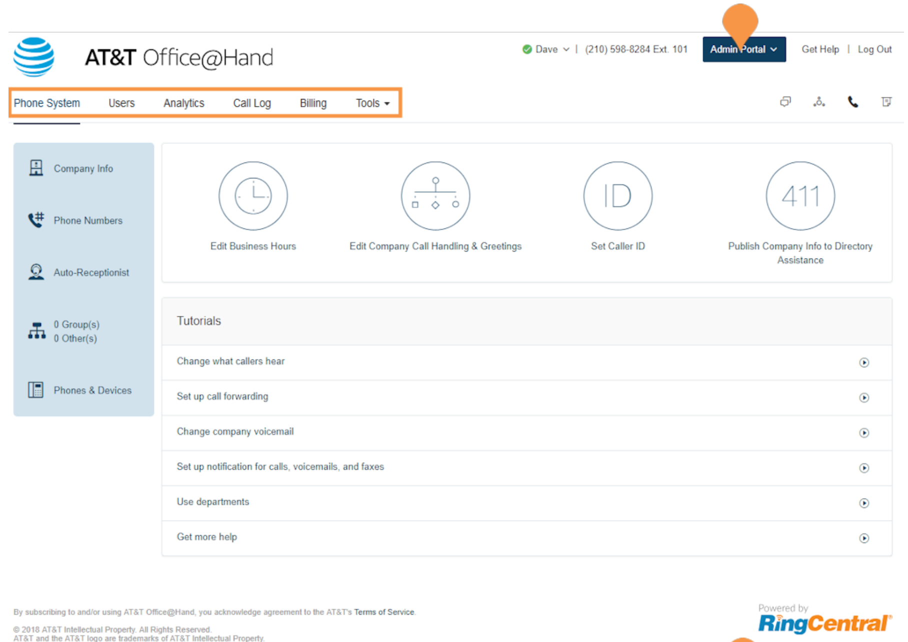


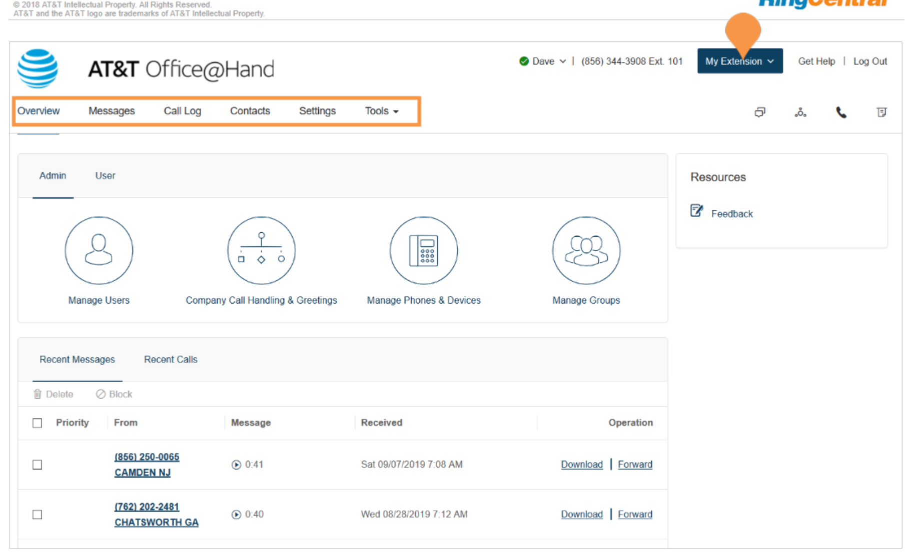




Admin Homepage

When you log in as an administrator, you will be taken to the Admin Portal which allows you access to admin-only tools and configure account-wide phone system settings. You can access your individual account overview and settings from the My Extension page. At the top of the screen, hover over Admin Portal and click **My Extension** to switch to your individual user homepage. .





Main Functions

There are a few main functions that administrators can access from any online page. These functions are Do Not Disturb, Conference, RingOut, and FaxOut.

Tool tips are available in the user interface.

Admin Portal

From the Admin Portal, admins see admin-only tools. The Phone System tab is the main tab and landing page that houses all of the main settings for the entire phone system. Here, you have Company Info, Phone Numbers, Auto-Receptionist, Groups, and Phones and Devices. The Call Log, and Billing tabs display information about your phone system. The Tools tab has more setup options such as Session Timeout, IVR, and Templates.

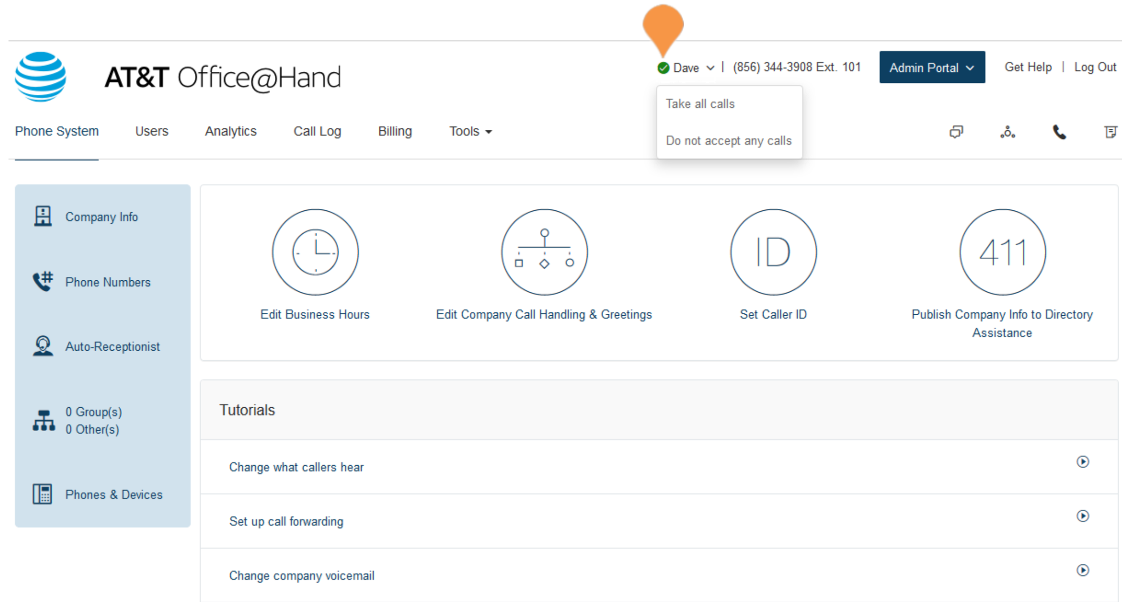
My Extension

When you switch to the My Extension page, you will see the standard user settings view of Overview, Messages, Call Log, Contacts, Settings, and Tools. Click on **Settings** to access your individual settings. The My Extension tab houses the same settings a regular user has.

Do Not Disturb

In the upper right of every page of your online account is a small colored icon next to your name. This icon displays your Do Not Disturb status. Click the icon to toggle between statuses:

- **Take all calls -** you are available to take all incoming calls.
- **Do not accept any calls -** you do not accept any calls. All callers are sent to voicemail.



Audio Conference

Office@Hand customers can setup, host, and join conference calls anytime, anywhere. Click the Conference icon in the upper right corner of your online account to get started.

Each customer receives a unique conference bridge number, and each user on the phone system gets his or her own host and participant access code so that you and your team can hold independent conferences whenever you want.

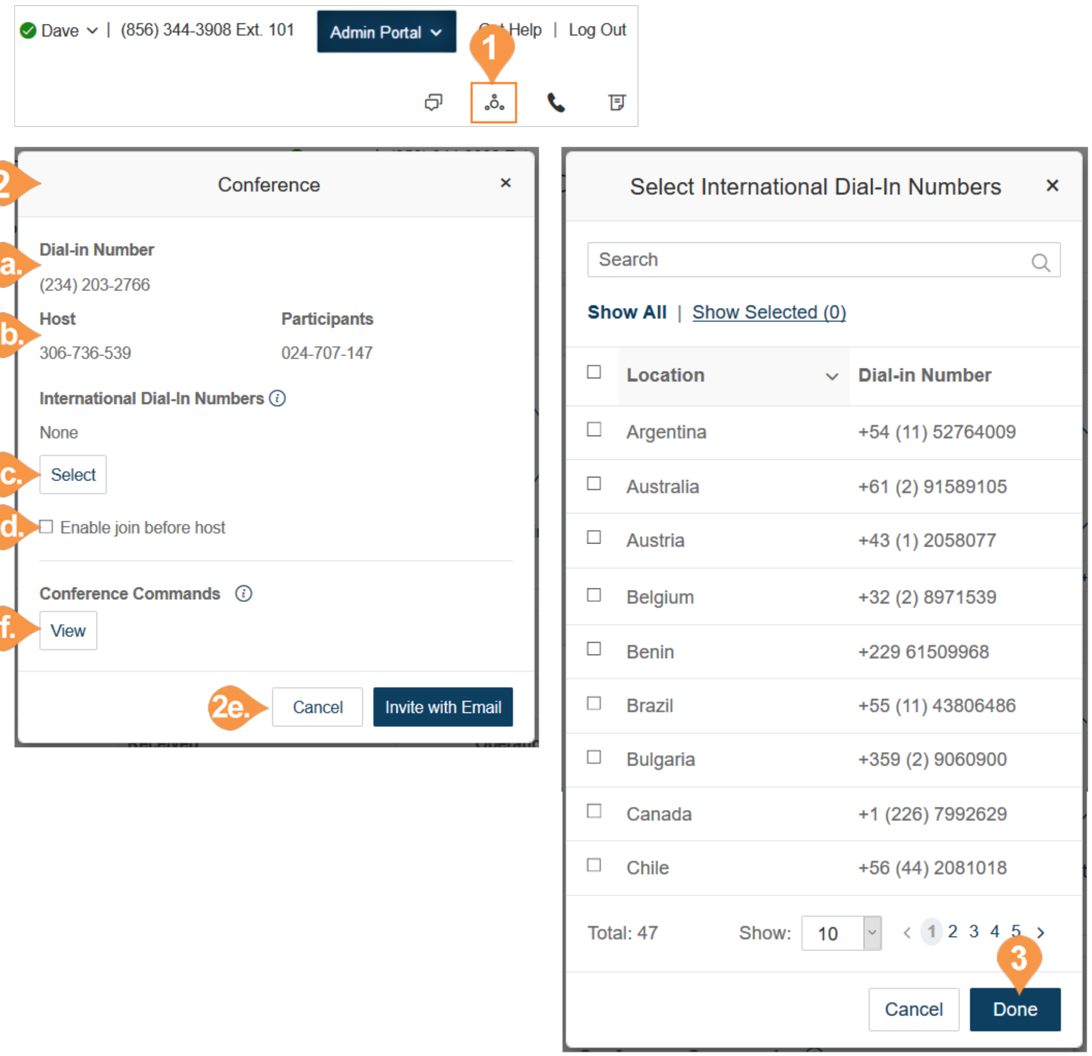
You also have the option to add the international dial-in number in the invitation. Check the "I have international participants" option and select the needed countries in the list.

Each conference call can include up to 1000 attendees, enabling you to hold large meetings and broadcasts.

Launch the Conferencing Application

1. Click the **Conference icon**.
2. A pop-up will appear with conference numbers and settings.
   a. View **Dial-in numbers**.
   b. View **Host** and **Participant** codes.
   c. If you have international participants, check the box next to **I have international participants**. Select international dial-in numbers at the bottom of the pop-up.
   d. Check the box next to **Enable join before host to allow participants** to start a conference call without a host.
   e. Click **Invite with Email** to open an email with prep-populated conference details - simply enter participant emails and send.
   f. Click **Conference Commands** to view Conference Commands*.
3. Click **Close**.

*See Conference Commands on the next page.



Conference Commands

For the Conferencing feature, the host and participants have the same conference bridge number to dial into, but their call control depends on the access codes that they will use.

The Host has the full call control and can access the conference commands in the table to the right.

Participants, on the other hand, have limited control of the conference commands.

The commands are displayed with the conferencing dial-in information.

Preventing Music-On-Hold

An on demand parameter can be configured to prevent users from playing music-on-hold. When you request support to enable this parameter for your account, and a user with music on hold enabled joins a conference bridge, the client is prevented from playing music-on-hold during an explicit or implicit hold (such as answering an incoming call). This feature allows other participants on the bridge to continue without disruption.

Conference Commands

Use your touch-tone dialpad keys to mute or block participants, record the call, and more.

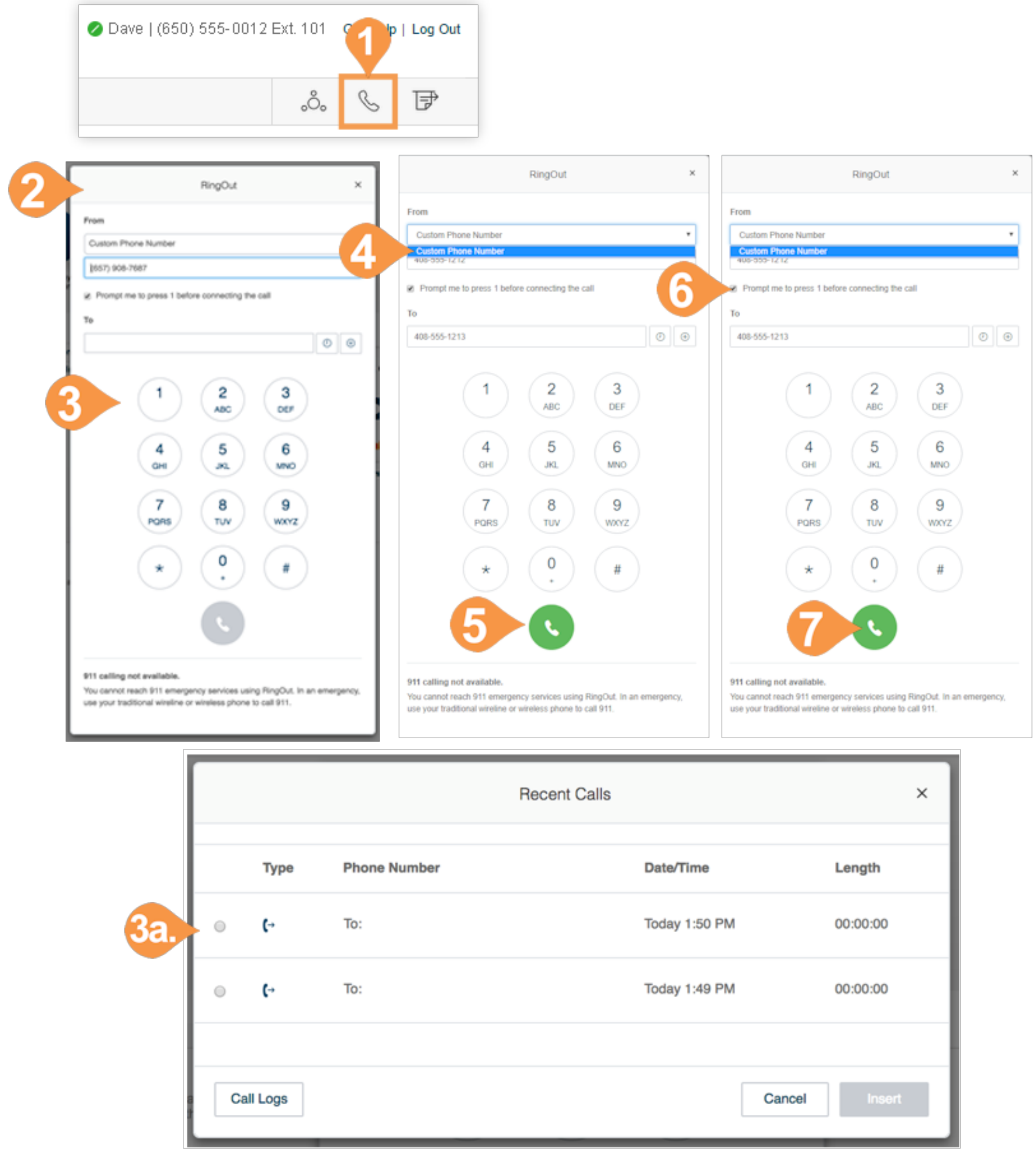
Command	Action
* # 2	**Caller Count** Keep track of how many people are on the call
* # 3	**Leave Conference** Lets the host hang up and end the call
* # 4	**Menu** Listen to the list of touchtone commands
* # 5	**Set Listening Modes** Press 1x: Mute callers - Callers can unmute with * # 6 Press 2x: Mute callers - Listen only. No unmuting option Press 3x: Unmute callers - Opens the line again
* # 6	**Mute Host Line** Press once to MUTE Press again to UNMUTE
* # 7	**Secure the Call** Press once to BLOCK all callers Press again to OPEN the call
* # 8	**Hear sound when people Enter or Exit call** Press 1x: Turns OFF sound Press 2x: Enter tone is ON Exit tone is OFF Press 3x: Enter tone is OFF Exit tone is ON Press 4x: Turns ON sound
* 9	**Record your conference** Press once to START recording Press again to STOP recording

Done

RingOut

RingOut enables one-touch calling from any phone or Internet-enabled computer, allowing you to avoid charges while making calls from any location, such as a hotel room. You can make calls with your business identity: show your Office@Hand business number as your Caller ID from any location. The Office@Hand system will call your phone first, then dial out to the number you'd like to call to get you connected. Access the RingOut icon from the upper right of every online account page, or click any number in your online account, including contacts, messages, or call logs.

1. Click the **RingOut** icon in the upper right corner.
2. A pop-up dialer will appear.
3. Dial a number or use your keyboard to type a number into the text field. You can also choose from recent calls or your contact list.
4. Select the **From** number you'd like to show as your caller ID. You also have the option to choose Custom phone number from the drop-down menu and enter the desired number in the text field below the drop-down menu.
5. Once you have entered From and To numbers, the **Call button** will turn green.
6. Check the box next to **Prompt me to press 1 before connecting the call** if you'd like the system to confirm that you would like to make the call before you are connected. When the system calls you, you will hear "*Please press 1 to connect*." This protects you in case you mistyped your own number, or if your voicemail picks up too quickly.
7. Click the **Call** icon. The system first calls you. When you answer (and press 1 as instructed if you've selected this option), it then calls the other number and connects you.

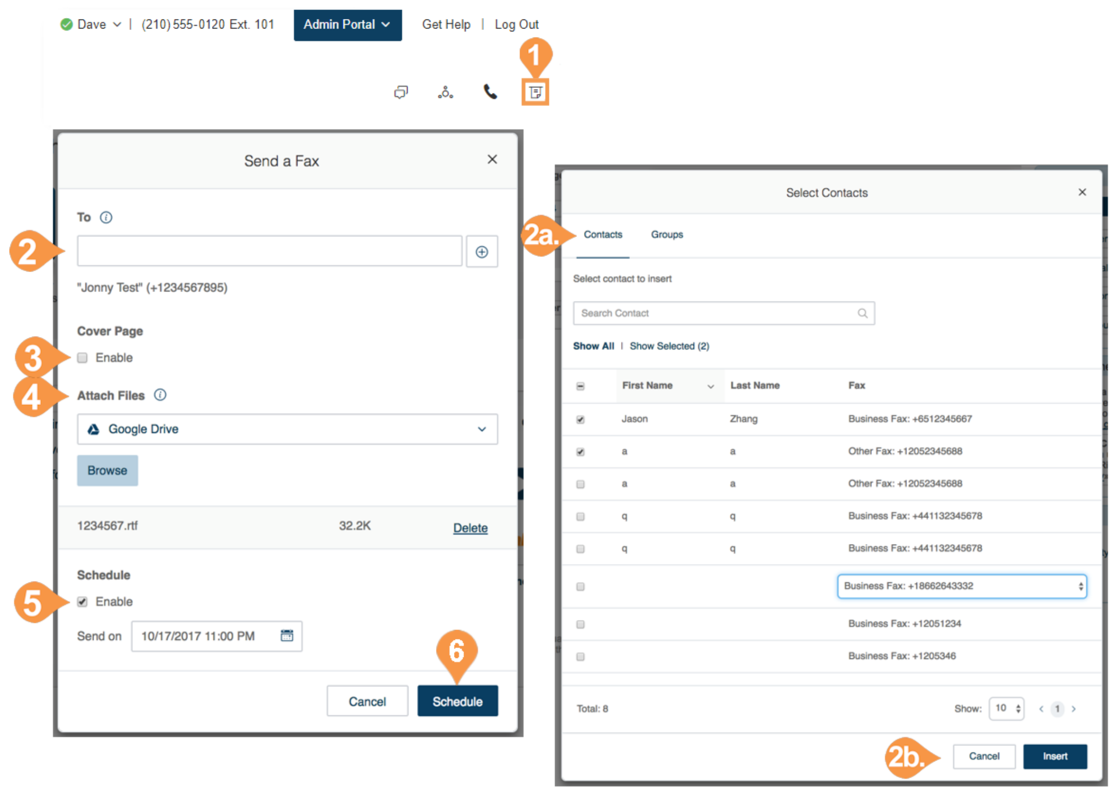


FaxOut

To quickly send a fax from your online account, click the FaxOut icon located in the upper right corner. Fill in the form with recipient's fax number and cover page information, and attach or scan a document, which will automatically be converted into a fax.

A wide variety of standard document types, including word processing and spreadsheet and PDF documents, are recognized by FaxOut. You can also send files from Dropbox, Box or Google Drive with just a few clicks.

1. Click the **FaxOut** icon in the upper right corner.
2. Enter up to 50 recipients and add a cover page message.
3. Attach files from Dropbox, Box, Google Drive or your computer and authorize Office@Hand to access your files (you have to do this only once).
4. Click **Send Now** and your fax is on its way.



Phone System

Phone System

The Phone System tab is the main tab of the Admin Portal. It houses all of the main settings for your entire phone system. Here you will find settings for:

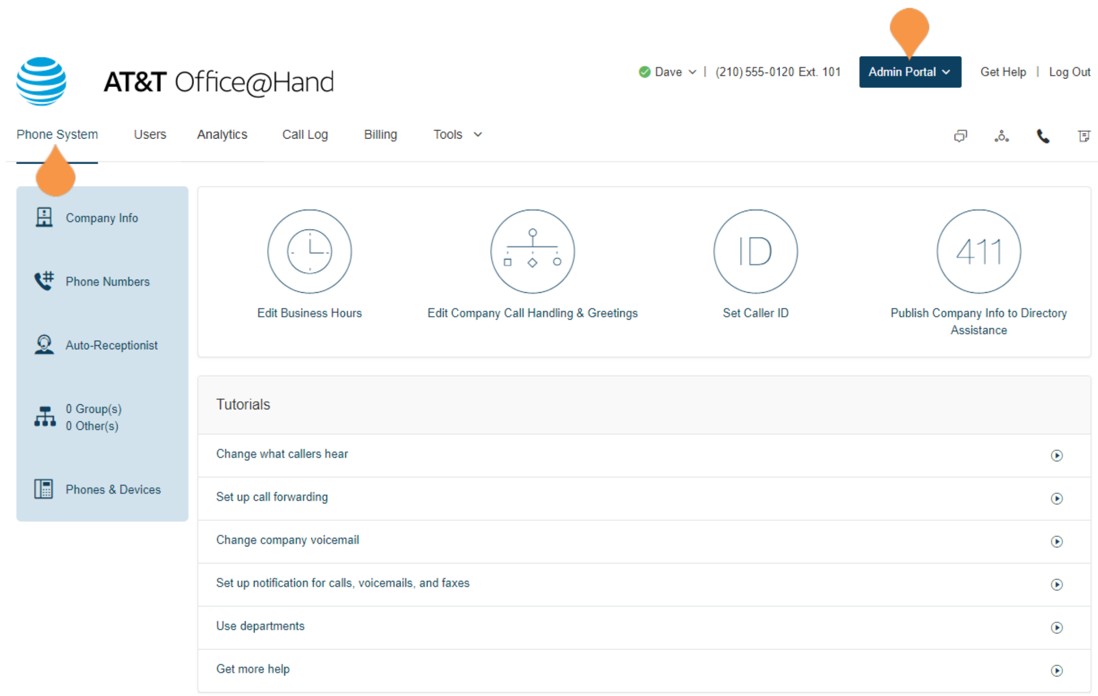
- Company Info
- Phone Numbers
- Auto-Receptionist
- Multi-Level Auto-Receptionist
- Groups
- Phones & Devices

On your Phone System page, you have Shortcuts that allow you to quickly access commonly used functions such as:

- Edit Company Business Hours
- Edit Company Call Handling and Greeting
- Set Company Caller ID
- Publish Company Info to Directory Assistance

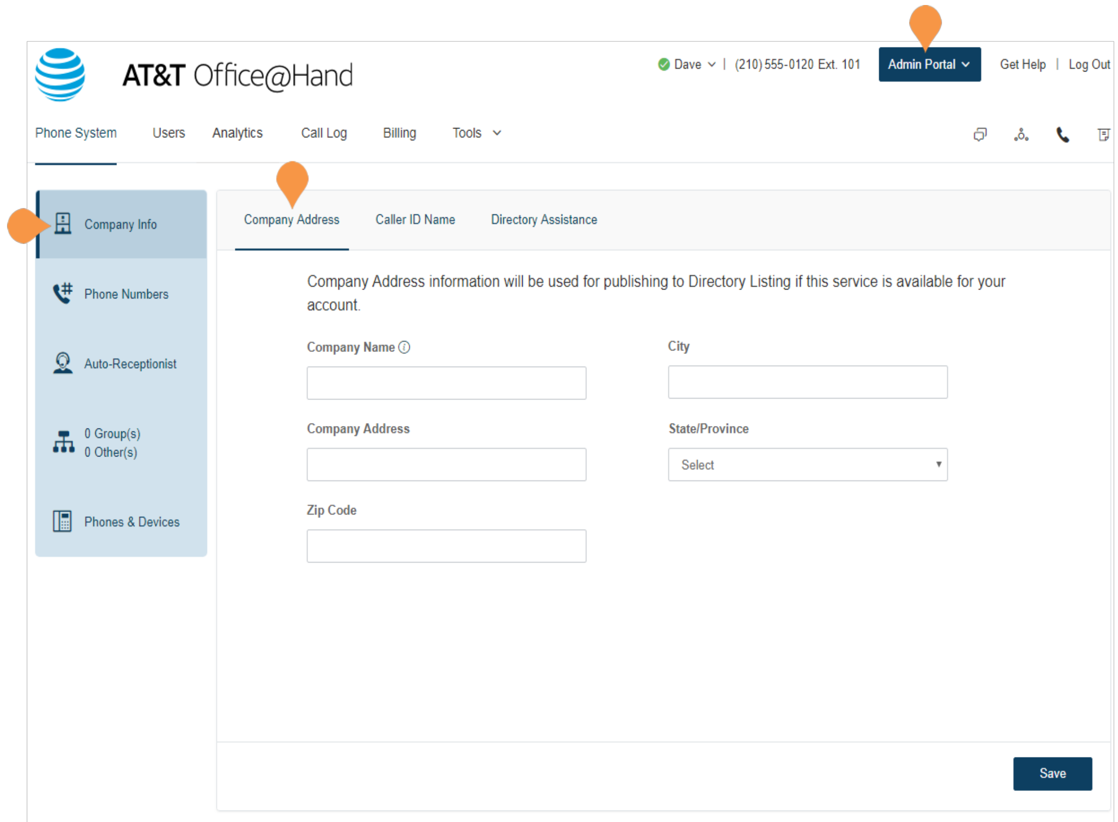
How do I…

If you need help setting up your phone system, check out the How do I… section to watch short, helpful videos.



Company Info

The Company Info settings include **Company Address**, **Caller ID Name**, and **Directory Assistance**. Select the appropriate tab to access each section.



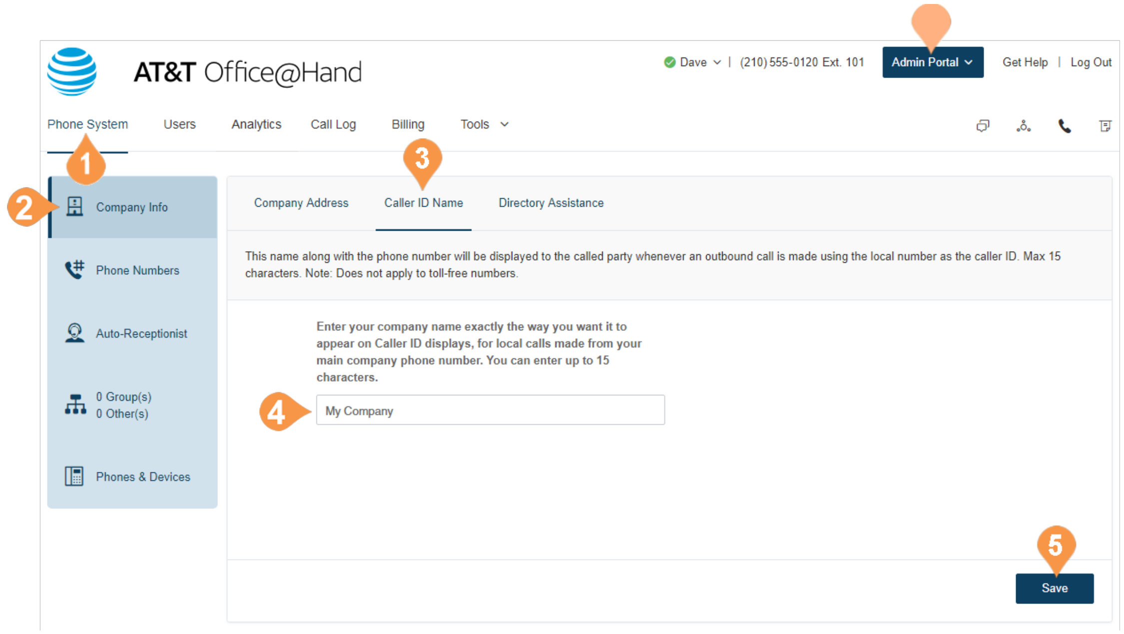
Caller ID Name

Set your Company Caller ID to your company's name so that your customers will know who is calling when you call them.

This name along with the phone number is displayed to the called party whenever an outbound call is made using the local number as the caller ID.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Info**.
3. Click **Caller ID Name**.
4. Enter your company name exactly the way you want it to appear on Caller ID displays, for local calls made from your main company phone number. You can enter up to 15 characters.
5. Click **Save**.

Outbound Caller ID cannot be set for an individual number or digital line. It is only available for local numbers and not toll-free numbers.



Directory Assistance

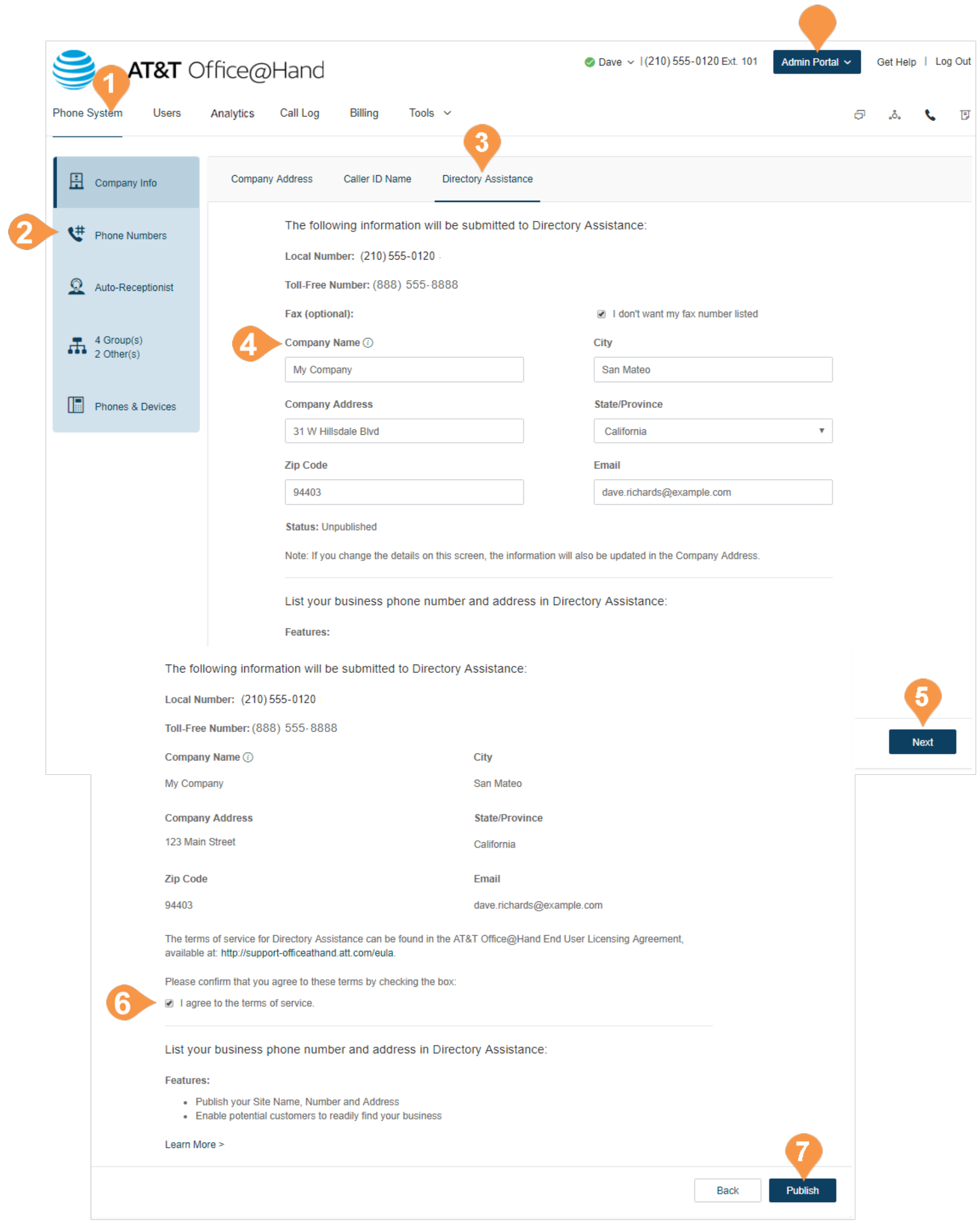
Directory Assistance is a free and convenient way to publish your business name, address, main number, and main fax number to increase your company's visibility in local directory assistance listings.

For more information about Directory Listing, go to Directory Listing Frequently Asked Questions.

To publish your information:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Info**.
3. Click **Directory Assistance**.
4. Enter your listing information.
5. Click **Next**.
6. Check the box next to "**I agree to the terms of service.**"
7. Click **Publish**.

Allow five business days for your listing to appear. Edit or delete your listing any time by following these same steps.

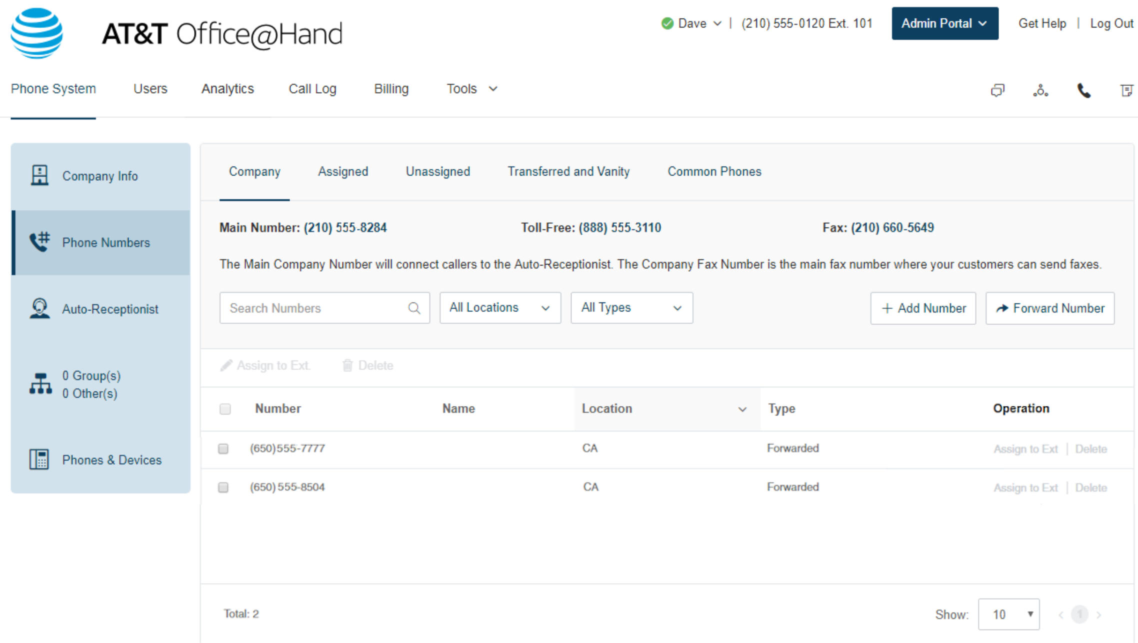


Phone Numbers

The Phone Numbers tab allows you to view your numbers by category of number, and add additional numbers to your account.

The tabs contains these types of numbers:

- Company: numbers that will connect the caller to the Auto-Receptionist.
- Assigned: numbers in your account assigned specifically to an extension.
- Unassigned: numbers in your account not assigned to any user.
- Transferred and Vanity: existing numbers that have been transferred, and vanity numbers to help customers remember your business phone number.
- Common Phones: numbers that are dedicated for use as phones for Hot Desking. For more information, see See “Hot Desking” on page 133.



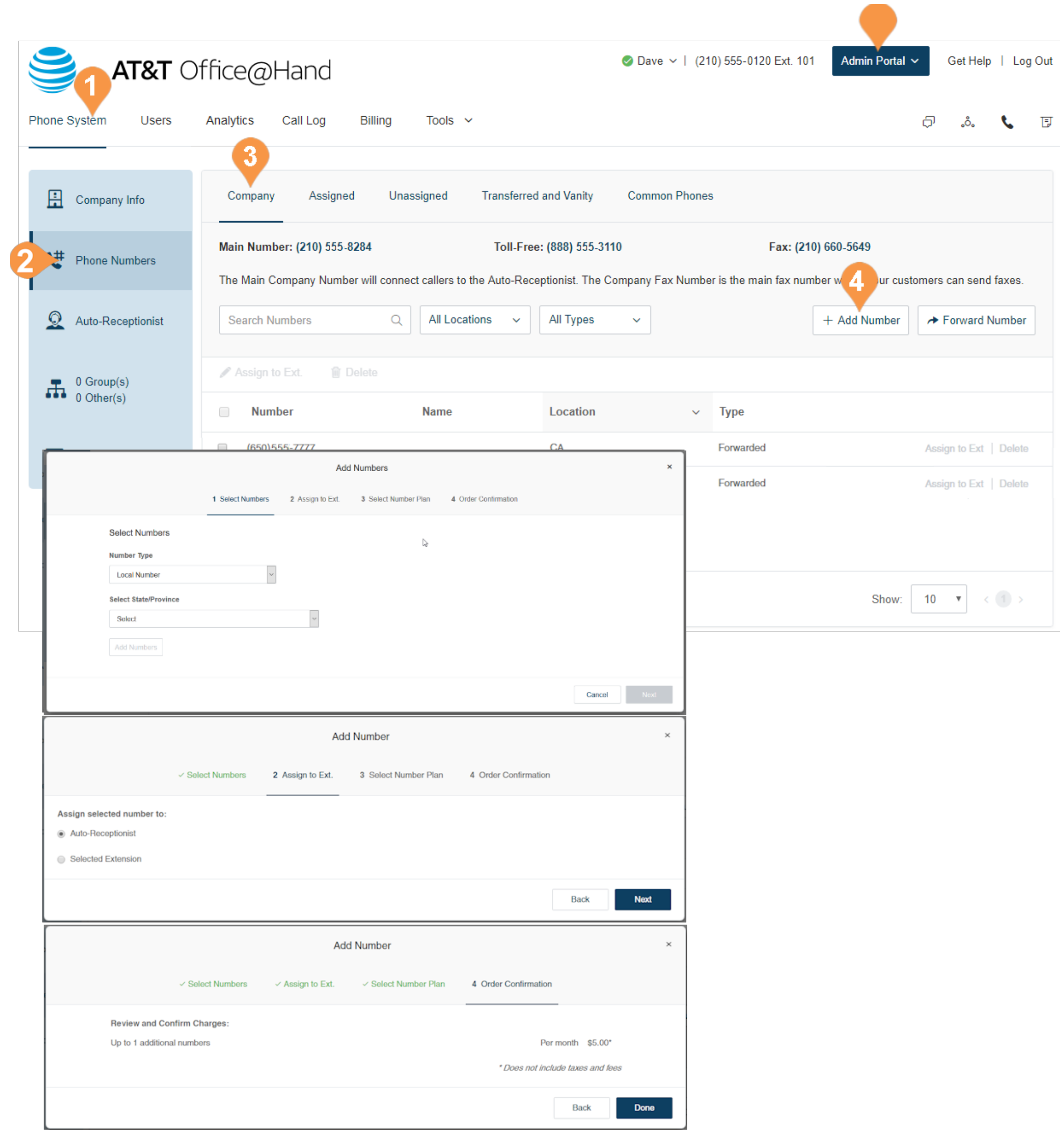
Add Company Numbers

Adding additional company numbers to your Office@Hand account is simple. Select from a list of local numbers by city and area code, choose an available toll-free number or create your own vanity (personalized) number. You can also use an existing number.

Each Office@Hand number can function as a voice and fax line for incoming calls. This means that one number can be used for both calls and faxing. This flexibility allows you to maximize the use of your service.

To add a company number:

1. From the **Admin Portal**, select **Phone System**.
2. Click **Phone Numbers**.
3. Click **Company**.
4. Click **Add Number** to add a new number. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Provide the State/Province and Area Code. Select one or more numbers and click **Add Numbers**.
   b. **Toll-Free Number**: Select the button for **Toll-Free Number** and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers**.
   c. **Vanity**: Select the button for **Vanity Number**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click Search to see if it is available. Select a number and click **Add Numbers**.
5. Click **Next**.
6. Assign the number as **Auto-Receptionist** or **Selected Extension**.
7. Review any changes to your number plan.
8. Click **Done**.



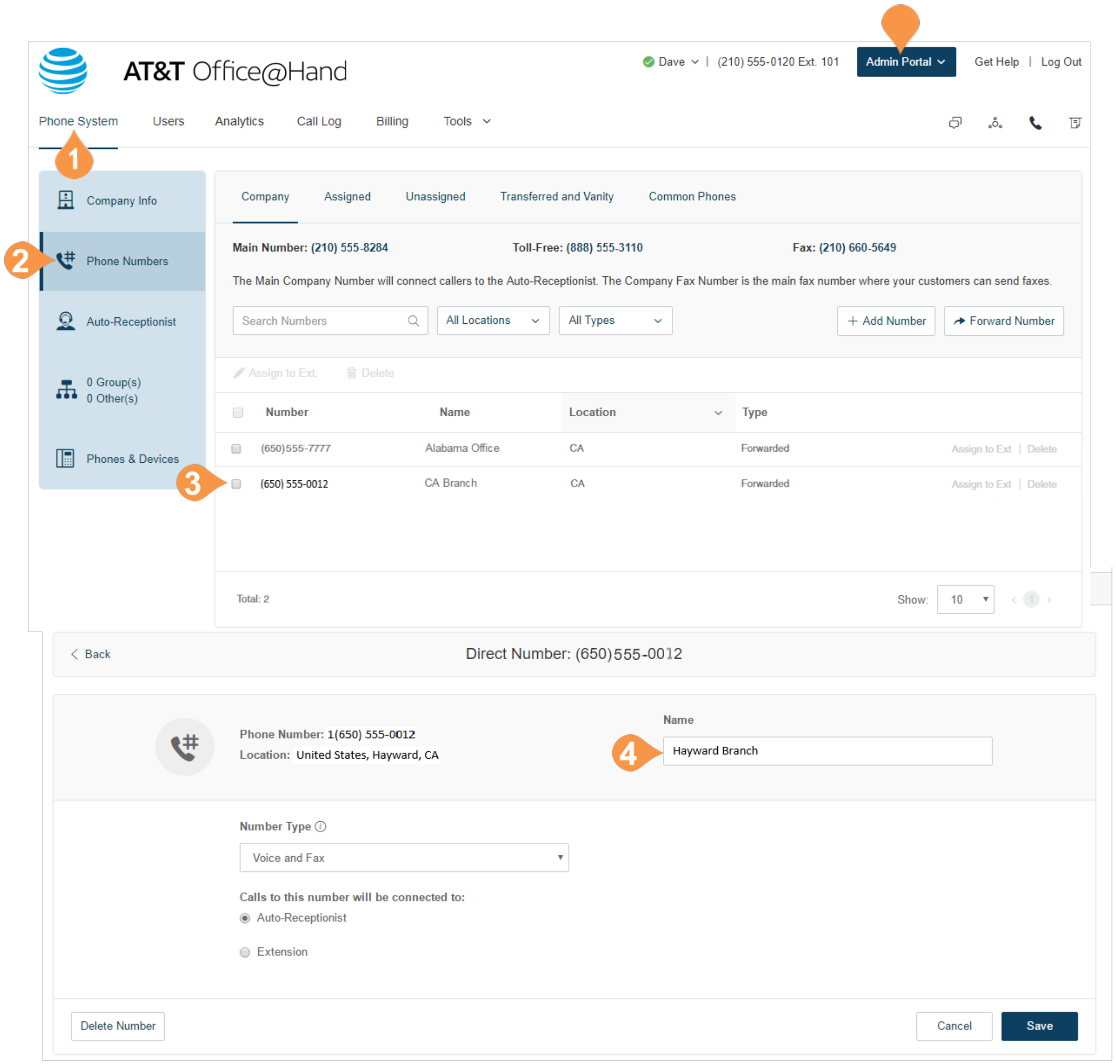
Name or Label Definition

You can label phone numbers in a meaningful way to help identify locations or users in your system. Larger businesses with multiple locations and advanced call handling rules might involve selecting from lists of numbers. Many numbers may appear similar unless they are renamed.

An admin can assign an alternative name to a particular number using the following steps:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click the phone number to which you want to apply a label. The **Direct Number** window opens.
4. Enter the label text in the **Name** field.
   - You can designate the kind of number by using **Number Type**.
5. Click **Save**.

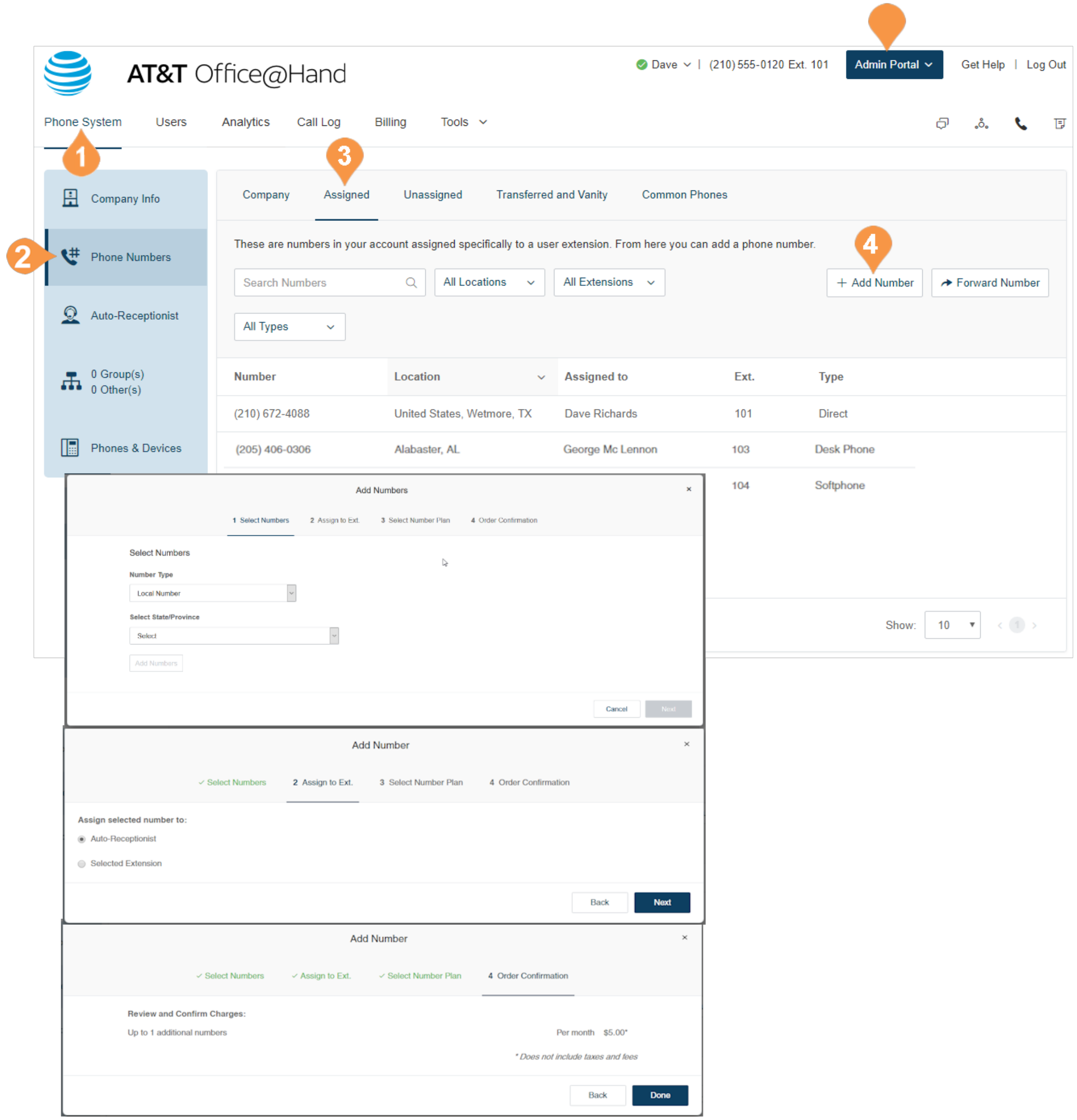
*This option is available for Enterprise users.



Add Assigned Numbers

Under Assigned, you will see all of the numbers assigned to a user that have been set for your phone system.

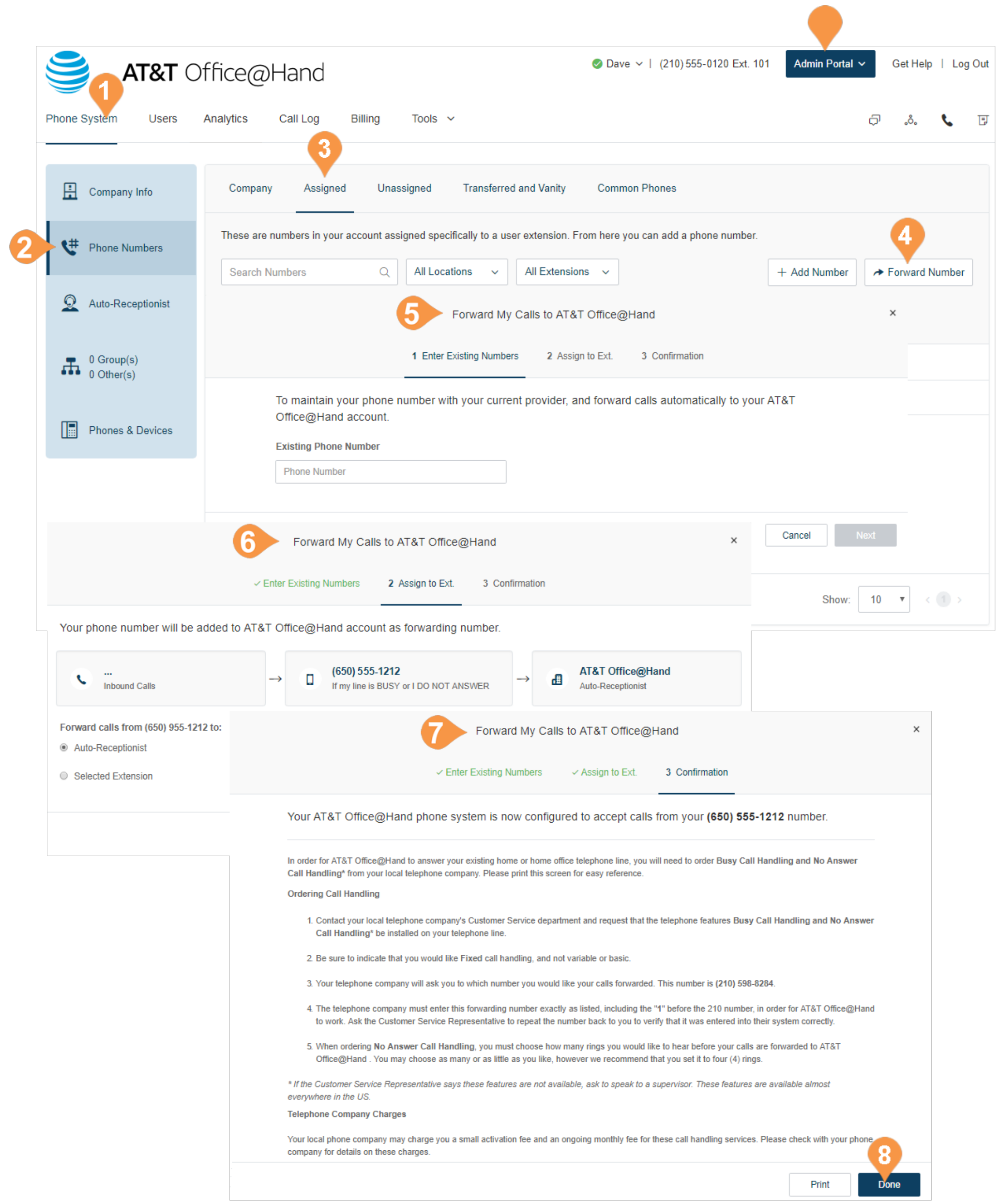
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Assigned**.
4. Click **Add Number** to add a new number. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Provide the State/Province and Area Code. Select one or more numbers and click **Add Numbers**.
   b. **Toll-Free Number**: Select the button for **Toll-Free Number** and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers**.
   c. **Vanity**: Select the button for **Vanity Number**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click Search to see if it is available. Select a number and click **Add Numbers**.
5. Click **Next**.
6. Assign the number as **Auto-Receptionist** or **Selected Extension**.
7. Review any changes to your number plan.
8. Click **Done**.



Forward a Number

To maintain your phone number with your current provider, and forward calls automatically to your Office@Hand account:

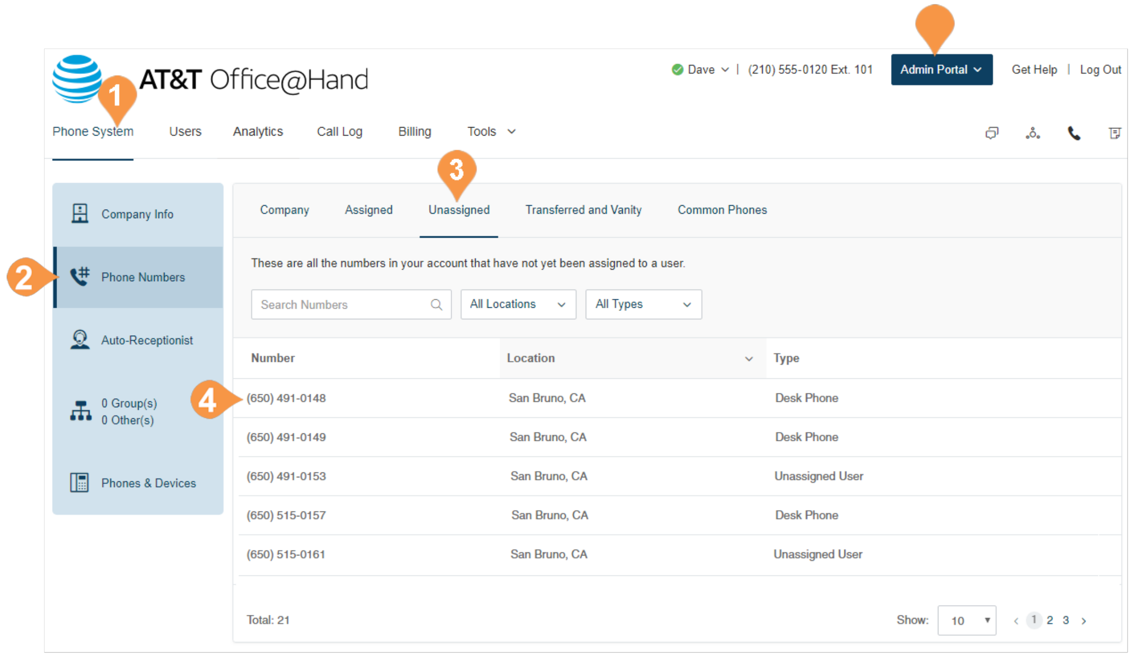
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone**.
3. Click **Assigned**.
4. Click **Forward Number**.
5. Enter an existing phone number and click **Next**.
6. Select **Auto-Receptionist**, or **Select Extension**. Click **Next**.
7. Review the information about ordering Busy Call Handling and No Answer Call Handling from your local telephone company, and local telephone company charges.
8. Click **Done**.



View Unassigned Numbers

Under Unassigned, you will see all of the numbers that have not yet been assigned to a user.

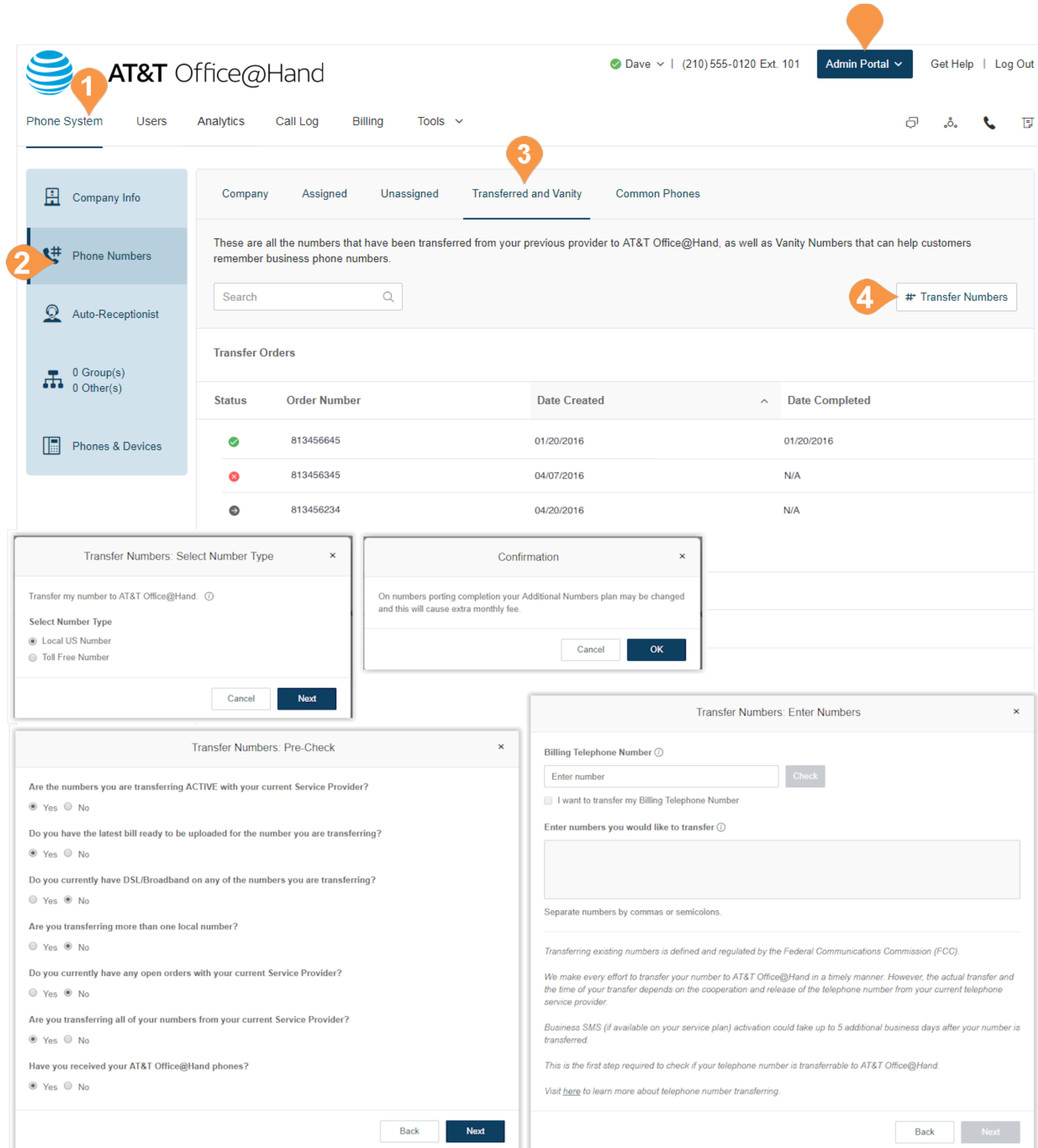
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Unassigned.** You can filter results by **Location** and **Type**.
4. Click a number to see more details. You can select **Phone Properties** to see more details in the Phones and Devices view.



View Transferred and Vanity Numbers

Under Transferred and Vanity Numbers, you see the numbers that you have transferred from your previous provider to AT&T Office@Hand, and your vanity numbers to help customers remember your number.

1. From **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers.**
3. Click **Transferred and Vanity Numbers**. You can filter results by **Location** and **Type**. Click a number to see more details.
4. To transfer a number to Office@Hand select **Transfer Number.**
   a. Select a Local US Number or Toll Free Number.
   b. Confirm that the transfer may incur charges to your plan.
   c. Answer the questions to verify that your transfer meets requirements.
   d. Enter the **Billing Number** and click **Check** to verify that the number can be transferred.
   e. Enter the numbers to be transferred, separated by commas or semi-colons. Click **Next**.
   f. Select a transfer date. The default date is the earliest available transfer date. Click **Next**.
   g. Map your transfer number to a temp number you are going to replace, or add the transfer number as an additional number. Click **Next**.
   h. Confirm the transfer order.
   i. Upload a signed Letter of Authorization (LOA). Click **Complete.**
5. To forward calls from your number to Office@Hand, select **Forward my calls to AT&T Office@Hand.** Enter your existing phone number. Select whether to forward the calls to the company auto-receptionist or an extension. You receive a confirmation.

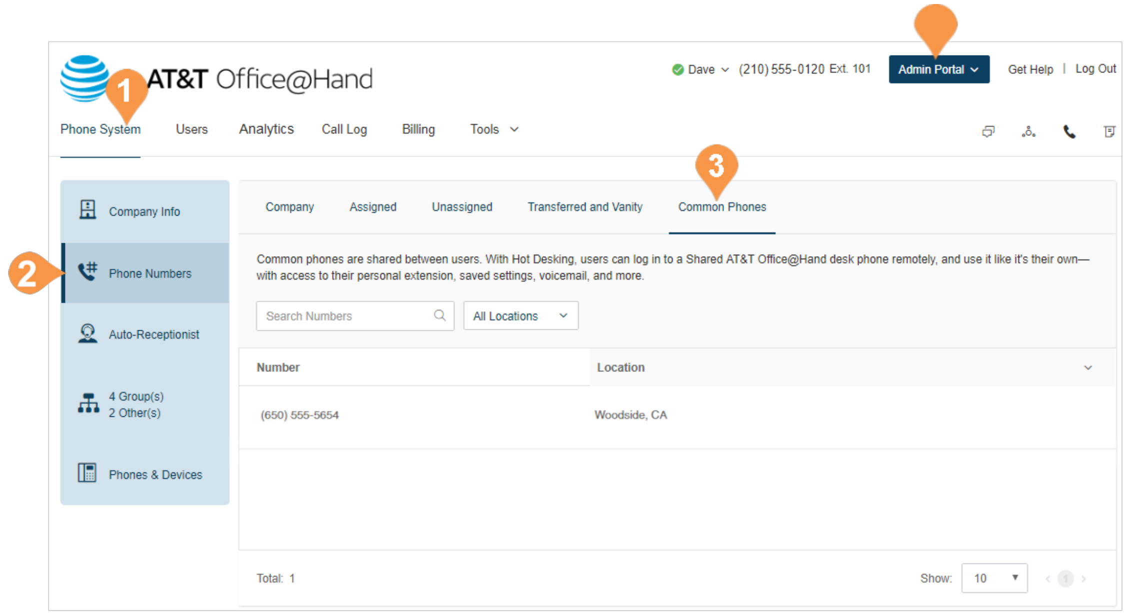


View Common Phones

Common phones are shared between users. With Hot Desking, users can log in to a Shared AT&T Office@Hand desk phone remotely, and use it like it's their own—with access to their personal extension, saved settings, voicemail, and more.

Under Common Phones, you will see all of the numbers that have been assigned for hot desking.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Common Phones**. You can filter results by **Location** and **Type**.
4. Click a number to see more details. You can select **Phone Properties** to see more details in the Phones and Devices view.



Auto-Receptionist

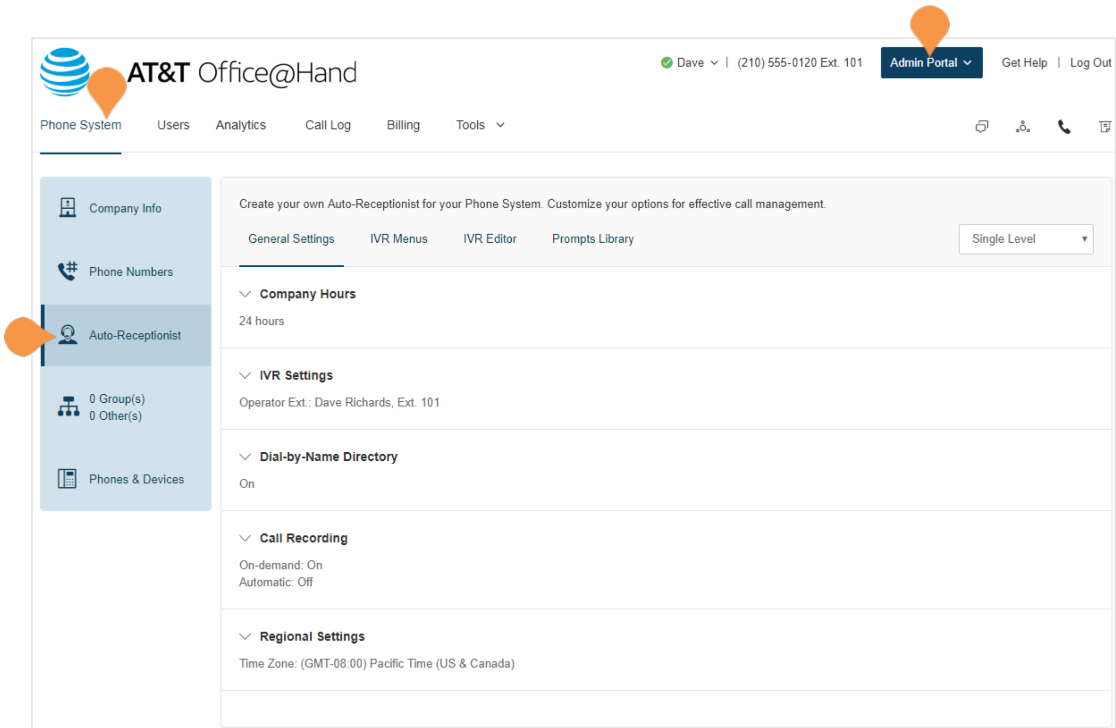
Auto-Receptionist Settings

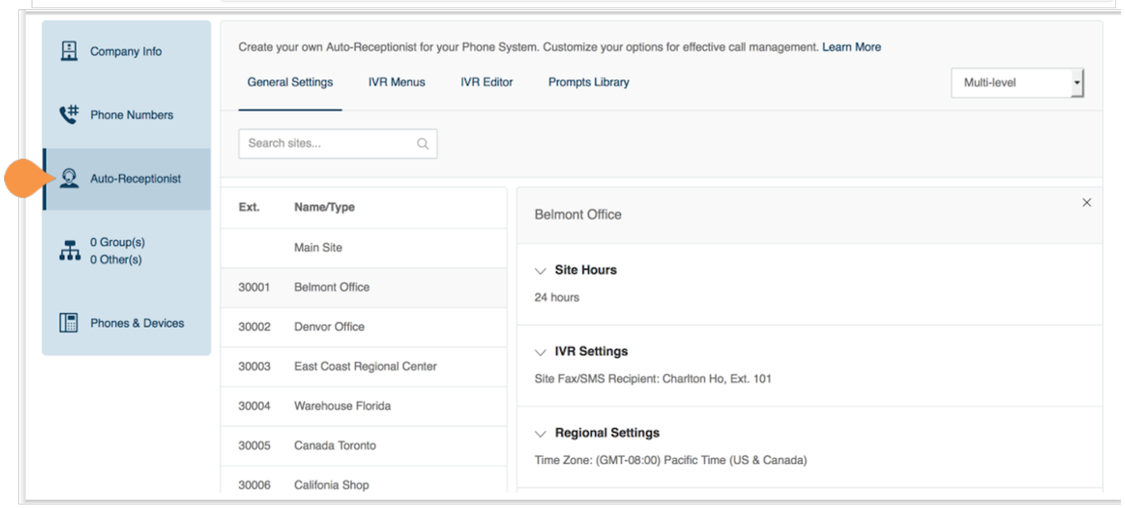
Create your own Auto-Receptionist for your phone system. Customize your options for effective call management, for example: choose your company hours, set your company greeting, define rules for call handling and more.

Note: The Auto-Receptionist defaults to IVR Mode: single level. You can change the IVR mode to multi-level for a more intricate IVR menu. Once the settings are changed to multi-level IVR mode, options are slightly different. For more information see Multi-Level Auto-Receptionist.

Manage Auto-Receptionist with Multi-Site Support

When you have enabled Office@Hand Multi-Site Support, the user interface displays the auto-receptionist for each of the sites' auto-receptionist with individual business hours, custom rules, IVR settings and regional settings. For more information on Office@Hand Multi-Site Support, see Multi-Site Settings. To create a new site, see Create a New Site.

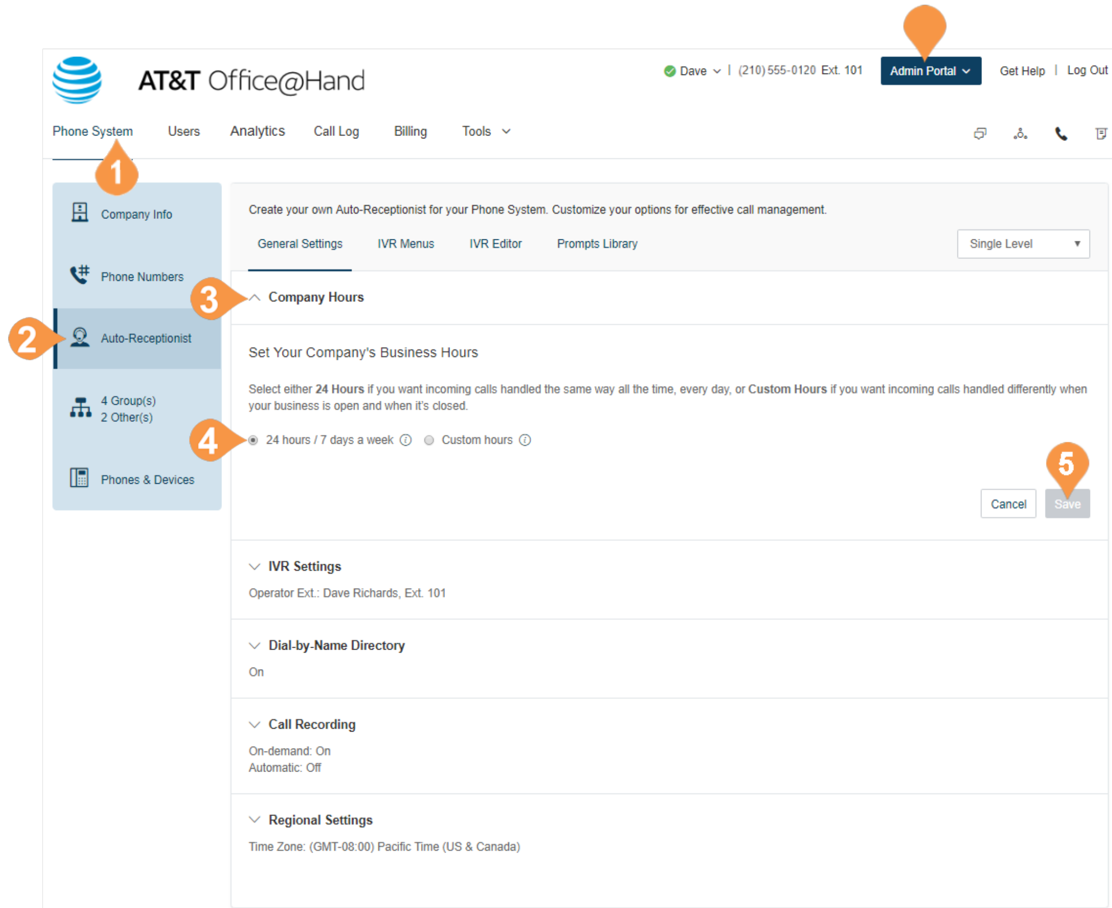




Company Business Hours

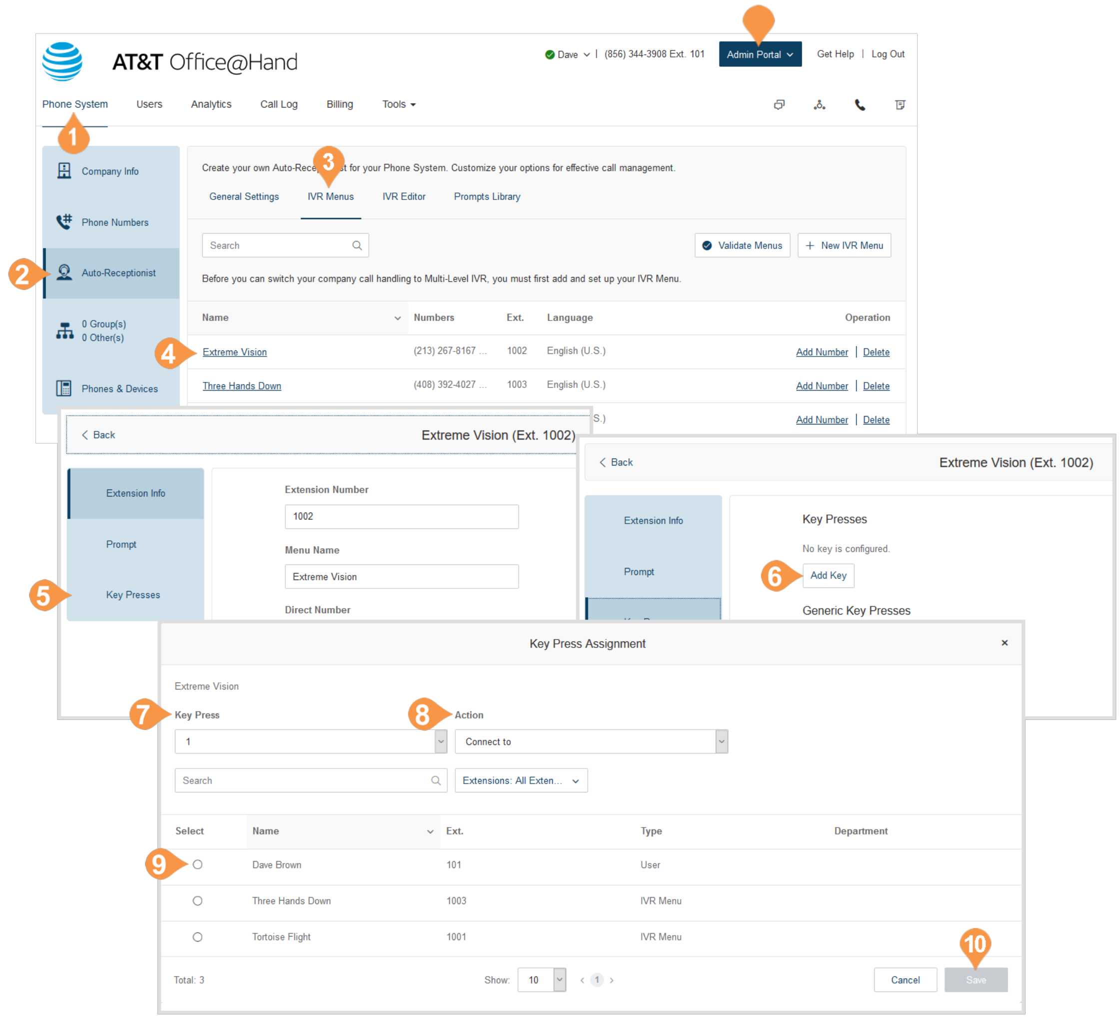
Customize your company's business hours. You can specify the opening and closing time for each day of the week or select 24 hours. This establishes the settings for the Business Hours and After Hours tabs in other settings areas (such as call queue settings and user settings).

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Hours**.
4. Set your Company Hours to:
   a. **24 hours** to have incoming calls handled the same way all the time.
   b. **Custom hours** lets you specify hours for each day of the week. You can also set separate call-handling rules and greetings for Business Hours and After Hours.
   To copy hours from one day to all weekdays, or to the entire week, select **Copy Settings to Weekdays** or **Copy Settings to All Days**.
5. Click **Save**.



Company Call Handling

The Auto-Receptionist greets callers with a recorded message when they call your company. Your Auto-Receptionist is initially set to play a default greeting with your company name using text-to-speech technology. You can set a custom greeting by recording through your phone or computer or by uploading a sound file. You can also connect the Auto-Receptionist calls directly to an extension of your choice.



Set Call Handling:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus** and select one of them. The **IVR Details** pop-up appears.
4. Click **Call Handling.**
5. Click **Add Key**. The **Key Press Assignment** pop-up appears.
6. Set the **Key Press**.
7. Select a **Connect to** action.
   - Transfer to voicemail of
   - Connect to dial-by-name directory
   - External transfer
8. Then select to whom the setting will apply.
   - All
   - IVR Menus
   - Users
   - Groups
   - Others
9. Select **Users**.
10. Click **Save** .

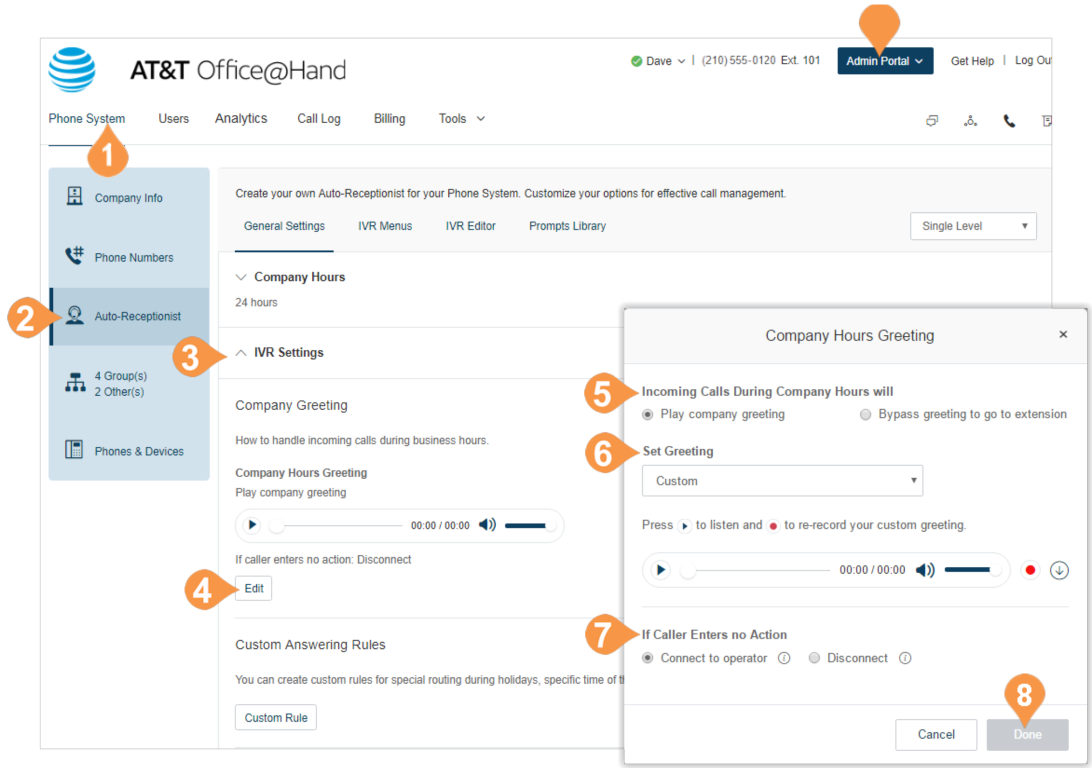
You can learn more about visual IVR settings in "Visual IVR Editor" on page 54.

Company Greeting and Menu

The Company Greeting provides additional call handling options, including hearing the **Default** greeting and recording a **Custom** greeting.

Set a Company Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **IVR Settings**. **Company Greeting appears under IVR Settings**.
4. Click **Edit** under Company Greeting. The **Company Hours Greeting** pop-up appears.
5. Set the **Incoming Calls During Company Hours will** to one of these:
   - Play company greeting
   - Bypass greeting to go to extension
6. For **Set Greeting**
   a. **Default**: Select **Default** and set the language the greeting for **View In**.
   b. **Custom**: Select **Custom** to set your custom recording:
      - Follow the directions for “Recording Greetings and Messages” on page 63.
7. Under **If caller enters no action**, choose **Connect to an operator** or **Disconnect**
8. Click **Done**.



Zero Dialing

Directly routes calls to a specified destination. Three options let you designate the call handling when the caller dials zero within your IVR.

To set zero dialing,

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Scroll down and click **Zero Dialing**.

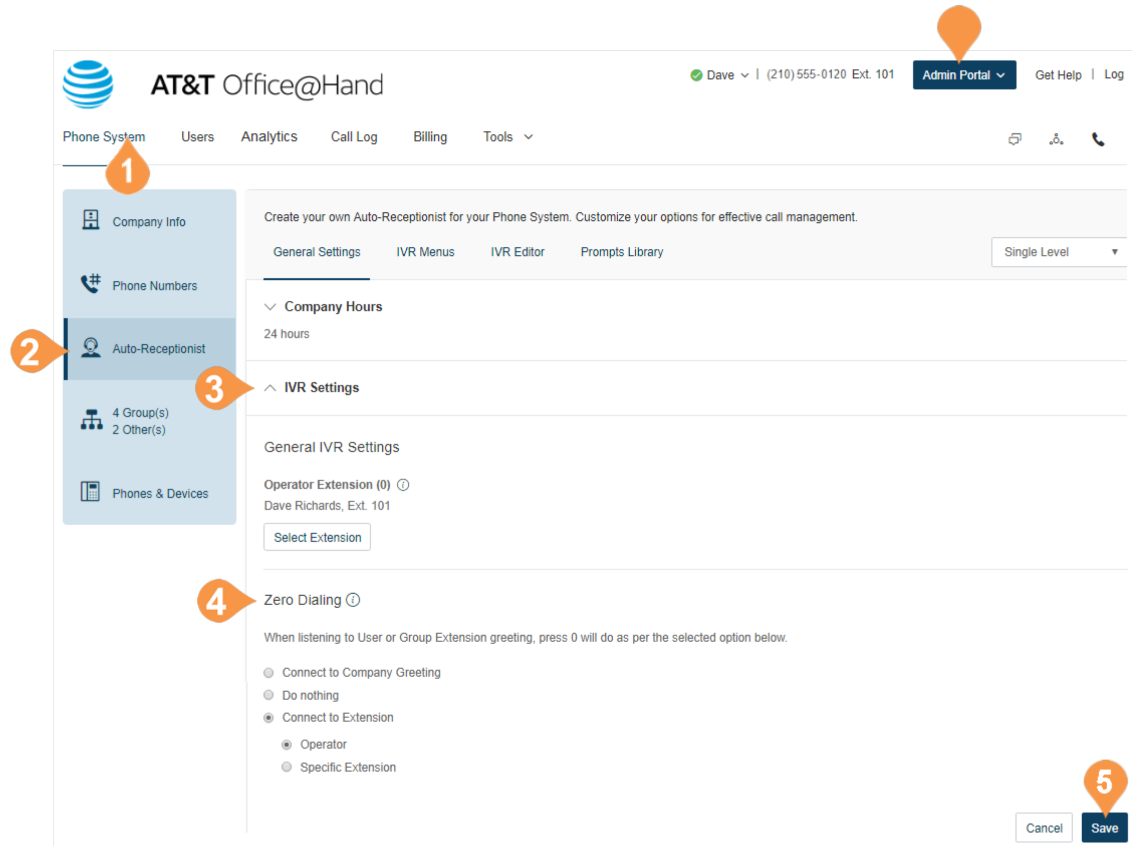
   Select one of three options:
   - **Connect to Company Greeting**
   - **Do Nothing**
     System ignores any '0' dialed by caller and continues uninterrupted. This applies regardless of the number of times the caller dials '0'.
   - **Connect to Extension**
     Choose from **Connect to Operator** or **Connect to Extension**

   If you choose **Connect to Extension**, the system prompts you for an extension number.

   Removal of the destination extension:

   A warning shows that the extension being removed is in use for 0-dial handling and you are given the option to cancel the removal.

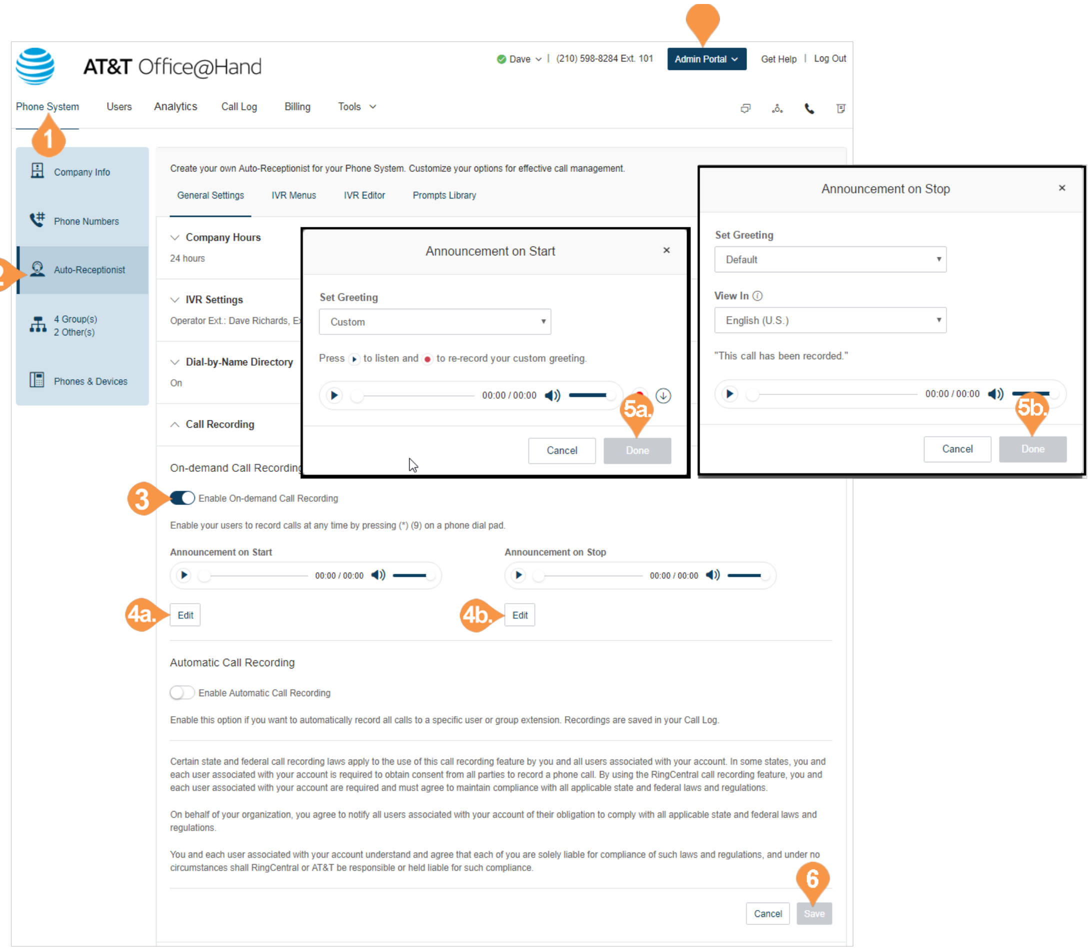
   When an extension is removed, the 0-dial option defaults to the company greeting.
5. Click **Save**.



On-demand Call Recording

On-demand Call Recording makes it easy for Office@Hand users to record calls they make or receive. When you enable On-demand Call Recording, users can activate it by pressing *9 on their phone's dial pad.

Note: State and federal laws require that your callers hear a call-recording notification before and after a call is recorded. As an administrator, you need to ensure your company's call recording procedures comply with federal and state laws; neither AT&T nor RingCentral are responsible for your company's compliance.



Choose an On-demand Call Recording Announcement

This explains how to select a particular recording announcement once On-demand call recording is enabled.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**. Slide the button on for **On-demand Call Recording**.
4. Click **Edit** to change,
   - Announcement on Start
   - Click **Set Greeting** and choose **Default** or **Custom**.
   - Click **Done**.
   - Announcement on Stop

     Click **Set Greeting** and choose **Default** or **Custom**.

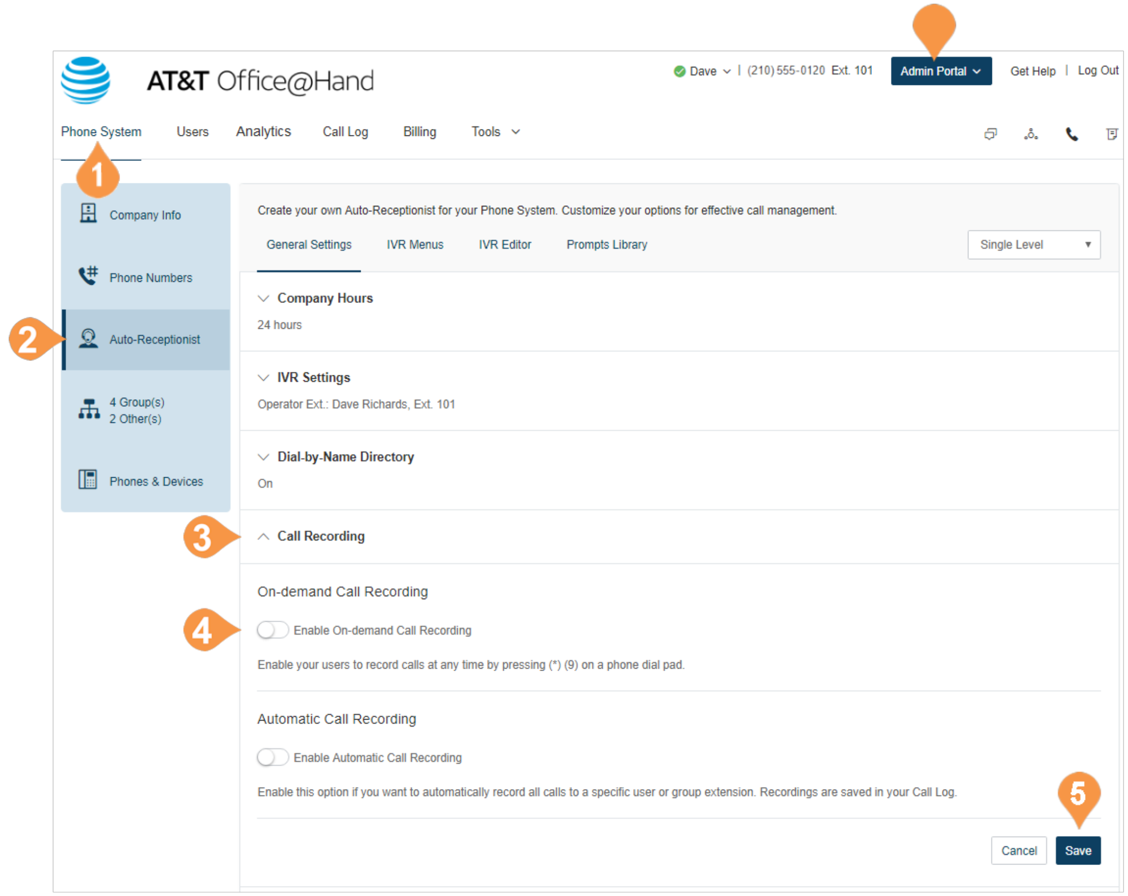
     Click **View in**, choose the language for viewing the message text.
5. Click **Done**.
6. Click **Save**.

To enable On-demand call recording, see page 41.

Enable On-demand Call Recording Announcement

To enable the on-demand call recording feature:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Move the slider button to the right next to, **Enable On-demand Call Recording**.
5. Click **Save**.



Automatic Call Recording*

Automatic Call Recording allows you to record incoming and outgoing calls automatically. You can also play back the recordings or download the recorded call logs for sales and support training, compliance, etc.

NOTE: State and federal laws require that your callers hear a call-recording notification before and after a call is recorded. As an administrator, you need to make sure your company's call recording procedures comply with federal and state laws; neither AT&T nor RingCentral are responsible for your company's compliance.

Choose an Automatic Call Recording Announcement

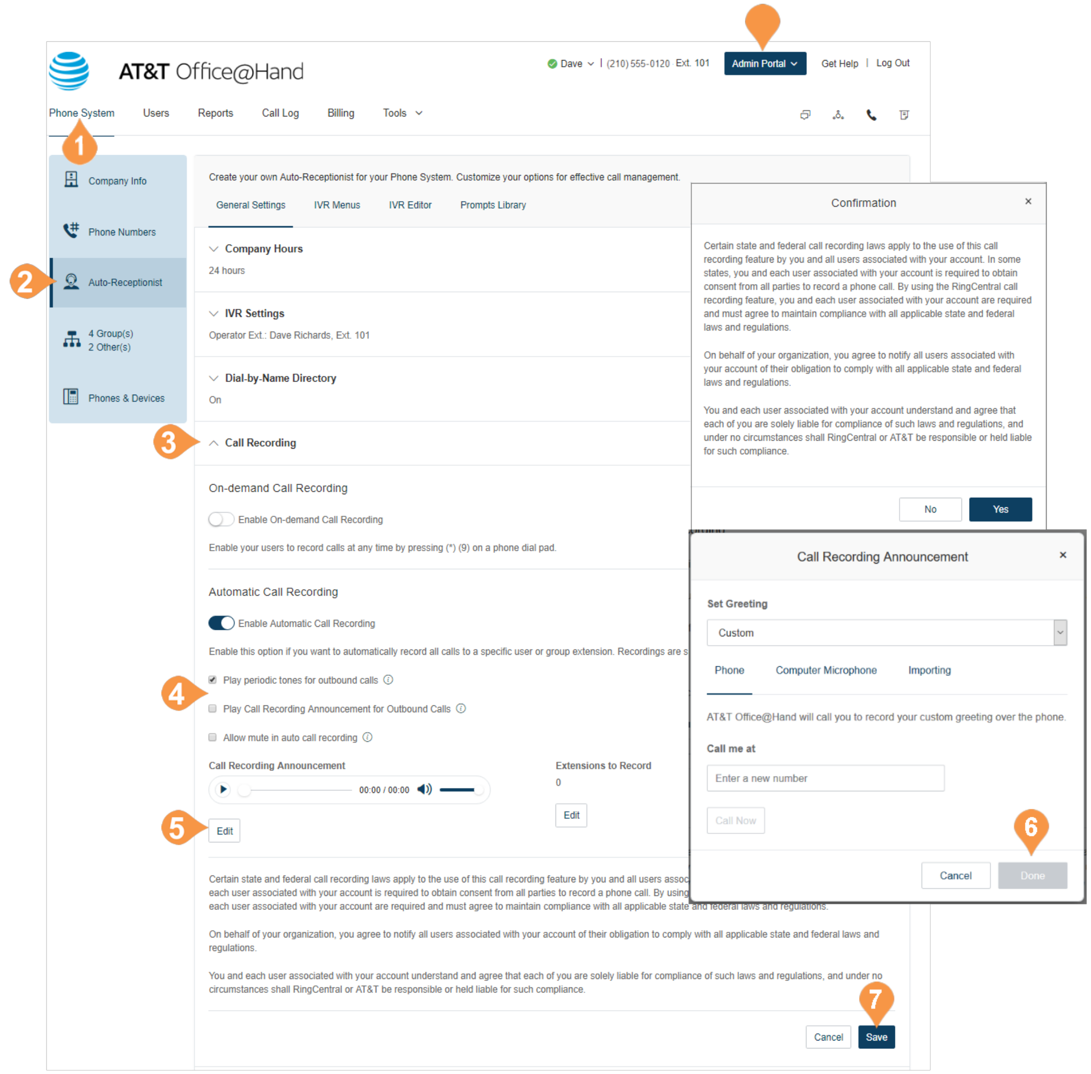
First enable automatic call recording. See page 43.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
   - Click to enable Automatic Call Recording.
   - Confirm your agreement to the laws.
4. Click boxes for the desired options:
   - Play periodic tones for outbound calls
   - Play Call Recording Announcement for Outbound Calls
   - Allow mute in auto call recording

You can also listen to your recording announcement or specify extensions to record.

5. Click **Edit** to select the call recording announcement and select an option:
   - Select **Default** to use the provided greeting.
   - Select **Custom** to record a greeting.
6. Click **Done**.
7. Click **Save**.

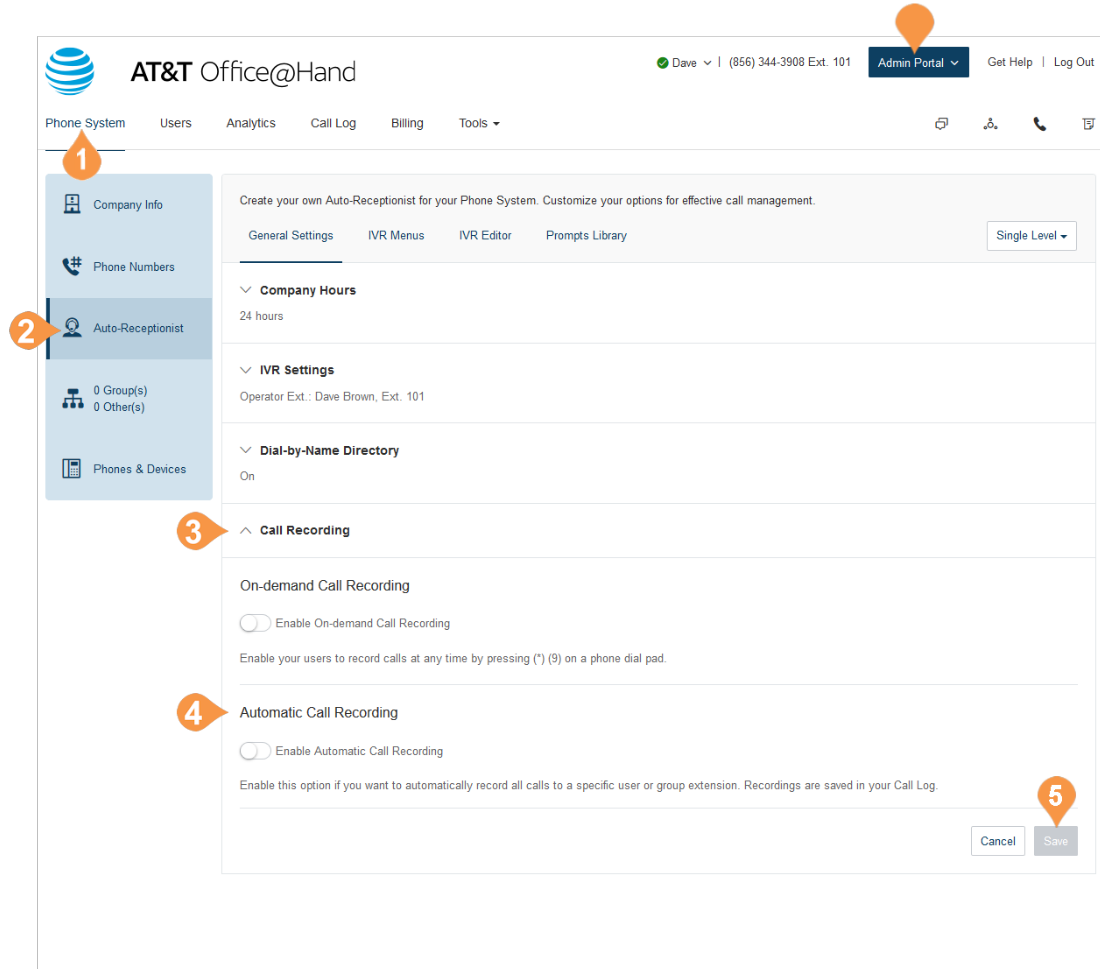
*This option is available for Office Premium and Enterprise only.



Enable an Automatic Call Recording Announcement

To enable the automatic call recording feature:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Slide the button on for **Automatic Call Recording**.
5. Click **Save**.



Planning for Interactive Voice Response (IVR)

In the Office@Hand system, you can create a multi-level IVR as an additional option to the Auto-Receptionist. It extends the Auto-Receptionist menu with more powerful and efficient call handling.

Layout Your Multi-level IVR Plan

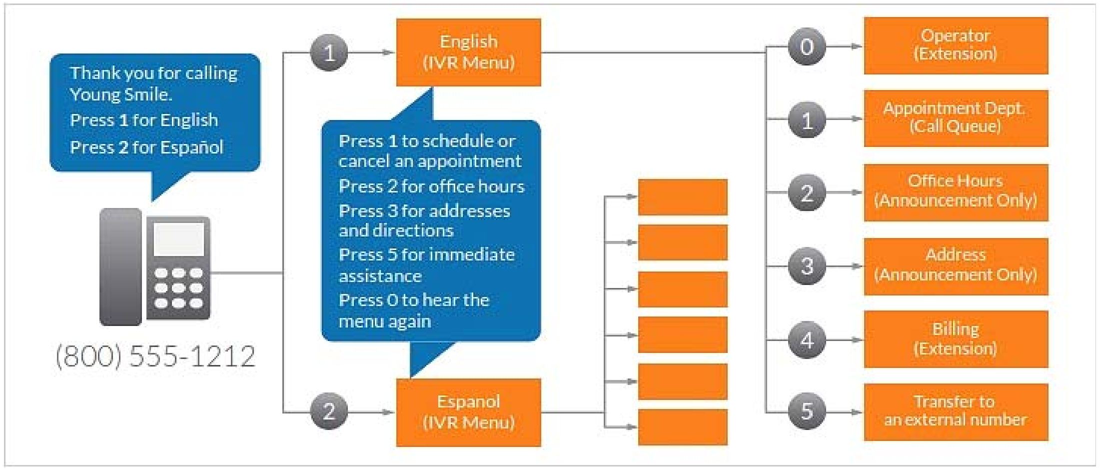
The Office@Hand Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar to the examples shown on this page.

Single-Location IVR Use Case

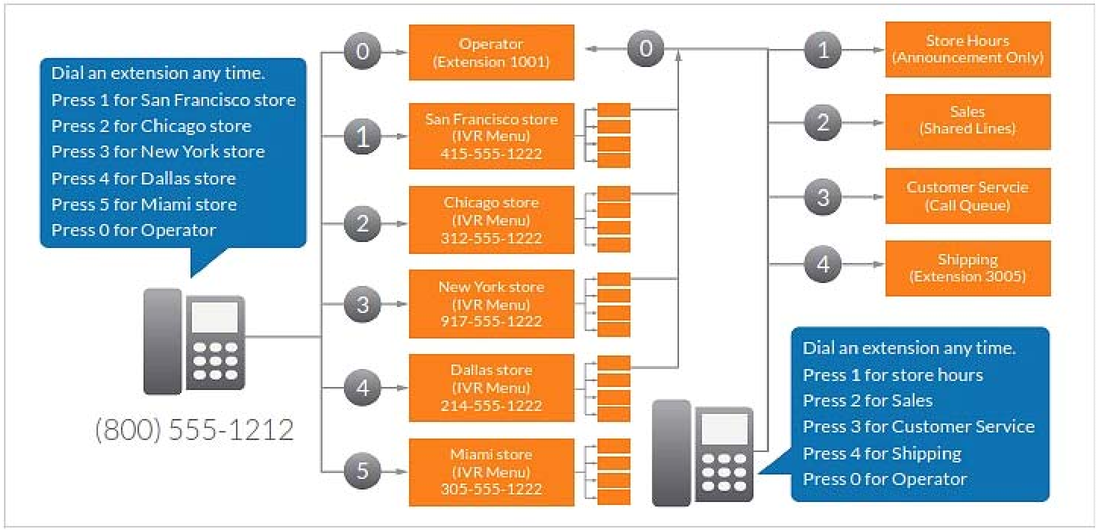
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

Multiple-Locations IVR Use Case

A nationwide furniture retailer has 5 stores located in San Francisco, Chicago, New York, Dallas, and Miami. The IT Manager sets up a toll-free number for the automated attendant system that can route incoming calls to the proper stores in the entire retail chain.



Multi-Level IVR, single location use case: bilingual dentist office

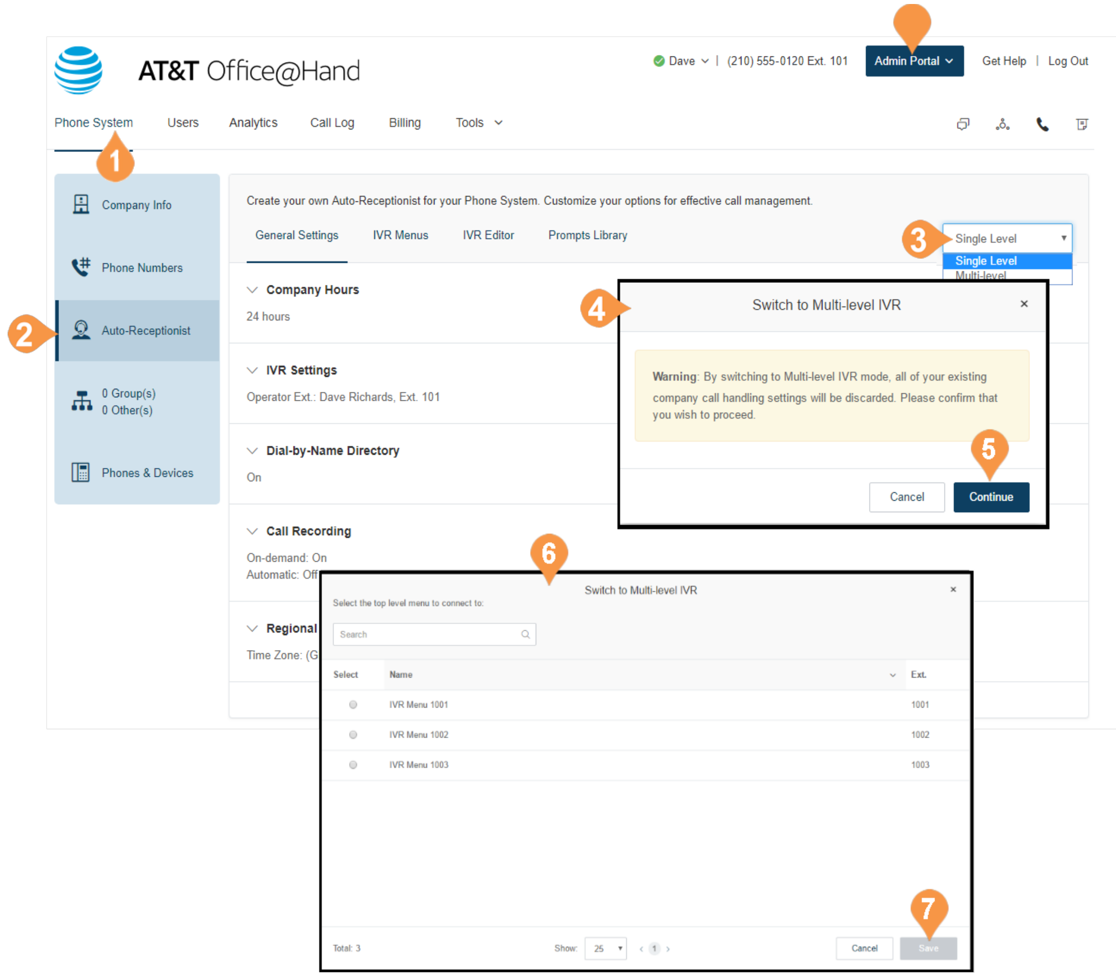


Multi-Level IVR, multiple location use case: nationwide furniture retailer

Switch to Multi-level IVR Mode

As an option, you can change your Auto-Receptionist from a single-level to a multi-level IVR to serve users at multiple locations or to provide callers with multi-lingual menus.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. On the Auto-Receptionist panel, click the **Single Level** button **Multi-level**. A pop-up will appear with a warning message. By switching to multi-level IVR mode, all of your company call handling settings will be discarded.
   Confirm that you wish to proceed.
4. Click **Continue** to confirm switching to multi-level IVR.
5. The **Switch to Multi-level IVR** pop-up appears. Do one of the following:
   - Enter a top level menu in the **Select the top level menu to connect to** search field.
   - Select the button next to one of the listed **Names**.
6. Click **Save**.



NOTE: Because your call handling settings are discarded, you will need to reset your call handling settings.

NOTE: Your IT department should validate and test the IVR configuration to ensure the routing and prompts in a root menu work well before connecting them to the Auto-Receptionist.

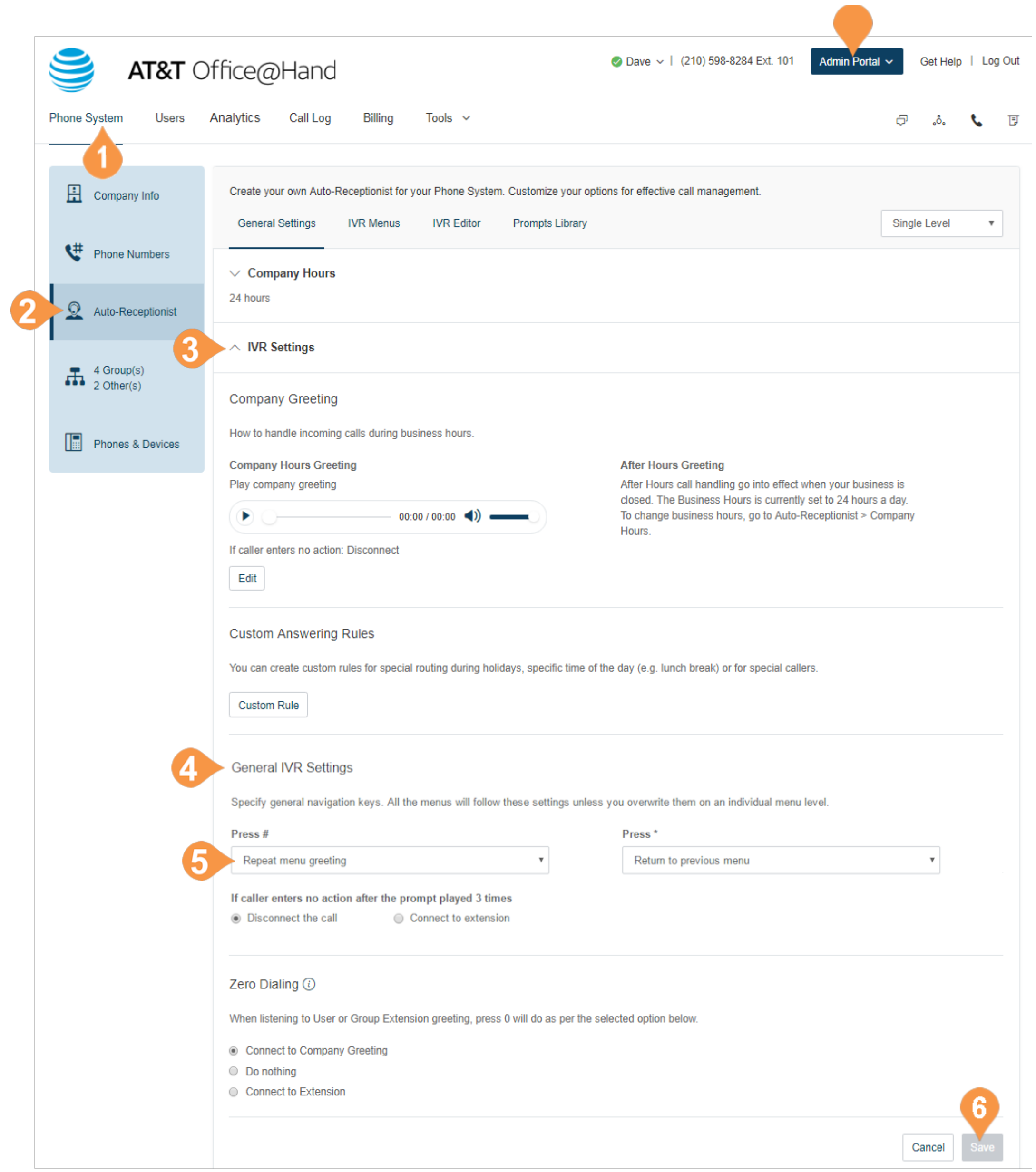
For more details, see "IVR Menus" on page 51.

Set General IVR Settings

When you have set multi-level IVR mode, you can see general IVR settings from the Auto-Receptionist menu.

To set general IVR settings:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Scroll down to **General IVR Settings**.
5. Under **General IVR Settings**, select options:
   - Configure the actions for the general navigation keys. When callers press **#** (hash/ pound) or * (star/asterisk), the following actions are available:
   - **Repeat menu greeting**
   - **Return to root menu**
   - **Return to previous menu**
   - If the caller enters no action after the prompt is played three times, the following actions are available:
   - **Disconnect:** The call will be disconnected.
   - **Connect directly to an extension:** The caller is routed to the extension you specify.
6. Click **Save**.



IVR Tool*

Office@Hand provides additional IVR tools to help you create and manage your IVR Menus. Auto-Receptionist consists of three parts that help you configure your IVR: IVR Menus, IVR Editor, Prompts Library.

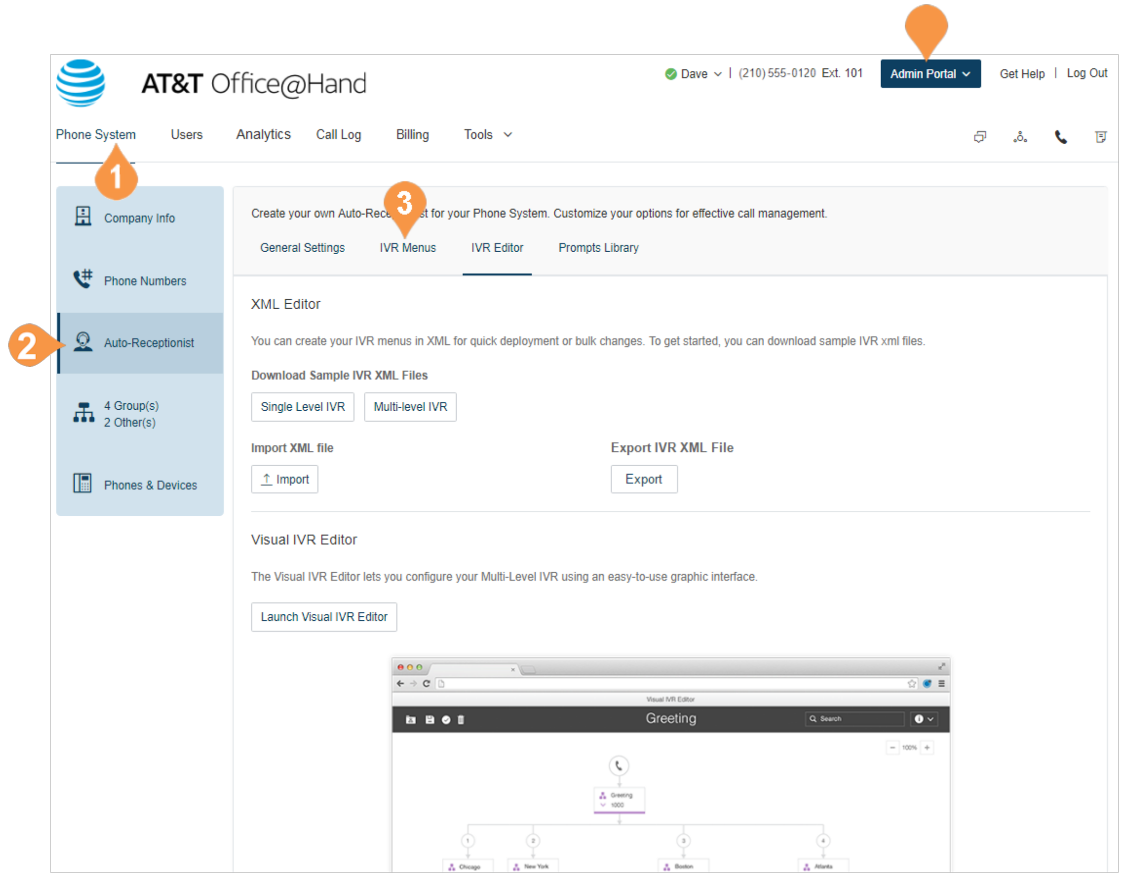
Use the IVR tool to:

- Configure IVR menus with the Visual IVR Editor
- Import prompt recordings
- Record prompts
- Import and export XML files

Note: Any change on the IVR menu overwrites the imported XML file. It is suggested that you export and save a new XML file after making changes.

Access the IVR Tool by using the following steps:

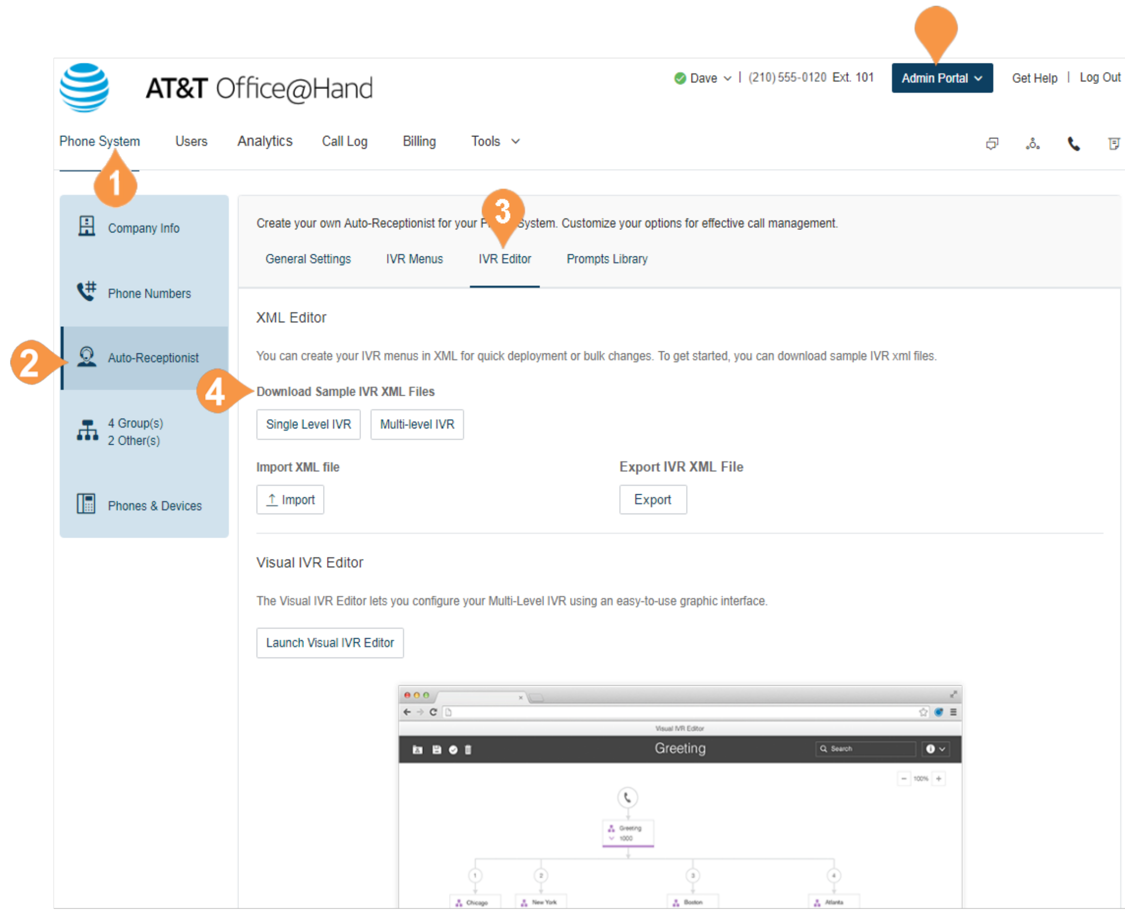
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select the **IVR Editor** tab.



*Available for Office Premium and Enterprise users only.

Import or Export XML Files

In the XML section, you can import and export XML files for your IVR. Your IVR Menus are validated by Office@Hand once you import an XML file.



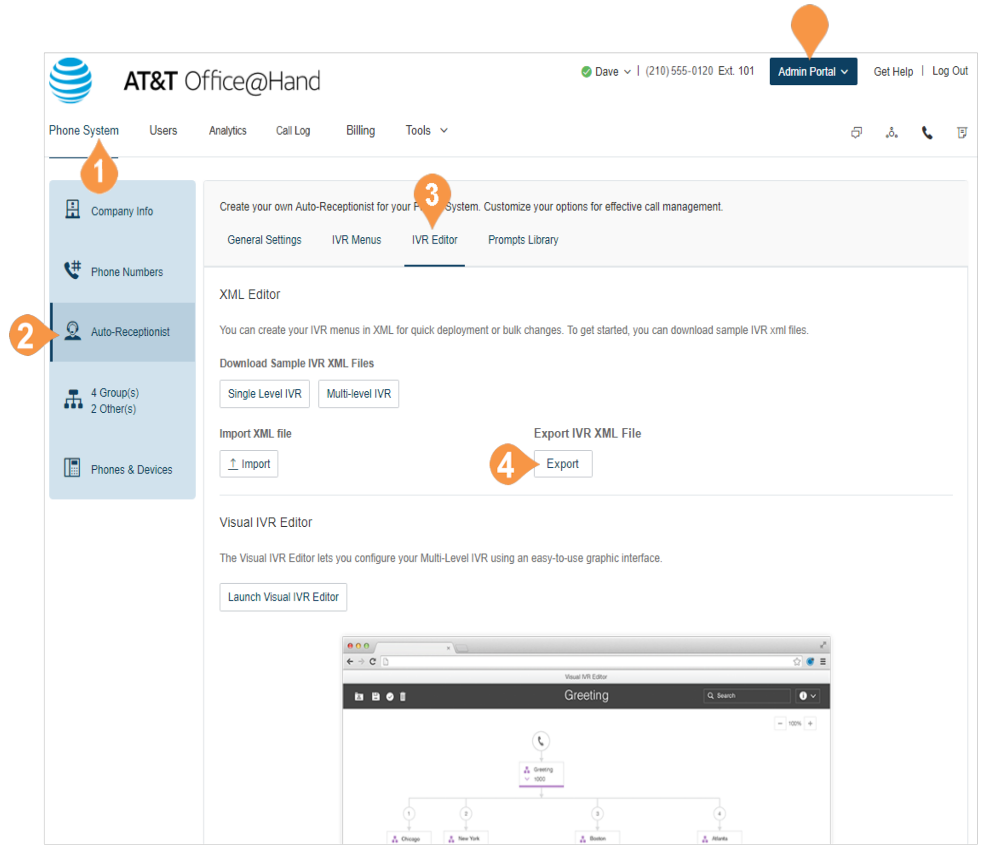
Download a Sample XML File

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. the XML Editor displays.
4. Under **Download Sample IVR XML Files**,
   - Click Single Level IVR, or
   - Click Multi-level IVR

The sample XML file is downloaded in your browser.

Export an XML File

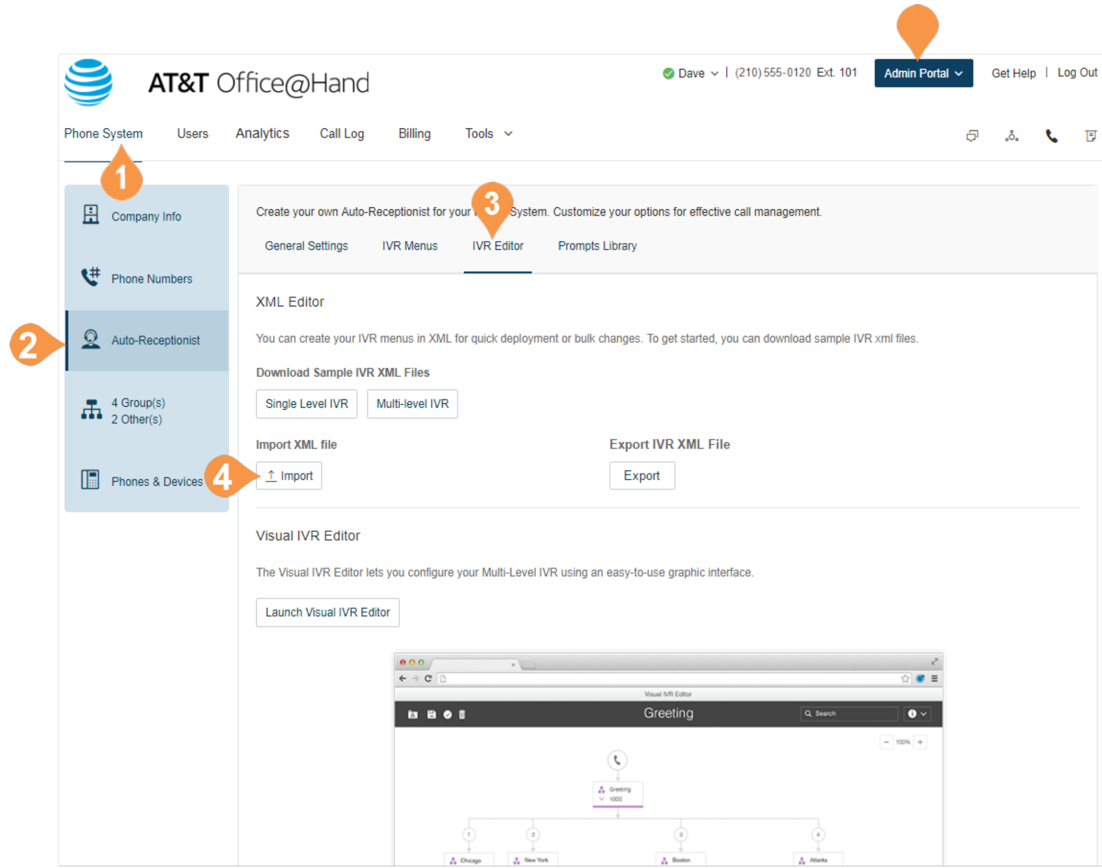
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. The XML Editor displays.
4. Under **Export IVR XML File**, click **Export**. The sample XML file is exported to your browser.



Import an XML File

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. the XML Editor displays.
4. Under **Import XML file**, click **Import** to browse and locate the XML file. then click **Import**.

Office@Hand detects configuration issues as soon as you click **Import**. You can manually fix the errors in the XML file and upload it again or you can click **Accept and Continue** to manually fix the errors using your Office@Hand online account.

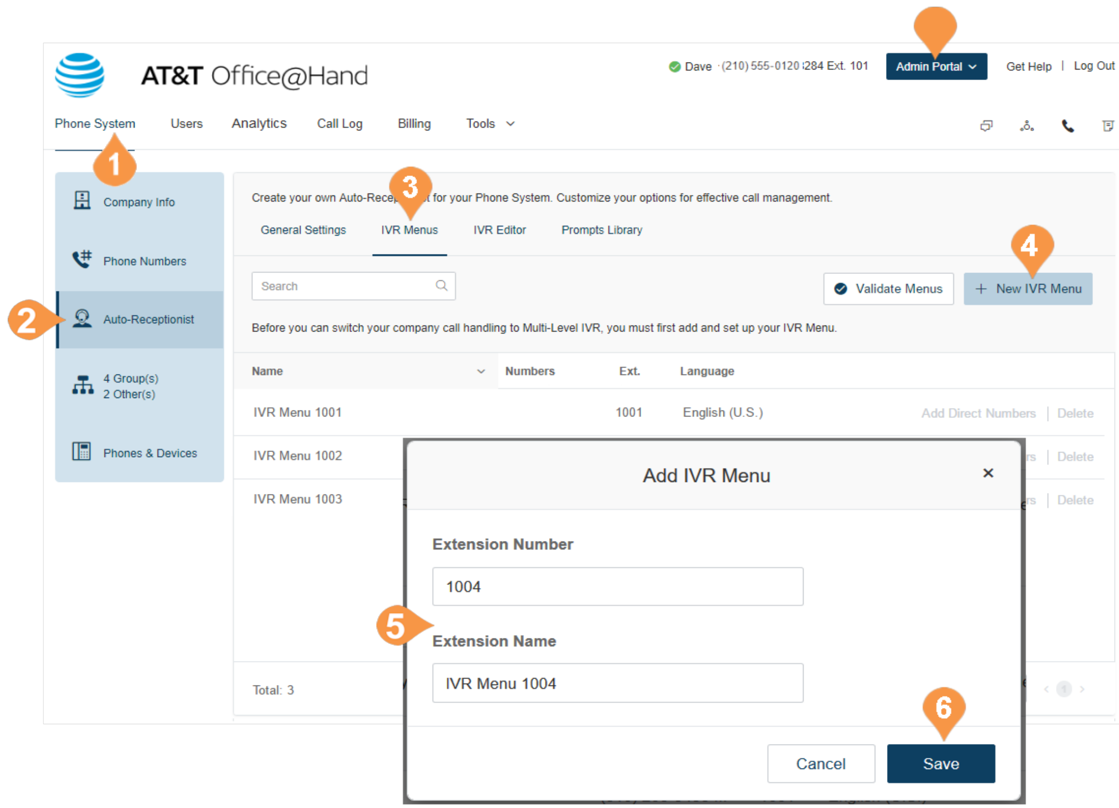


IVR Menus

Office@Hand offers various tools to help manage and create IVR (interactive voice response) menus. Administrators can add new IVR menus as shown in the following instructions, use the Visual IVR Editor, or import an XML file.

Add an IVR Menu Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Click **New IVR Menu** button The **Add IVR Menu** pop-up appears.
5. Enter the **Extension Number** and **Extension Name**.
6. Click **Save**.



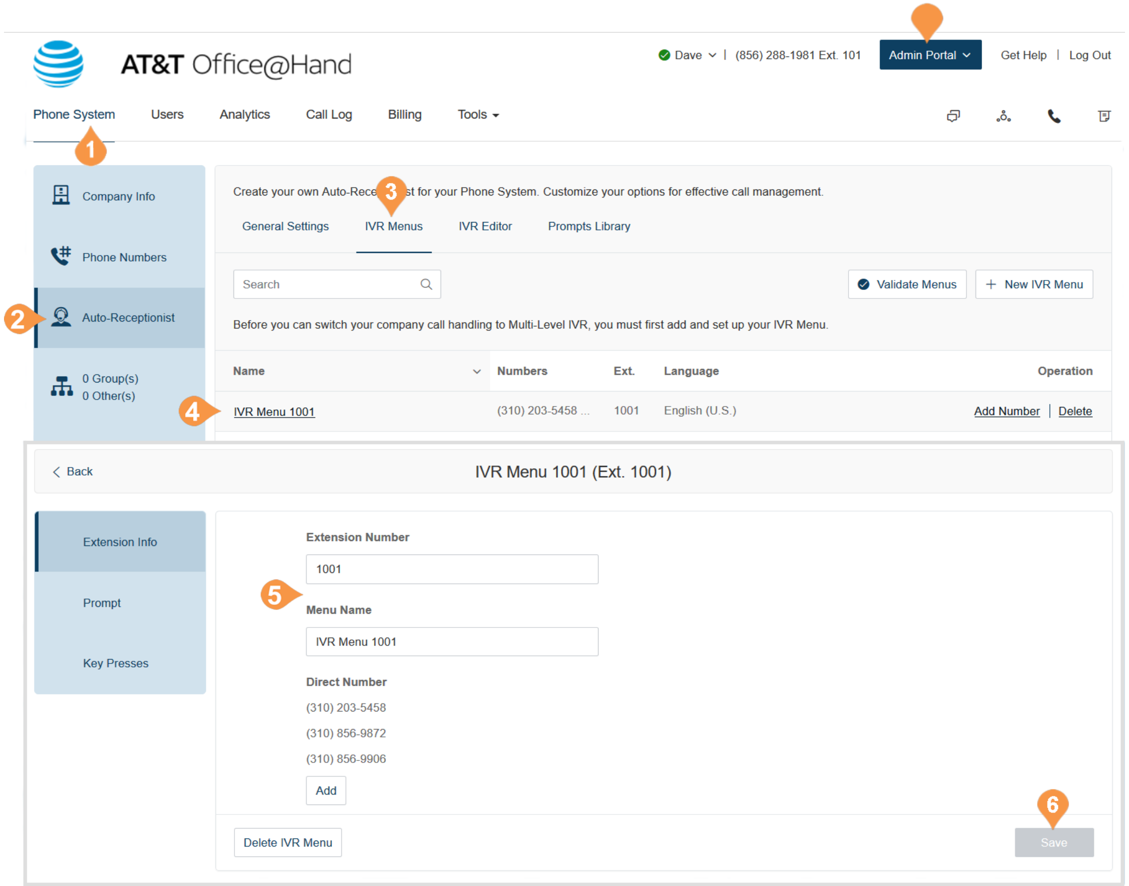
The new IVR Menu appears listed under the **IVR Menus** tab.Configure an IVR Menu

After you have created an IVR Menu, configure the Extension Info, Direct Numbers, Prompt, and Call Handling.

Configure Extension Info

After you select an existing IVR Menu, edit your extension number, name, or delete your menu.

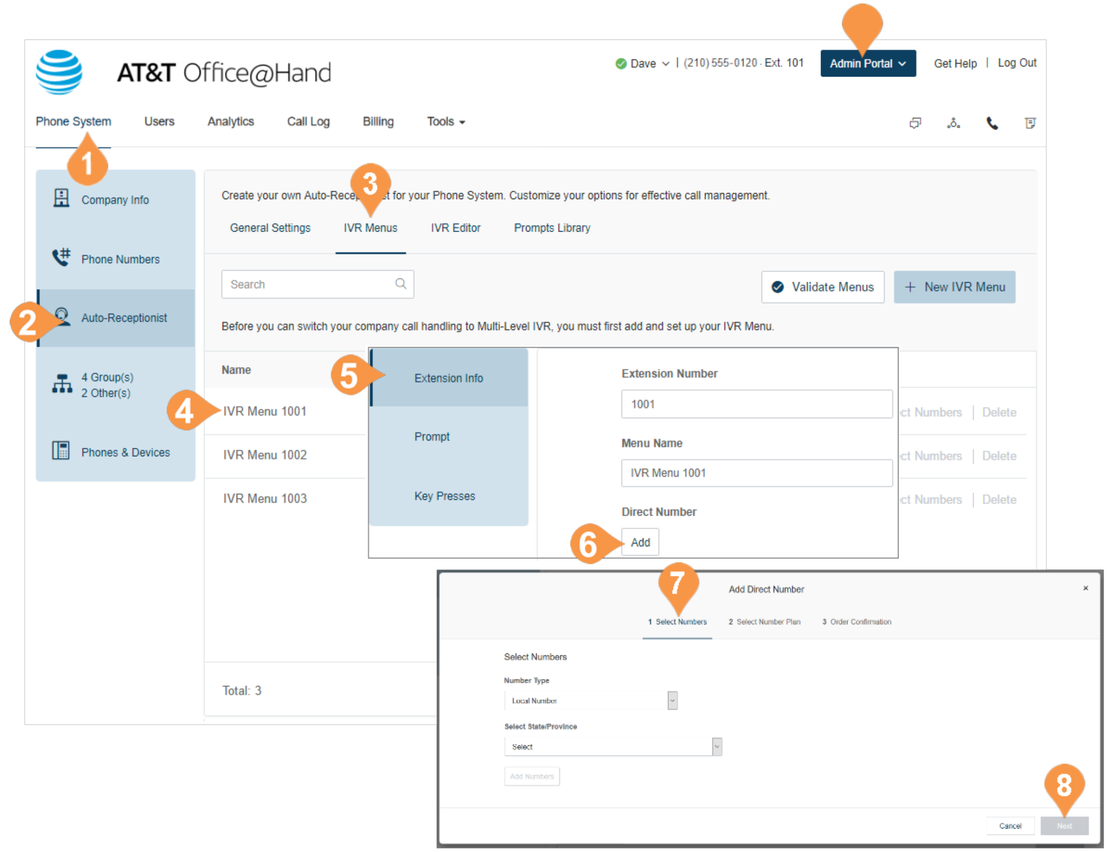
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menus**. The Extension Info **IVR Details** pop-up appears.
5. Enter the **Extension Number** and **Extension Name**.
    - If you would like to delete this IVR menu, click **Delete Menu**.
6. Click **Save**.



Add a Direct Number

To add a direct number for an IVR menu:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Click an existing **IVR Menu**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select one of the number types from the dropdown menu. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Select Local (Domestic). Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free**: Select **Toll-Free Number**. Select a Toll-Free prefix and a number from the drop-down menu.
   c. **Vanity**: Select **Vanity**. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
8. Click **Next** when finished choosing your number. Proceed to the completion of your order

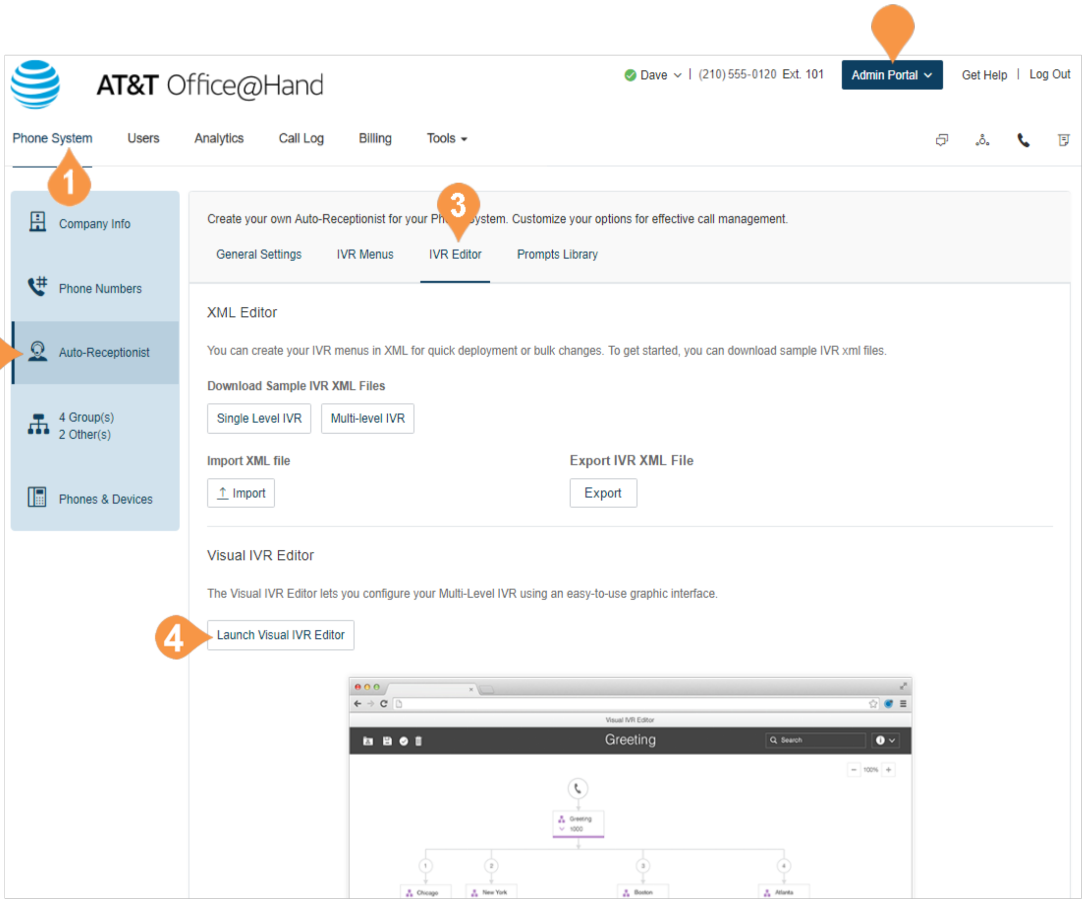


Visual IVR Editor

The Visual IVR Editor lets you configure your Multi-level IVR using an easy-to-use graphical interface. Add menus and assign to extensions with just a few clicks.

Launch the Visual Editor

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab.
4. Click **Launch Visual IVR Editor**. The **Visual IVR Editor** opens in a new browser tab.

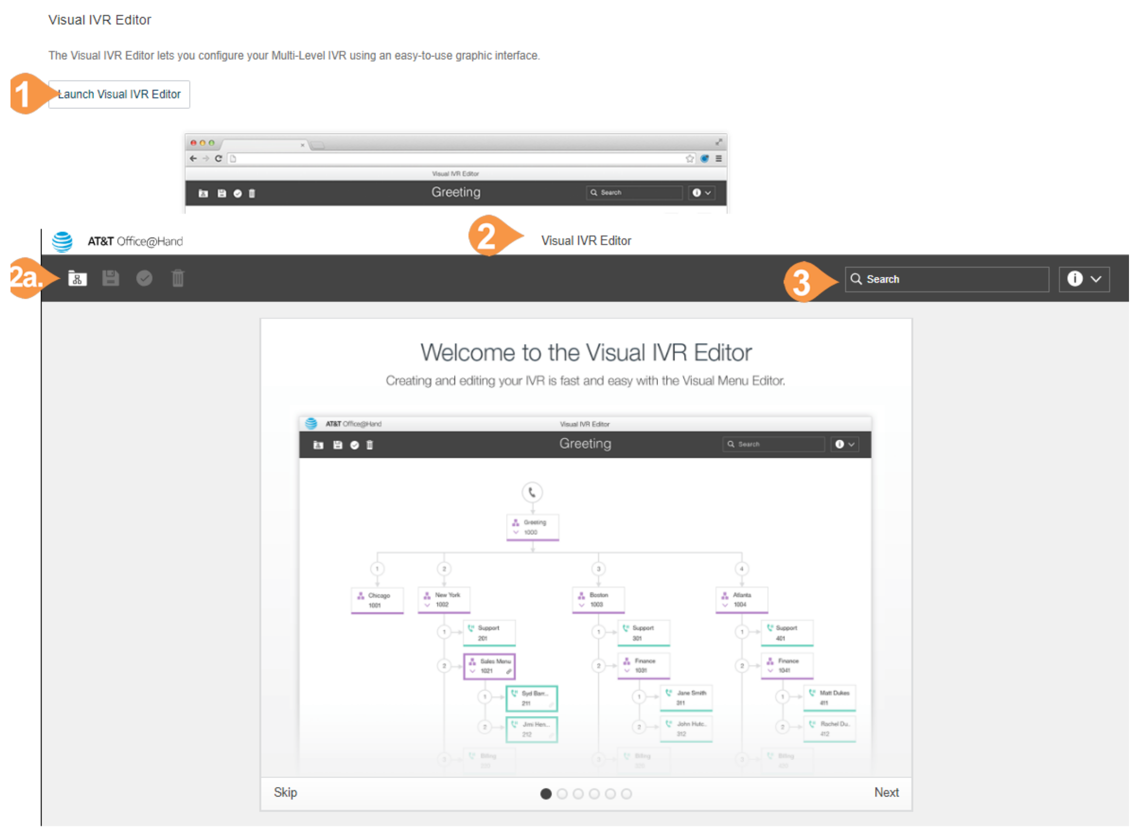


Create a New IVR Menu

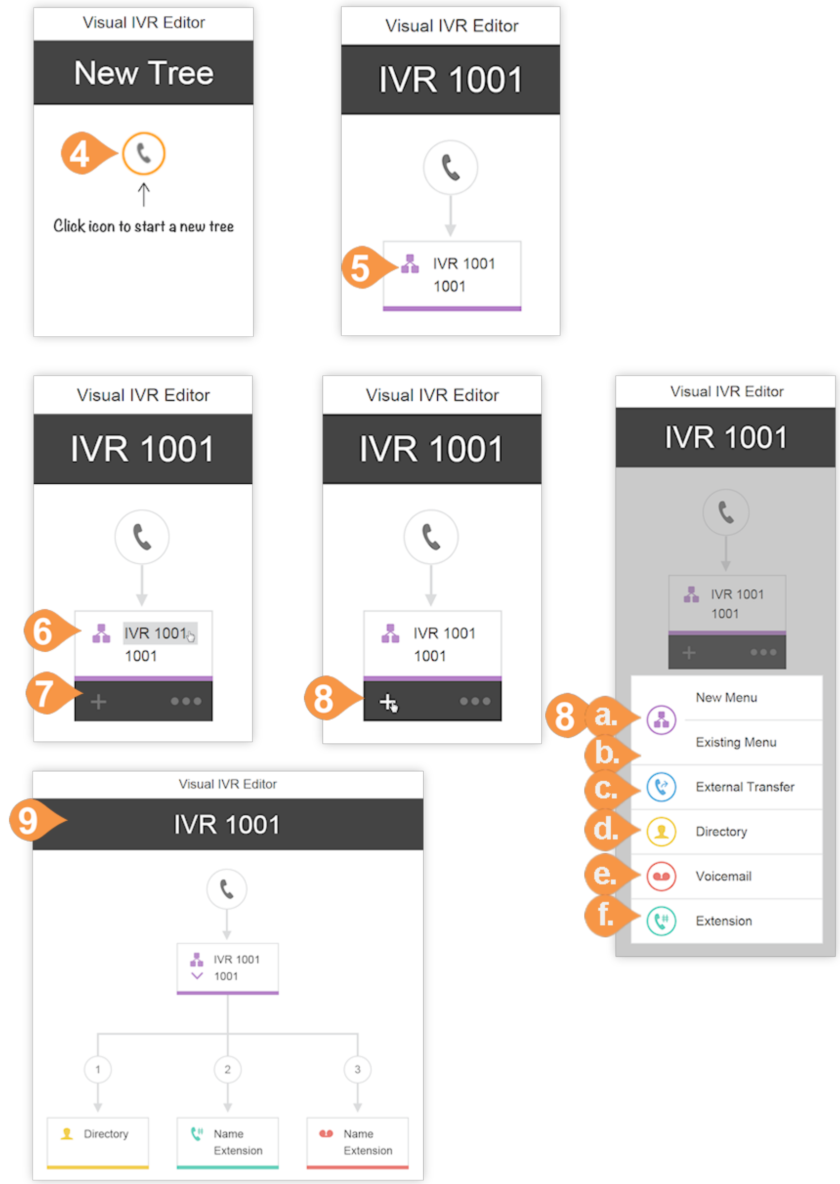
Use these steps to create a new IVR menu with the visual editor.

1. Open the Visual IVR Editor in auto-receptionist.
2. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
   a. In the upper-left corner of the screen you have icons for **Open Existing Menu**, **Save**, **Validate**, and **Clear Workspace**.
3. In the upper-right corner you have a **search bar**, an **information drop-down menu** with options for **Take a Tour** and **Learn More**, and when you are viewing an IVR menu, you will see zoom in and out buttons.

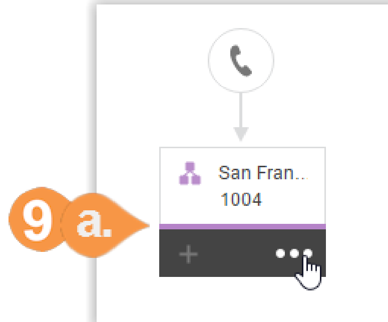
You can click **Next** to navigate through the welcome instructions in the Visual IVR Editor.

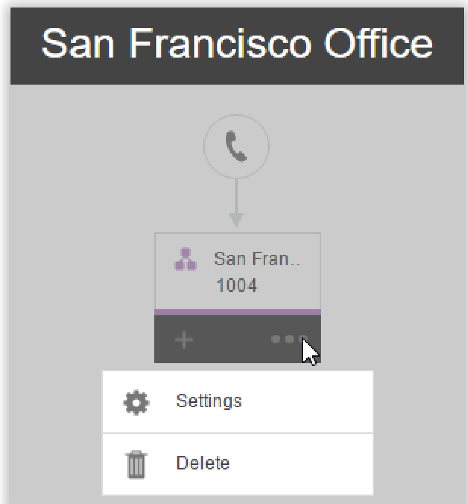


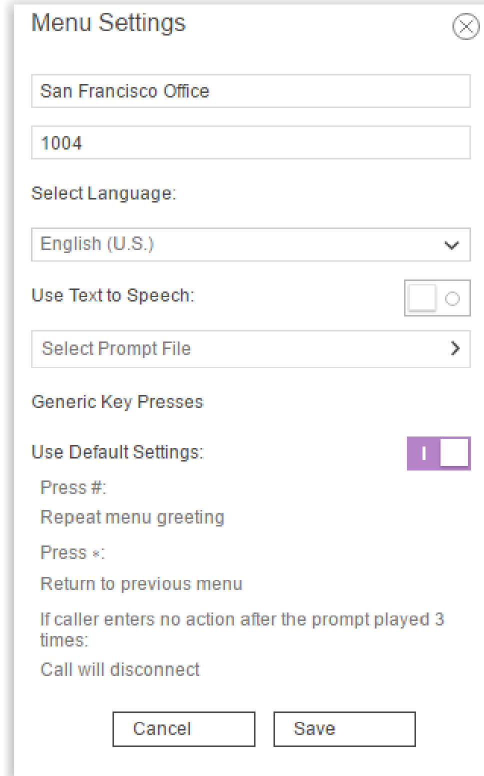
4. Click the **Phone icon** to start a new tree.
5. Your new tree will be automatically assigned a name and extension number.
6. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
7. Hover over your new IVR menu to see more options.
8. Click "+" to add sub-items to your tree. Sub-items include:
   a. **New Menu**: Create a new IVR menu as an option within your tree.
   b. **Existing Menu**: Choose an existing IVR menu from a different IVR tree.
   c. **External Transfer**: Include an external number in your tree.
   d. **Directory**: Attach your company's dial-by-name directory to your tree.
   e. **Voicemail**: Give the option to leave a voicemail.
   f. **Extension**: Add a specific extension to your tree.



9. As you add sub-items to your tree, they will appear in the Visual IVR Editor. Once you have added your items to your menu, hover over an item to edit it and see more options. Each menu has its own settings. For some items you will see a "+" and "…" and other items will only have the trash can icon.
   a. **IVR Menus**
      - Click the IVR name and extension text fields to edit them.
      - Click "+" to add sub-items to your tree.
      - Click "…" to open the menu for Settings and Delete.
      - Click **Settings** to edit your IVR Menu settings just as you would edit them in the IVR Group settings.
      - Click **Delete** to delete this item.





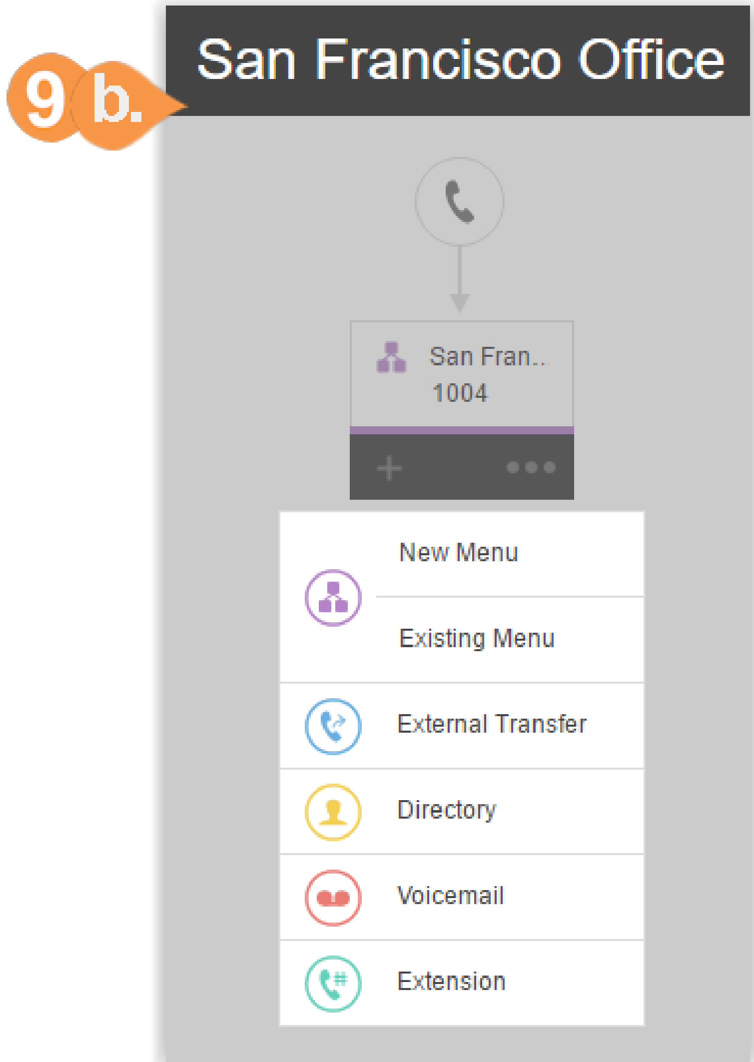


b. **External Transfer**
- Click the phone number text field to enter the external transfer number of your choice.
- Click the trash can icon to delete this item.

c. **Directory**
- No further configuration is needed.
- Click the trash can icon to delete this item.

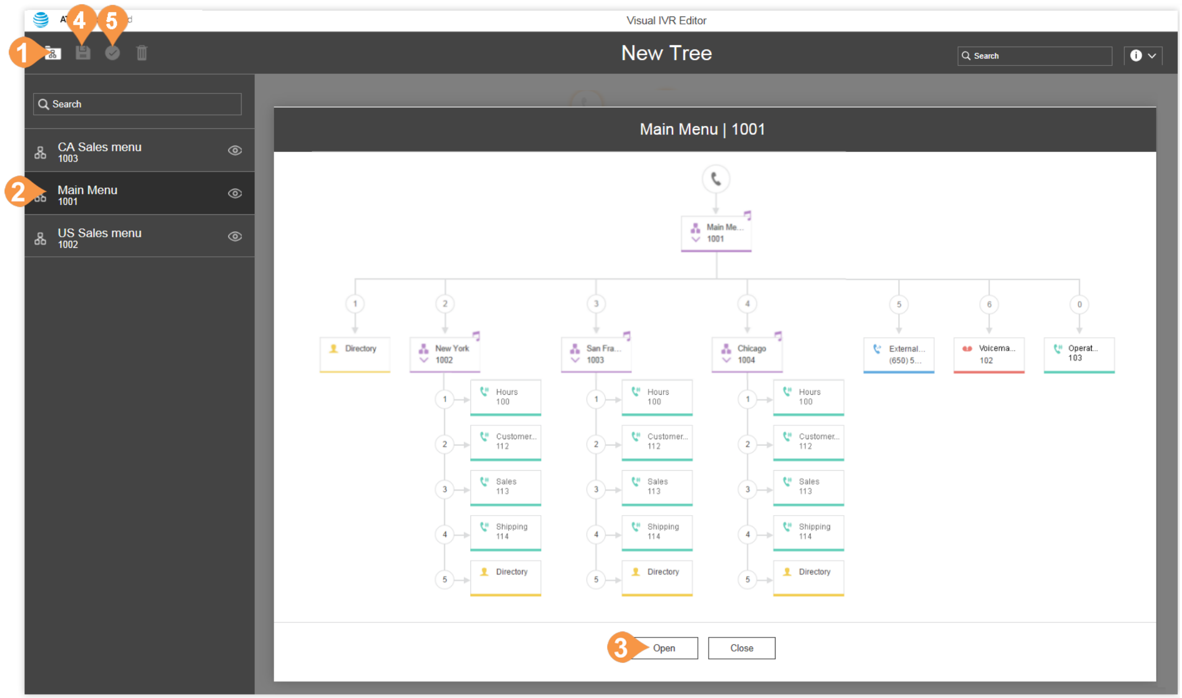
d. **Voicemail**
- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trash can icon to delete this item.

e. **Extension**
- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trash can icon to delete this item.
- You can also change the order and key press of an item by click on the existing number and typing a new number.
- Click out to save.



Edit an Existing IVR Menu with the Visual IVR Editor

1. From the **Admin Portal**, launch the Visual Editor, then click the **Open Existing Menu icon**.
2. Click on an existing menu to see a preview of the menu.
3. Click **Open** to be able to edit the menu in the Visual IVR Editor.
4. After editing your menu, click the **Validate icon** to check your IVR menu.
5. Click the **Save icon** once you are done editing to save your IVR.



Prompts

Prompt recordings guide callers with instructions on keys to press. Prompts can be pre-uploaded and saved to the Prompt Library, which you can then set up as prompts using the IVR Tool.

There are two prompt modes: audio and text-to-speech.

- Audio prompts are voice recorded.
- Text-to-speech prompts are written by you, then Office@Hand's automated system reads the prompt to your callers.

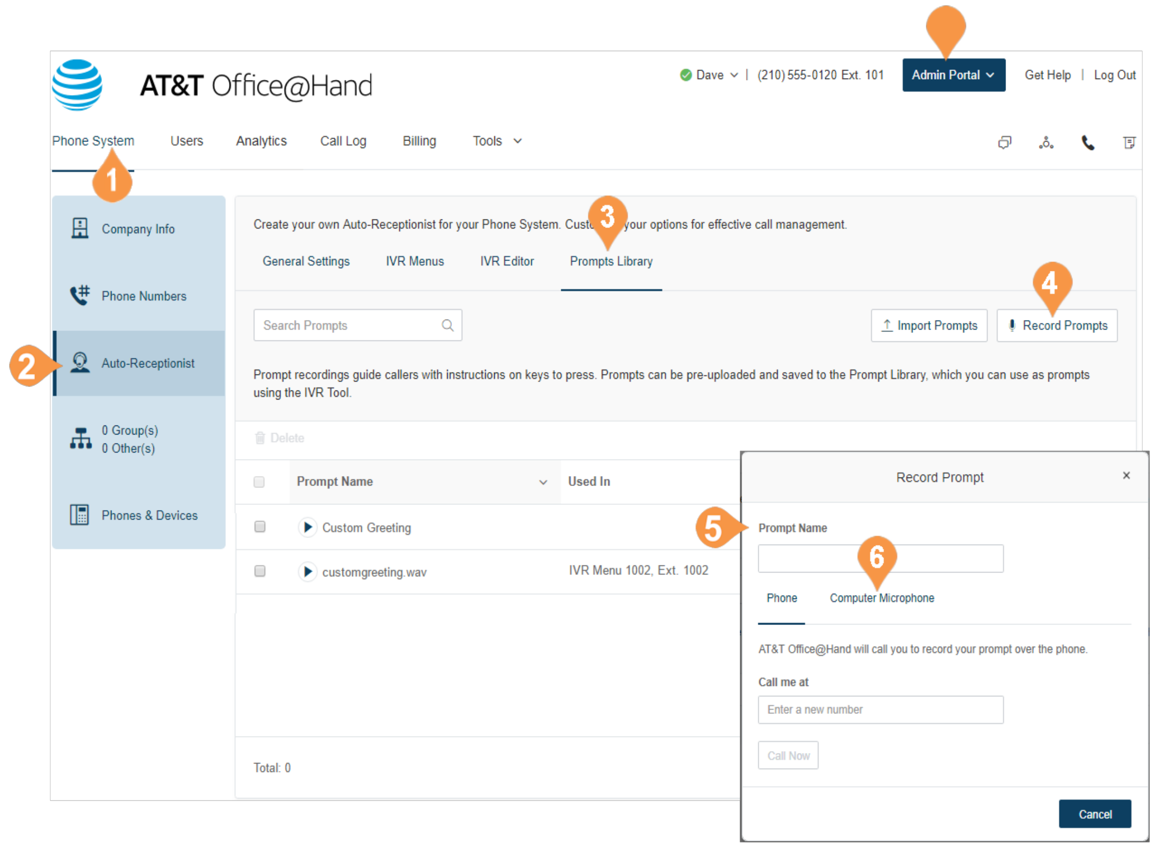
Note: An IVR menu can function independently from the Auto-Receptionist, so it does not have to be set up for an Auto- Receptionist greeting.

Record an Audio Prompt

To record a new audio prompt for your system,

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select the **Prompts Library** tab.
4. Click **Record Prompts**. The **Record Prompt** pop-up appears.
5. Enter a name for your prompt in the **Prompt Name** field.
6. Select one of these methods to record a prompt and follow the on-screen instructions:
   - Phone (record over the phone)
   - Computer Microphone.

Follow the remaining on screen instructions to record your prompt.

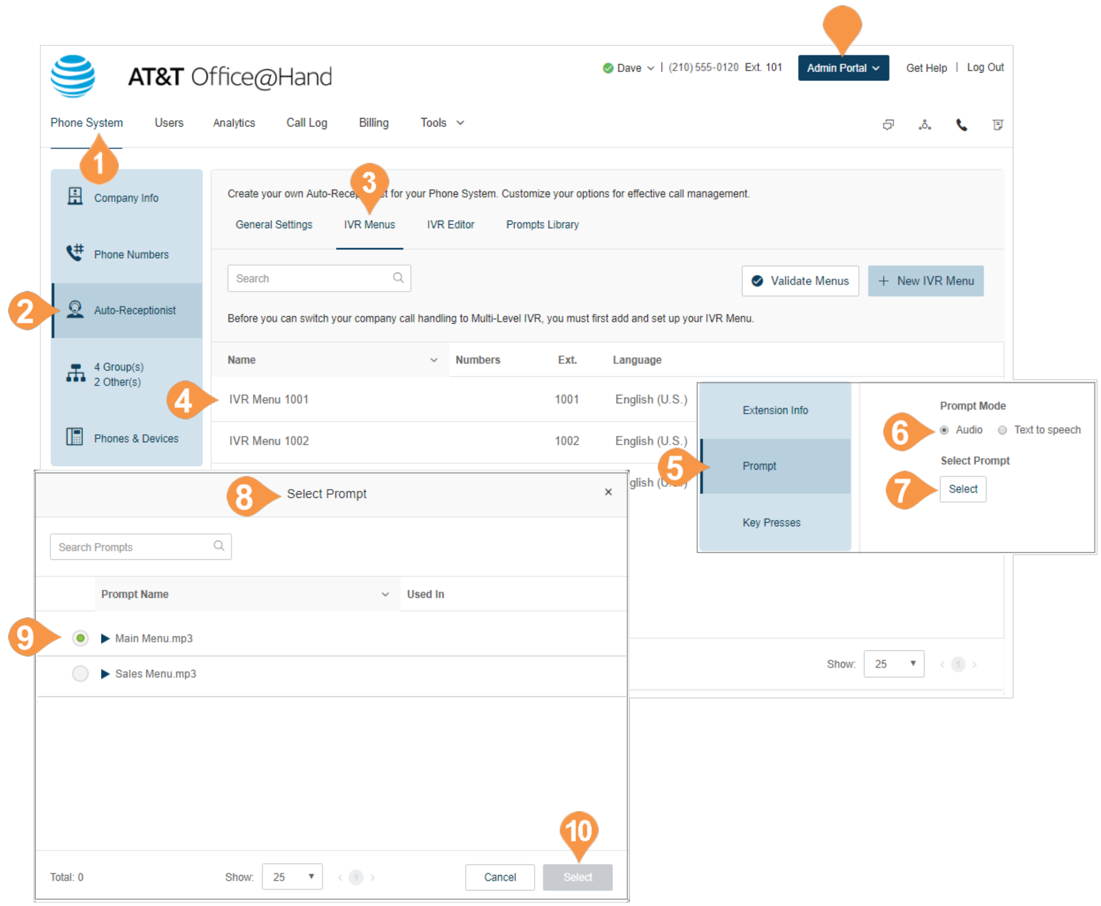


Select Prompt Mode: Audio

To select a previously recorded audio prompt, do the following:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menu. The Extension Info appears.**
5. Click **Prompt**. The **IVR Prompt** pop-up appears.
6. Under **Prompt mode**, select the button next to **Audio**.
7. Click **Select from Prompt Library**.
8. The **Select Prompt** pop-up appears with a list of pre-uploaded prompts.
9. Select the button next to the prompt you'd like to set.
10. Click **Select**.

You can listen to your new prompt by dialing into the extension and re-recording it until you are satisfied.

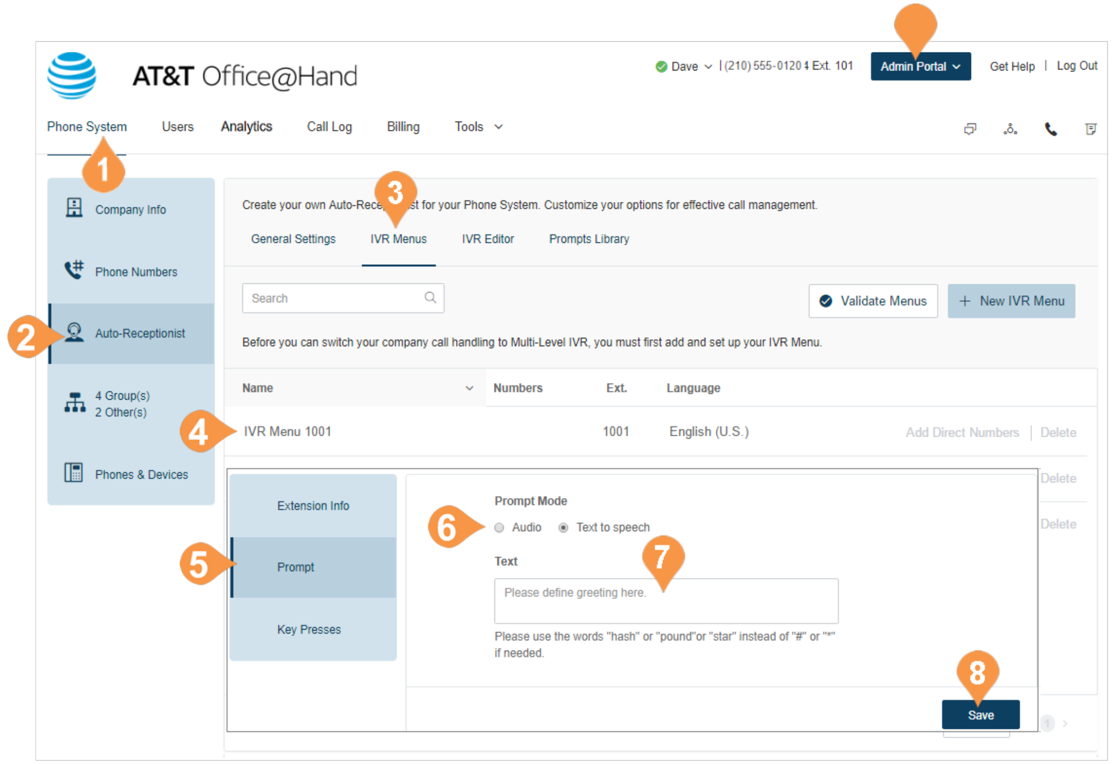


Select Prompt Mode: Text-to-Speech

Office@Hand's text-to-speech utility converts the text greeting you typed into a voice file and saves it to the IVR Prompt Library. Set an IVR prompt using text-to-speech. The text you enter must contain only letters, digits, space, commas, and periods. No special symbols. Use the words "hash" or "pound" or "star" instead of "#" or "*" if needed.

To set up a text-to-speech prompt for an IVR menu:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menu. The Extension Info appears.**
5. Click **Prompt**. The IVR Prompt pop-up appears.
6. Under **Prompt mode**, select the button next to **Text to speech**.
7. In the box for **Text:** type your desired greeting and connection instructions for your callers.
8. Click **Save.**



Recording Greetings and Messages

Several tasks require admins to record messages or greetings for your Office@Hand system. These steps explain how to do the following:

- Record Over the Phone
- Record Using the Computer Microphone
- Import a WAV or MP3 file.

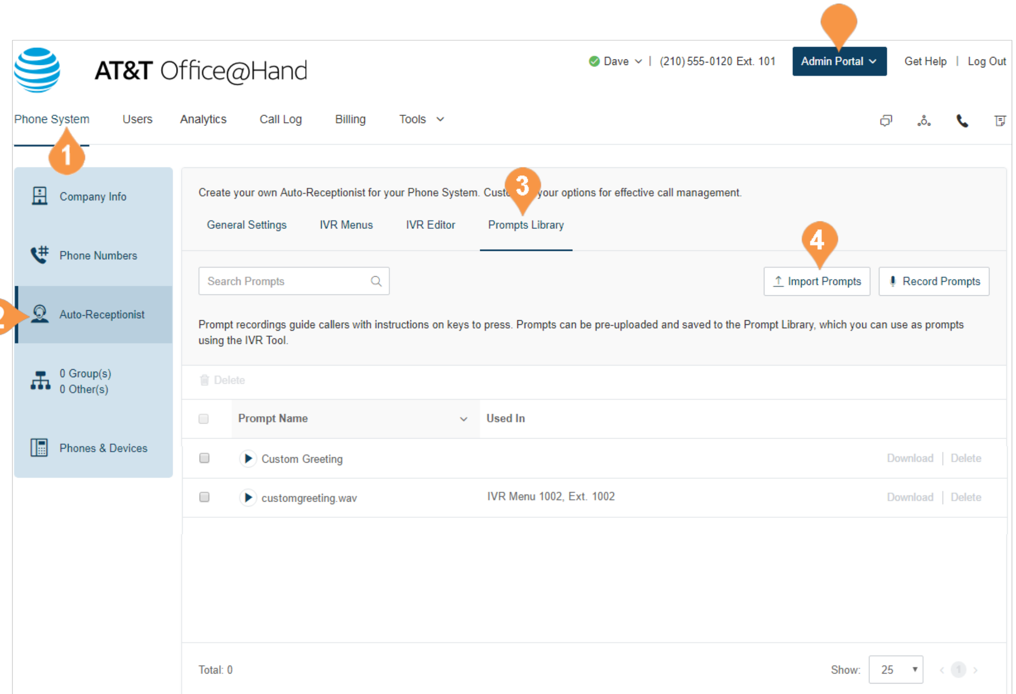
Import a WAV file for Your IVR Prompt

In the Prompts section, you can import or record your IVR prompts and edit prompts that have already been imported. To import a WAV file, do the following:

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **Prompts Library** tab.
4. Click the **Import Prompts** button.

   A browser appears.

   - Navigate to the prompt file location.
   - Select the file and click **Open**.



Record a Prompt over the Phone

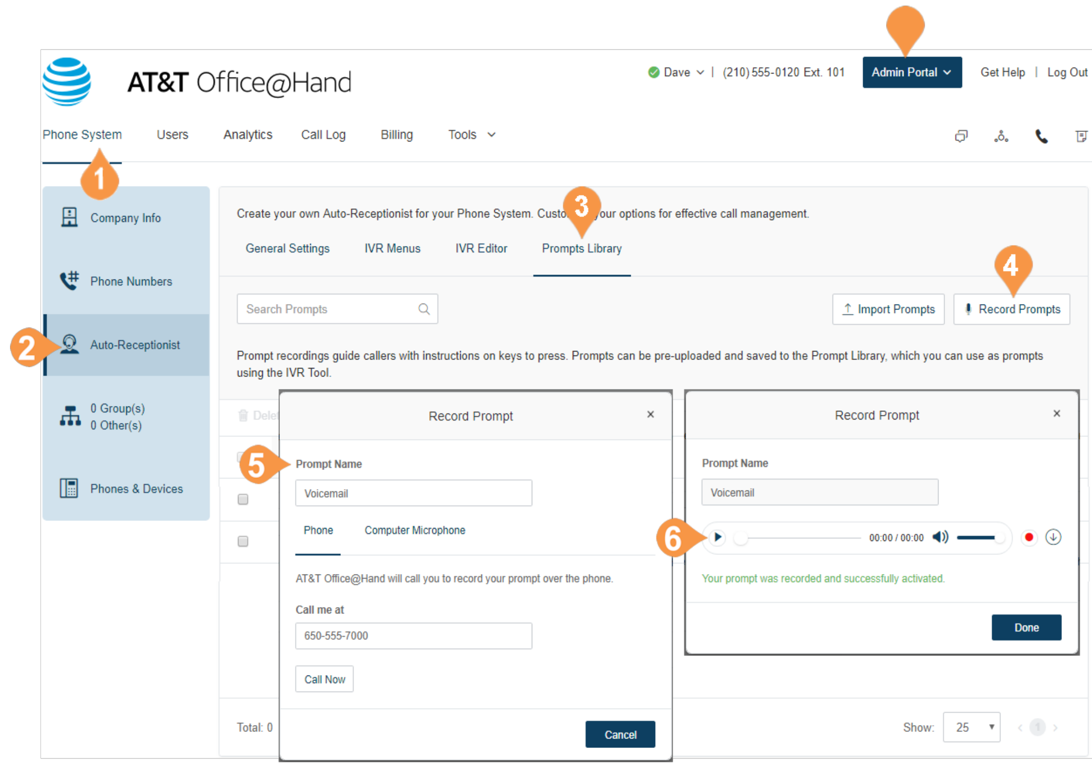
Account admins and users with permissions can create a custom audio prompt. One way to create this prompt is to record the prompt using your Office@Hand phone.

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.

   The **Record Prompt** pop-up appears.

Enter a name in the text field next to **Prompt Name**.

5. Select the **Phone** tab.
   - Next to **Call me at**, enter a phone number.
   - Click the **Call Now** button, and Office@Hand will call you to record your message. Record your IVR prompt over your phone when prompted.
6. Review the prompt and click **Done**.



Record a Prompt Using Your Computer Microphone

Account admins and users with permissions can create a custom audio prompt. One way to create this prompt is to record the prompt using your computer microphone.

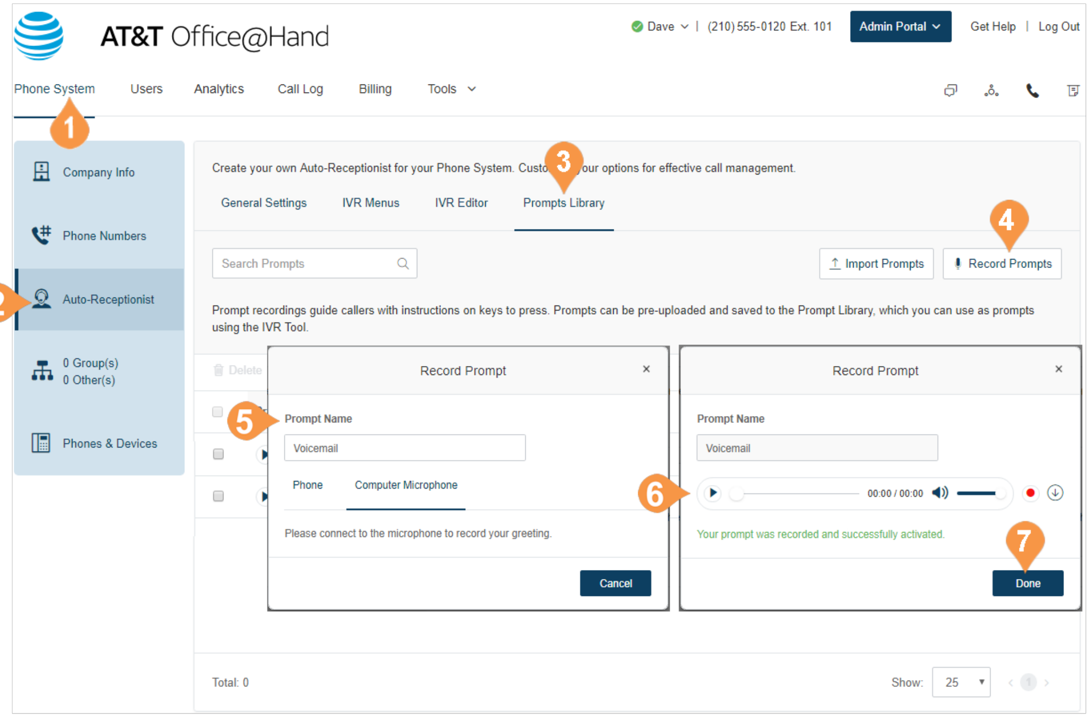
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.

   A pop-up will appear.

5. In the Record Prompt window, enter a name for your prompt. Ensure that a microphone is connected to your computer and click **Record Using Computer Microphone**.

   Click **Allow** if Office@Hand asks to record through your computer.)

6. The **Record Prompt** pop-up appears.
   a. When ready, click the red **Record** button to record or re-record your IVR prompt through your computer microphone.
   b. Click the **Play** button to listen to your prompt and then click the Record button to re-record your IVR prompt.
   c. Click the **Download** button to and save your recording to your computer.
7. Click **Done**.

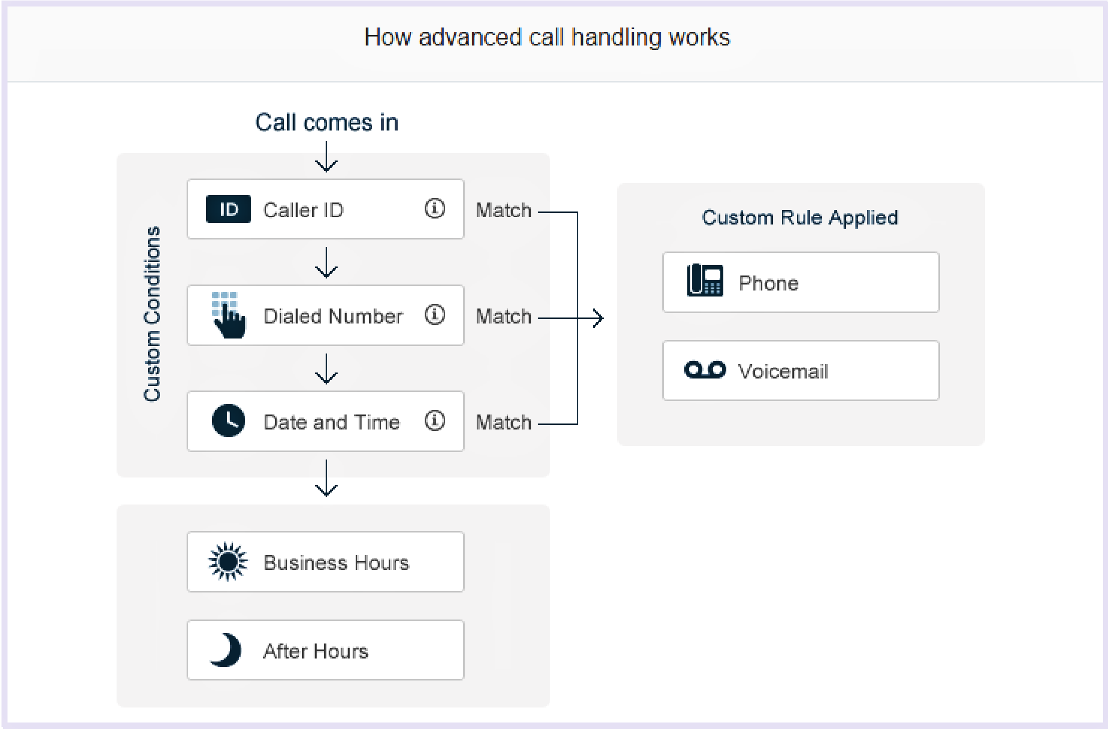


Custom Rules

Custom rules let you manage call handling enabling you to create efficient processes and streamline your work flow.

When your call enters the Office@Hand system it is filtered through any conditions you have set, for example Caller ID, Dialed Number, or Date and Time. You can also apply business hours or after hours conditions to incoming calls. These conditions are passed to the destination phone or voicemail.

Once you create a custom rule, be sure to test the rule to verify it works as you expect.

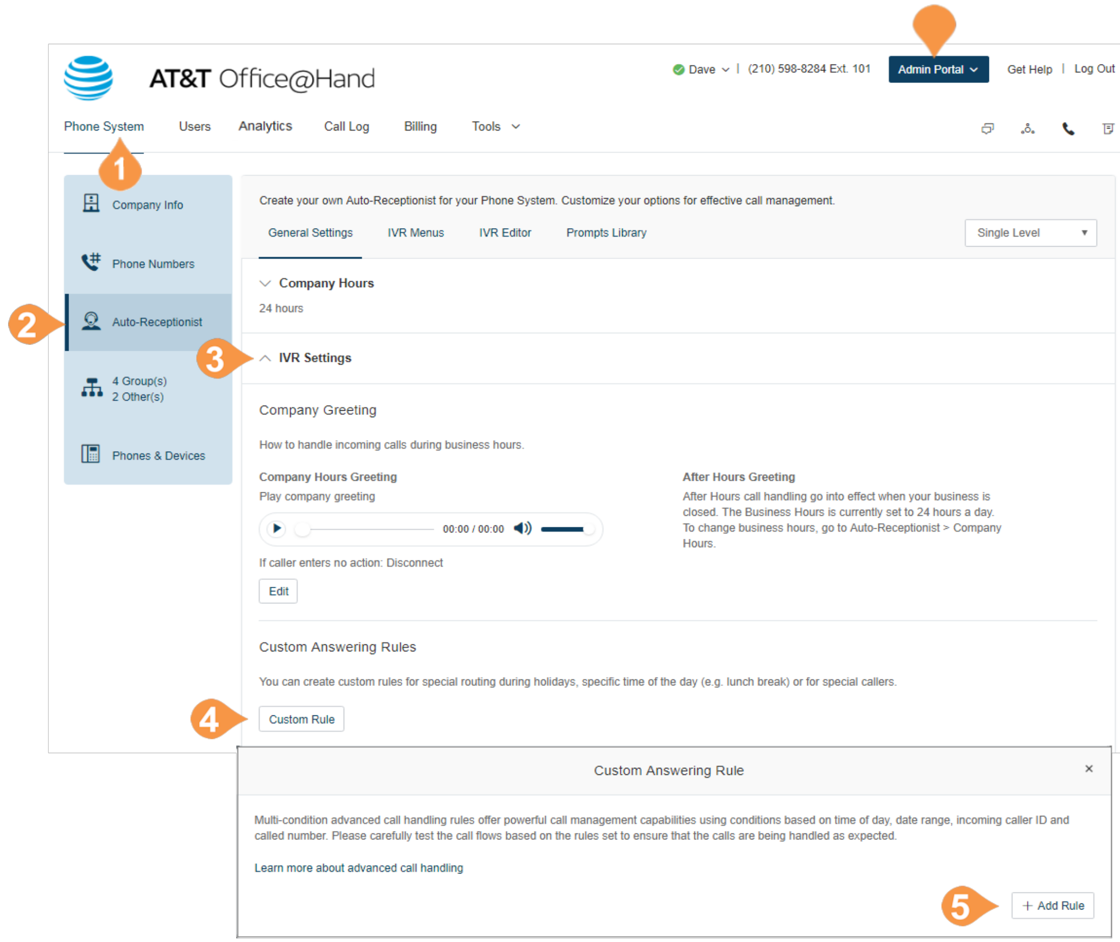


Create a Custom Rule

Additionally, any previously-created rules are listed in the pop-up that appears.

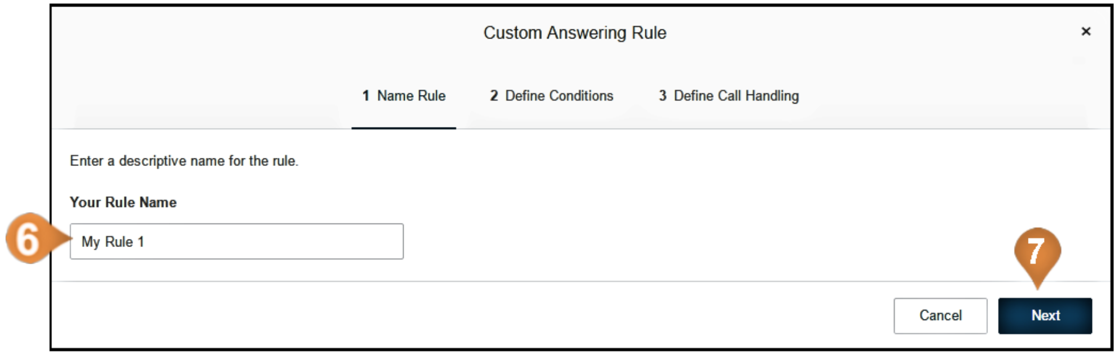
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Under the **General Settings** tab, click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Custom Rule**.
5. Click **Add Rule**. The **Custom Answering Rule** pop-up appears.

Instructions continue on the following pages.



6. Enter the **Rule Name**.
7. Click **Next**.
8. Click one of the answering rule conditions:
    - CallerID
    - Called Number
    - Date and/or Time.

Instructions continue on the following pages.

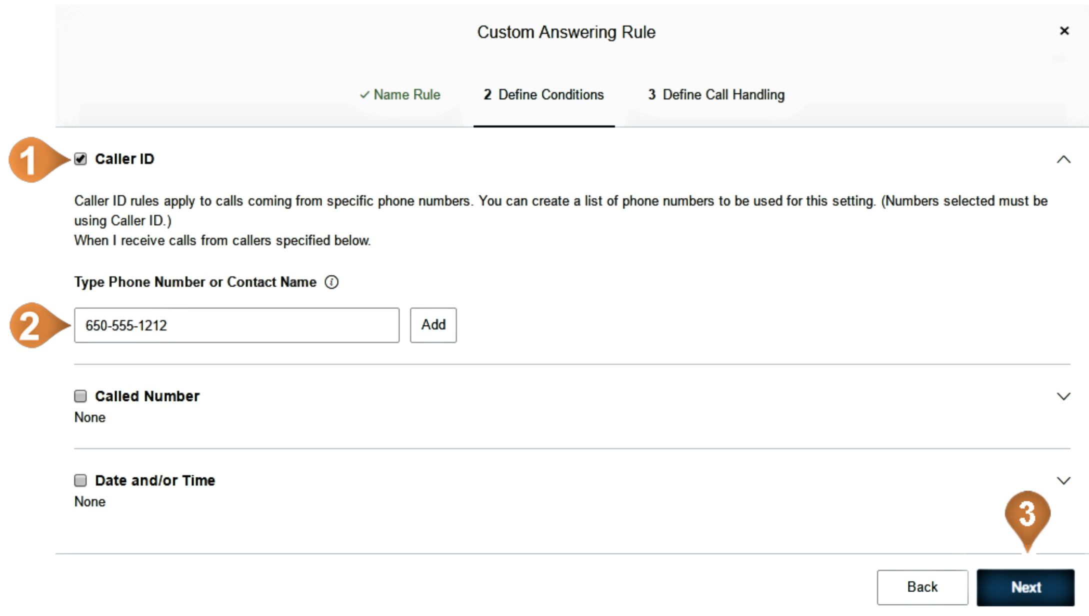


Custom Rule Condition - Caller ID

Caller ID - applies the rule according to phone numbers you specify. Be sure the specified number is caller ID enabled.

Follow the previous steps, “Custom Rules” on page 66, then:

1. Click the answering rule conditions, CallerID.
2. Enter the phone number or contact name and press **Add**.
3. Click Next. the **Custom Answering Rule** pop-up appears. Go to “Custom Rule Call Handling Definitions” on page 72.

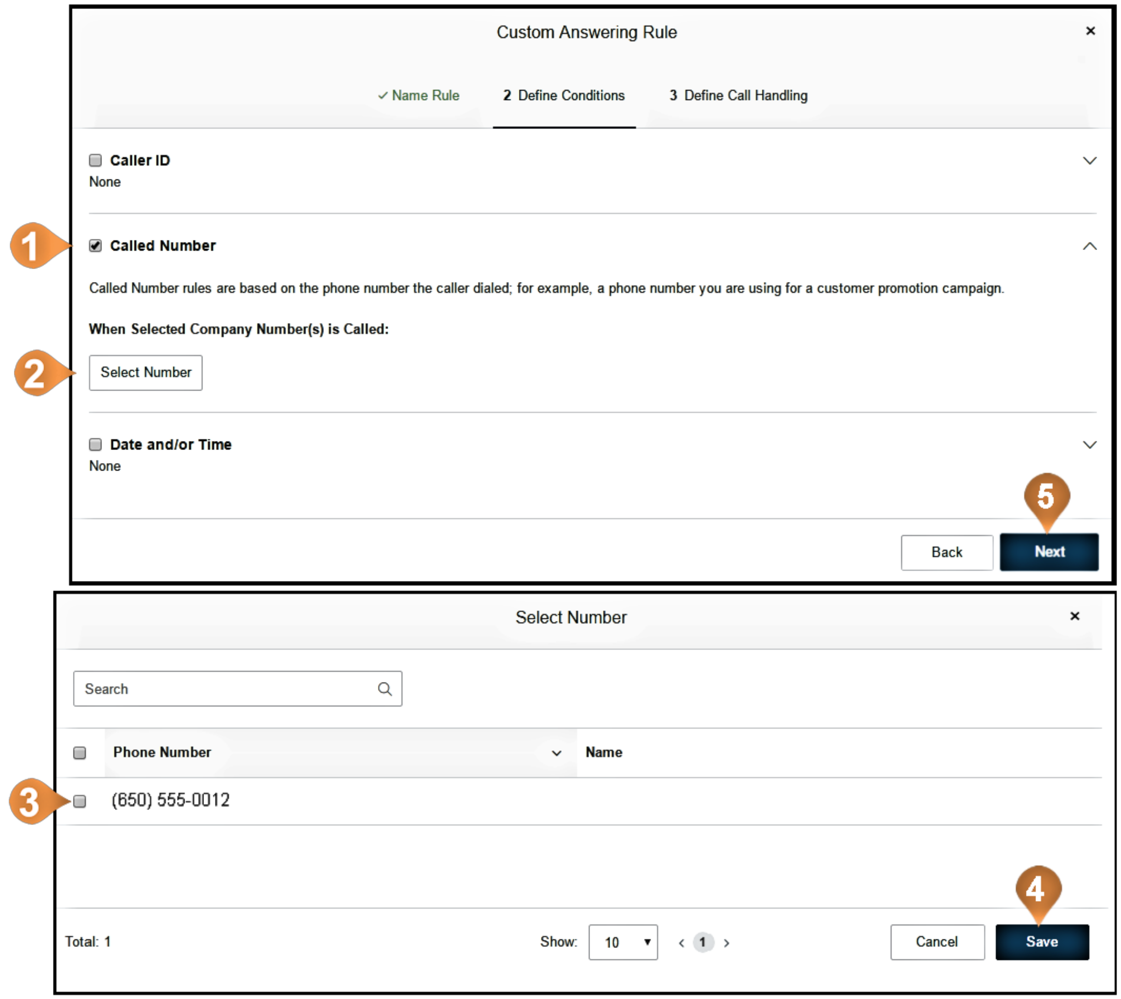


Custom Rule Condition - Called Number

Called Number applies the rule to the phone number dialed.

From the previous steps, then:

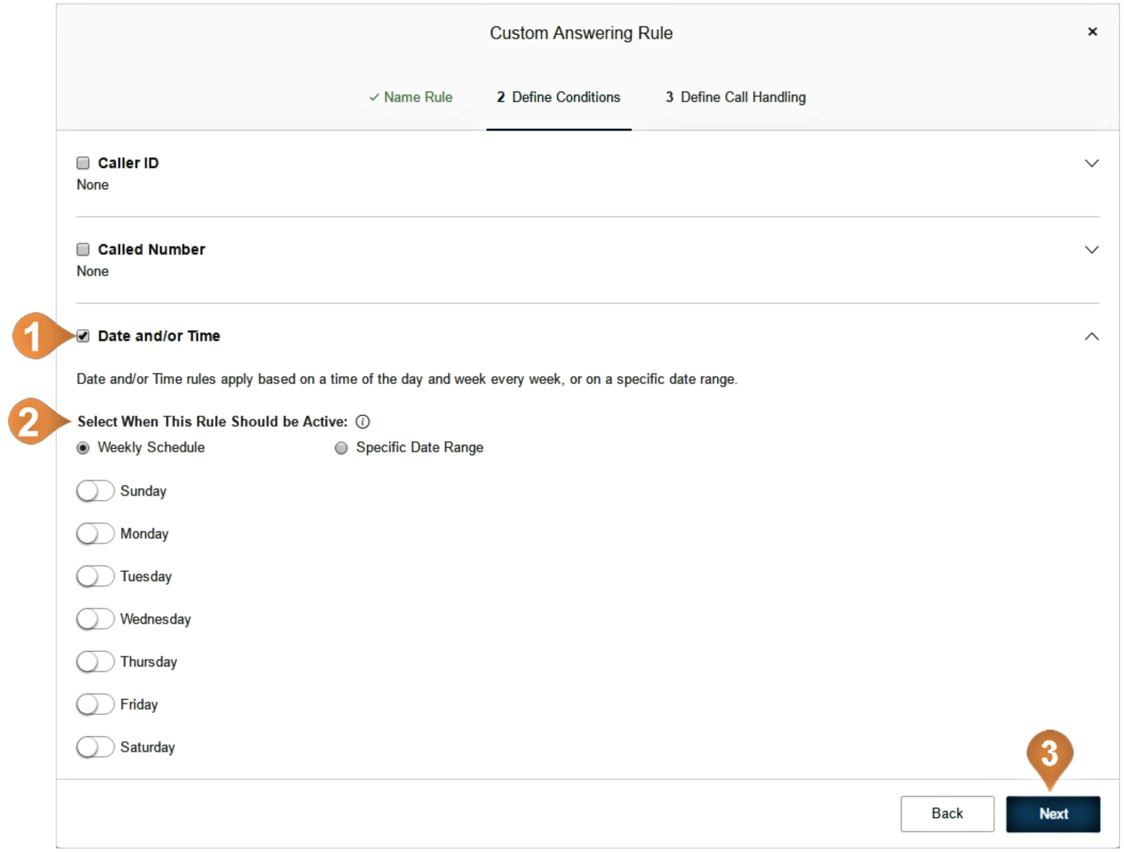
1. Click the answering rule condition, **Called Number**.
2. Click the check box **Select Number**. The **Select Number** pop-up appears.
3. Click the **Select Number** button.
4. Click **Save**.
5. Click Next. Go to “Custom Rule Call Handling Definitions” on page 72.



Custom Rule Condition - Date and/or Time

This condition applies rules based on a time of day, week, or date range.

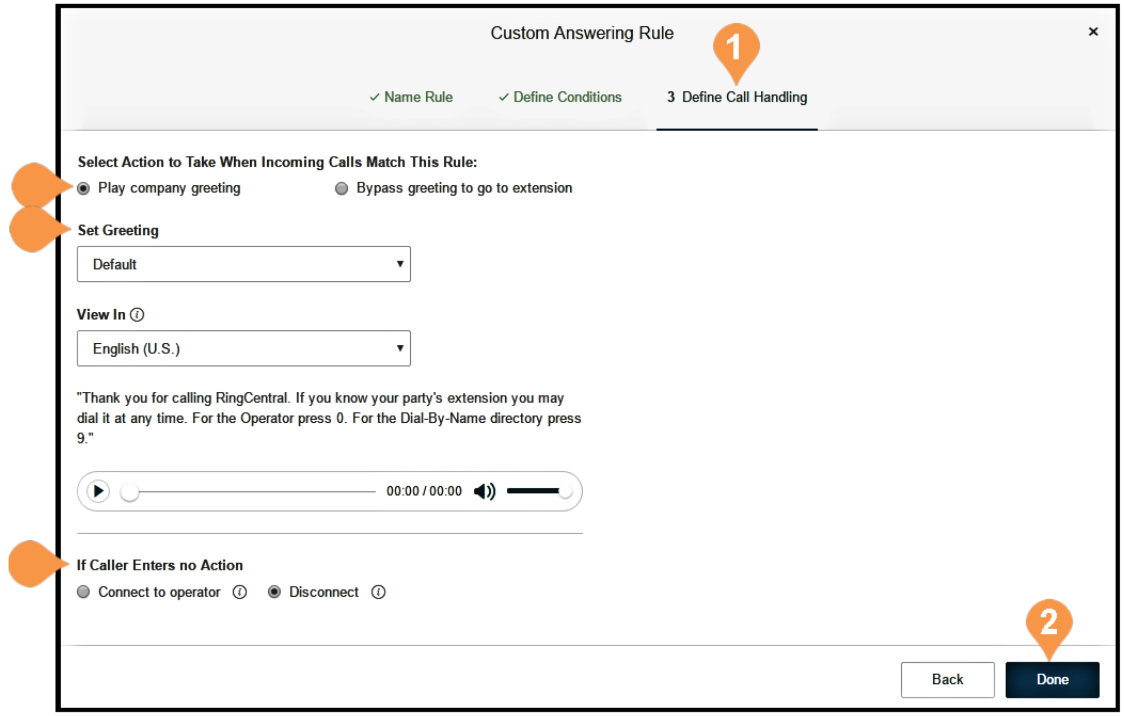
1. Click the answering rule condition, **Date and/or Time**.
2. **Select When this role Should be Active**.
3. Click **Next**. Go to “Custom Rule Call Handling Definitions” on page 72.



Custom Rule Call Handling Definitions

From setting a rule condition, now define the call handling for that rule.

1. **Select Action to Take When Incoming Calls Match This Rule:**
   - Choose to **Play Company Greeting** or **Bypass greeting to go to extension.**
   - **Set Greeting -** Choose **Default** or **Custom.** The default greeting is shown in the window. Select **Custom** to create your own.
   - **If Caller Enters no Action -** Choose whether the call is routed to the operator or disconnected if the caller does not enter an action.
2. Click **Done.**



Call Groups

Call Groups

Office@Hand offers many different types of groups for your phone system needs.

Call Queues are different from extensions. Call queues increase the efficiency of your company by directing the calls to the right employees. Call queues can support up to 25 calls waiting in a call queue.

Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices.

Shared Lines allow calls made to one phone number to be answered by multiple phones. Answered calls can easily be handed off to other phones sharing the same phone number. This feature is commonly required in many industries, such as retail, restaurant, warehouse, etc.

Park Locations are private locations for your employees to park and pick up calls. Create up to 100 park locations for different groups of users in your phone system.

Call Monitoring allows you to set of permissions that allow specific users to monitor the calls of other users. Available for Premium and Enterprise users only.

Other – Message-Only Extensions allow you to create a dedicated extension specifically for receiving voice messages. All calls routed to this extension will be automatically directed to the extension's voicemail box.

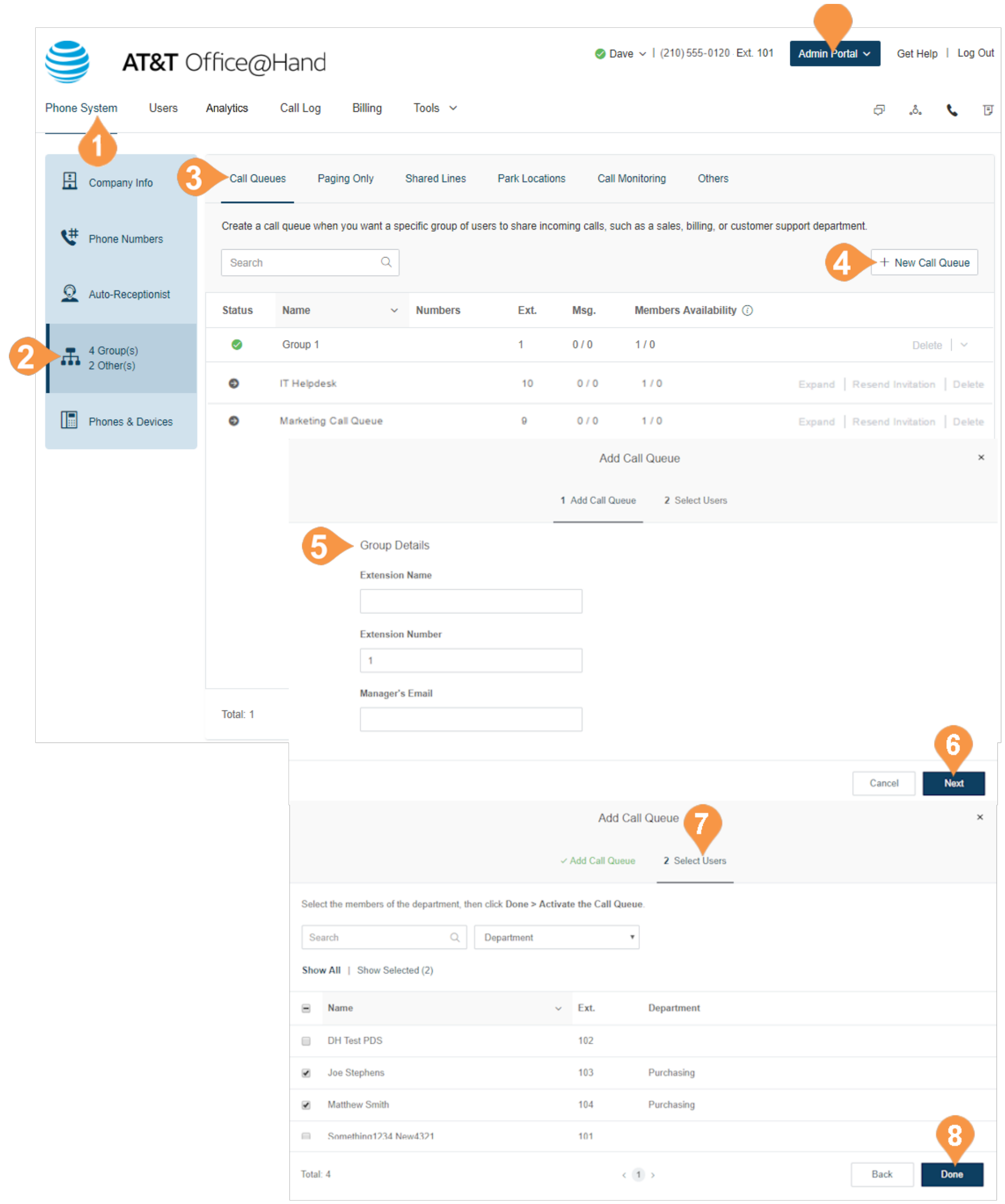
Other – Announcements-Only Extensions allow you to create a dedicated extension specifically for playing an announcement. All callers routed to this extension will only hear a recorded announcement/greeting.

Call Queues

Create a call queue when you want a specific group of users (such as Sales, Support, or Billing) to share incoming calls. Each call queue can have an extension or direct (local or toll-free) number of its own. You can define specific business hours for each call queue and set up email or text message notifications of any missed calls or voicemails.

Add a Call Queue Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Click the **New Call Queue** button.
5. Enter an **Extension Number**, **Extension Name**, and **Manager Email**.
6. Click **Save**.
7. Select the users you'd like to add to the group from the list of available members.
8. Click **Save**.



Configure a Call Queue

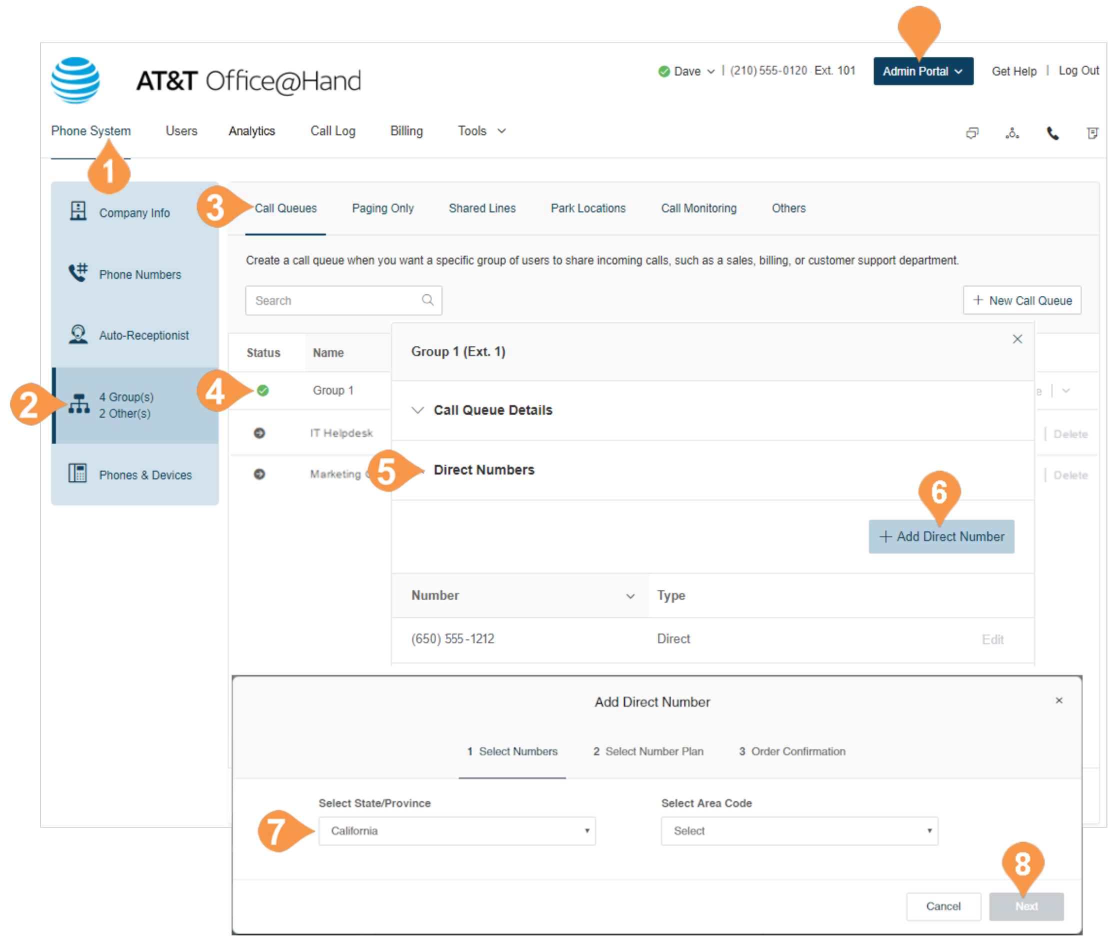
After you have created a Call Queue, you can configure the Call Queue Info, Direct Numbers, Greeting, Call Handling, and Messages & Notifications. The phone system supports more than 10 call queue agents ringing simultaneously. This setting needs to be first enabled in the admin interface. Admin users can set the number of simultaneously ringing call queues to 25 or 50. Note: Only agents with 2 active phones in call forwarding can be added to queues with higher limits (25 or 50).

Call Queue Info

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue** (Customer Support in this example). If you don't have any existing Call Queues, go to the previous page to learn how to create one.
5. Select **Call Queue Details**.
6. Edit the group's settings in **General** and **Settings**:
   a. **Extension Number**
   b. **Group Name**
   c. **Record Group Name**
   d. **Company Name**
   e. **Contact Phone**
   f. **Manager Email**
   g. **Status**
   h. **Regional Settings**
   i. **Business Hours**
   j. **Address**
7. Click **Save**.

Add a Direct Number

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select the **State/Province** and **Area code** then select from one of the available numbers.
8. Click **Next**.
9. Follow the prompts to purchase your new number.

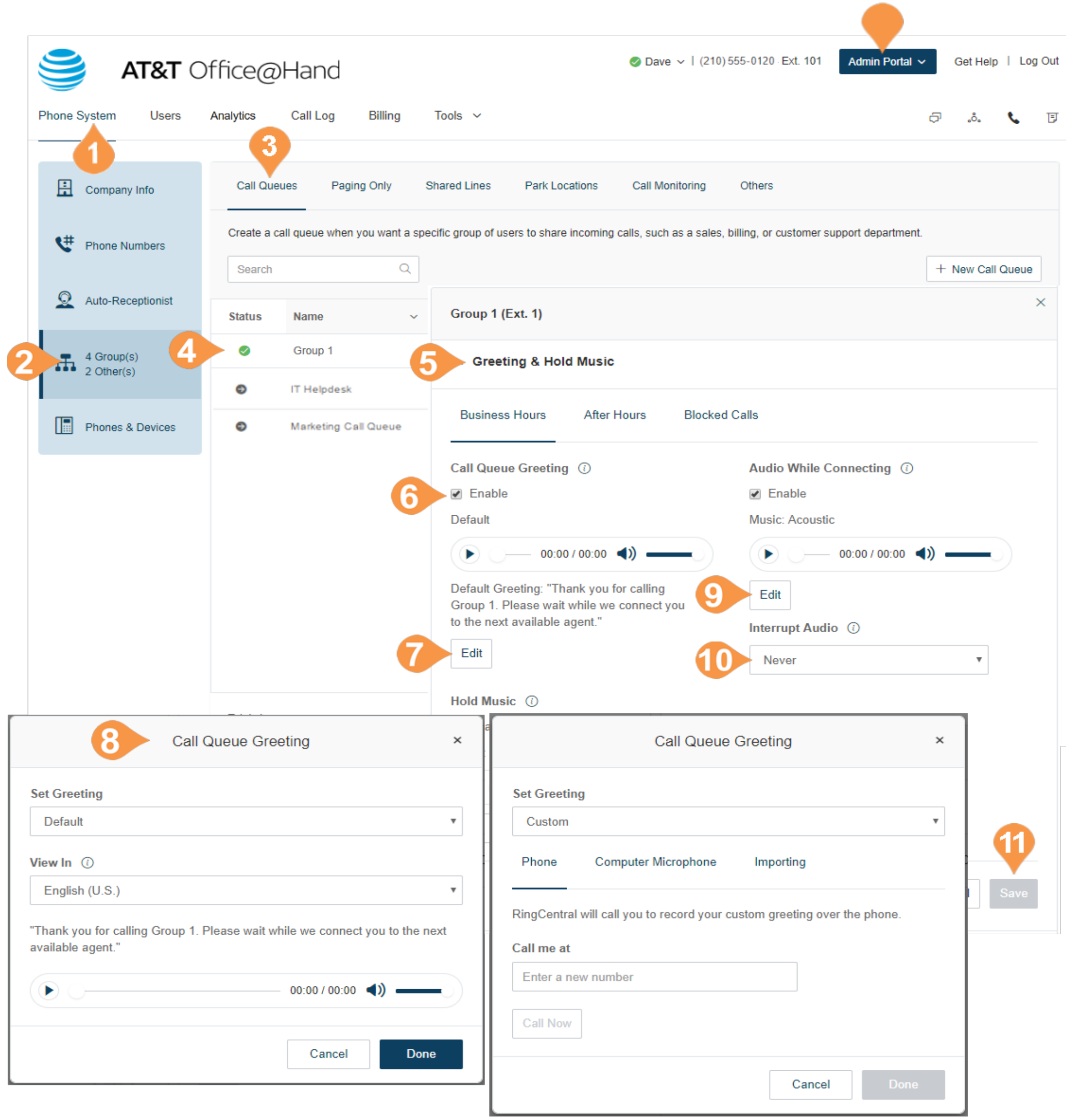


Call Queue Greetings

If you would like your callers to hear a recorded greeting before being connected to a call group, turn on the Call Queue greeting.

Set a Call Queue Greeting

1. Select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Greeting & Hold Music**.
6. Select the button next to **On**.
7. Click **Set Greeting**.
8. Choose your preferred type of greeting.
   a. **Default**
   b. **Custom** – set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the menu if you have saved numbers or enter a phone number. Click **Call Now**; Office@Hand calls you to record a message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings appear. When ready, click the red **Record** button to record your greeting through a computer microphone. Stop and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file. Click **Attach.**
9. Click **Edit** under **Audio While Connecting** to select the audio callers hear during business hours while waiting for a connection.



10. Choose under **Interrupt Audio** how often the audio is interrupted by a prompt. If you choose an interrupt time, you can then choose a standard Interrupt Prompt, such as "Thank you for holding. Please continue to stay on the line," or record or upload your own custom prompt.
11. Click **Save**.

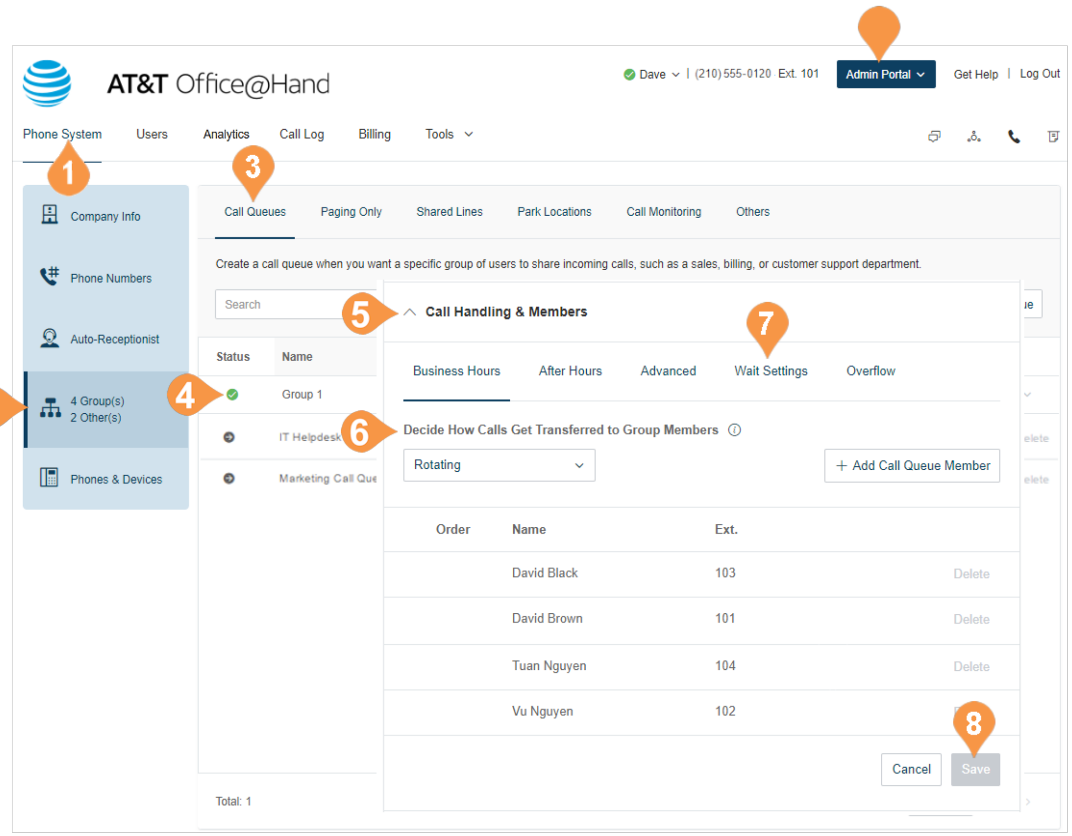
Call Handling

Choose how you'd like each call queue to handle incoming calls. Set the order in which the calls will be transferred to the members of the call queue, choose the audio while connecting, hold music, and hold time here.

1. From the **Admin Portal,** select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Click the name of the **Call Queue** to configure.
5. Select **Call Handling & Members** to edit your call handling settings.
6. On the Business Hours tab, select how which calls will be transferred to department members:

   a. **Rotating** – in order by extension number
   b. **Simultaneous** – on all department extensions
   c. **Sequential** – set a defined order
7. Choose how to handle callers who are on hold in the **Wait Settings** tab. Tool tips in the product interface help you configure hold times.
8. Click **Save**.

Note: If you would like after-hour call handling to take effect when your business is closed, configure the business hours for the extension, and complete the settings on the **After Hours** tabs.

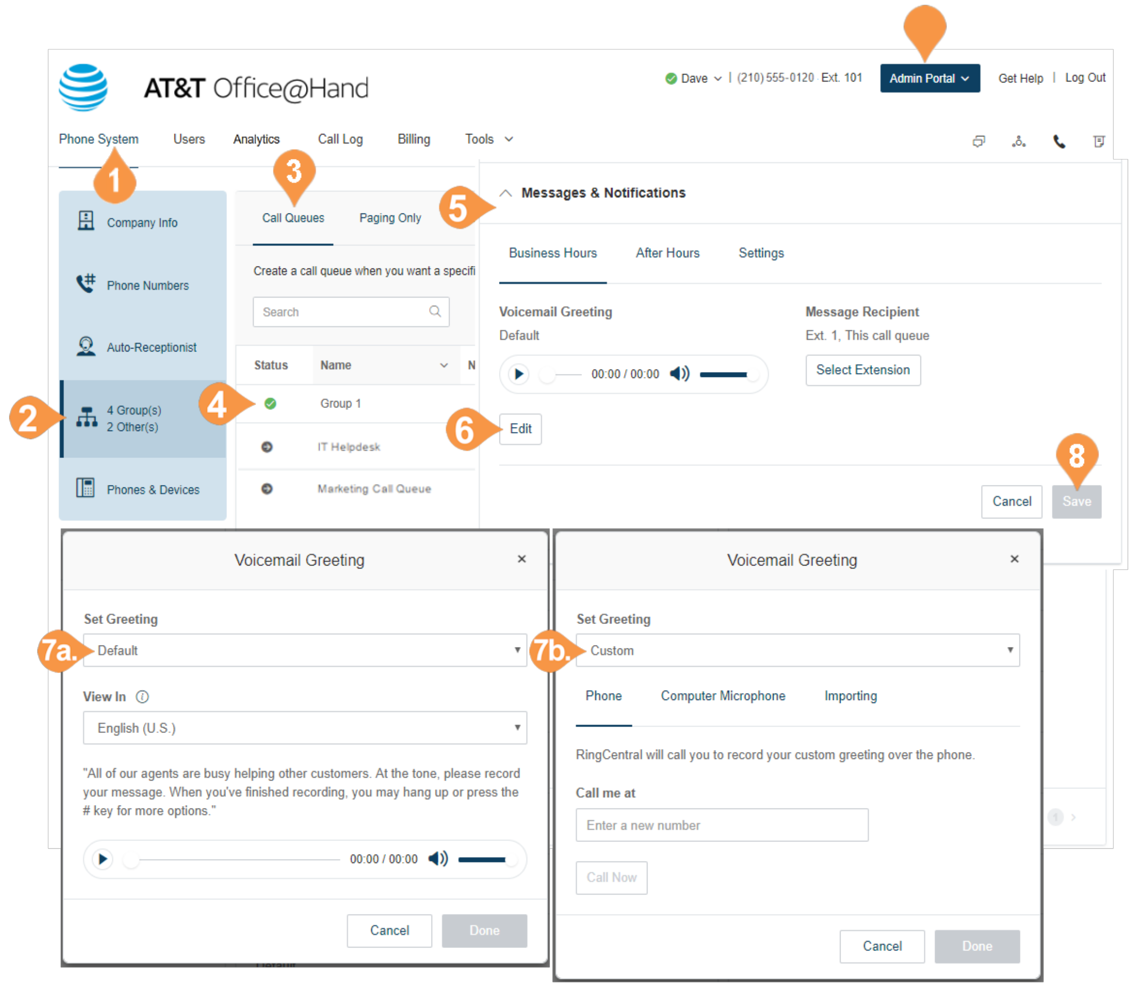


Messages & Notifications

In this section, set your message recipient, voicemail greeting, and notifications. Office@Hand allows each Call Queue to have separate voicemails to greet unanswered calls, as well as allows you to set a recipient for these voicemails.

Set a Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue**.
5. Click **Messages and Notifications**.
6. Click **Edit** under **Voicemail Greeting**.
7. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your greeting through your computer microphone. Stop the recording and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
8. Click **Save**.

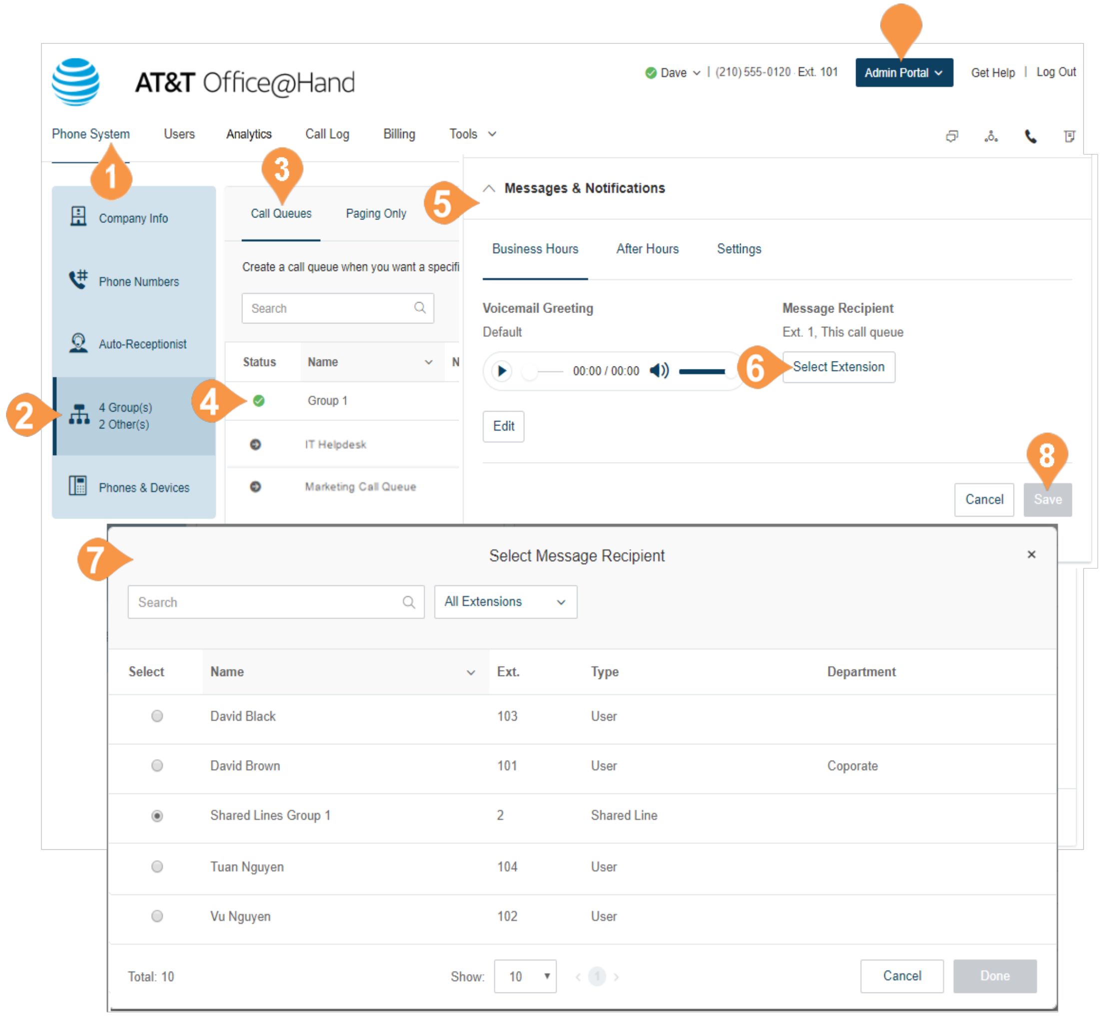


Message Recipient

After you have set your Voicemail Greeting, you can set which users or call queues are to receive the messages.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue** (Customer Support in this example).
5. Click **Messages and Notifications**.
6. Click **Select Extension** under **Message Recipient**.
7. A dialog box shows a list of members who you can select to receive messages for this Call Queue. Select the button next to the recipient.
8. Click **Done**, then click **Save**.

Note: If you have set custom Company hours, follow these steps for both the Business Hours and After hours tabs.

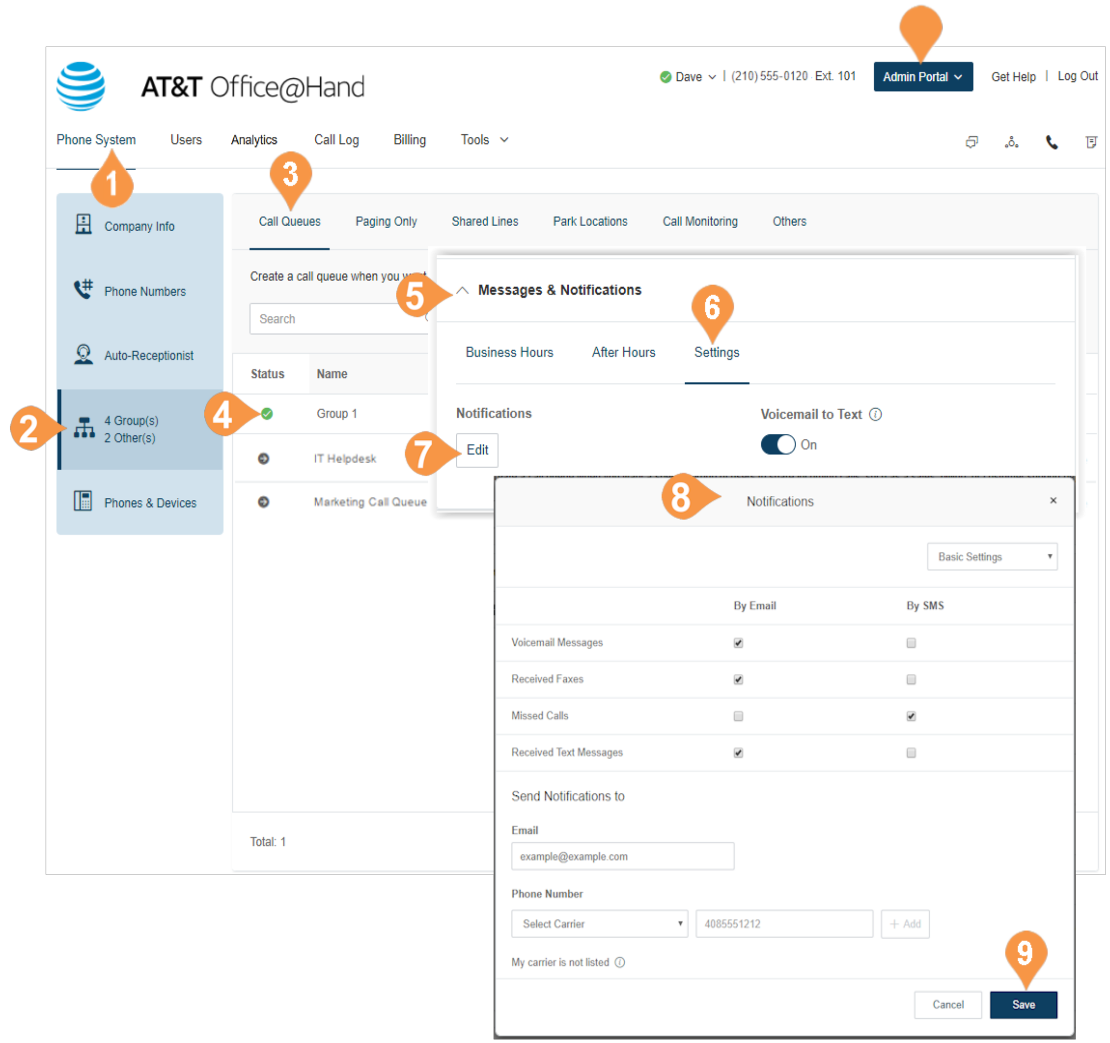


Notifications

As an administrator, you can set up notifications to be sent to your phone or email when voicemails, faxes, missed calls, and text messages are received for each call queue.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue**.
5. Click **Messages and Notifications**.
6. Click the **Settings** tab.
7. Click **Edit** under **Notifications**. A dialog appears with options for notifications to a recipient of your choice when voicemail messages or faxes are received, or calls missed.
8. Set your notification settings
   a. Configure your **Basic Settings** that control the notification recipient and the default behavior for each type of notification.
   b. You can optionally set your **Advanced Settings**. These settings allows you to customize your notifications settings, including the content and recipient for each type of notification.
9. Click **Save**.

Note: If you have set custom business hours, follow these steps for both the Business Hours and After hours tabs.



Configurable Information Display

Administrators can assign text labels to incoming IVR and Call Queue phone numbers and configure which call information is displayed on endpoints so queue members know how to greet callers. Additionally, queue call information can be uniformly displayed across all endpoints (hard phones & soft clients), benefiting users who use hard phones and soft clients together.

Add a Direct Number to a Call Queue

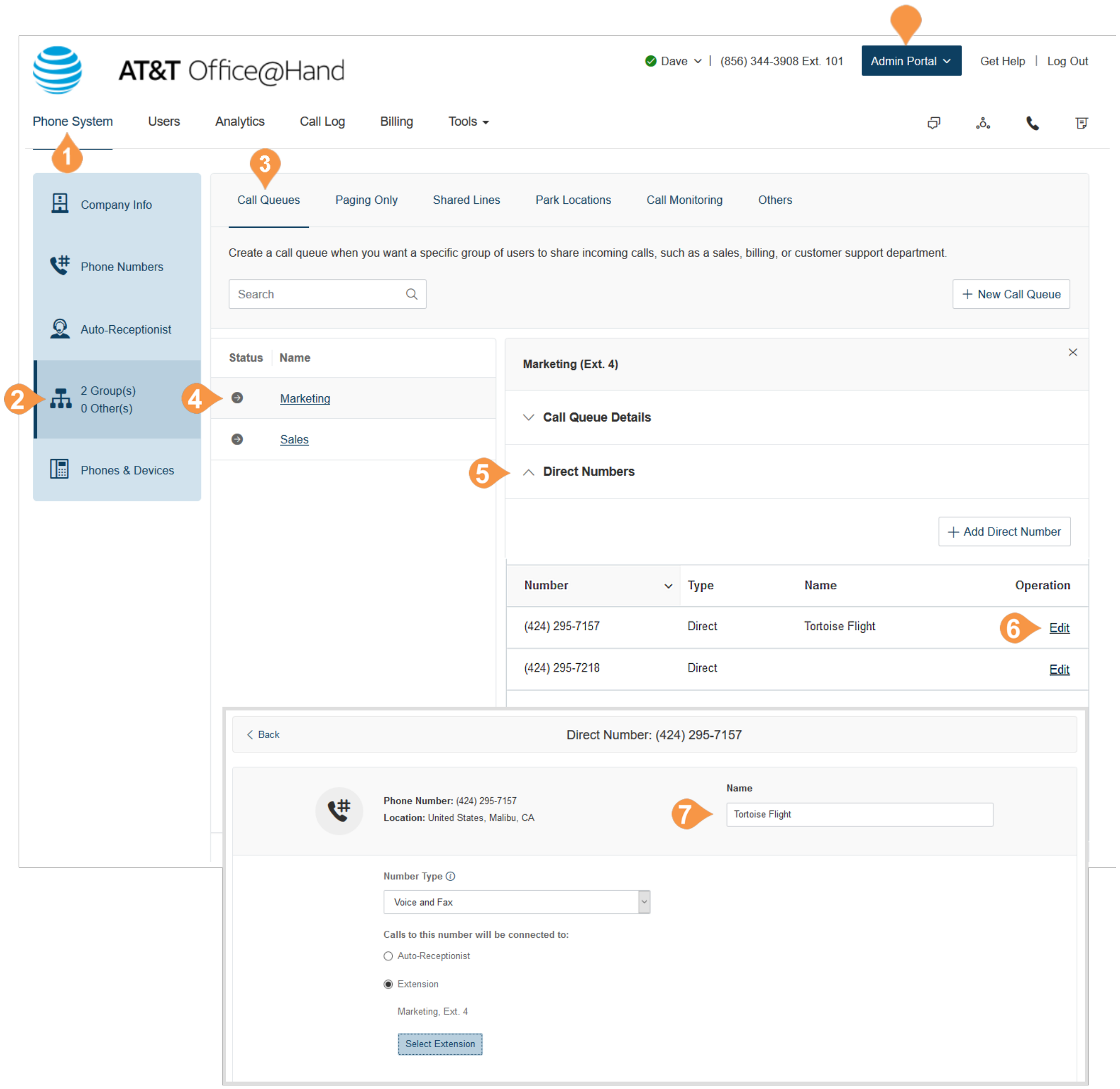
1. From the **Admin Portal**, select the **Phone System** tab.
2. Choose **Groups/Others** from the sidebar.
3. Select the **Call Queues** tab.
4. Click on a list entry.
5. Choose the **Direct Numbers** tab from the new menu tabs and select **Add Direct Number** to add a new number.
6. Select **Edit** on the entry you want to update.
7. A new window appears with details of the listing. **Enter** your preferred name of 15 character or fewer in the **Name** field.

Click Save.

Call queue information is not displayed when a call is forwarded using a custom advanced answering rule.

When information is not configured, a blank space may instead be displayed.

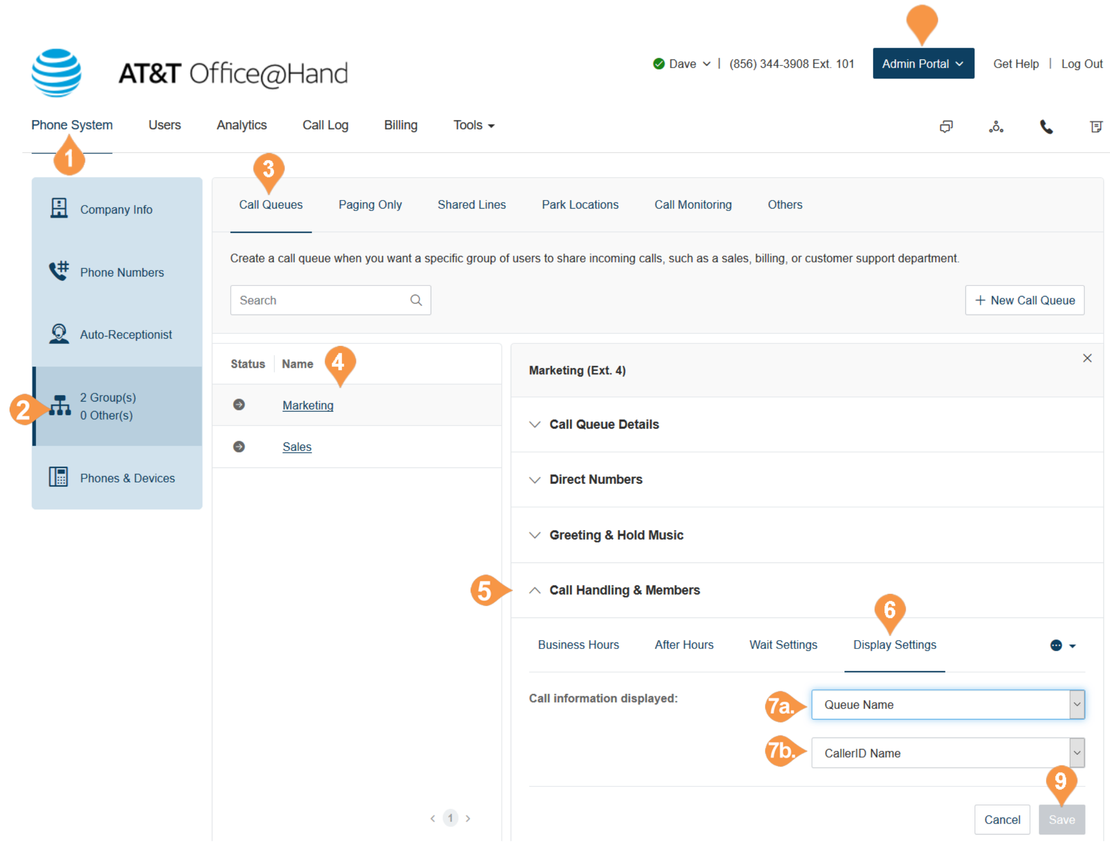
When a Caller ID name or number is blocked, anonymous, or not included by the service provider "Unknown" may display instead.



Configure Call Queue Display Settings

To configure your call queue display settings,

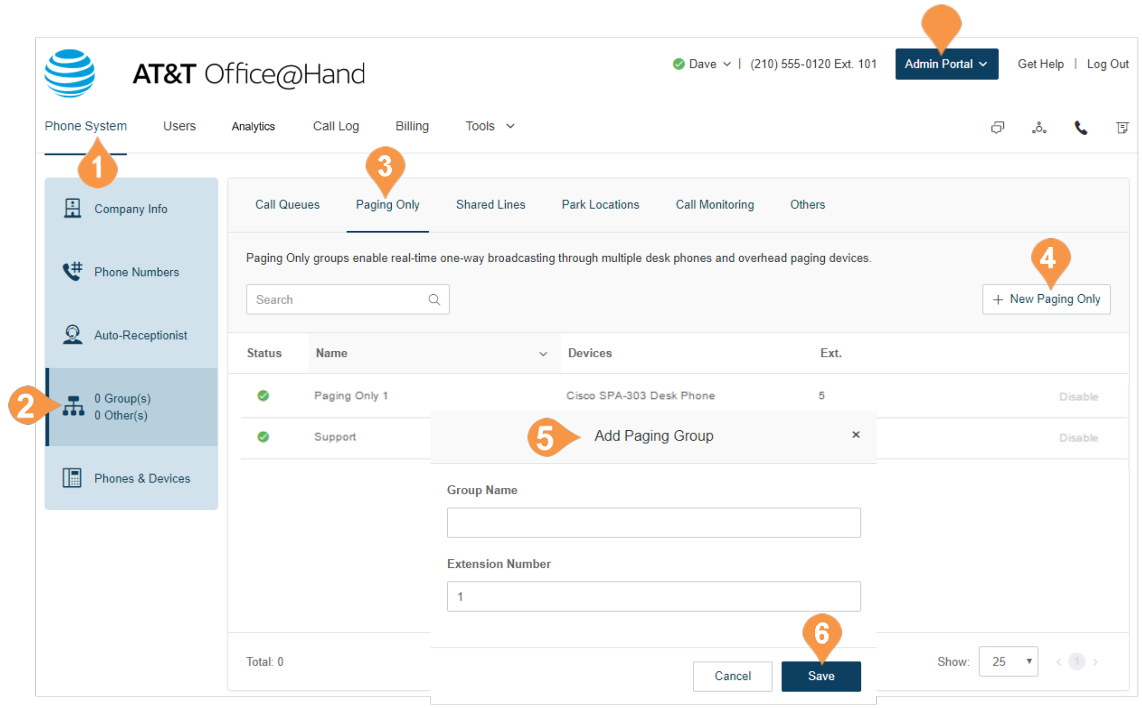
1. From the Admin Portal, select the Phone System tab.
2. Select Groups/Others from the sidebar.
3. Select Call Queues.
4. Choose an entry from the list to modify.
5. Select Call Handling & Members.
6. Click the Display Settings tab.
7. In the Call Information displayed fields, enter the Queue Name and Caller ID name.
8. Click Save.



Paging Only

Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools and hospitals, among others.

You can page using a special phone with a paging soft-key, or by dialing *84 from your digital desk phone or from your VoIP calling enabled mobile phone.



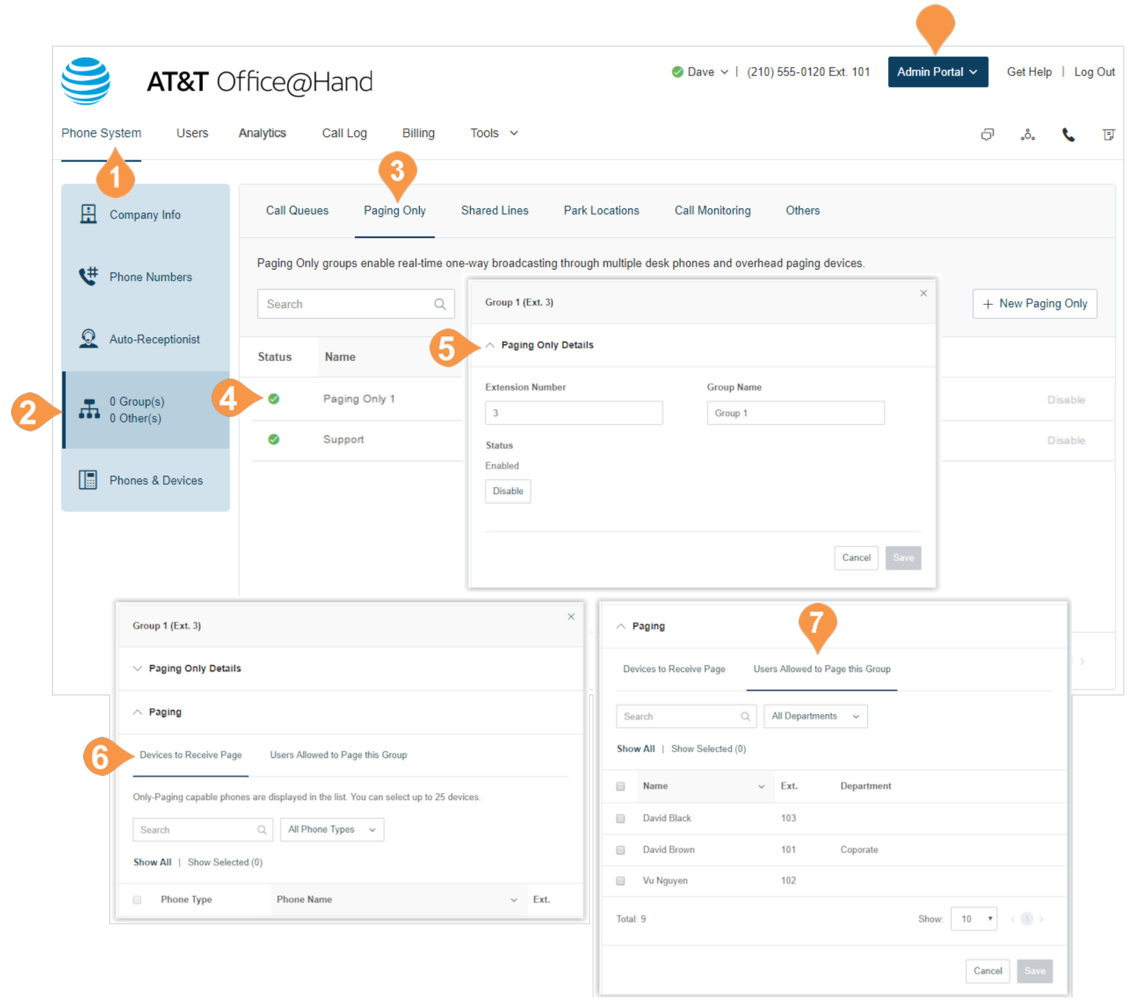
Add a Paging Only Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Paging Only** tab.
4. Click **New Paging Only**.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

Configure a Paging Only Group

After the paging group is set up, select the devices to receive pages from the list of paging devices and user phones capable of doing so.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Paging Only** tab.
4. Select a **Paging Only** group.
5. Click **Paging Only Details**.
   a. Edit your group's name and extension.
   b. Click **Save**.
6. Click **Paging**. Paging-capable devices are displayed on the **Devices to Receive Page** tab. You can filter the list of devices by **User Phones** or **Paging Devices**.
   a. Select up to 25 devices to receive pages.
   b. Click **Save**.
7. Click the **Users Allowed to Page this Group** tab. You can filter the list of users by department.
   a. Select the users who are to be allowed to page.
   b. Click **Save**.

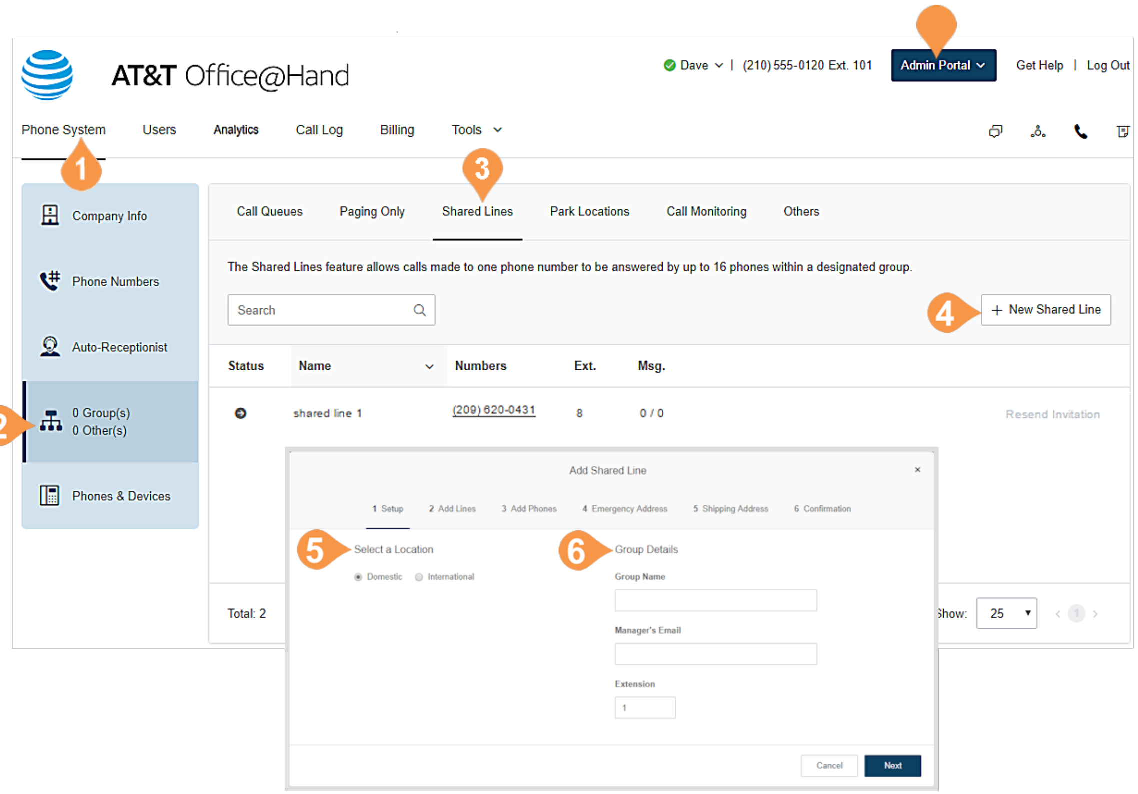


Shared Lines

The Shared Lines feature allows calls made to one phone number to be answered by up to 16 phones as a designated group. Multiple groups of shared lines can be set up. Answered calls can easily be handed off to other phones sharing the same phone number.

Add a Shared Lines Group

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click **New Shared Line**.
5. Enter an **Extension** number, **Group Name**, and **Manager Email** for the Shared Lines group.
6. Click **Next**.
7. In **Add Shared Lines**, make one of the following selections:
   a. Select **New Phone Number**, enter the number of phone lines, and the **State**, and **Area Code**, and then click **Add**.
   b. Select **Existing Phone Number** and select numbers from your Office@Hand numbers.
8. Follow the prompts to complete the ordering of the phone numbers and devices.
9. Click **Save**.



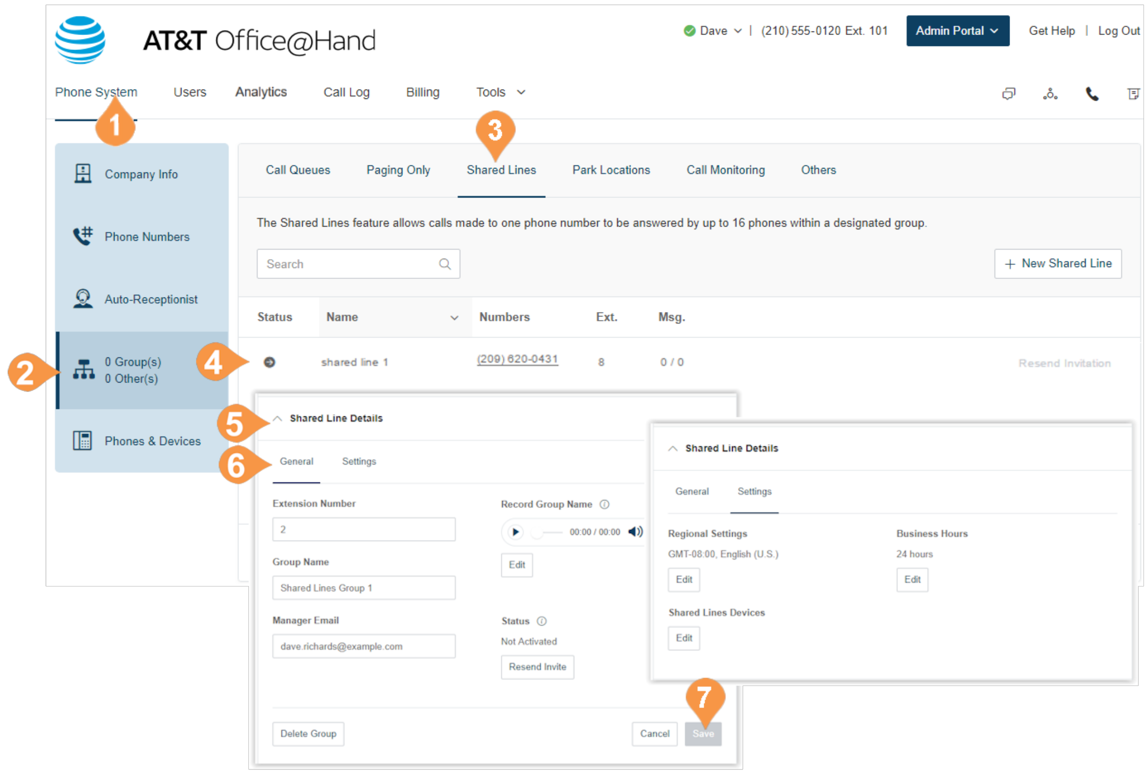
Configure a Shared Lines Group

Configure the Shared Lines group's name, password, business hours, and regional settings. You can also apply an existing template to the group.

Info

Edit your extension number, name, and delete your menu.

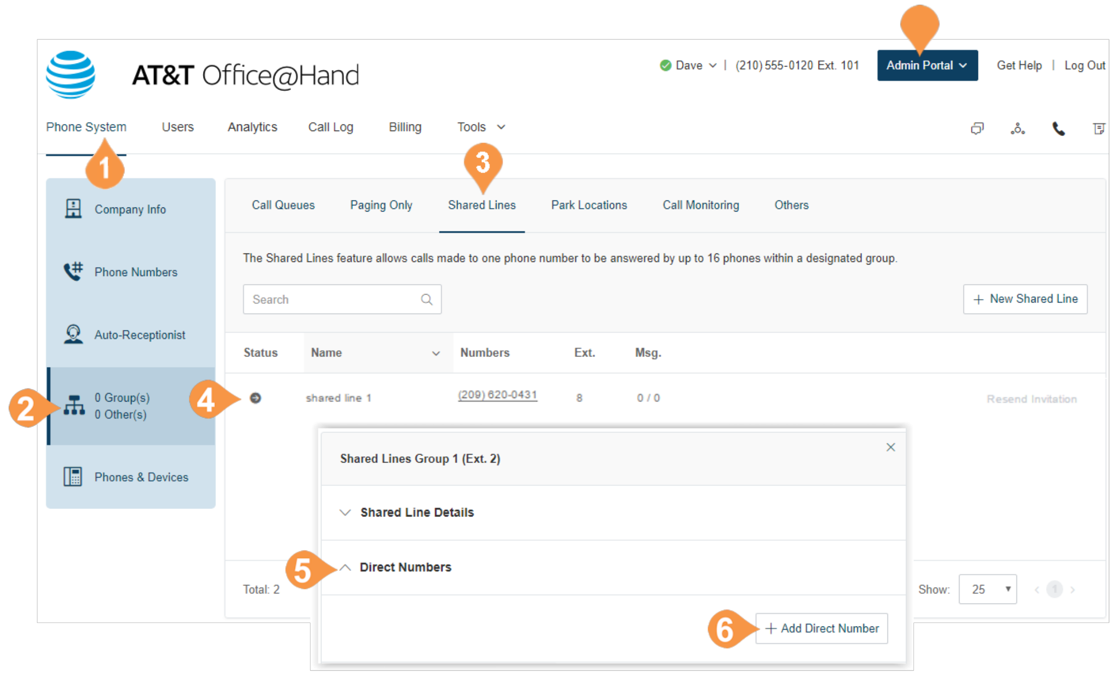
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click a **Shared Line** from the list. If you do not have a Shared List listed, see the previous page for instructions on how to create a shared line.
5. Select **Shared Line Details**.
6. Edit the group's settings in **General** and **Settings**:
   a. **Extension Number**
   b. **Group Name**
   c. **Record Group Name**
   d. **Manager Email**
   e. **Business Hours**
   f. **Regional Settings**
   g. **Status (read-only)**
   h. **Regional Settings**
   i. **Business Hours**
   j. **Shared Line Devices**
7. Click **Save**.



Add a Direct Number

To add a direct number to a shared lines group:

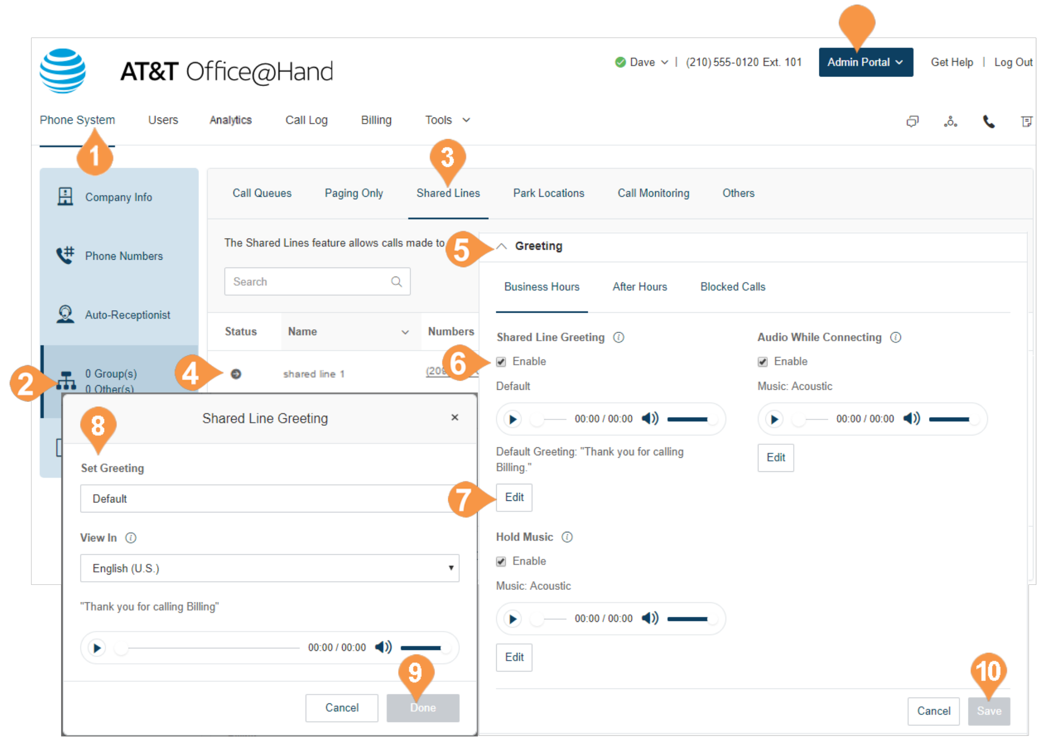
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Direct Numbers**.
6. Click **Add Direct Number.**
7. Follow the following instructions for the type of number you choose:
   a. **Local (Domestic) -** Provide the State/Province and Area Code and Select number.
   b. **Toll-Free -** Select the button for **Toll-Free** and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers**.
   c. **Vanity -** Select the button for **Vanity**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available. Select a number and click **Add Numbers**.
8. Click **Next.**
9. Review and confirm the order.
10. Click **Done**.



Set Greeting

You can set a default greeting, or record a custom greeting for the group.

1. From **Admin Portal**, select **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Select **Greeting**.
6. Under **Shared Line Greeting**, check **Enable** if you'd like a greeting.
7. Click **Edit** to set your greeting.
8. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings appear. When ready, click the red **Record** button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.



- **Import**
  Browse for a WAV or MP3 file you want to use. Click **Attach**.

9. Click **Done**.
10. Click **Save.**

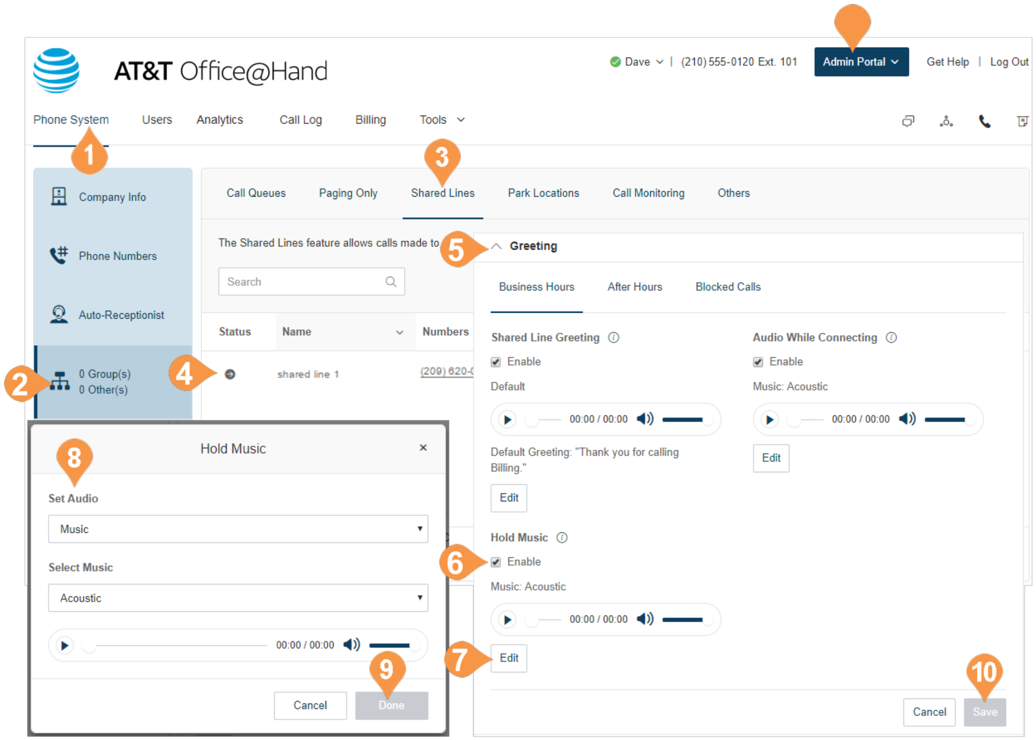
Set Custom Music on Hold

You can customize Music on Hold for shared lines to tailor the caller's waiting experience. The Music on Hold options include:

- Ringtones.
- Predefined music: Acoustic, Beautiful, Classical, Corporate, Country, Holiday, Latin, Modern Jazz, Nature, Reggae, World.
- Upload custom file in WAV or MP3 format.

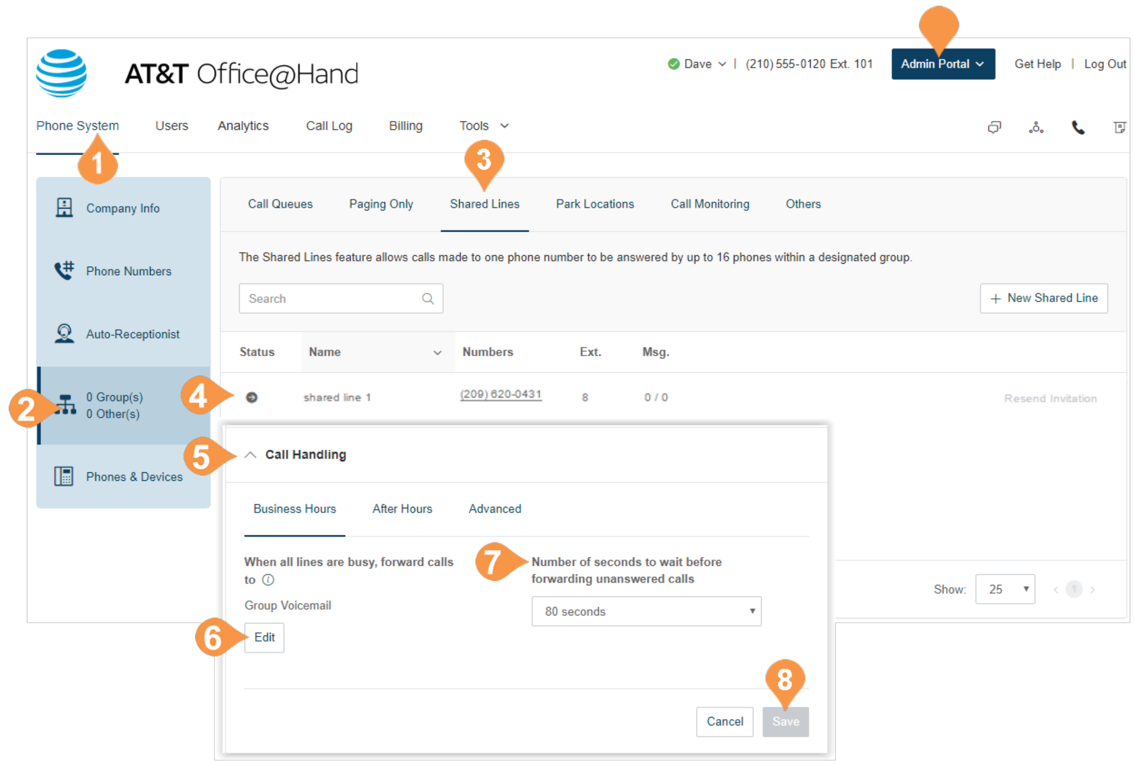
To set up custom Music on Hold:

1. From **Admin Portal**, select **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Select **Greeting**.
6. Under **Hold Music**, check **Enable**.
7. Click **Edit** to customize your Music on Hold.
8. Select the audio type and select or upload music.
9. Click **Done**.
10. Click **Save**.



Call Handling

The Shared Lines Group Call Handling section allows you to review or change each option for handling incoming calls for both Business Hours and After Hours. You can also set a customized call handling rule under the Advanced settings.



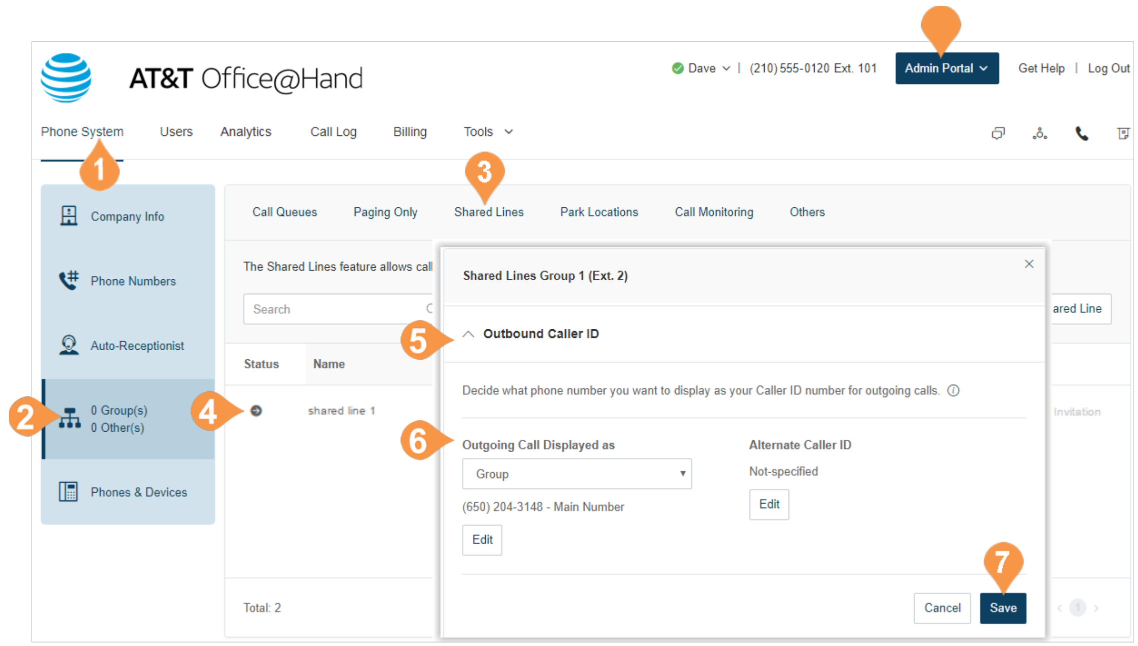
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Call Handling**.
6. Under **When all lines are busy forward calls to**, click **Edit**.
   a. Select the button next to the call destination you'd like to set.
   b. Click **Done**.
7. Under **Number of seconds to wait before forwarding unanswered calls** use the drop-down menu to choose a value between 10 and 80 seconds.
8. Click **Save**.

Note: If you would like after-hour call handling to take effect when your business is closed, configure the business hours for the extension, and complete the settings on the **After Hours** tabs.

Outbound Caller ID

Set up an outbound caller ID for the group, or use individual numbers as caller IDs for each line.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Outbound Caller ID**.
6. Choose whether you'd like to use the one number as the caller ID for the entire group or if you'd like to use individual lines.
   a. **Group** - Select **Group** from the menu. Click **Edit** and choose a number to display as your caller ID for outbound calls.
   b. **Individual Lines** - Select **Individual Lines**.
7. Click **Save.**

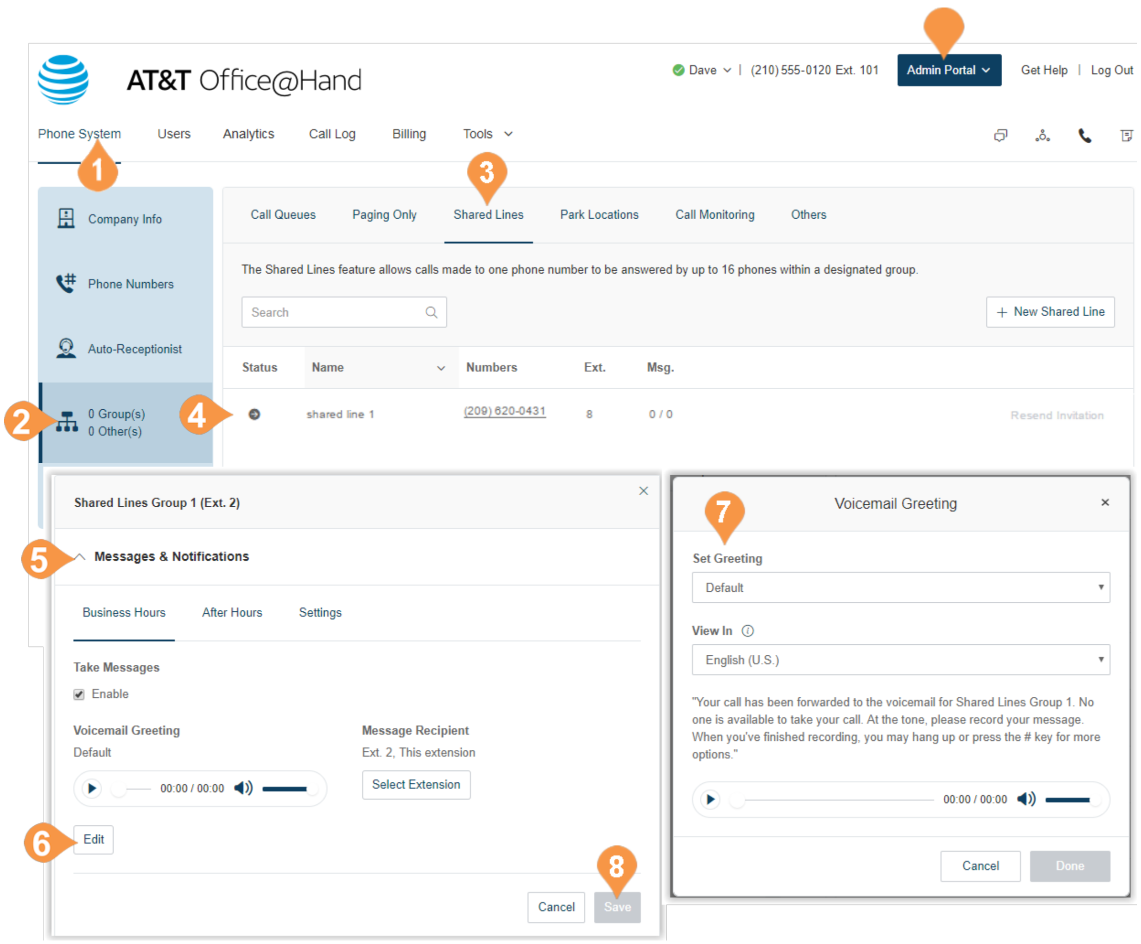


Messages & Notifications

Set up a group voicemail and notification options, such as your voicemail greeting, and message recipients and notifications for messages, missed calls, and faxes.

Voicemail Greeting

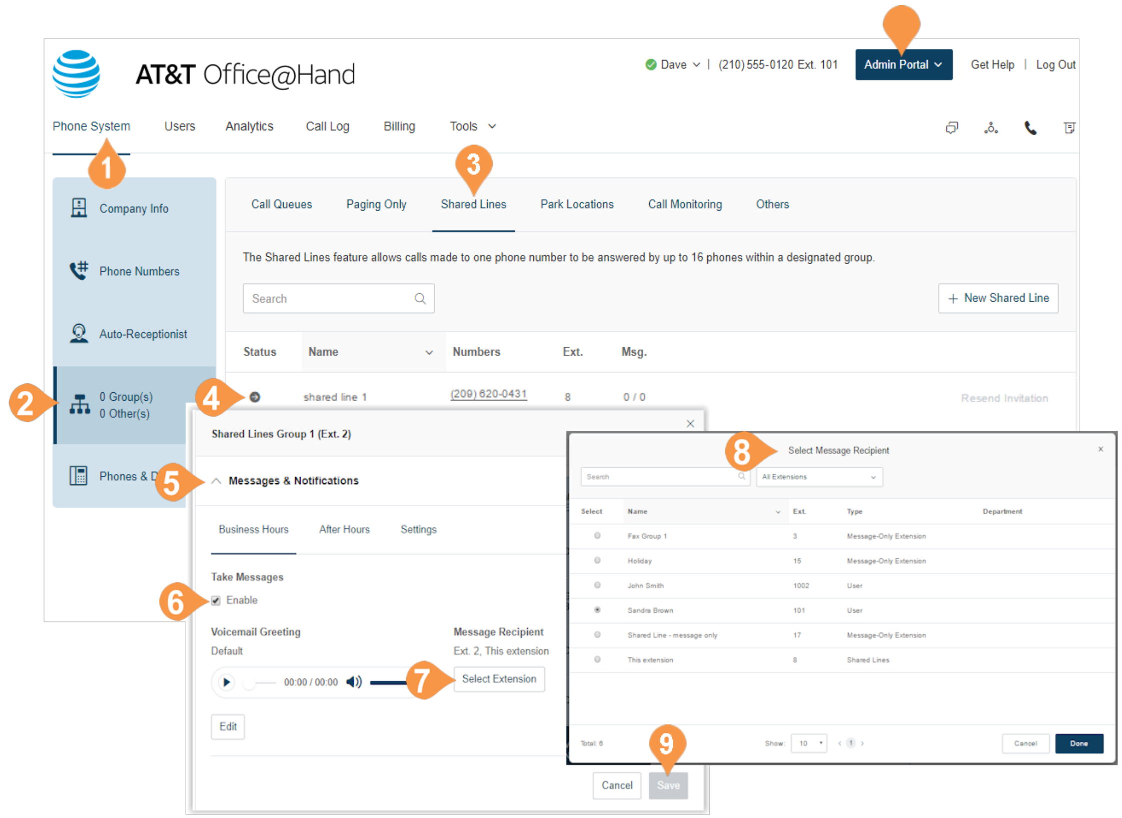
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Click **Edit** under **Voicemail Greeting**.
7. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at,** choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
8. Click **Save**.



Message Recipient

After you have set your voicemail greeting, you can set which users or groups are to receive the messages.

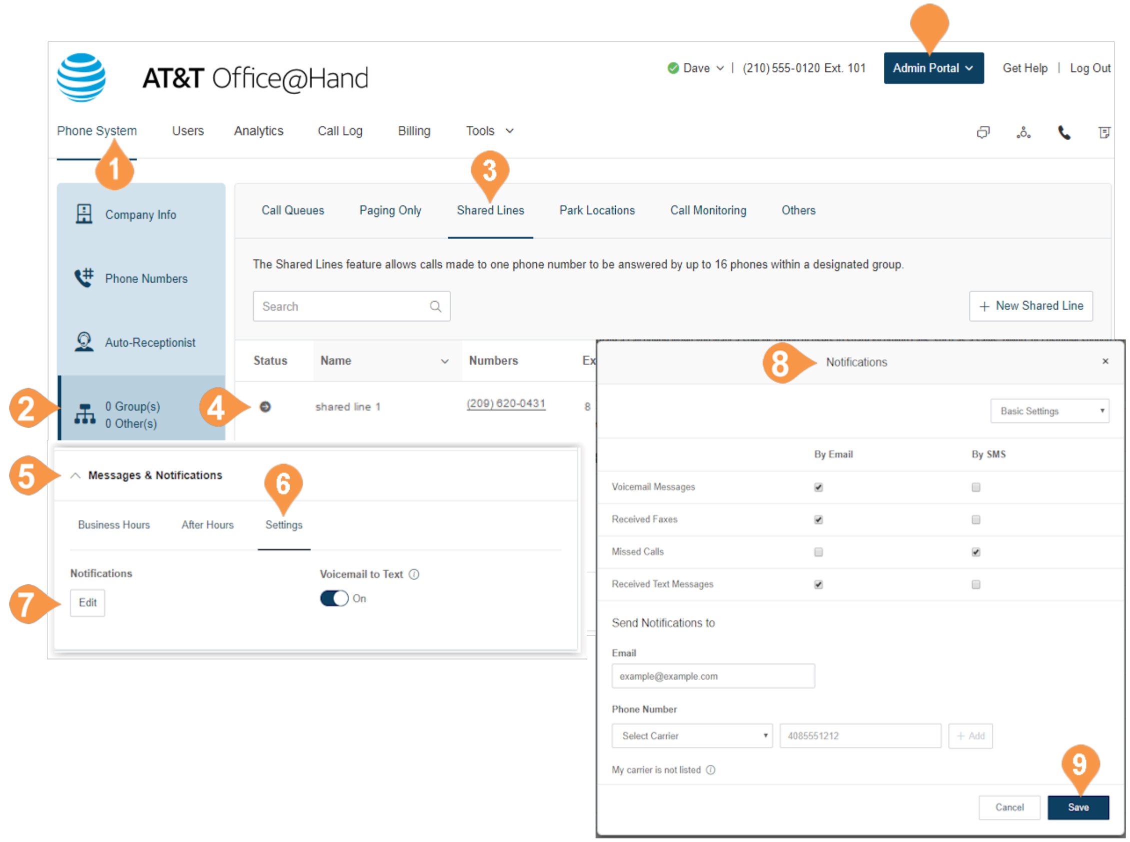
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines group**.
5. Click **Messages & Notifications**.
6. Under **Take messages**, select **Enable**.
7. Click **Message Recipient**. A pop-up will appear with a list of recipients.
8. In the **Select Message Recipient** dialog box, select a message recipient from the available list of extensions and click **Done**.
9. Click **Save**.



Notifications

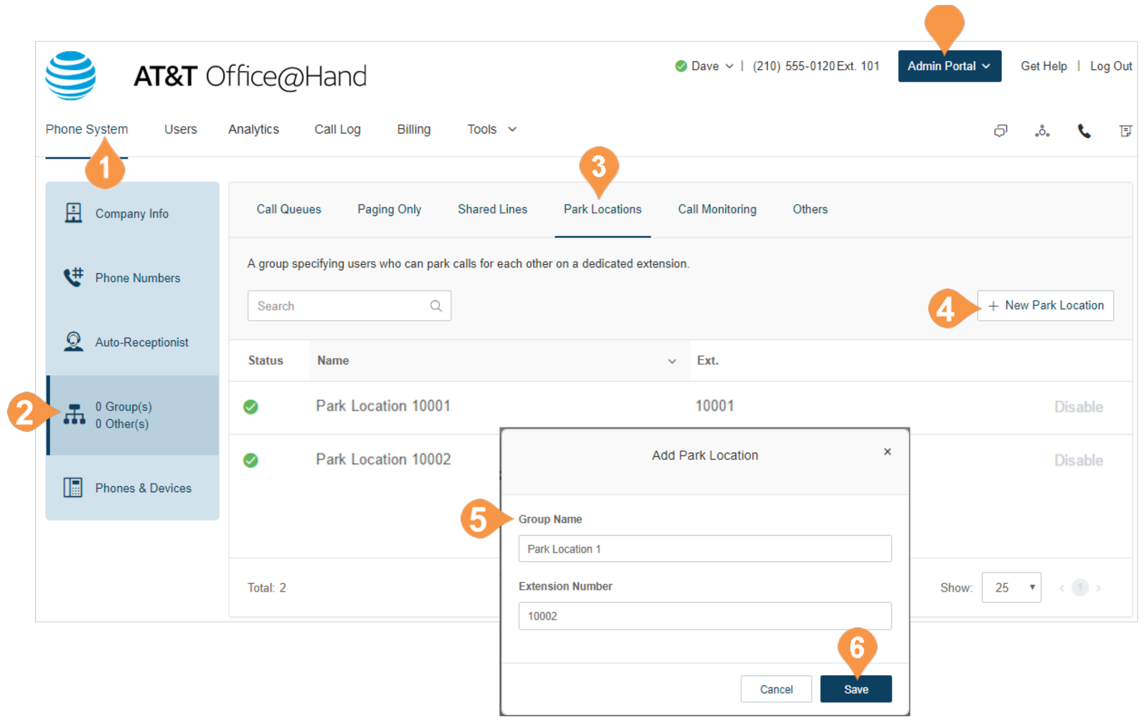
Choose who will receive notifications for voicemail messages and how they will receive them.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Click the **Settings** tab.
7. Click **Notifications**. A pop-up will appear with notification options.
8. Set your notification settings.
   a. Configure your **Basic Settings** that control the notification recipient and the default behavior for each type of notification.
   b. You can optionally set your **Advanced Settings**. These settings allows you to customize your notifications settings, including the content and recipient for each type of notification.
9. Click **Save**.



Park Location

Use Park Location groups to create a private location in which specific users can park and pick up calls. Once users have been added to the group, the park location can be added to the user's Presence on a desk phone or HUD on the Office@Hand Phone desktop application. You can have up to 100 park locations in your phone system



Add a Park Location

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Locations** tab.
4. Click **New Park Location**.
   The **Add Park Location** pop-up appears.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

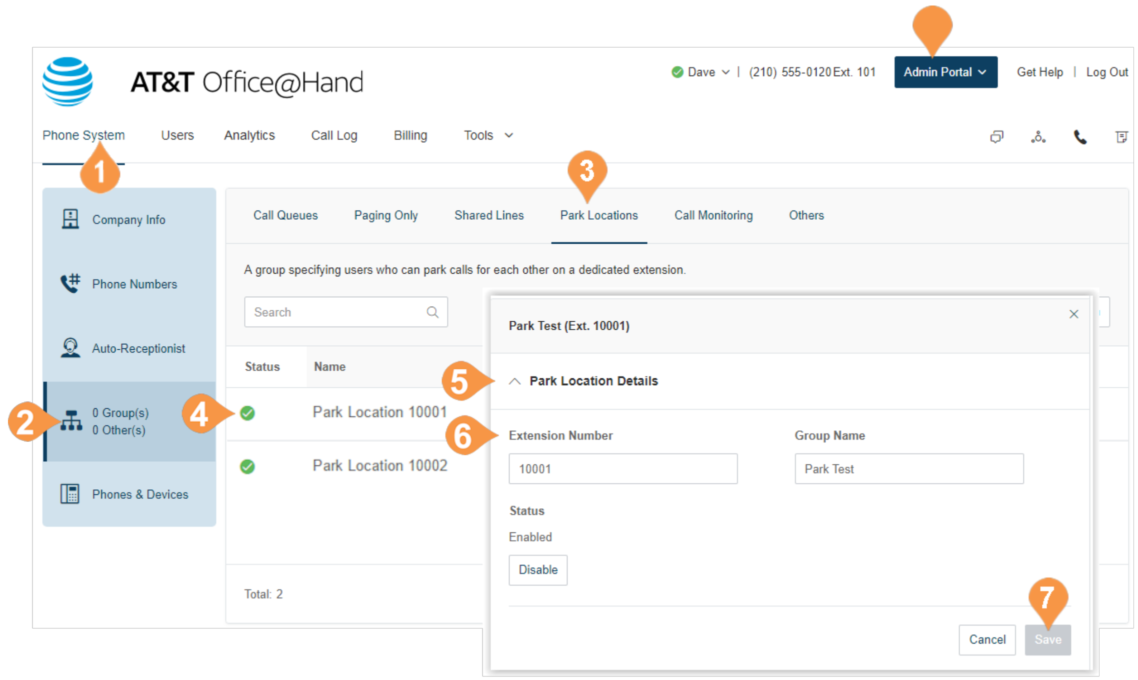
Note: Only one call can be parked in each location at a time.

Configure a Park Location

After you create a Park Location, you can edit its information and add or remove users to it.

Info

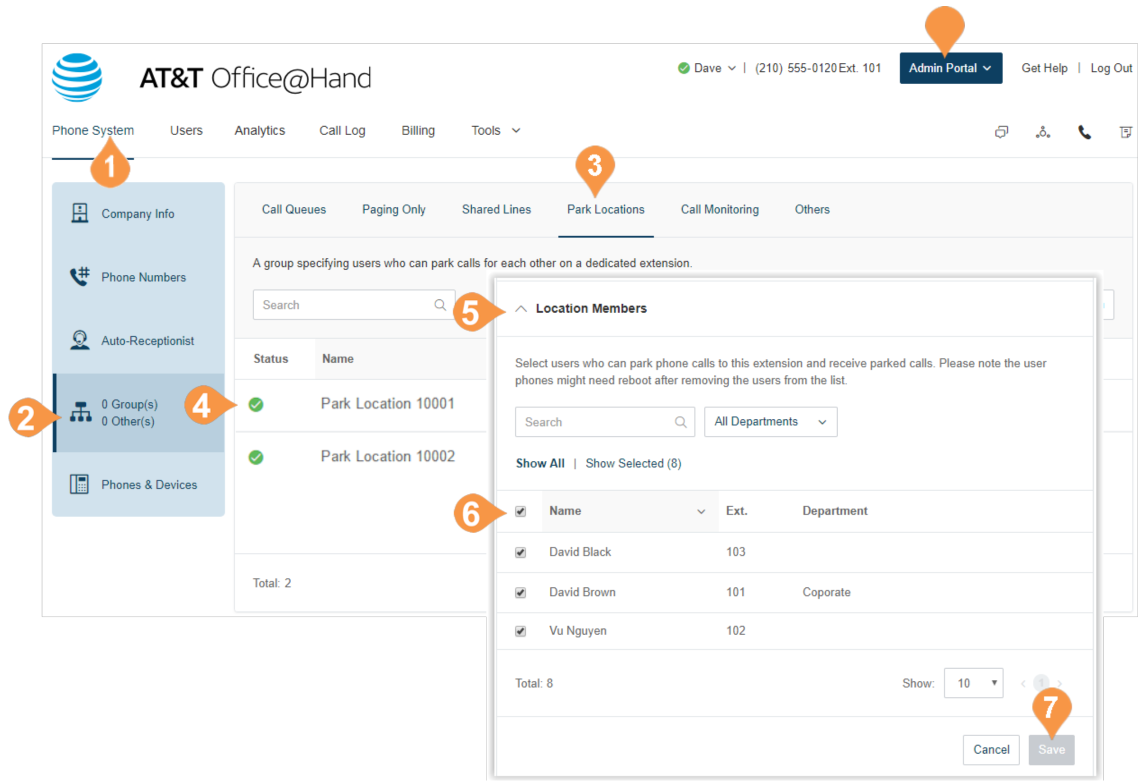
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Park Location** tab.
4. Select a **Park Location** (Park Location 1001 in this example).
5. Click **Park Location Details**.
6. Edit your **Extension Number** and **Park Location Name**. If you'd like to delete this extension, click **Delete Park Location**.
7. Click **Save**.



Add Users to a Park Location

To add users to a park location:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Park Location** tab.
4. Select a **Park Location** (Park Location 1001 in this example).
5. Click **Location Members**.
6. Select users who can park phone calls to this extension and receive parked calls. Note that when removing users the list, the user phones may require a reboot.
7. Click **Save**.



Call Monitoring Group*

Call monitoring groups all authorized users to access calls made by other users in real time. These functions provide training, coaching, and QA tools for supervisors or other levels of the management team. They can also help improve teams' performance and productivity. The following actions are available for authorized users in a call monitoring group: Monitor, Whisper, Barge, and Take Over.

To set up call monitoring, you'll need to create a call monitoring group and configure it. The system prompts you to select the users who will have permission to monitor, and lastly, select the users who can be monitored.

After creating a call monitoring group, users who have the permission to monitor others' calls will use the touch tones on their phones to access the call monitoring features. These users will select a current call in progress on their phones then press the touch tone for the action they'd like to take.

You must have a supported device with presence capabilities to use this feature.

Supported Devices:

- Polycom VVX 310
- Polycom VVX 410
- Polycom VVX 500
- Cisco SPA 303
- Cisco SPA 508G
- Cisco SPA 514G
- Cisco SPA 525G2

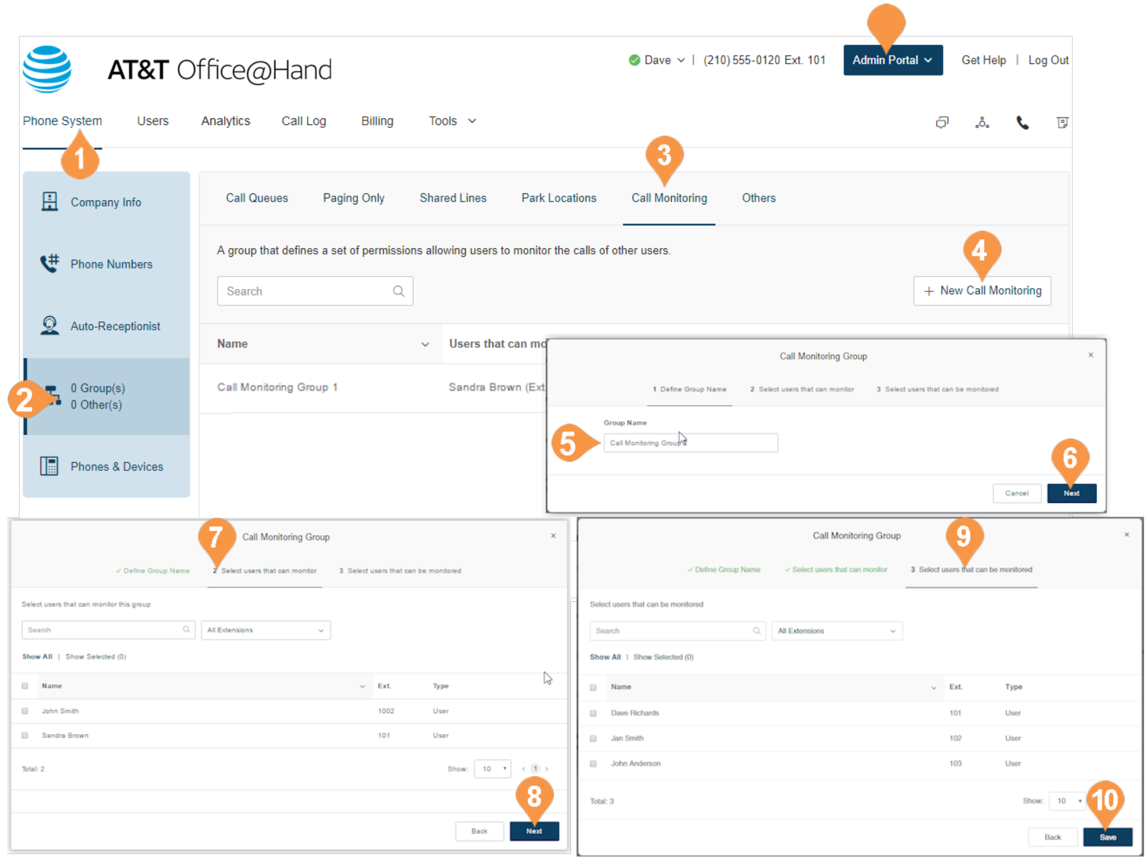
Action	Description	Example	Touch Tone
Monitor	Silently listen in on a call	Supervisors/QA to monitor performance	*80
Whisper	Speak only to the employee without the caller on the other end hearing	Provide support to users to help them handle a call	*81
Barge	Join the call so all parties can communicate with each other	Help facilitate discussion between all parties	*82
Take Over	Take over the call entirely and release the employee from the call	Allow the supervisor to handle a call and allow the employee to continue other tasks	*83

Add a Call Monitoring Group*

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Monitoring** tab.
4. Click **New Call Monitoring**.
5. Enter a **Group Name**.
6. Click **Next**.
7. Select the users that can monitor this group.
8. Click **Next**.
9. Select the users that can be monitored by this group.
10. Click **Save**.

Note: The users who will be doing the monitoring (for example, supervisors) can add the users who will be getting monitored (for example, agents) in his or her desk phone Presence appearance. The desk phone may need to be rebooted after these settings have been changed.

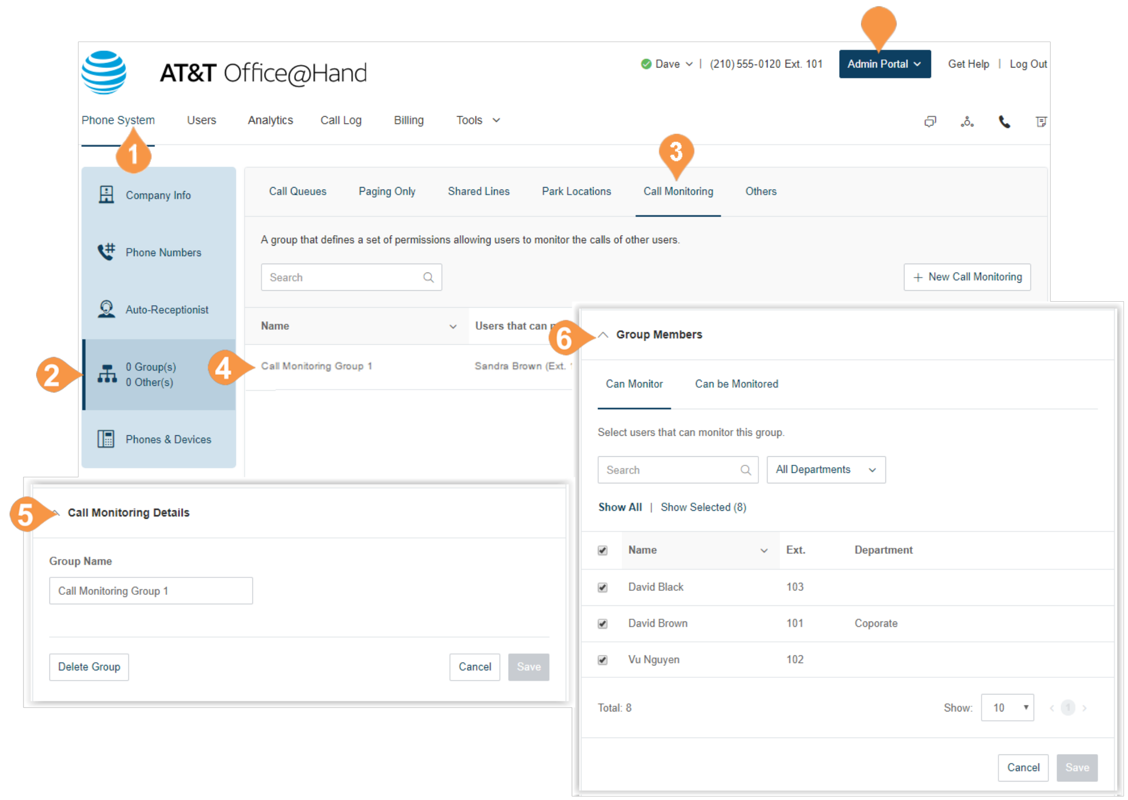
*Available for Office Premium and Enterprise users only.



Configure a Call Monitoring Group

After you create your Call Monitoring Group, you can edit the group members and set up Presence for members of the group.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Monitoring** tab.
4. Select a **Call Monitoring group**.
5. Click **Call Monitoring Details** to edit the **Group Name** or delete the group.
6. Click **Group Members** to edit the users that can monitor others or can be monitored.



Message-Only Extensions

Create an extension dedicated to receiving messages. All calls routed to this extension will automatically be directed to the extension's voicemail box.

Add a Message-Only Extension

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Click **New Message-Only Extension**.
   The **Add Messages-Only Extension** pop-up appears.
5. Enter the **Extension Name**, **Extension Number**, and **Email.**
6. Click **Save.**

Action	Description	Example	Touch Tone
Monitor	Silently listen in on a call	Supervisors/QA to monitor performance	*80
Whisper	Speak only to the employee without the caller on the other end hearing	Provide support to users to help them handle a call	*81
Barge	Join the call so all parties can communicate with each other	Help facilitate discussion between all parties	*82
Take Over	Take over the call entirely and release the employee from the call	Allow the supervisor to handle a call and allow the employee to continue other tasks	*83

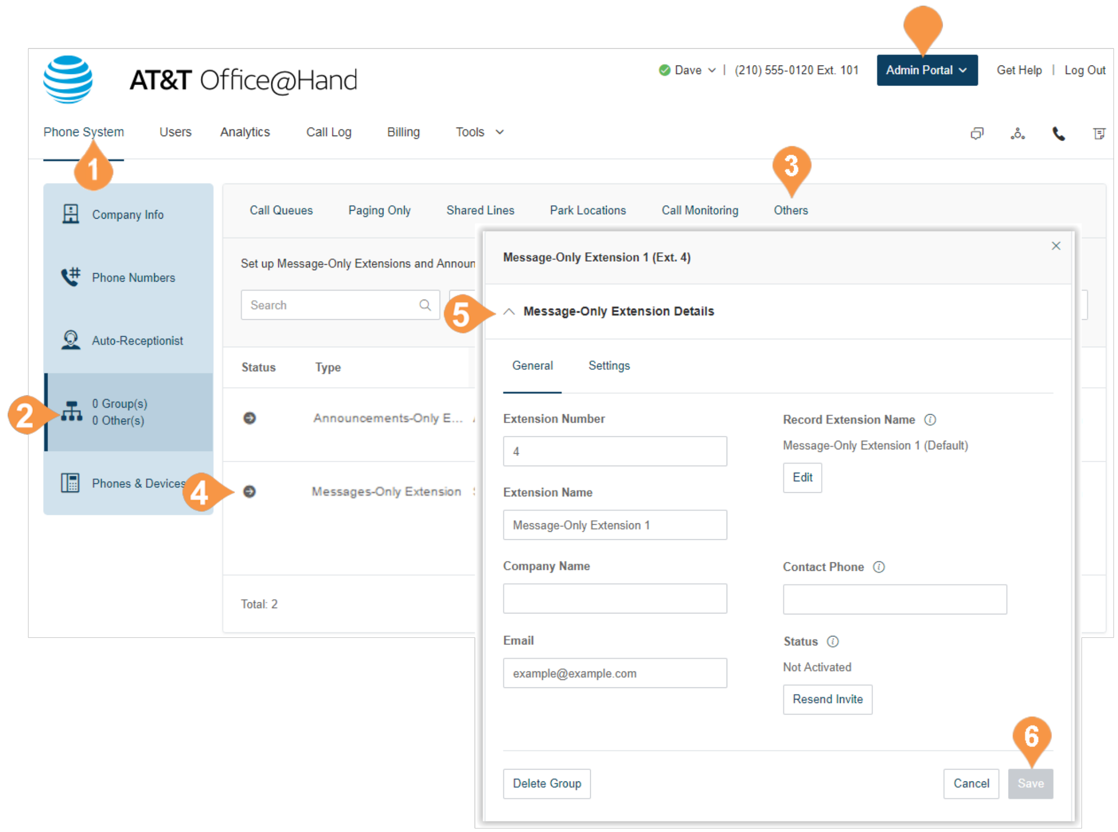
Configure a Message-Only Extension

After you've created a Message-Only Extension configure the extension info, direct numbers, and messages and notifications.

Extension Info

Edit your extension number, name, and delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Message-Only Extension Details** to view or edit the following settings on the **General** or **Settings** tabs:
   a. **Extension Number**
   b. **Extension Name**
   c. **Record Extension Name**
   d. **Company Name**
   e. **Contact Phone**
   f. **Email**
   g. **Status**
   h. **Regional Settings**
6. Click **Save**.

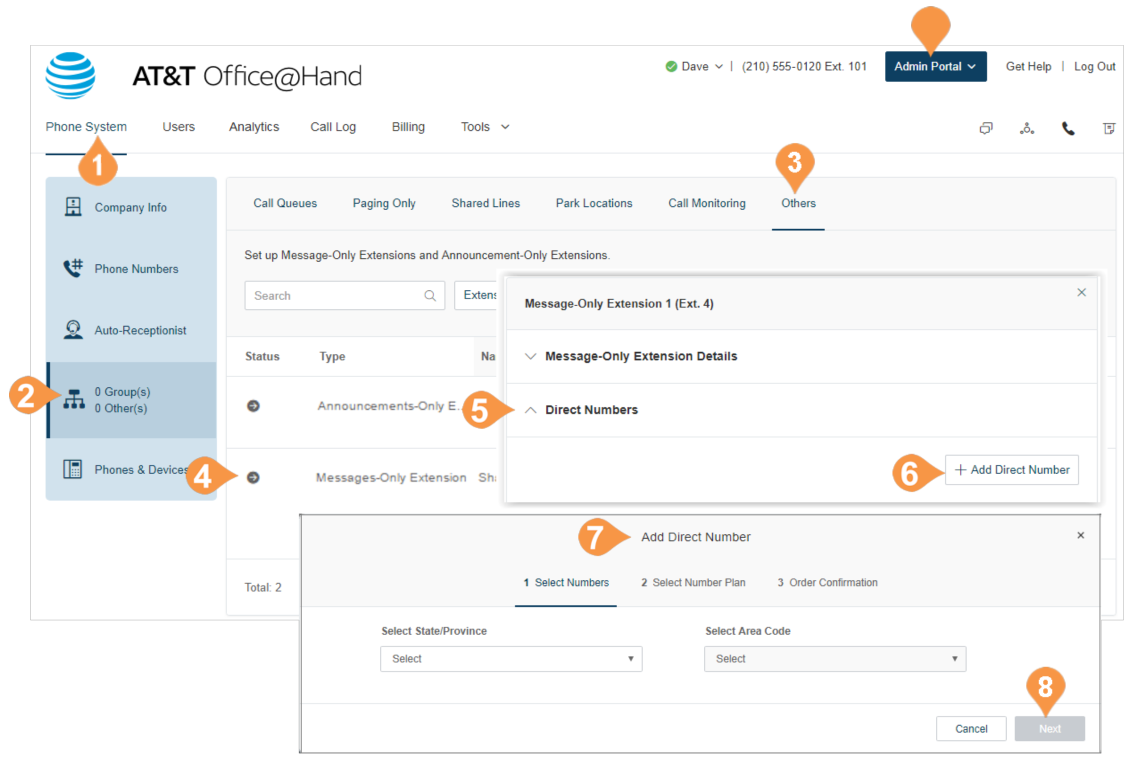


Add a Direct Number

To add a direct number to a message-only extension:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension**.
5. Select the **Direct Numbers** tab.
6. Click **Add Direct Number**.
7. Select the **State/Province** and **Area code** then select a number from the drop-down menu.
8. Click **Next** when finished choosing your number.

Follow the prompts to purchase your new number.

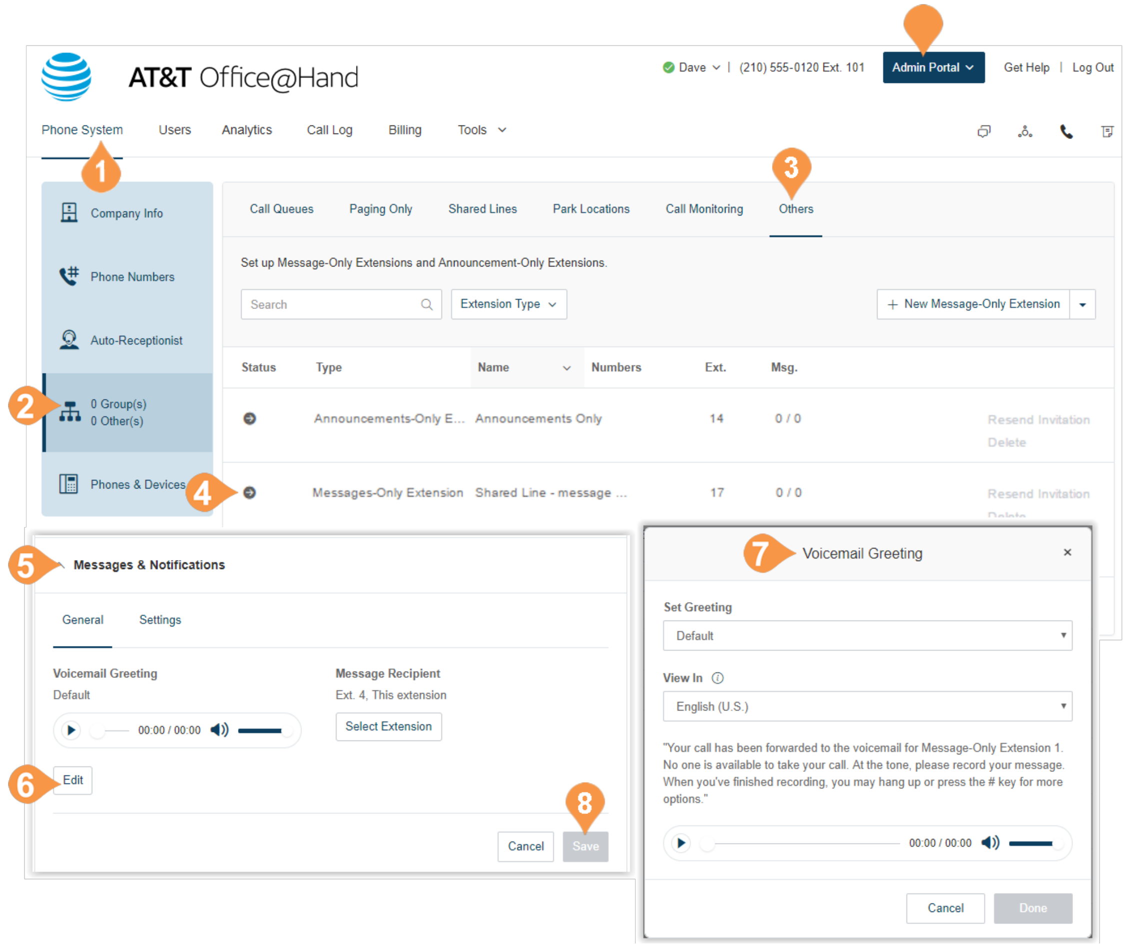


Messages & Notifications

Set the voicemail greeting to use for your Message-Only Extension.

Set a Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Messages & Notifications**.
6. Click **Edit** under **Voicemail Greeting**.
7. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
8. Click **Save**.

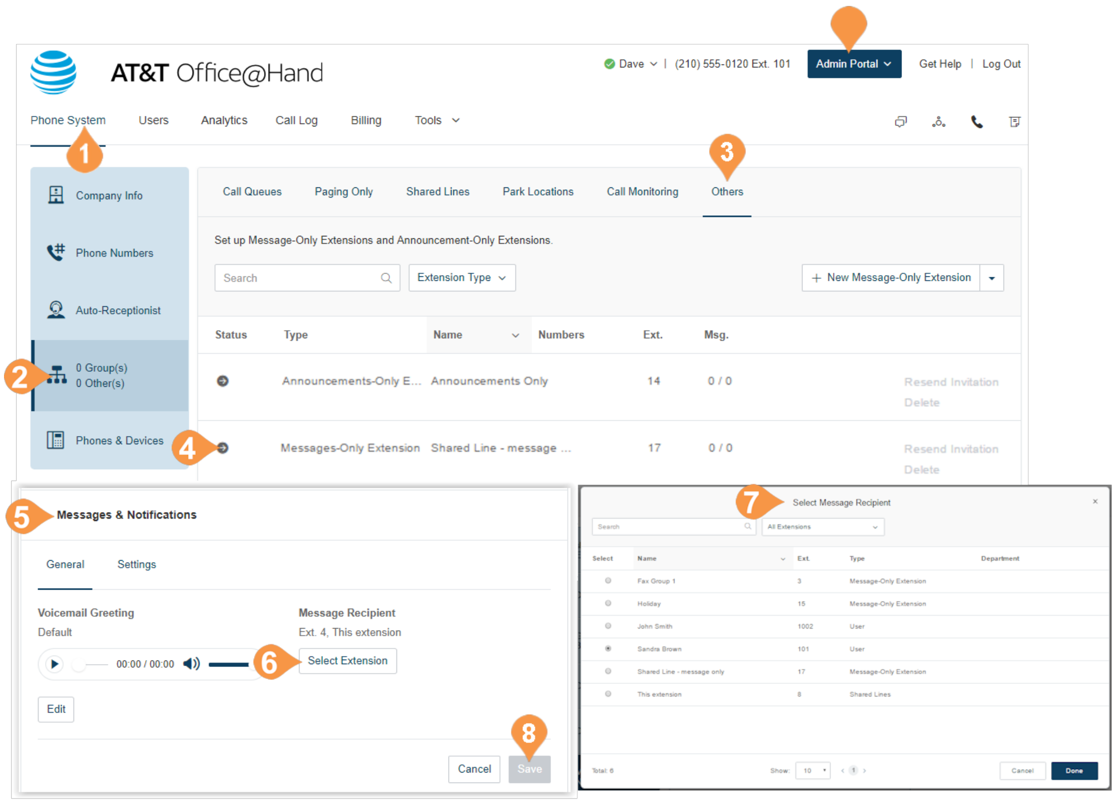


Message Recipient

After you have set your voicemail greeting, you can set which users or groups are to receive the messages.

To set a message recipient:

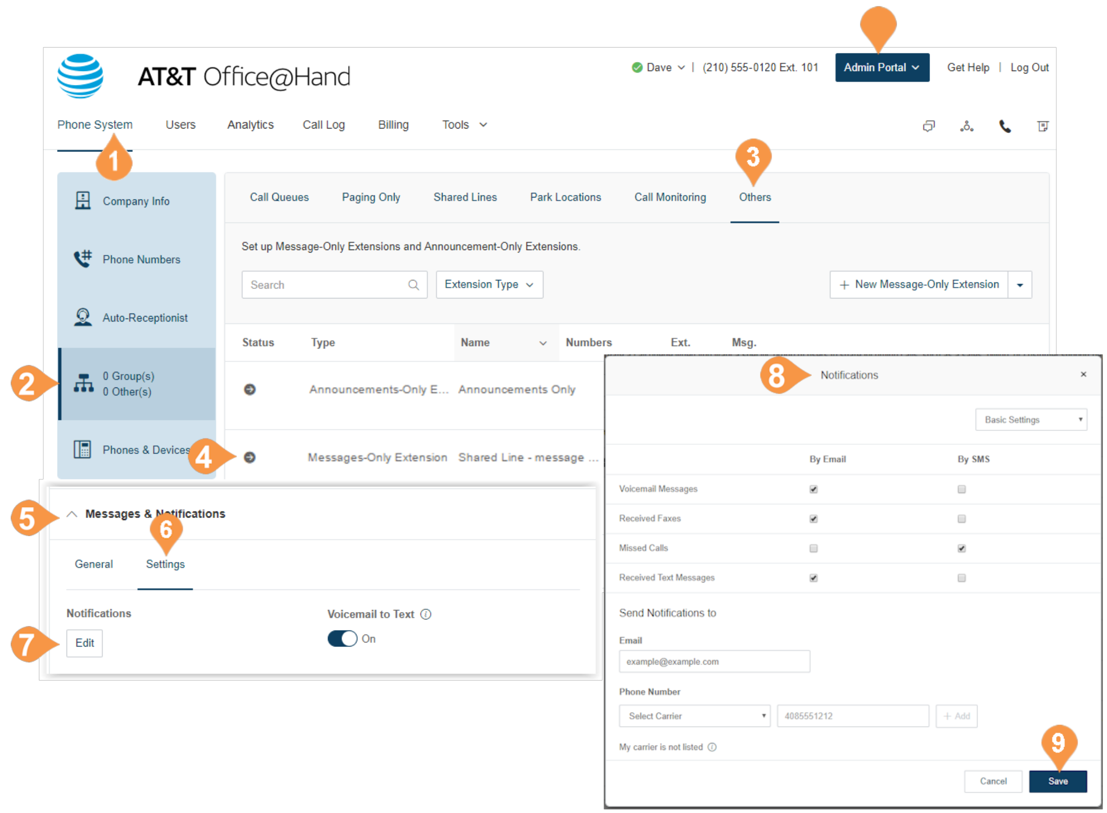
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Messages & Notifications**.
6. Click **Select Extension** under **Message Recipient**.
7. A dialog appear with a list of recipients. Select the button next to the extension you'd like to set as the recipient. Click **Done**.
8. Click **Save**.



Notifications

Choose who will receive notifications for voicemail messages and how they will receive them.

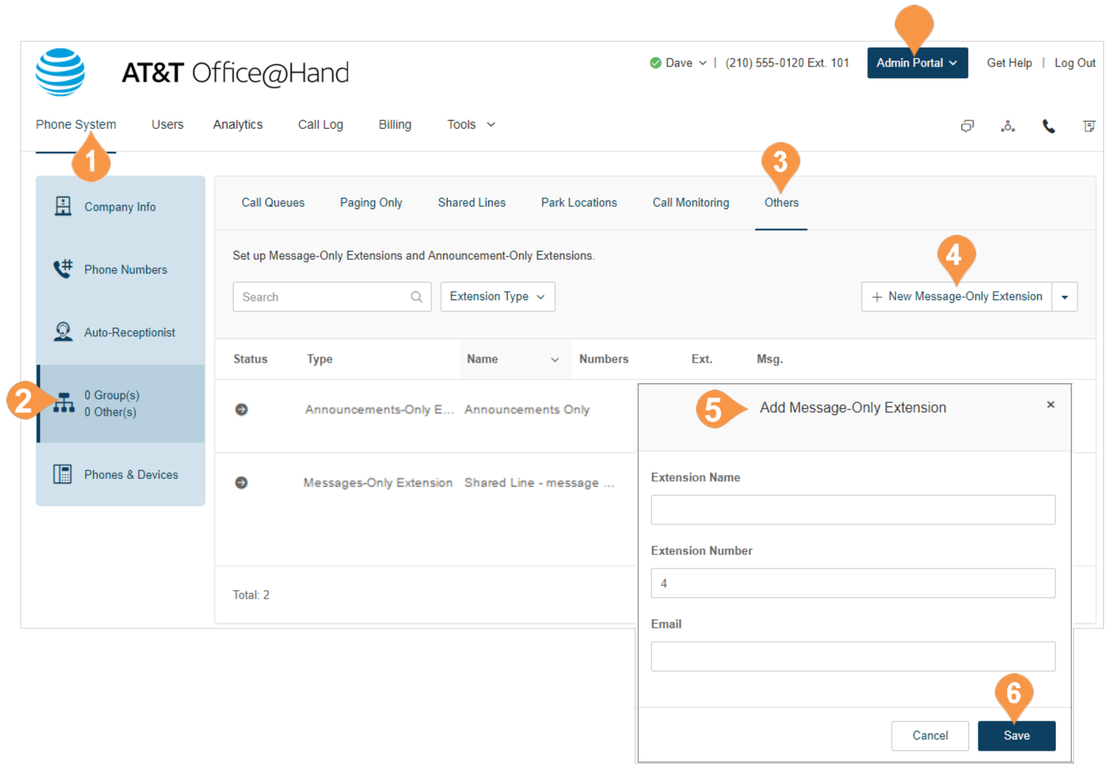
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension** (Voicemail in this example).
5. Click **Messages & Notifications**.
6. Click the **Settings** tab.
7. Click **Notifications**. A pop-up will appear with notification options.
8. Set your notification settings.
   a. Configure your **Basic Settings** that control the notification recipient and the default behavior for each type of notification.
   b. You can optionally set your **Advanced Settings**. These settings allows you to customize your notifications settings, including the content and recipient for each type of notification.
9. Click **Save**.



Announcement-Only Extensions

Create an extension that only plays an announcement for your callers. All callers routed to this extension hear a recorded announcement such as a holiday closure announcement. Add an Announcements-Only Extension.

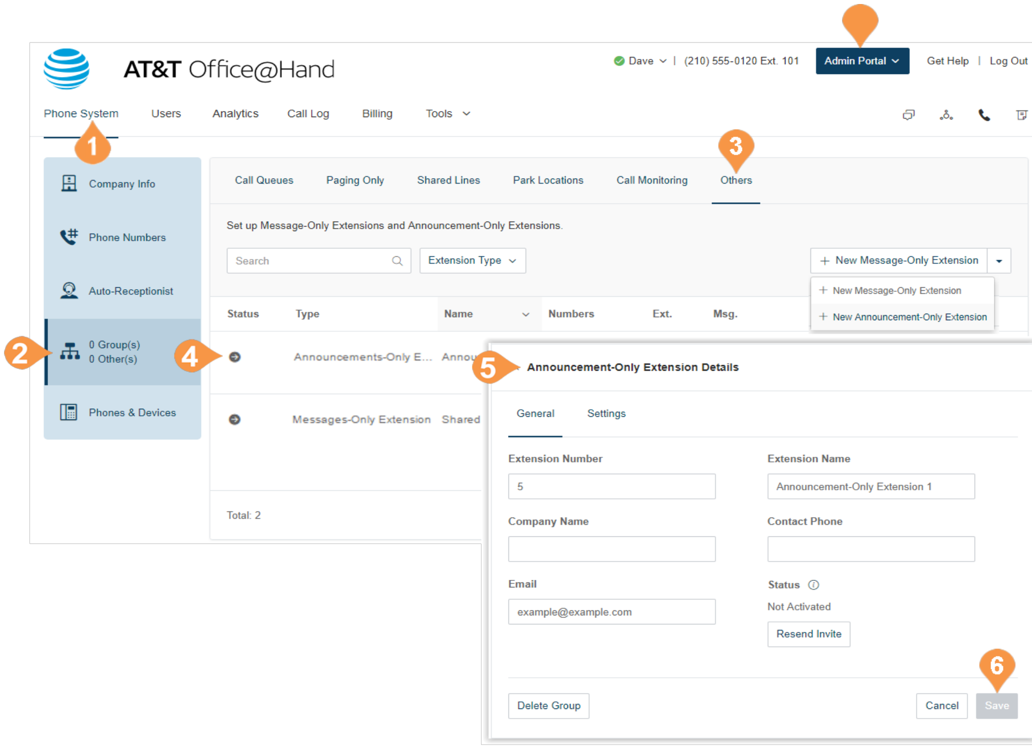
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select **New Announcements-Only Extension** from the menu.
   The **Add Announcements-Only Extension** pop-up appears.
5. Enter the **Extension Name**, **Extension Number**, and **Email**.
6. Click **Save.**



Extension Info

Edit your extension number, name, and delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Announcements-Only Extension** (Office Address and Hours in this example).
5. Click **Announcement-Only Extension Details** to view or edit the following settings on the **General** or **Settings** tabs:
   a. **Extension Number**
   b. **Extension Name**
   c. **Company Name**
   d. **Contact Phone**
   e. **Email**
   f. **Regional Settings**
6. Click **Save**.

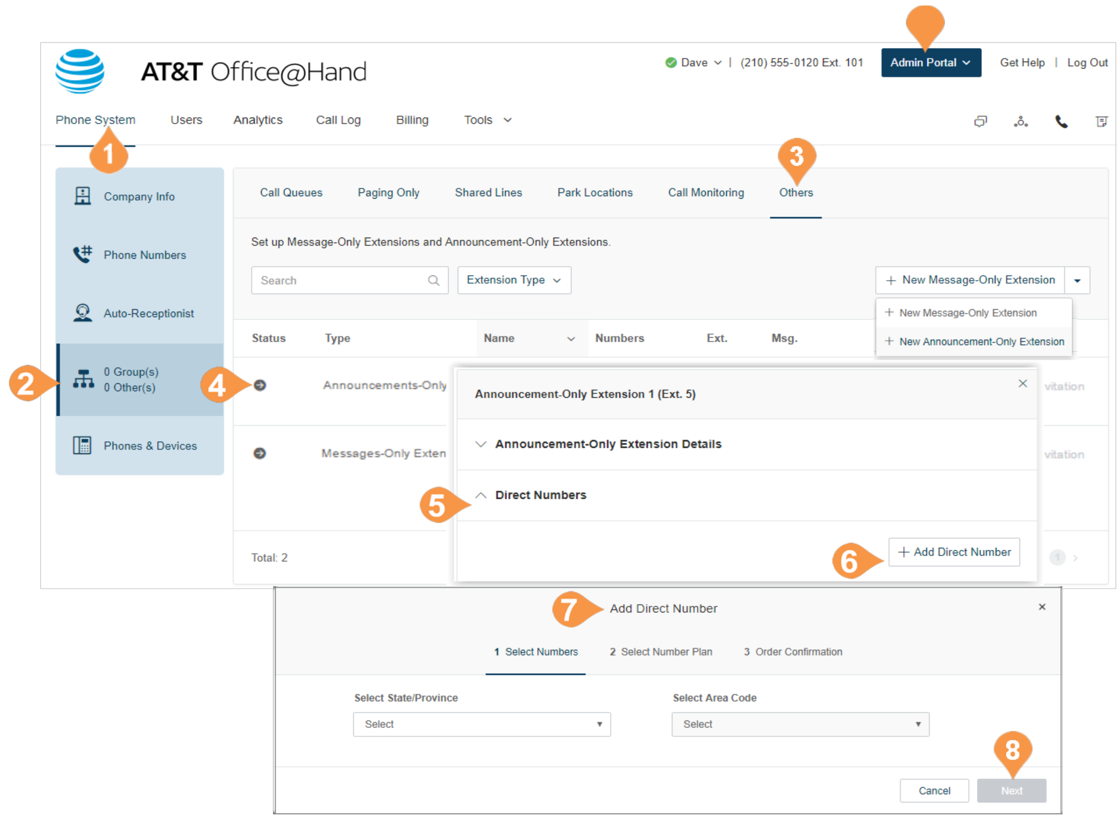


Add a Direct Number

To add a direct number for your Announcement-Only Extension:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Announcement-Only Extension** (Office Address and Hours in this example).
5. Click **Direct Number**.
6. Click **Add Direct Number**.
7. Select the **State/Province** and **Area code** then select a number from the drop-down menu.
8. Click **Next** when finished choosing your number.

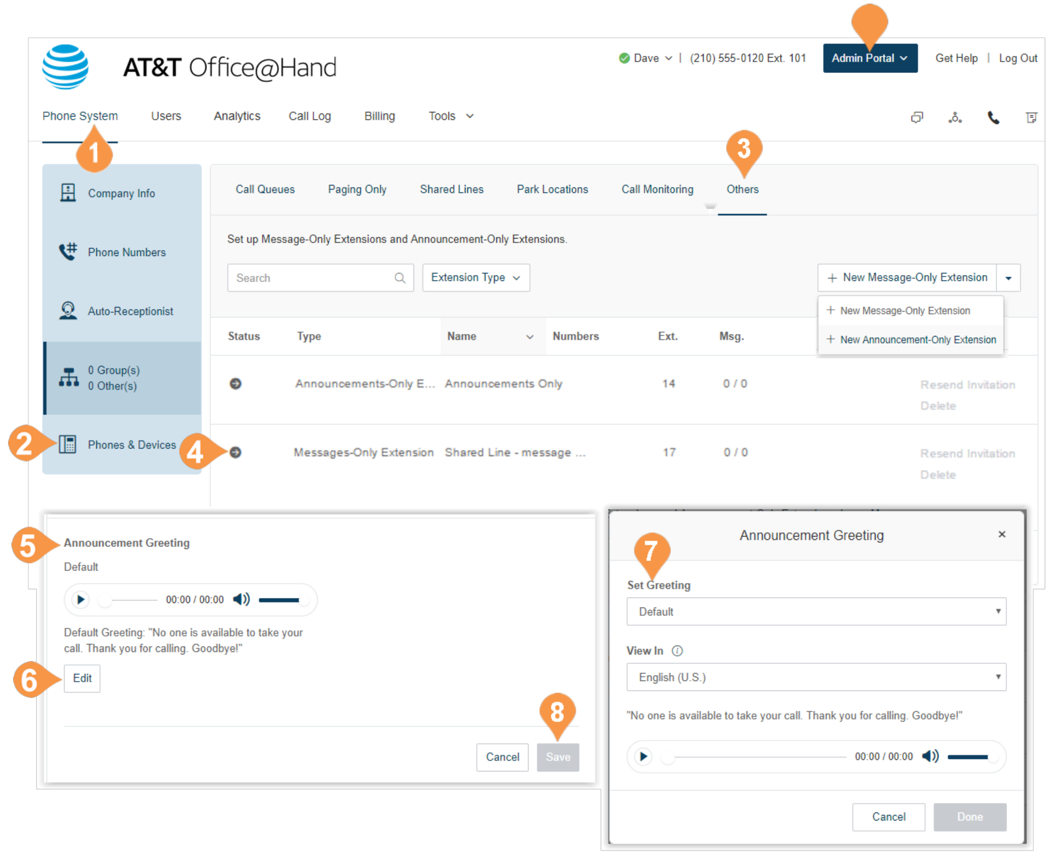
Follow the prompts to purchase your new number.



Set an Announcement

To set an announcement:

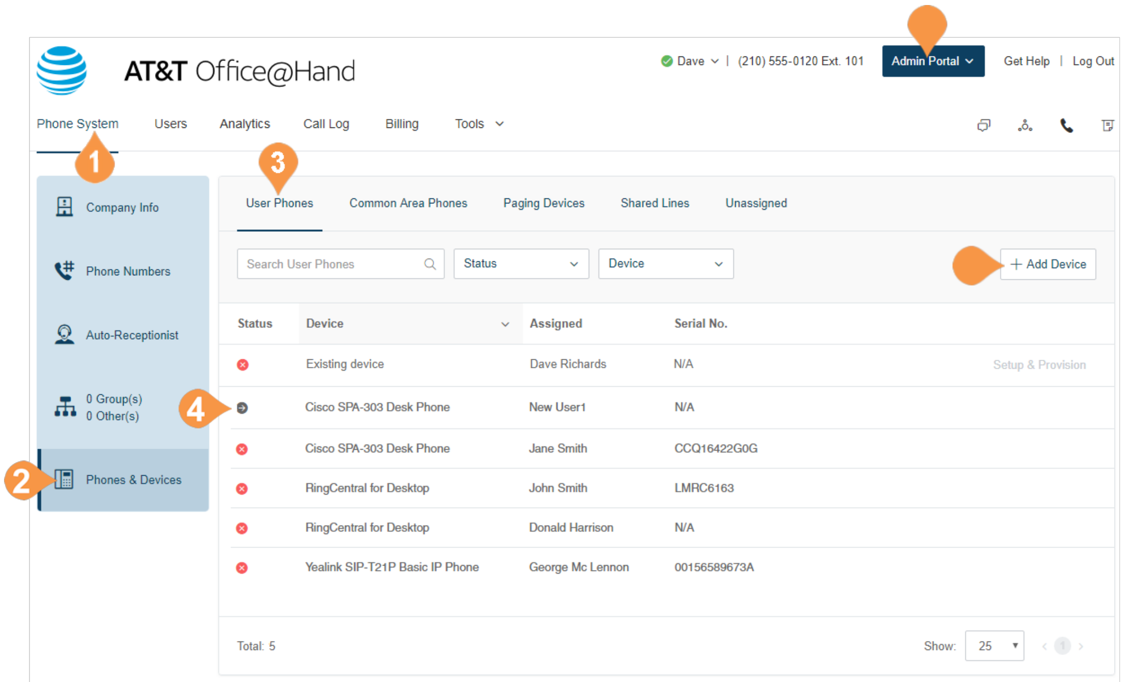
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Announcement-Only Extension** (Office Address and Hours in this example).
5. Click **Announcement**.
6. Click **Edit** under **Announcement Greeting**.
7. The interface displays the current greeting. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your announcement through your computer microphone. Stop the recording and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
8. Click **Save**.



Phones & Devices

Phones & Devices

This section provides you a view of all phones that are associated with your Office@Hand account. You can add phones and devices from this section as well.



User Phones, Devices, Unassigned

To view and edit devices on your account:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click on the tabs at the top of the middle panel to see:
   a. User Phones
   b. Common Phones
   c. Paging Devices
   d. Shared Lines
   e. Unassigned
4. Click on a device to view and edit details.

Search Devices

You can search or filter the phones or devices by specifying search text, status, or device, and selecting the search icon. The search displays results for devices meeting the search criteria in the device category.

Add a Device

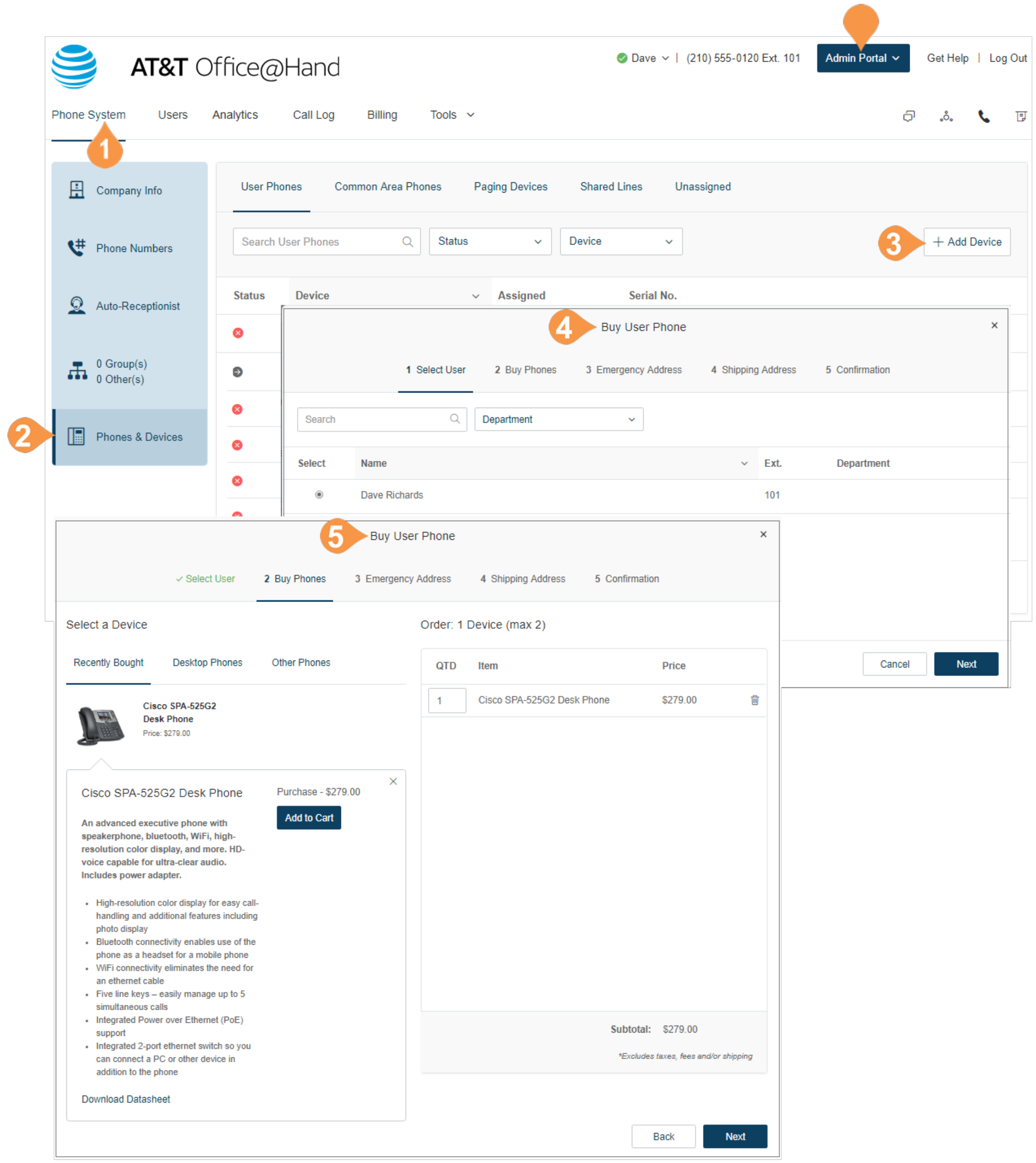
You can add a phone or device by clicking **Add Device** in the upper right. See the next pages for more detailed instructions.

Add a User Phone

To add a user phone:

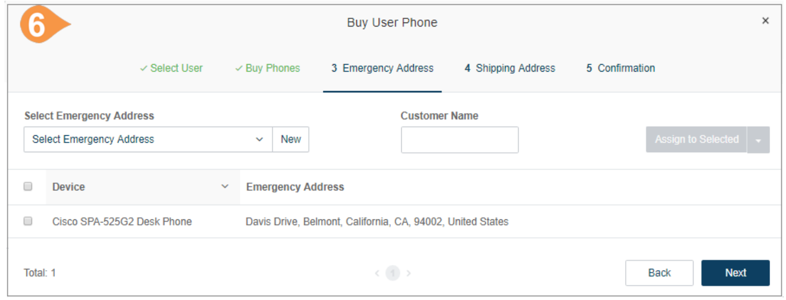
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Add Device**.
4. Select a user to assign the phone to.
5. Select a phone to buy.

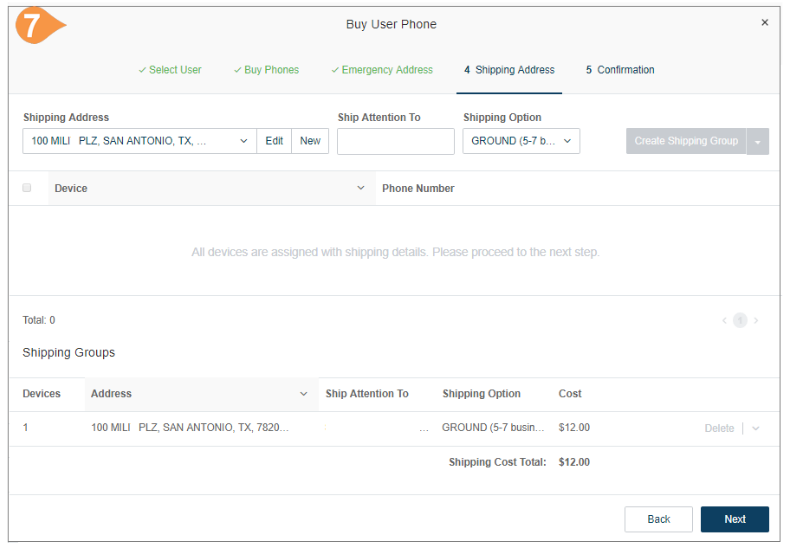
Instructions continue on the next page.

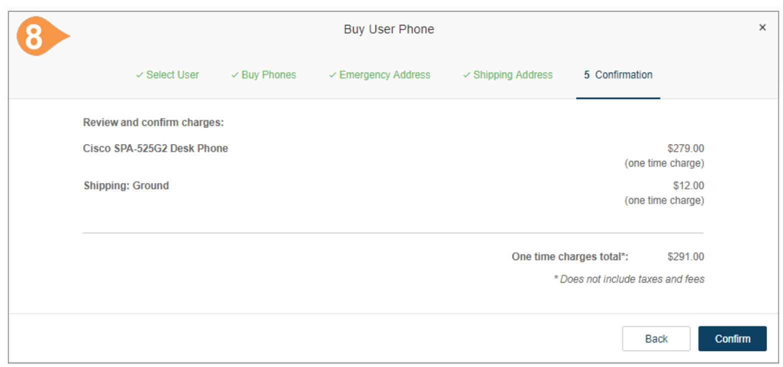


6. Register your **Emergency Address**.
   a. Select the address from the drop-down menu.
   b. Select one or more devices.
   c. Click **Assign to Selected** or **Assign to All**.
   d. Click **Next**.
7. Specify your **Shipping Address**.
   a. Enter or select an address from the menu.
   b. Select one or more devices.
   c. Create a shipping group to apply to certain devices you are ordering, or select **Ship All Items to this Address**.
   d. Click **Next**.
8. Review your changes and **Confirm**.

Note: If you have exceeded your device spending limit for your current billing cycle, your transaction will fail and you will see a message warning you that your order has been put on hold. The warning message states: “Your selections exceed the allowable maximum equipment value that can be placed on your bill (for this billing cycle). Your order has been put on hold. Please call us at AT&T Advanced Solutions customer care at (866) 563-4703.” You can call the number on the warning message to resolve the issue.





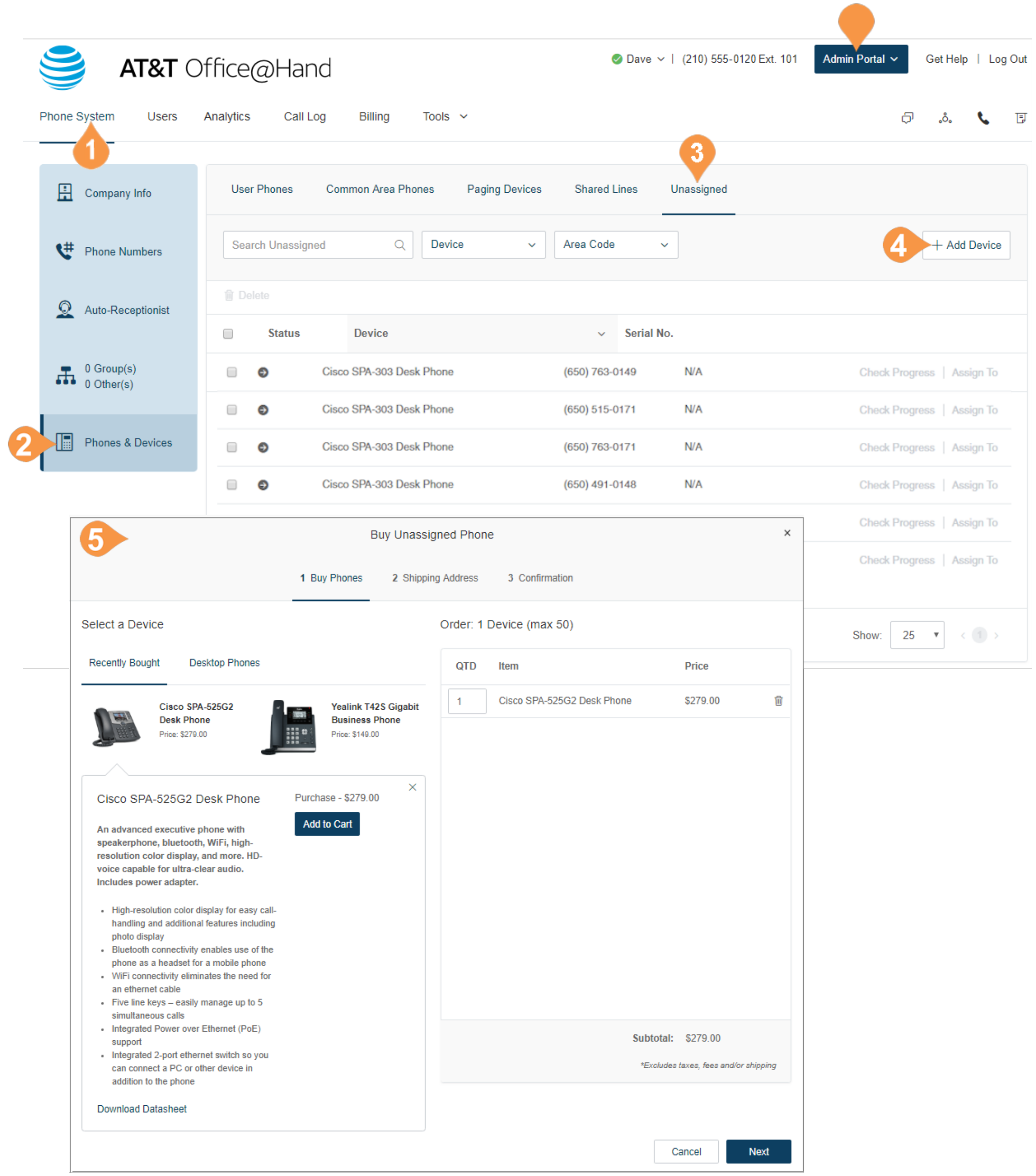


Add an Unassigned Phone

To add an unassigned phone:

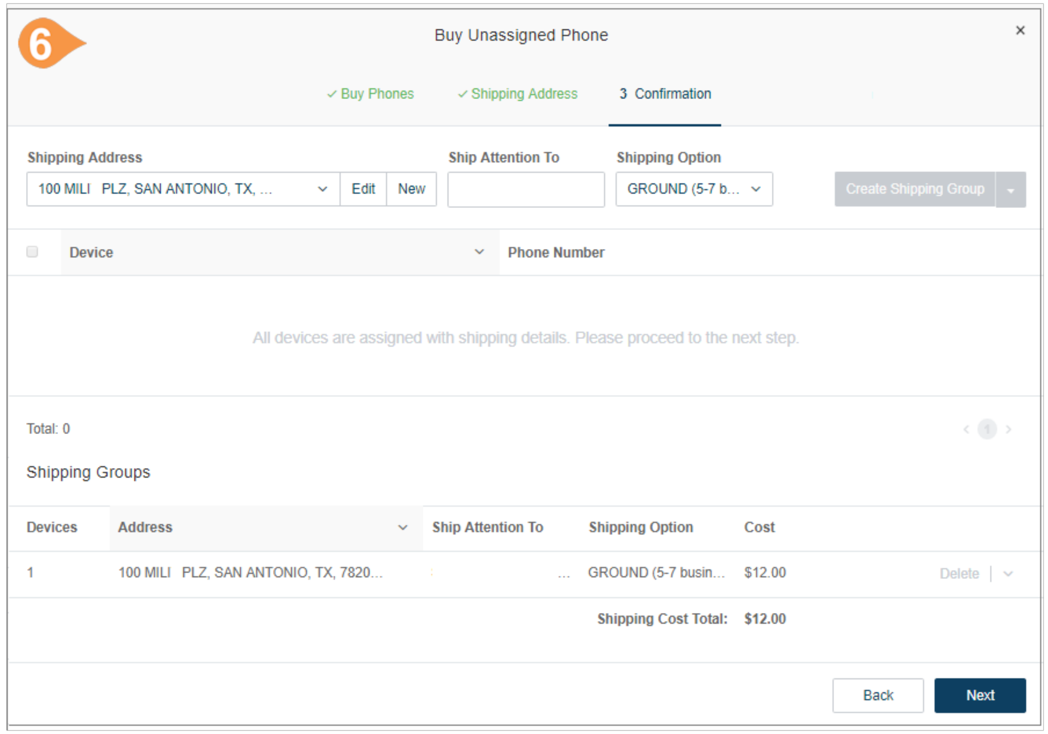
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Unassigned** tab.
4. Click **Add Device**.
5. Select a phone to buy.

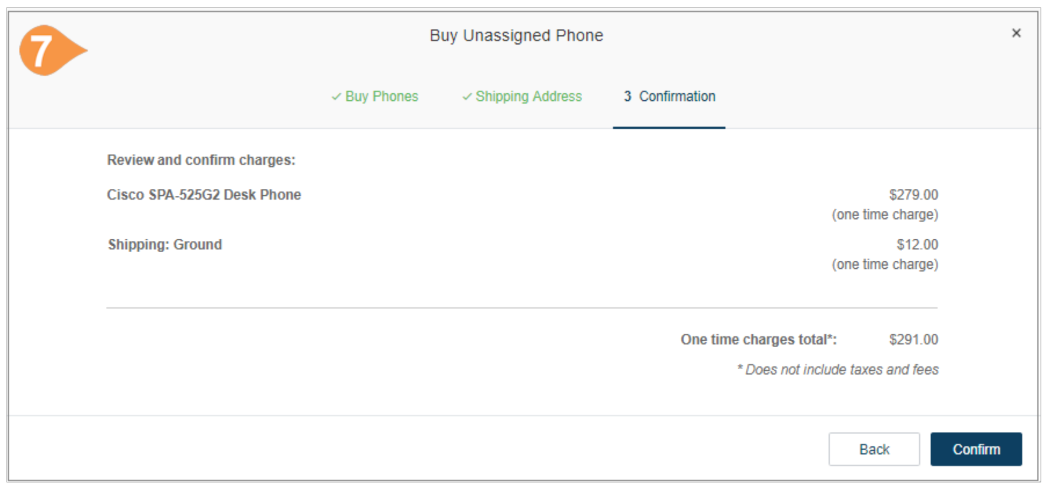
Instructions continue on the next page.



6. Specify your **Shipping Address**.
   a. Enter or select an address from the menu.
   b. Select one or more devices.
   c. Create a shipping group to apply to certain devices you are ordering, or select **Ship All Items to this Address**.
   d. Click **Next**.
7. Review your changes and **Confirm**.

Note: If you have exceeded your device spending limit for your current billing cycle, your transaction will fail and you will see a message warning you that your order has been put on hold. The warning message states: “Your selections exceed the allowable maximum equipment value that can be placed on your bill (for this billing cycle). Your order has been put on hold. Please call us at AT&T Advanced Solutions customer care at (866) 563-4703.” You can call the number on the warning message to resolve the issue.

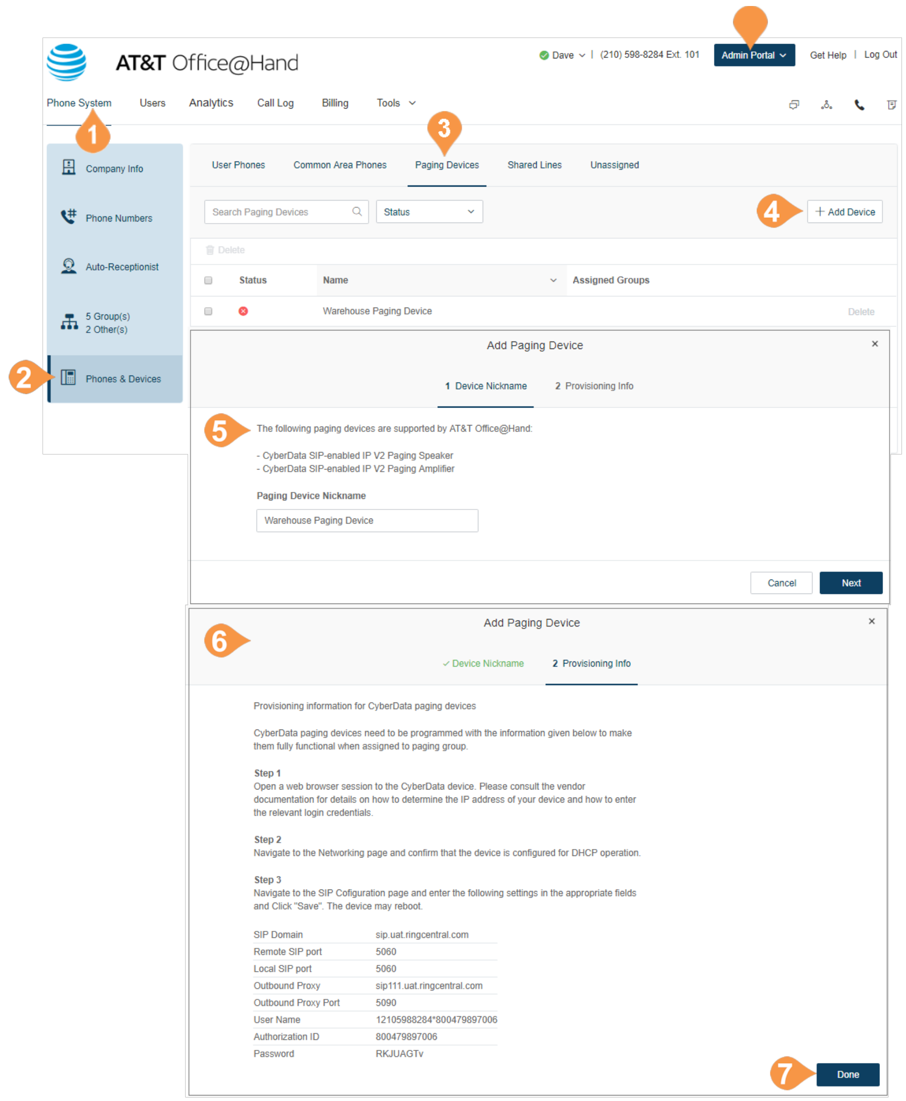




Add a Paging Device

To add a paging device:

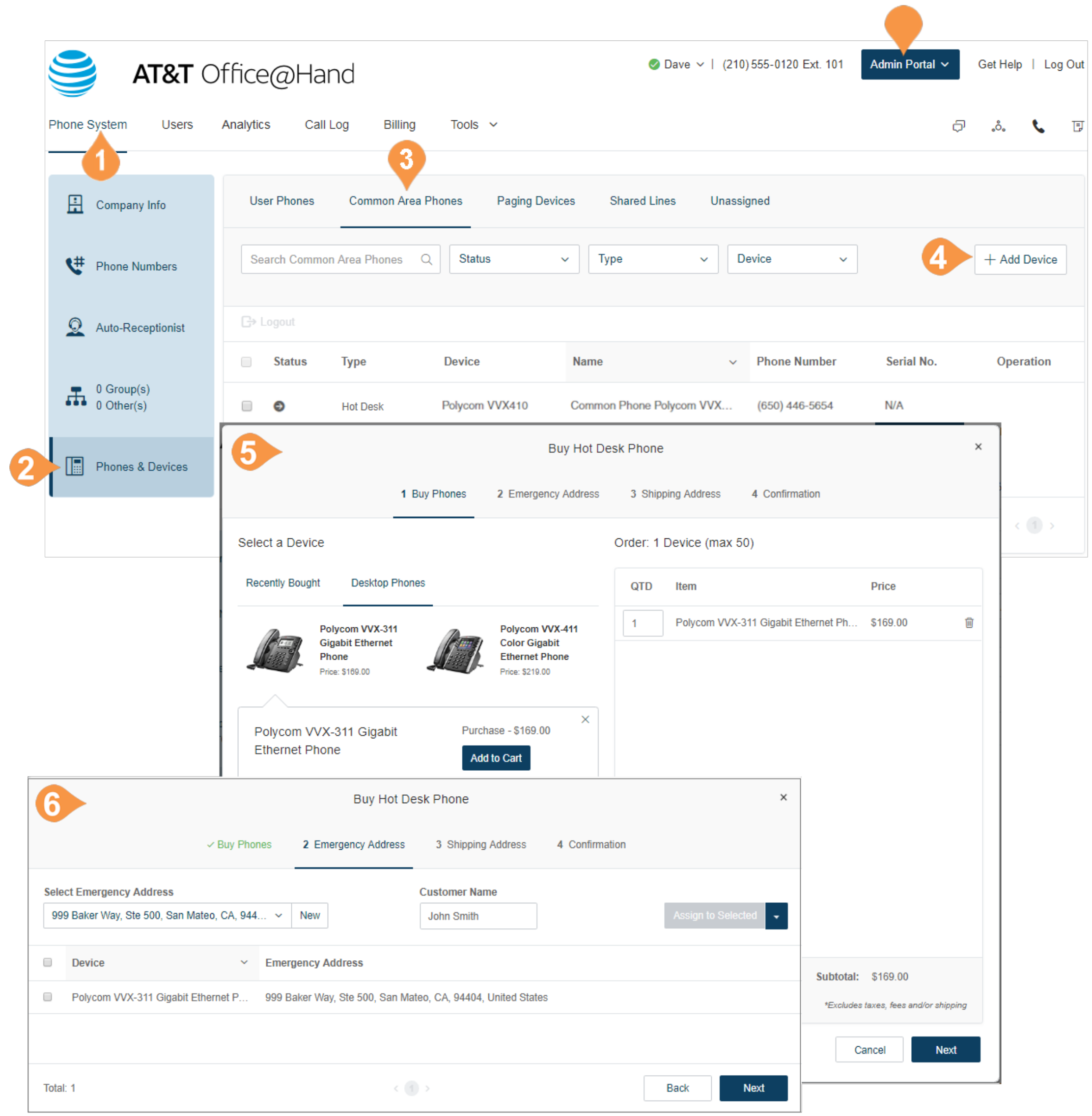
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Paging Devices** tab.
4. Click **Add Device**.
5. Enter the paging device nickname.
6. View the provisioning information for the device.
7. Click **Done** to add the device to your system.



Add a Common Phone

A common phone is only available for hot desking, and enables any employee to log in to a shared phone that adopts the user's phone settings. For more information on managing common phones, see Hot Desking.

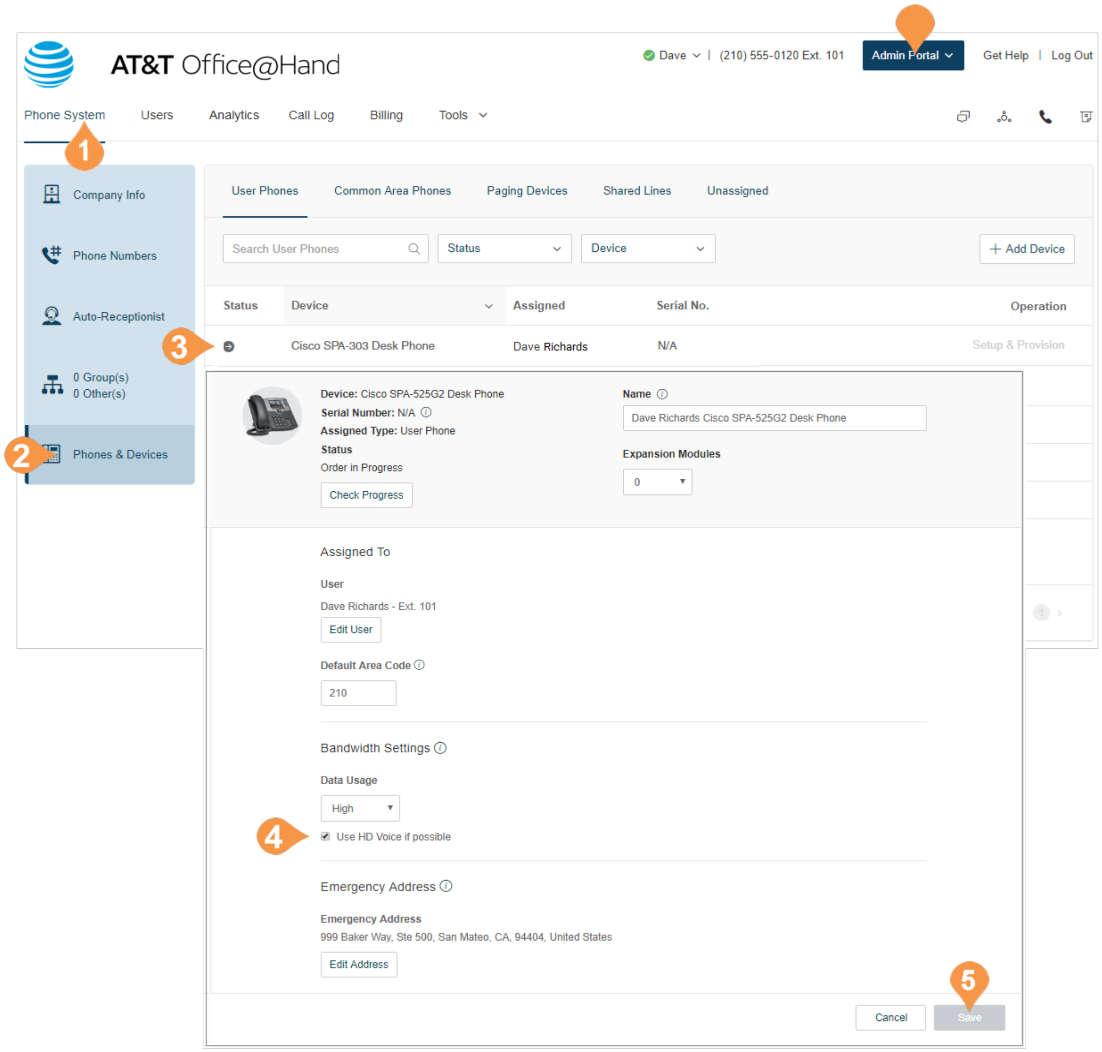
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Common Area Phones** tab.
4. Click **Add Device**.
5. Select a phone to buy.
6. Register your **Emergency Address**.
   a. Select the address from the drop-down menu.
   b. Select one or more devices.
   c. Click **Assign to Selected** or **Assign to All**.
   d. Click **Next**.
7. Specify your **Shipping Address**.
   a. Enter or select an address from the menu.
   b. Select one or more devices.
   c. Create a shipping group to apply to certain devices you are ordering, or select **Ship All Items to this Address**.
   d. Click **Next**.
8. Review your changes and **Confirm**.



HD Voice*

HD Voice enables higher fidelity voice transmission that offers a more lifelike communication experience. You can enable the HD Voice option for your devices from your online account.

1. From the **Admin Portal**, select the **Settings** tab.
2. Click **Phones & Devices**.
3. Under **User Phones**, select a phone.
4. Under **Phone Details**, check the box next to **Use HD Voice if possible**.
5. Click **Save**.



Primary beneficiaries are users calling another extension in their account. Secondary beneficiaries are users calling other Office@Hand users. Supported devices include the following desk phones that support the OPUS codec (both devices must support the codec):

- Polycom IP 335/450/550/560/650/670
- Polycom VVX 101/201/310/410/500/600
- Polycom IP 5000/6000/7000 Conf. Phones
- Yealink T21P/T42G/T42S/T46S/W52P/W56P
- Cisco SPA 303/508G/509G/514G/525G/525G2

You can also use HD Voice on:

- Office@Hand for Desktop (Windows, Mac)
- Office@Hand mobile app (iOS, Android)

Enabling Video Calls

You can enable video on internal point-to-point calls in your Office@Hand account. Supported devices include the Polycom VVX 601/600 and 501/500 (supporting detachable cameras for video calling). Phones with video support include video codecs with audio for all outbound calls. No new firmware is required for the Polycom phones to enable video.

This feature is available as a on-demand feature for Premium and Ultimate tiers. Contact AT&T Advanced Solutions to ask about this feature.

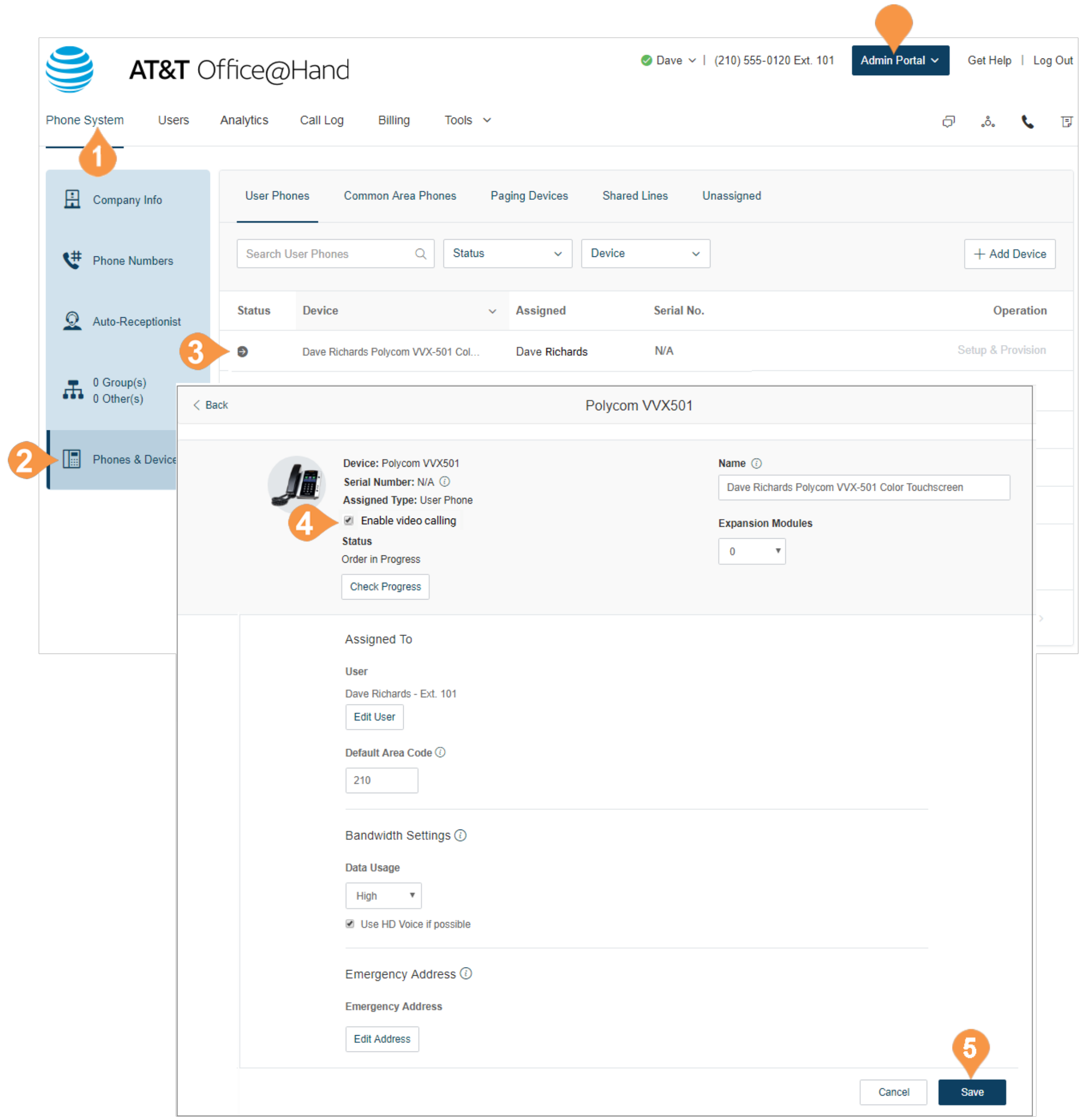
To enable video:

1. From the **Admin Portal**, select **Phone System**.
2. Click **Phones & Devices**.
3. Under **User Phones**, select a supported phone.
4. Check the box next to **Enable Video Calling**.
5. Click **Save**.

Note: you can enable video calling for multiple devices by multi-selecting the Polycom devices in the list and enabling video calling in bulk.

The phone will be resynchronized to make and receive video calls with similarly configured devices within your Office@Hand account.

For information about placing video calls, see the Office@Hand User Guide.



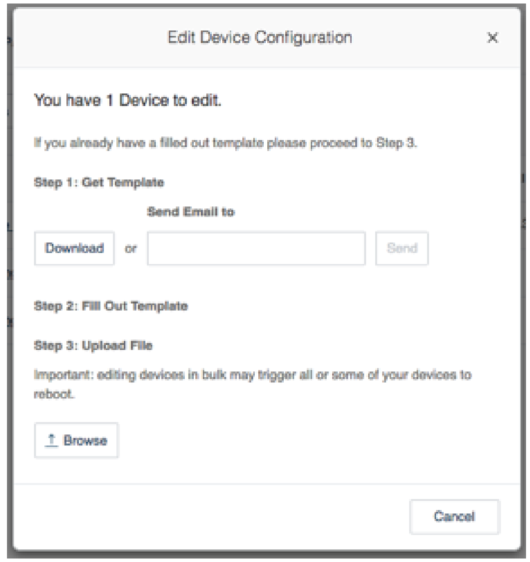
Bulk Device Update

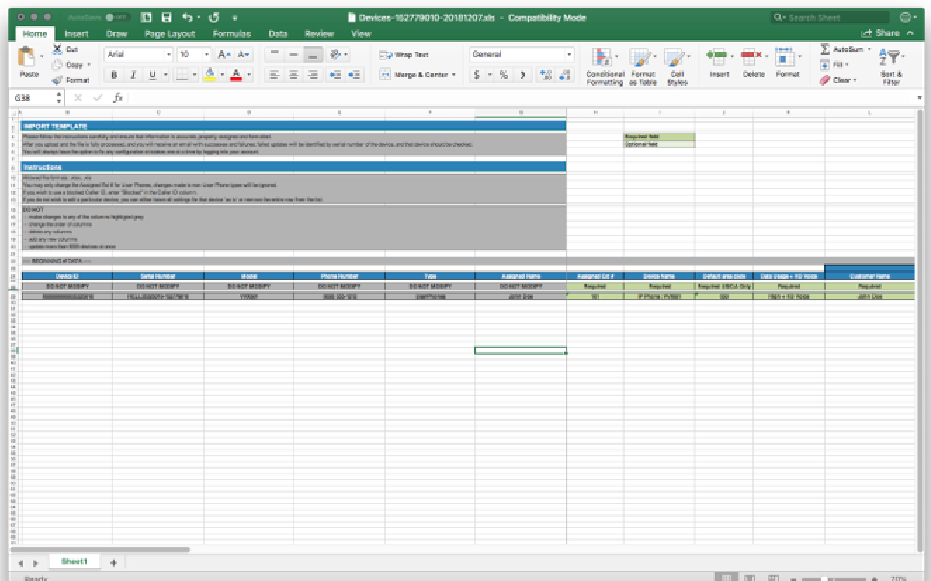
For enterprise customers managing a large number of devices, the Bulk Device Update feature provides an ability to configure the settings of multiple IP devices in a single file upload.

Contact support to enable this on-demand feature.

To perform a bulk device update:

1. From the **Admin Portal**, select **Phone System**.
2. Click **Phones & Devices**.
3. Expand the more menu.
4. Select **Edit Device Configuration**.
5. Download the template.
6. Fill out the template with these settings:
   - Assigned Ext #: only for user-type phones
   - Device Name
   - Default Area Code (US/CAN only)
   - Data Usage + HD Voice
   - E911 Address
   - Caller ID
   - Display Ext # (for Polycom VVX only)
7. Upload the template. Note devices may reboot.



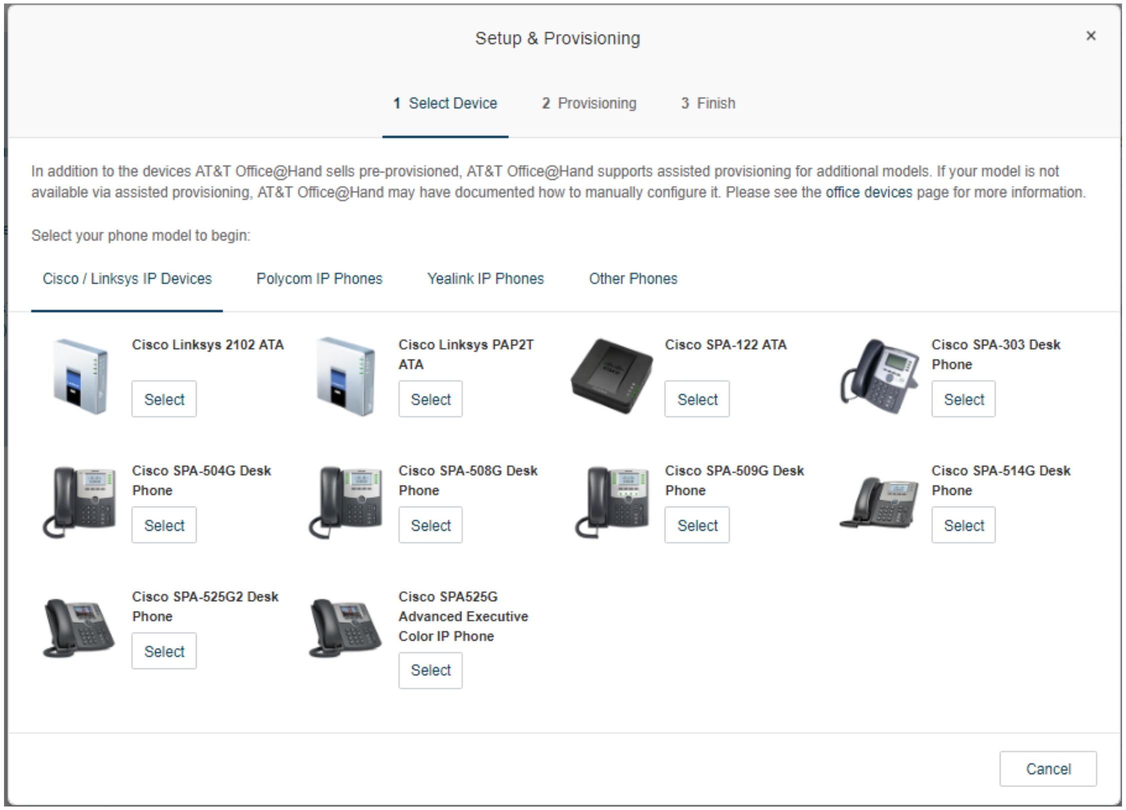


Assisted Provisioning

Assisted Provisioning

You can provision supported third-party devices with your service.

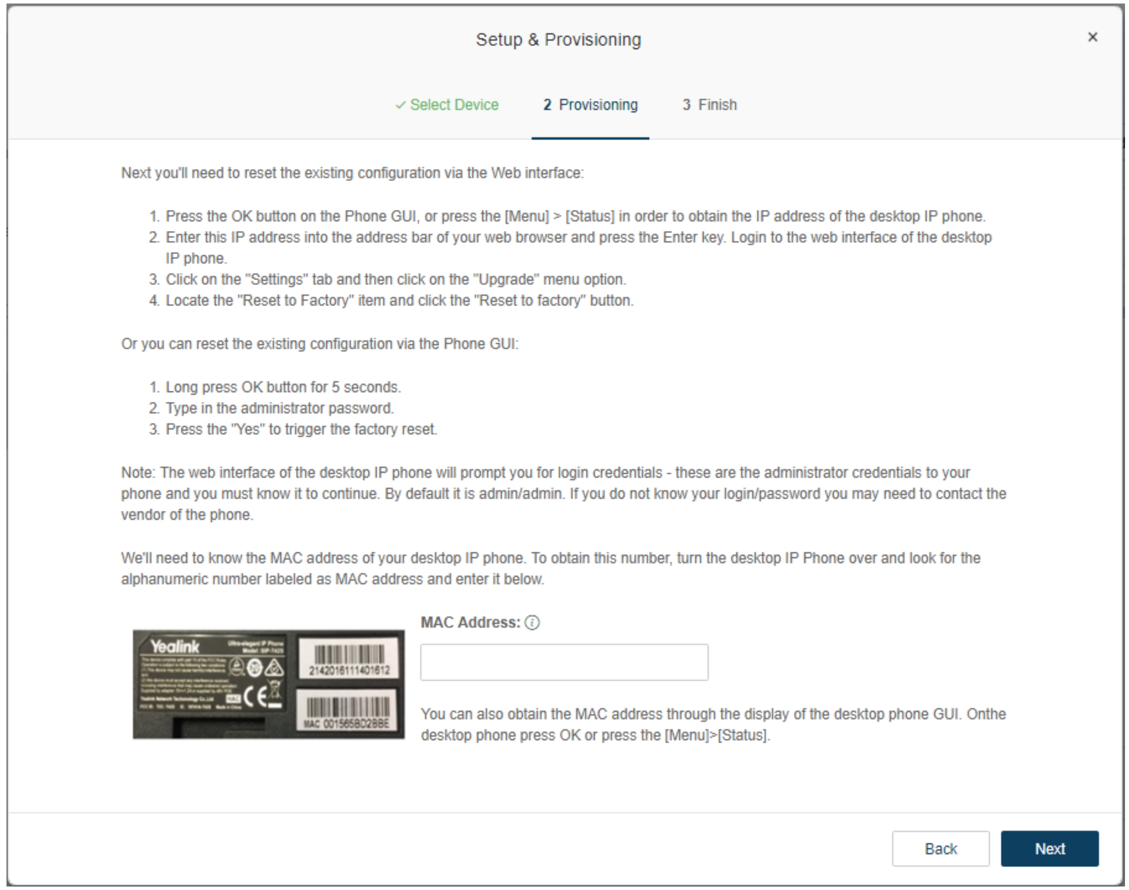
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Select the device that needs to be provisioned.
4. Click **Setup and Provision**.
5. Select your phone model. If you have selected:
   a. **Cisco/Linksys IP Devices**: select this tab and **Select** the phone model from the list of choices. Proceed with the steps on the following pages.
   b. **Polycom IP Phones**: select this tab and **Select** the phone model from the list of choices. Proceed with the steps on the following pages.
   c. **Yealink IP Phones**: select this tab and **Select** the phone model from the list of choices. Proceed with the steps on the following pages.
   d. **Other Phones**: select this tab and **Select** an existing phone. The next window displays the SIP Configuration or information needed for manual provisioning. Contact your device manufacturer to know how to configure your device using these configurations.



Yealink Configuration

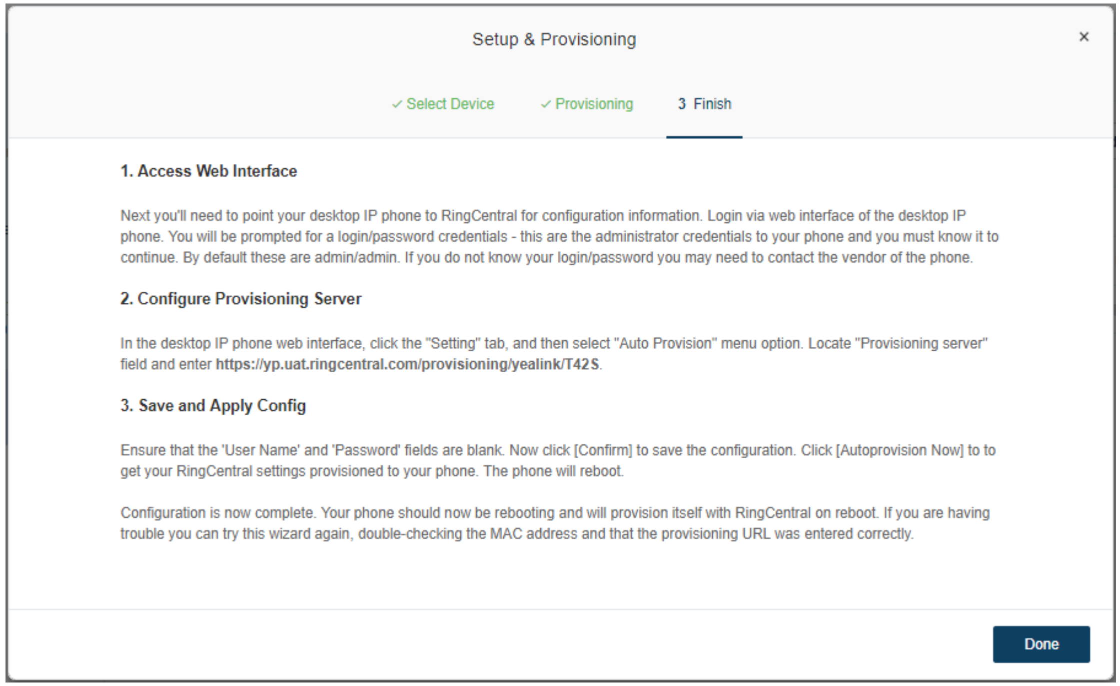
To configure a Yealink device:

1. Follow the instructions to reset the phone's existing configuration through the phone's Web interface, or the desktop phone interface.
2. Enter login credentials when prompted by the Web interface. These are the administrator credentials to your phone. The default credentials are admin/admin. If you do not know your credentials, contact your phone vendor.
3. Enter the phone's MAC Address from the rear of the base station, or from the display of the desktop phone interface.
4. Click **Next**.



Yealink Configuration (continued)

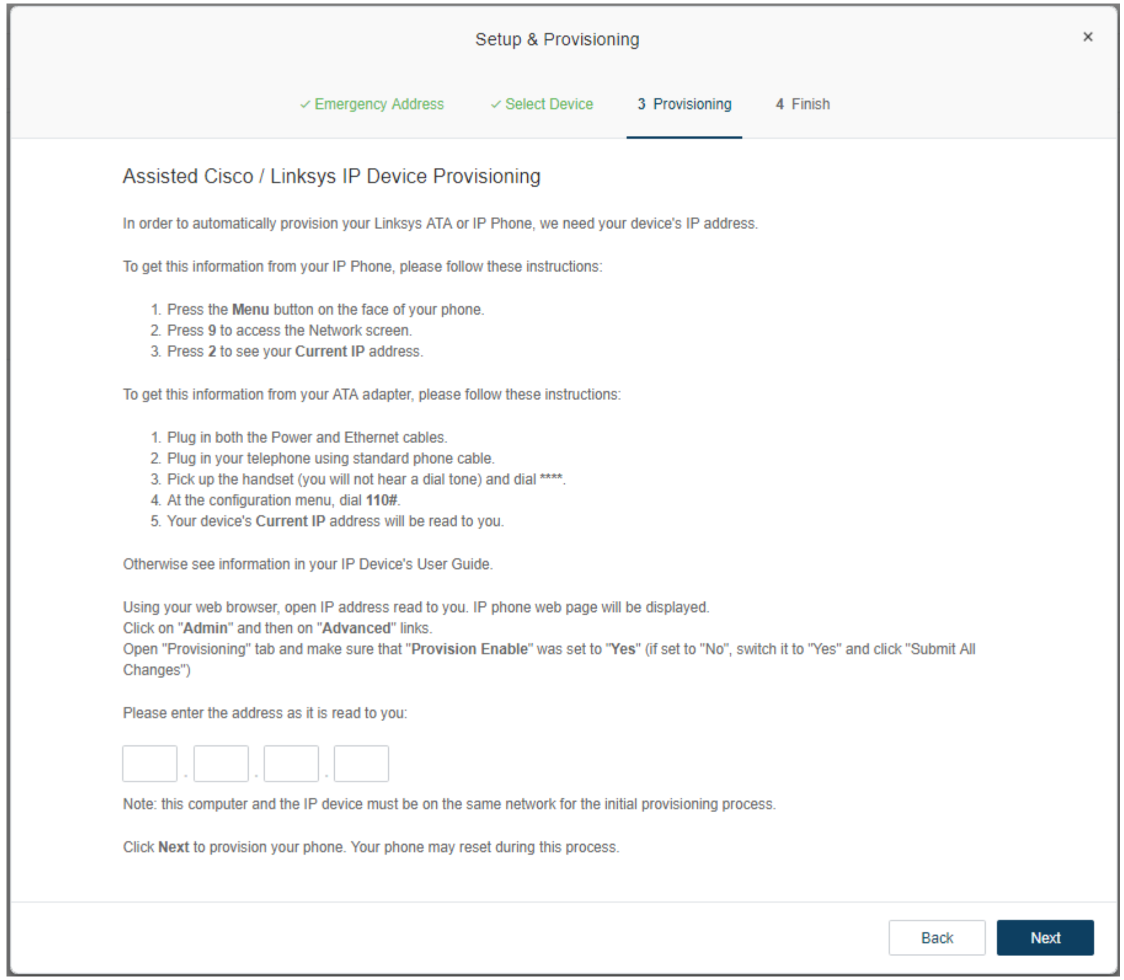
5. A confirmation indicates that your device has been provisioned successfully. The phone will reboot and provision itself with Office@Hand on reboot. Click **Done**.



Cisco/Linksys IP Devices

To configure a Cisco/Linksys IP device:

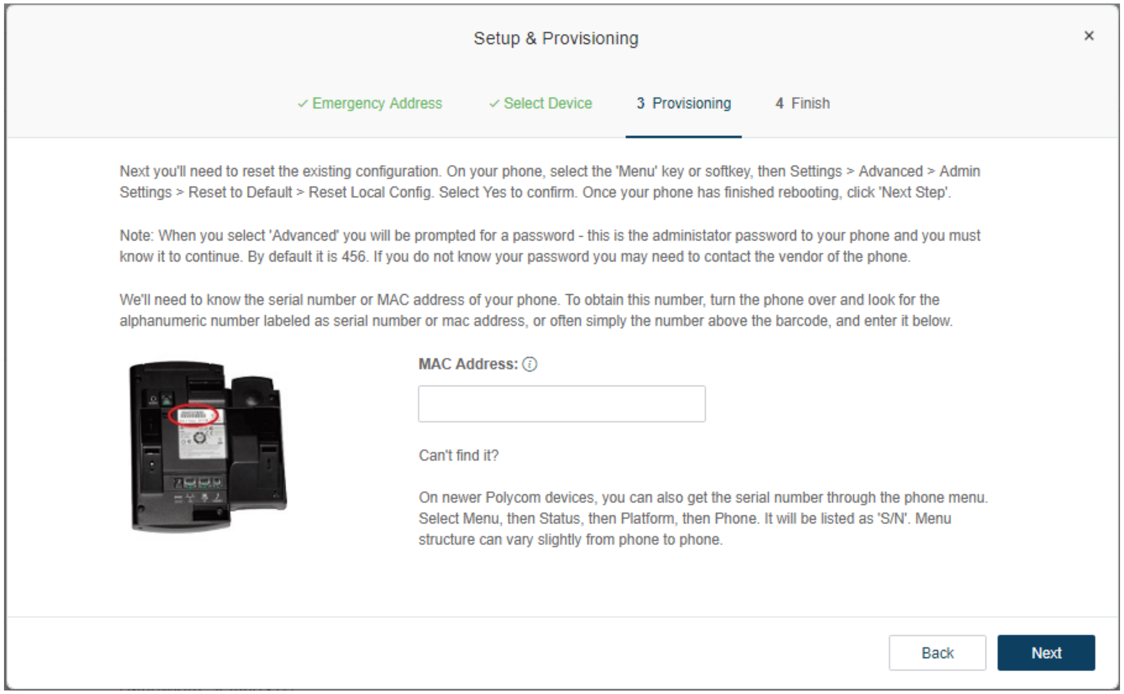
1. Reset the phone to defaults prior to provisioning to remove any unnecessary settings that may cause failure of provisioning. Refer to your manual on how to reset the phone to defaults.
2. Enter the IP Address of the device as instructed and click **Next**. Office@Hand locates and provisions your device.
3. Follow the instructions to complete the provisioning of your phone. Once you complete the configuration and save it, the phone will reboot and provision itself with Office@Hand on reboot. Click **Done**.



Polycom

To configure a Polycom device:

1. Reset the existing device configuration following the instructions. Once your phone has finished rebooting, click 'Next Step.'
2. Enter the administrator password to your phone when prompted. By default it is 456. The default credentials are admin/admin. If you do not know your password, contact your phone vendor.
3. Enter the phone's serial number or MAC Address from the rear of the phone, which may be the number above the barcode. Click **Next**.
4. Follow the instructions to complete the provisioning of your phone. Once you complete the configuration and save it, the phone will reboot and provision itself with Office@Hand on reboot. Click **Done**.

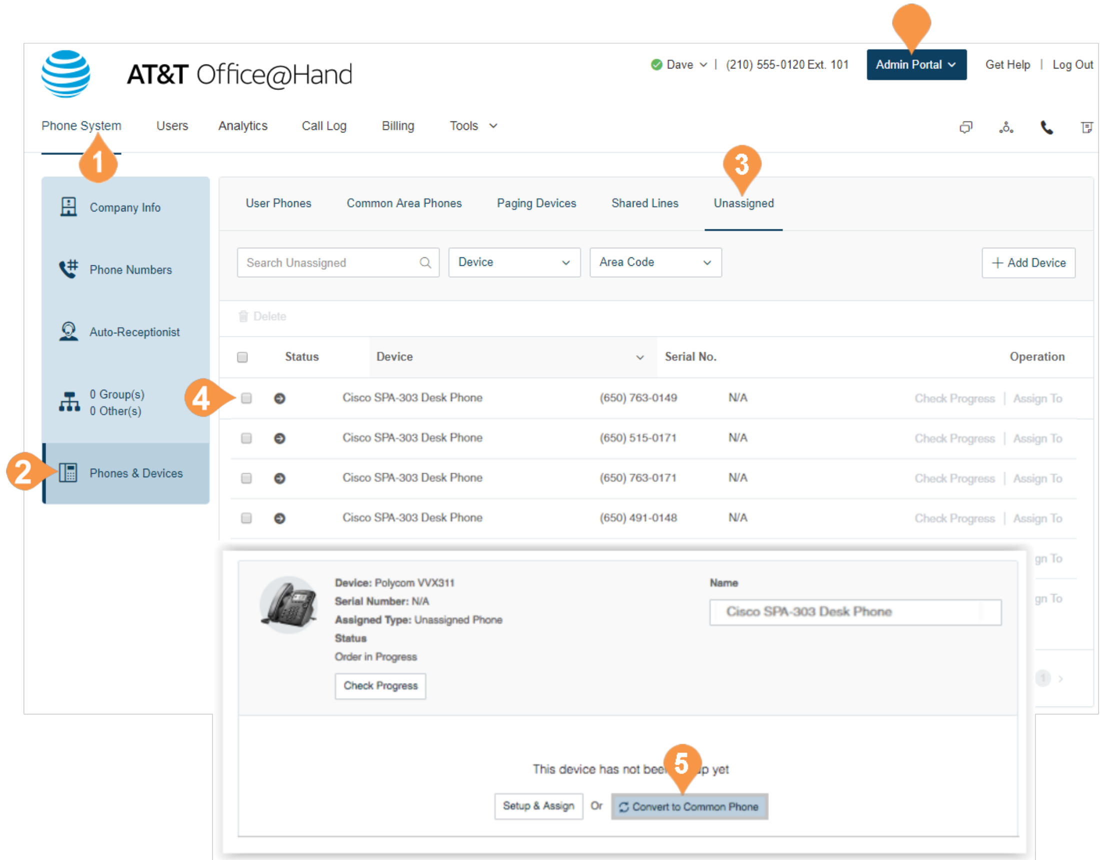


Hot Desking

Hot Desking

Hot desking* enables any employee to log in to a shared phone that adopts the user's phone settings. Employees who travel from different offices can share the same common phone and desk while keeping their own extension profiles and voicemail access. The admin can view and manage the common phones for hot desking from the Devices tab.

Hot desking is only available for extensions with digital lines. Host phones will not support any inbound or outbound calling without a guest user logged in (except emergency calls).



Common Phone Setup

Hot Desking is required to be set up on a common phone. You can either purchase a new common phone, or convert an existing unassigned Polycom VVX 310, VVX 410, VVX 500, or other supported phone, to a common phone. See these sections:

- Add a Common Phone
- Convert an Unassigned Phone to a Common Phone

Convert an Unassigned Phone to a Common Phone

Converting an unassigned phone to a common phone makes that phone only available for use in hot desking. No minutes are included for any type of calls.

To convert an unassigned phone to a common phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Unassigned** tab.
4. Select an unassigned phone.
5. In Phone Details, select **Convert to Common Phone**.

Follow the instructions to complete the conversion.

*Available for Office Premium and Enterprise only.

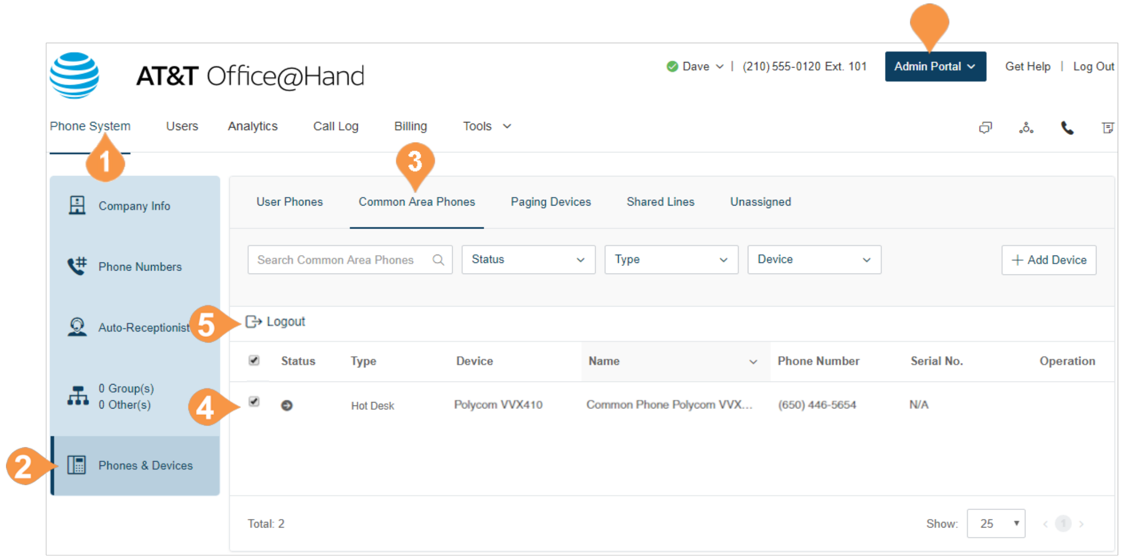
Log out a Common Phone

You can log out the currently logged in user from the common phone.

To log out a common phone:

1. From the Admin Portal, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Common Area Phones** tab.
4. Check the box next to a common phone.
5. Above the columns, select **Logout**.

You are informed that if the user is on a call, the user will be logged out after the call ends.



Set the Hot Desking Session Timeout

The hot desking session timeout specifies the time period when guest users will be logged out from phone endpoints. The default session timeout is 12 hours.

No Timeout

Certain enterprises with a mobile workforce may use the 'Never' value for the timeout to configure that all hot desk sessions in the account will not timeout. When using this option, the hot desk session can only be logged out by a user from the phone.

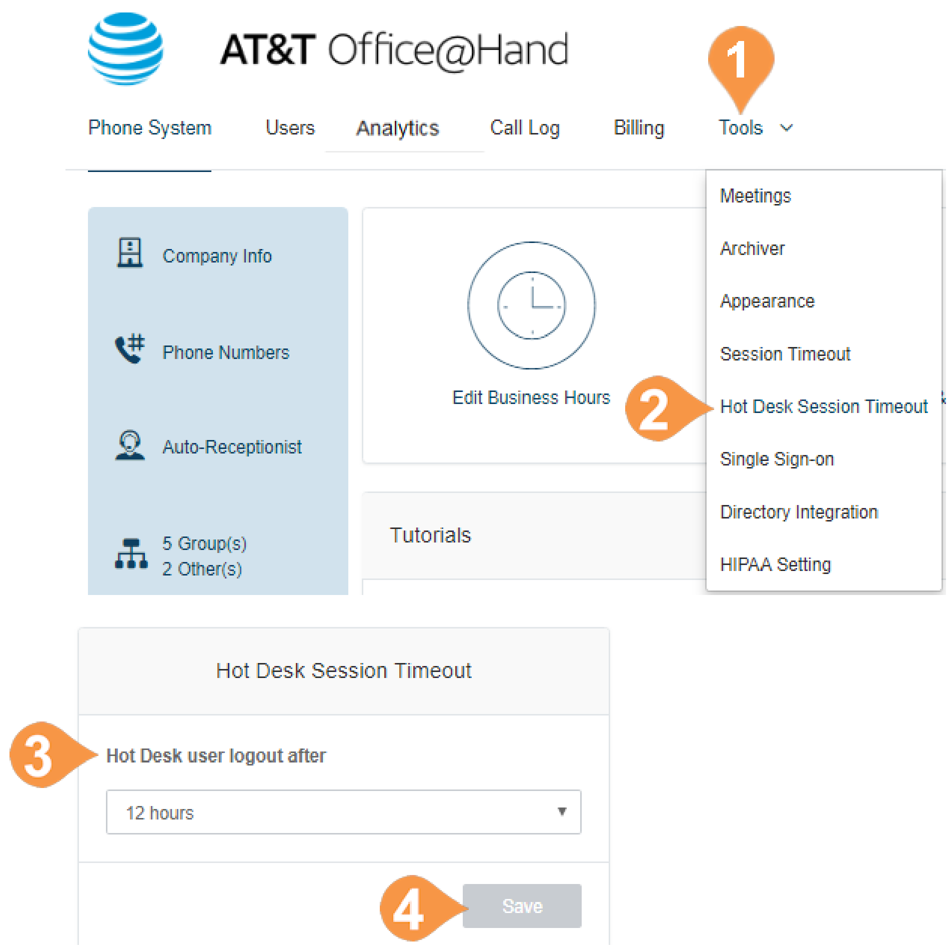
Set the Timeout

To set session time out for all common phones:

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Hot Desk Session Timeout**.
3. Set the session timeout from the menu.

   To configure no timeouts, select the **Never** value.

4. Click **Save**.



User Management

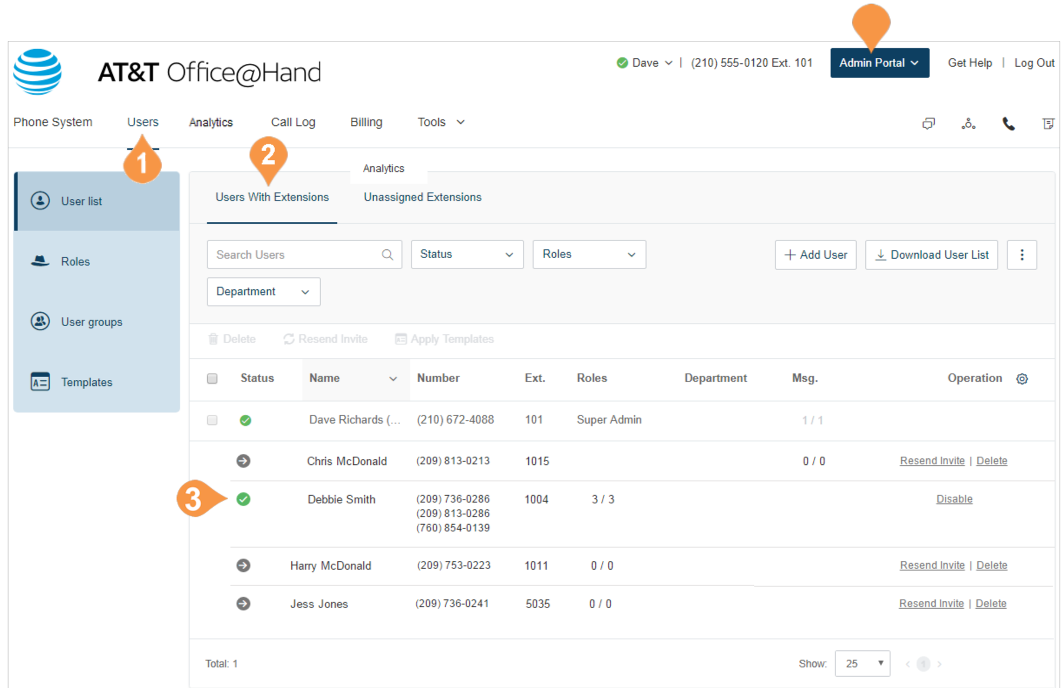
User Management

This section describes user settings actions that only admins can perform.

Users with Extensions

View your users and their extension information as well as any unassigned extensions on your account:

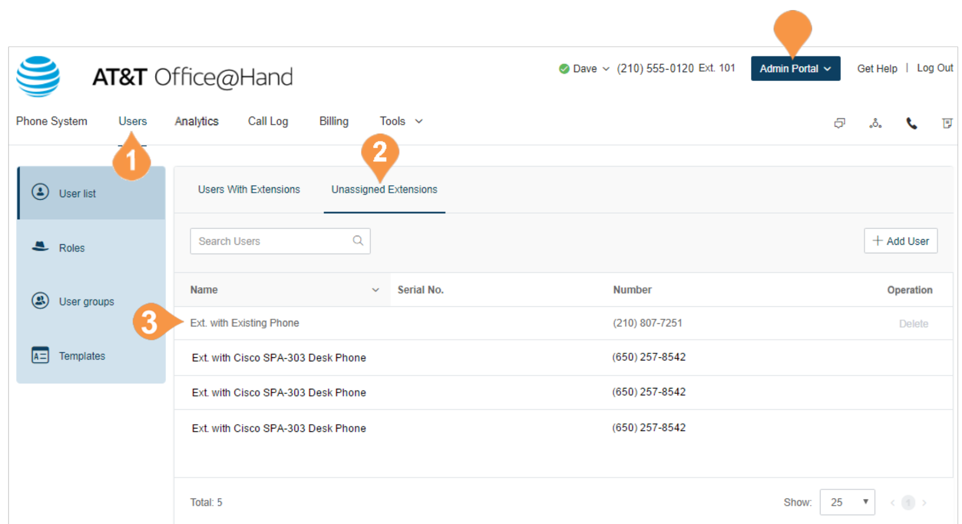
1. From the **Admin Portal**, select the **Users** tab.
2. Click **Users with Extensions** to view the users on your account.
3. Select a user.
4. View or edit the settings for the selected user. See the AT&T Office@Hand User Guide for more information about user settings.



Unassigned Extensions

View unassigned extensions and assign an extension to a new user:

1. From the **Admin Portal**, select the **Users** tab.
2. Click **Unassigned Extensions** to view the unassigned extensions on your account.
3. Select an extension.
4. Enter information about the user that the extension will be assigned to. Click **Save and Enable** to add the user to your phone system.



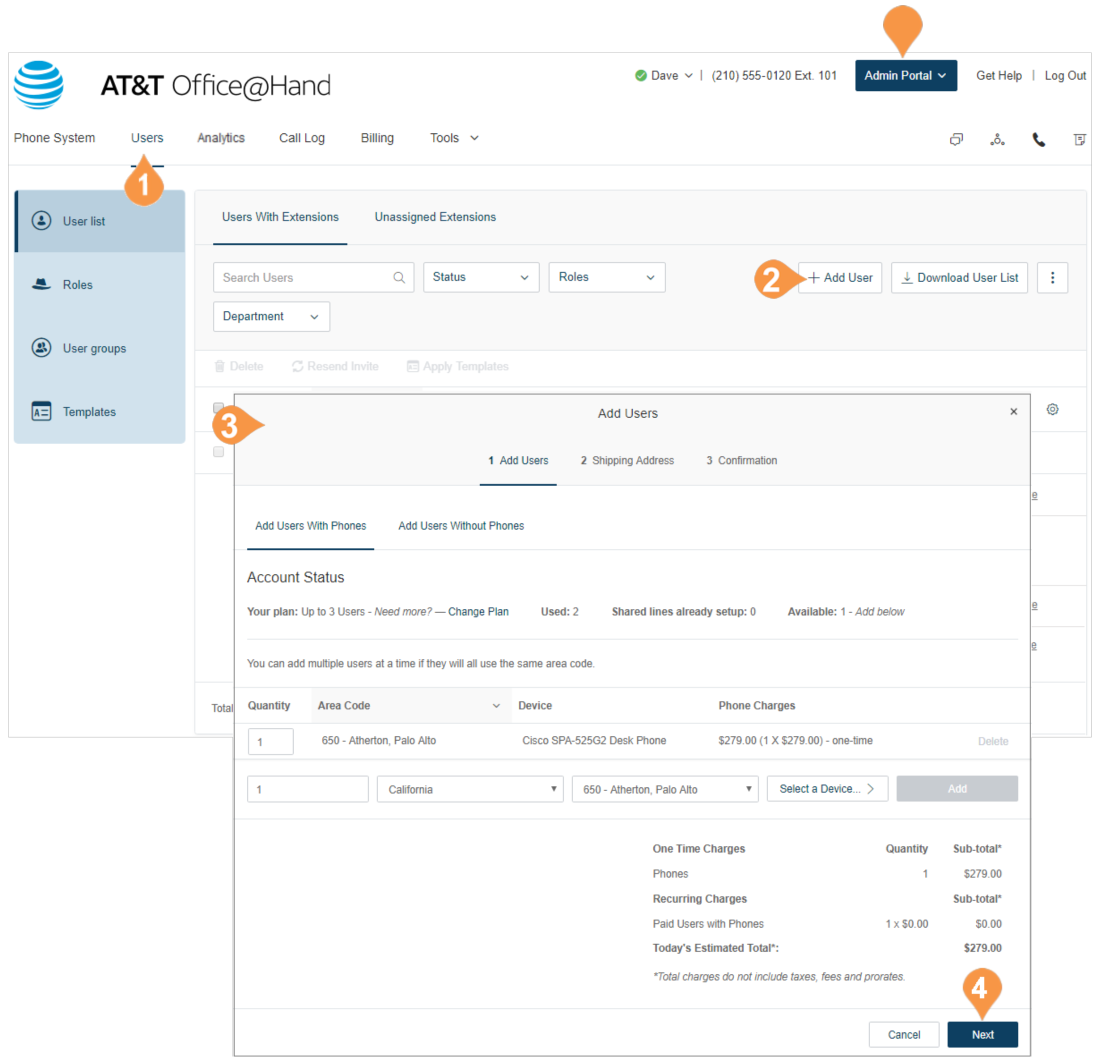
Add User Extensions and Phones

You'll want to add new users to your Office@Hand account as your business grows. As an administrator, you may also need to edit existing user phone settings, assign extensions, and set up new users.

Add Users with Phone Devices

To add users with phone devices:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Add User** (+) icon. A pop-up window will appear with steps for adding your extension.
3. On the **Add Users with Phones** tab, choose the number of users you'd like to add, the phone numbers you'd like to add for them, and the phones you'd like to add. Click **Add**. Repeat as needed to add additional users with a different area code or phone device type.
4. When complete click **Next**. Follow the prompts for your shipping address and billing information then review and submit your order.



Account Type Restrictions in Adding Users

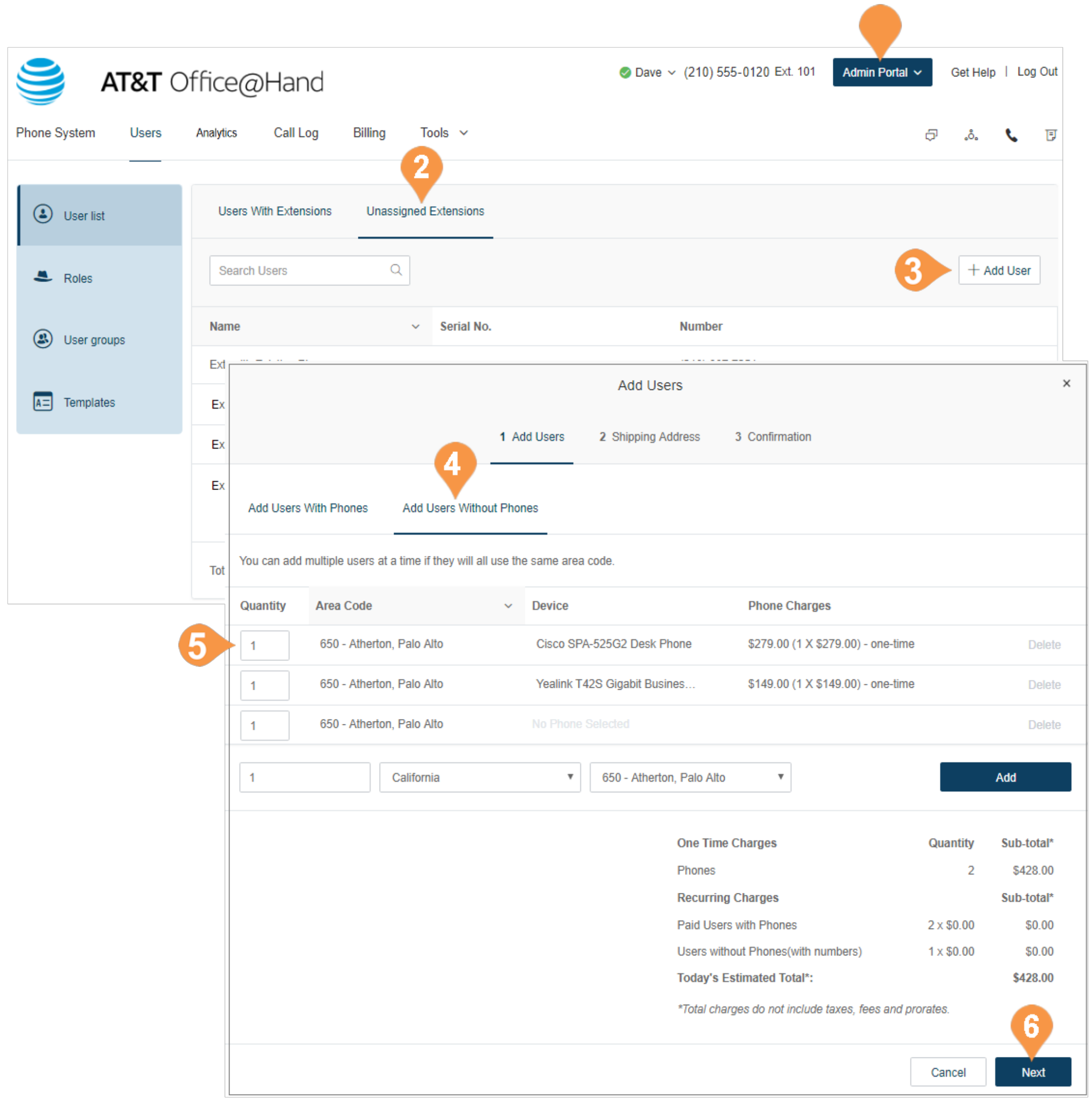
If your account is registered as an Individual Responsibility User (IRU), you are restricted to adding a maximum of 20 users through the Admin Portal.

If you would like to add more users above this limit, you can do so by contacting AT&T Advanced Solutions customer care.

Add Users without Phones

To add users without a phone assigned:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Unassigned Extensions** tab.
3. Click the **Add User** (+) icon. A pop-up window will appear with steps for adding your extension.
4. Select the **Add Users without Phones** tab.
5. Choose the number of users you'd like to add and the phone numbers you'd like to add for them. Click **Add**. Repeat as needed to add additional users with a different area code.
6. When complete click **Next**. Follow the prompts for your shipping address and billing information then review and submit your order.



Note: Users without phones can receive caller ID only on incoming calls, while users with phones can also receive called ID on outbound call.

Account Type Restrictions in Adding Users

If your account is registered as an Individual Responsibility User (IRU), you are restricted to adding a maximum of 20 users through the Admin Portal.

If you would like to add more users above this limit, you can do so by contacting AT&T Advanced Solutions customer care.

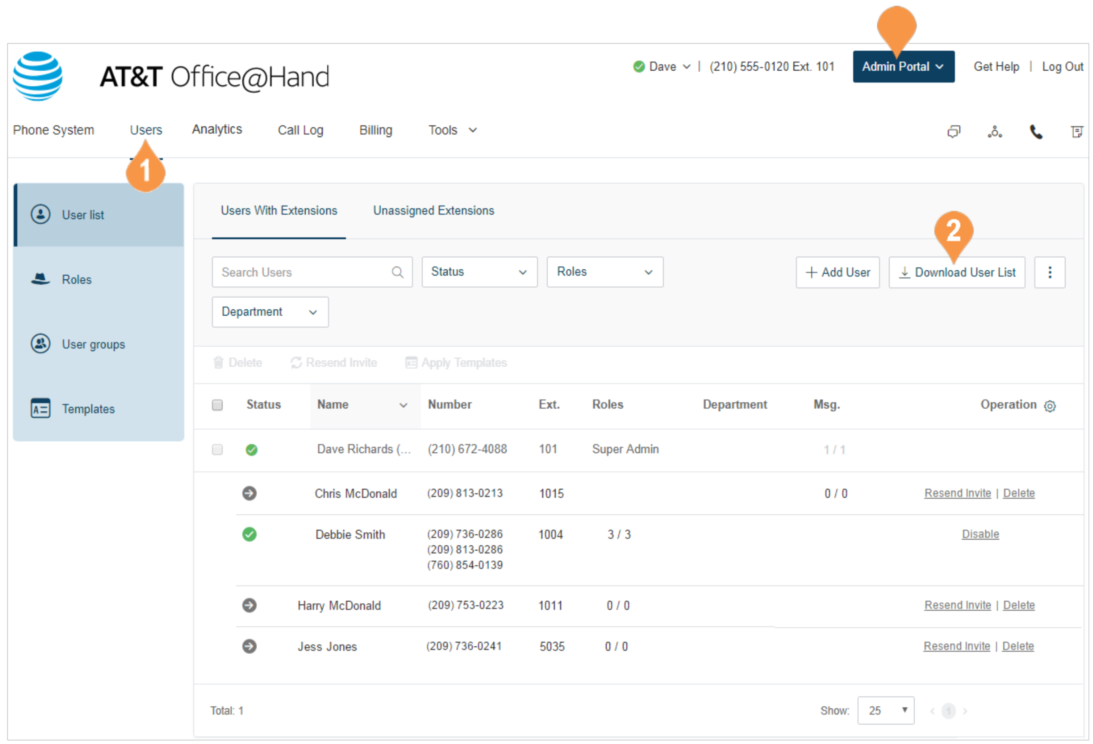
Manage Users and Extensions

In the Users List, you can manage users and extensions.

Export a User List

You can export a list of users and extensions in Microsoft Excel file format. You can use this feature to create a company directory or to perform an audit of users.

1. From the **Admin Portal**, select the **Users** tab.
2. To download a list of users and extensions for audit, click **Download User List**.
3. View the file in Microsoft Excel.

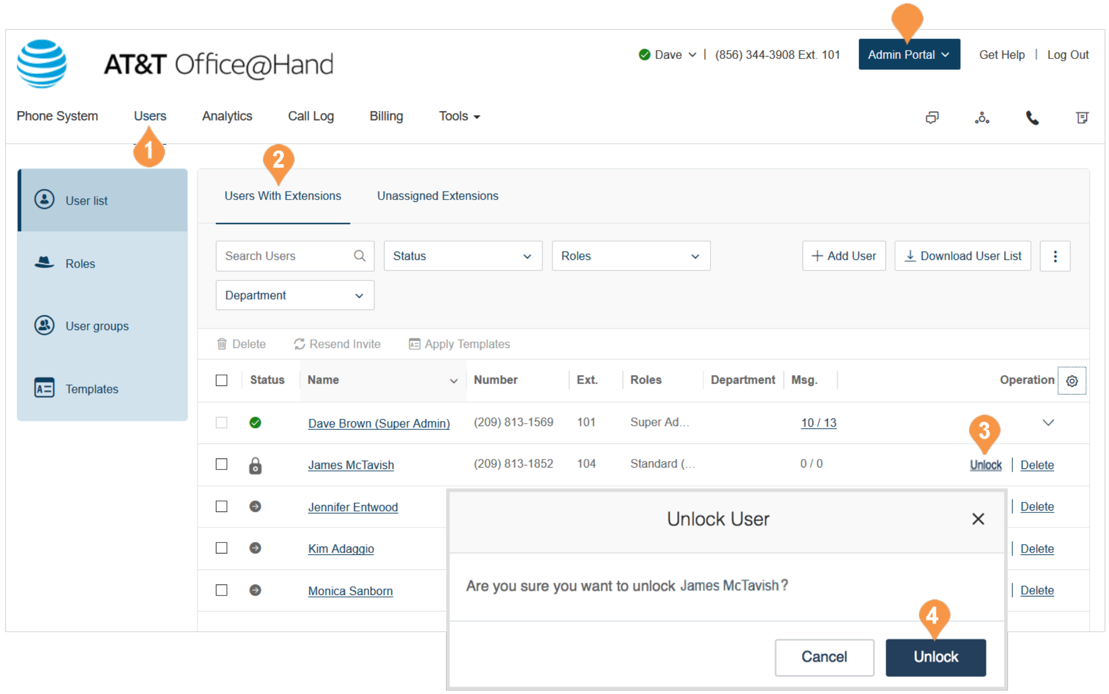


Account Lockout

This feature allows an admin to see user account status and remove the lock on an account. Customer admins can use this feature to resolve end user account lockout issues by allowing the admin to unlock the account without a password change. An account under lockout displays a lock icon in the **Status** column.

To change the lockout condition,

1. From the **Admin** portal, select the **Users** tab.
2. Select **Users With Extensions**, which populates with a list of users and their phone and status details.
3. Find the locked user by locating the lock icon in the **Status** column and click **Unlock** in the **Operation** column.
4. A popup displays and asks you to confirm that you want to unlock. Select **Unlock**.



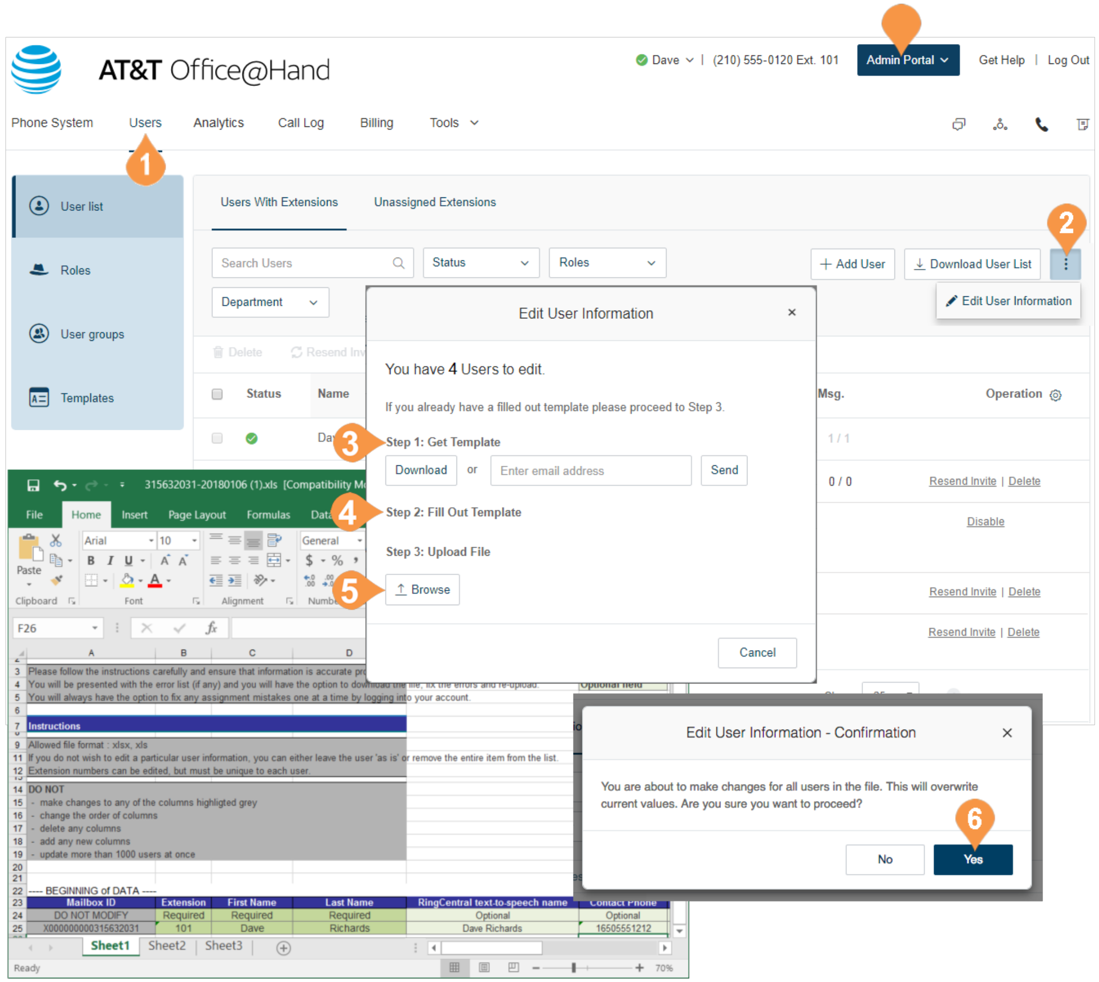
Bulk Edit User Information

You can efficiently make changes for multiple users in a single action. You export a template and add your user information into the template for import to Office@Hand.

This feature is available for accounts with two or more users, and is not available to accounts that are using Active Directory.

To edit user information in bulk:

1. From the **Admin Portal**, select the **Users** tab.
2. Click **Edit User Information**.
3. Click **Download** or enter an email address and click **Send**.
4. Fill out the template with the user information.
5. Click **Browse** and upload the user file.
6. Confirm that you will overwrite all the user data.



User Settings

Users Settings

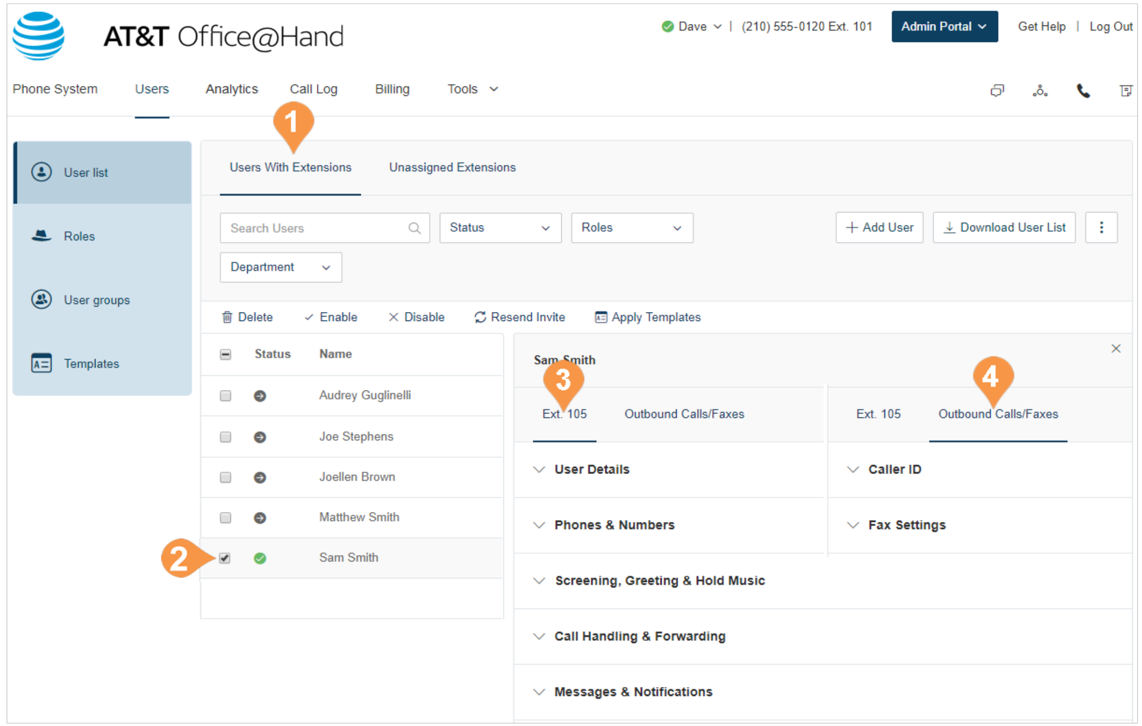
Admins have the ability to edit the following settings for users in the phone system:

- User Information
- Phones & Numbers
- Screening, Greeting, & Hold Music
- Call Handling & Forwarding
- Messages & Notifications
- Outbound Caller ID
- Outbound Fax Settings

Learn more about each of these settings in the AT&T Office@Hand User Guide.

Administrators will use the Users section to access and edit these settings.

1. From the **Admin Portal**, select the **Users** tab.
2. Select a user.
3. On the user settings pane,
   - Select the extension, for example, Ext. 105, then the category to edit.
4. On the user settings pane,
   - Select Outbound Calls/Faxes, then the category to edit.



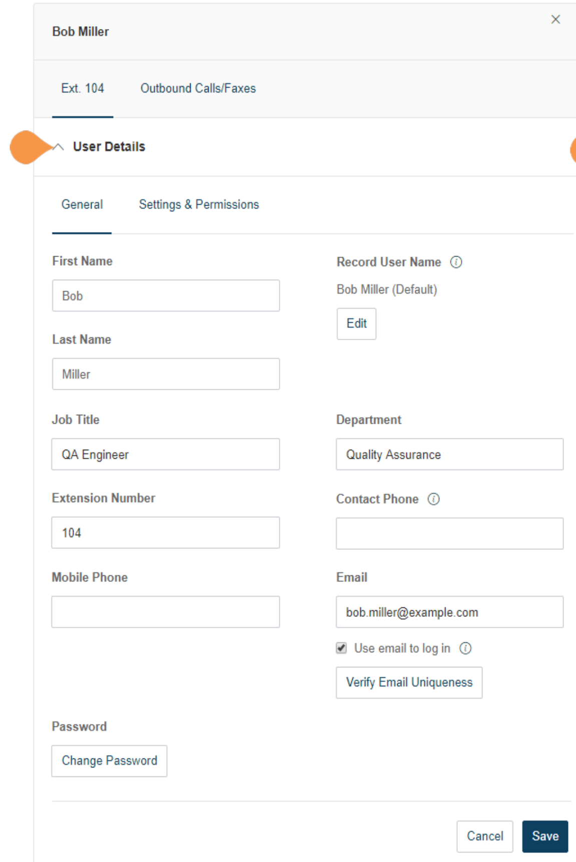
User Details

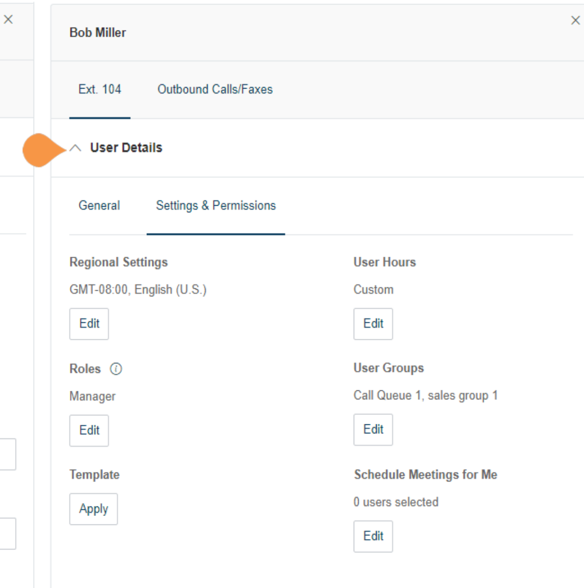
Click on **User Details** to view and edit the selected user's information. From this menu, you can edit a user's extension, name, recording, phone numbers, email address, job title, department, roles, user groups, hours, password, and regional settings.

Custom Fields

Custom Fields in User Details is an on-demand feature that allows company administrators to create fields in User Details which can be used to store company-specific data or unique identifiers. For customers that maintain employee or user records across multiple systems, custom fields allow them to add data to the users in their account which can be used to cross-reference data sets between disparate systems.

To enable this on-demand feature, contact support. For information on creating custom fields, see "Create a Custom Field" on page 146.



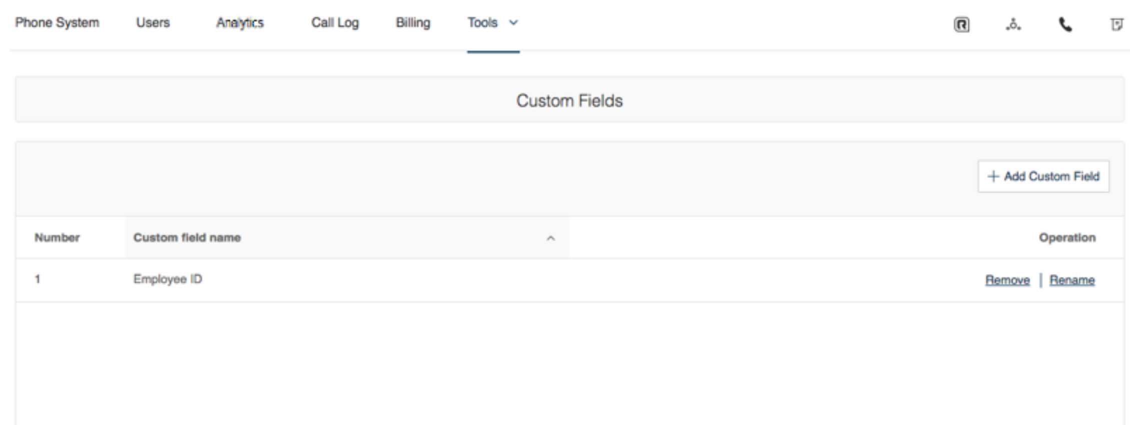


Create a Custom Field

You can create up to five custom fields in User Details. These fields are visible to the user in that user's details.

To create or edit custom fields in User Details:

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Custom Fields**.
3. Click **Add Custom Field**.
4. Enter the **Custom field name**.
5. Click **Save**.



Delete a Custom Field

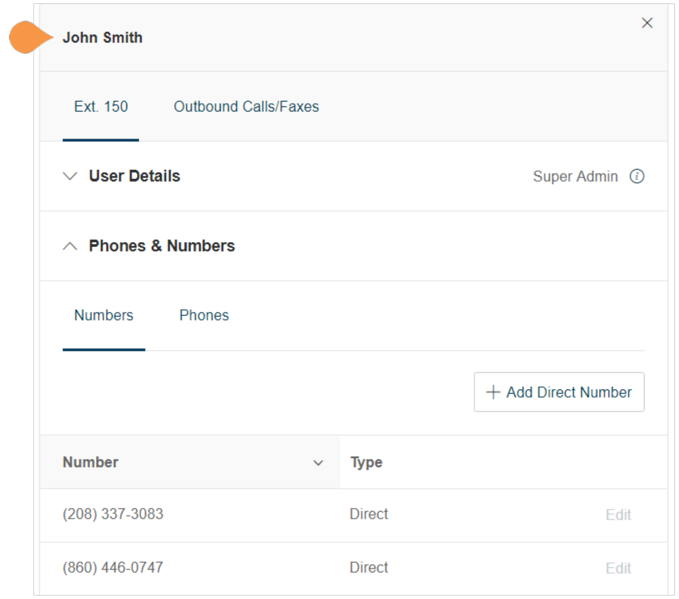
Deleting a field permanently removes information stored in the field for all users and is not recoverable. It is strongly recommended that you download / save your user information prior to deleting this field. To proceed, follow the steps below.

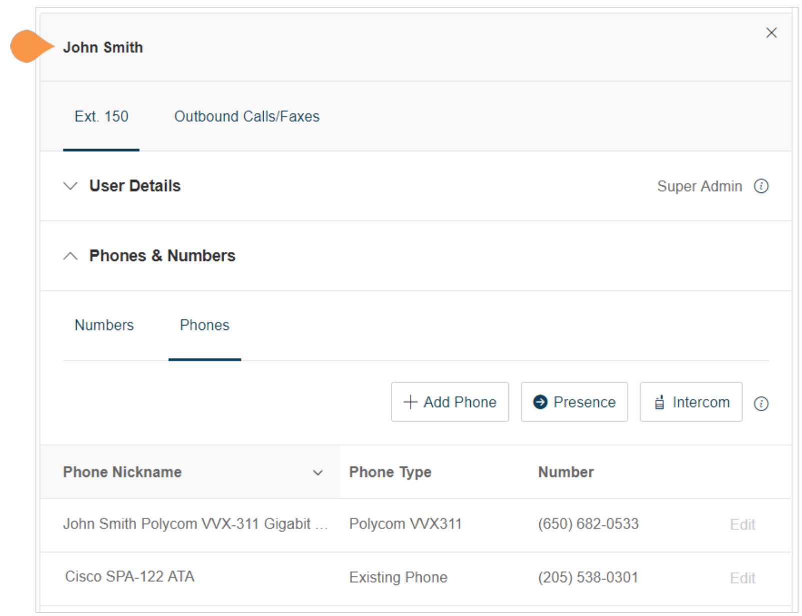
1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Custom Fields**.
3. Select the custom field from the list.
4. Click **Remove**.
5. Read the disclaimer, then click **Yes** if you agree.

This feature is available on-demand at no additional cost. Contact RingCentral Support to enable this feature on your account.

Phones & Numbers

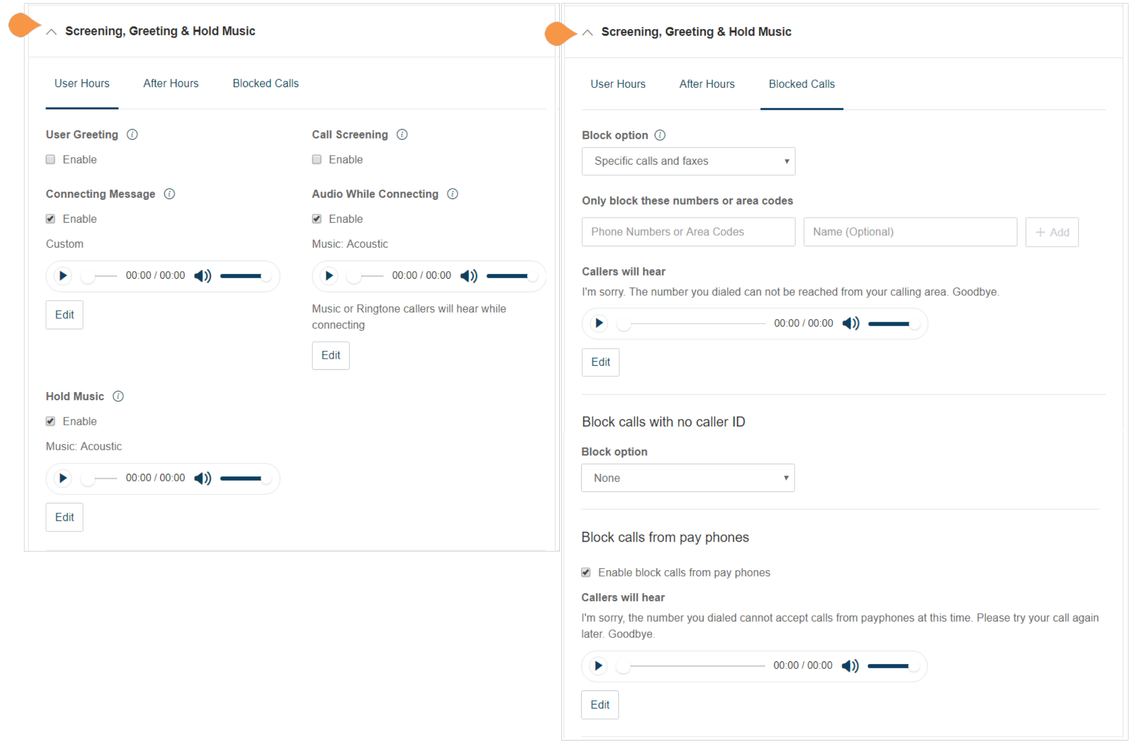
Click **Phones & Numbers** to view and edit the selected user's phone numbers and phone settings. You can add a direct number for this user, add a phone, download/activate apps, change presence and intercom settings, and view and edit conference settings.





Screening, Greeting & Hold Music

Click **Screening, Greeting & Hold Music** to view and edit the selected user’s greeting, call screening options, connecting message, audio while connecting, hold music, and blocked call settings.



Call Handling & Forwarding

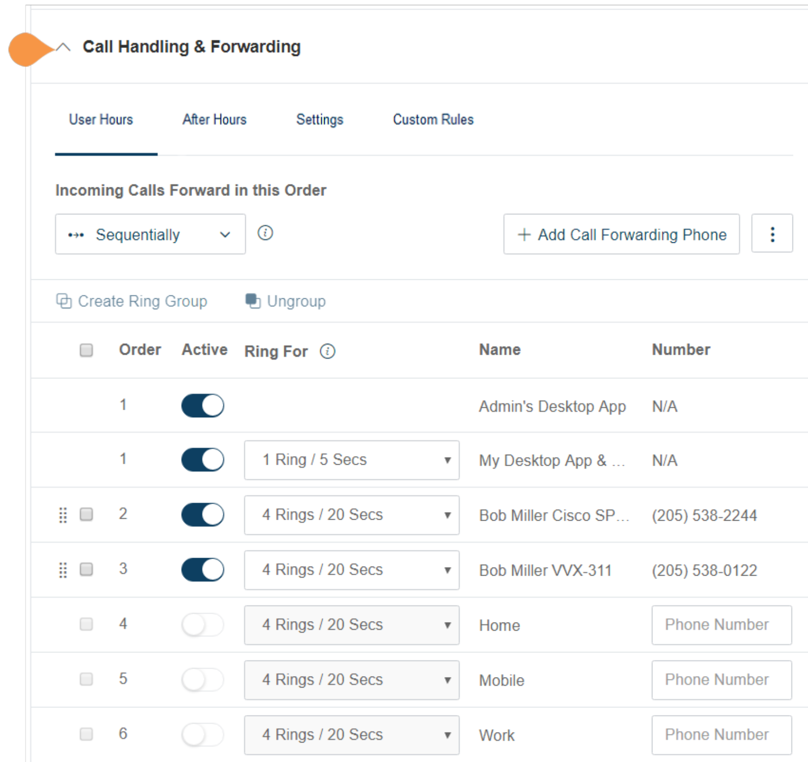
Click **Call Handling & Forwarding** to view and edit the selected user's call handling, call forwarding, ring group, additional phones, ring pattern, incoming call, and call flip settings.

Setting Call Forwarding on the Phone Hardware

You can enable and disable call forward options on some equipment, such as Polycom® VVX® phones. The ability to ability to enable call forwarding on the phone hardware must be enabled in your account. Some limitations apply:

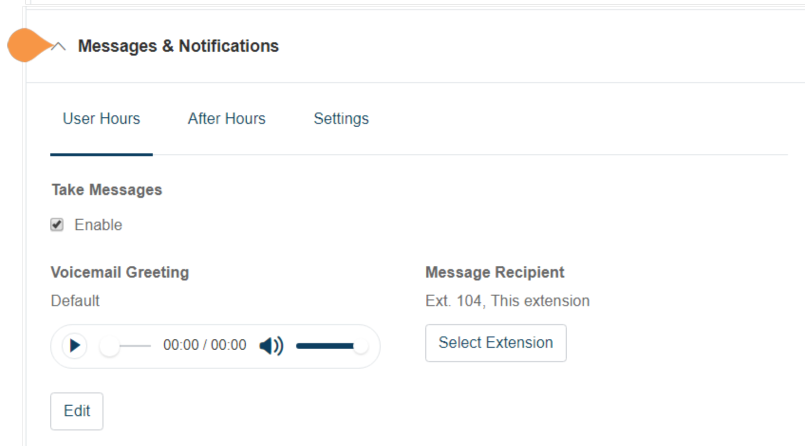
- If the call forward is configured on the phone hardware, the forwarding will not be indicated in the Office@Hand system.
- The **Call Forward on Busy** menu option is not supported.
- The Call Forward selection on the phone setup between multiple devices is restricted to run only three times.

A 911 call back, if received on the user's phone with Call Forward enabled is forwarded to the destination.



Messages & Notifications

Click **Messages & Notifications** to view and edit the selected user's voicemail settings, voicemail greeting, message recipient, messages, and notification settings.

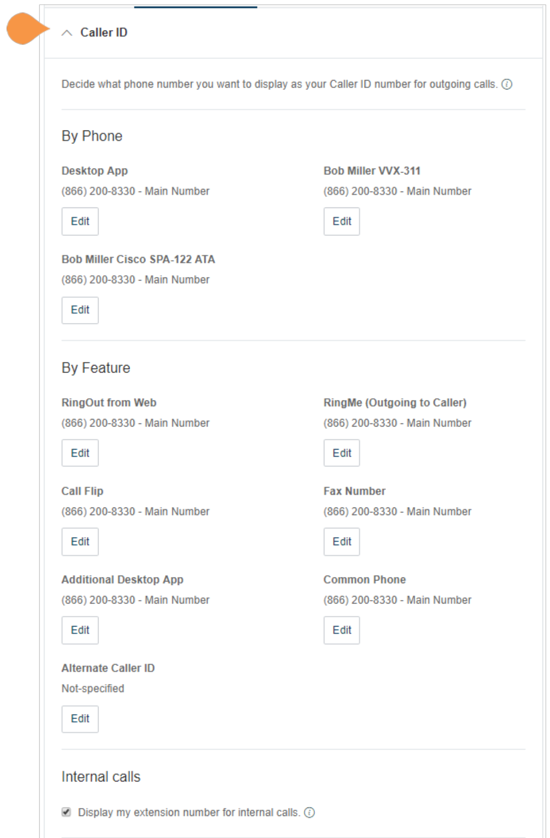


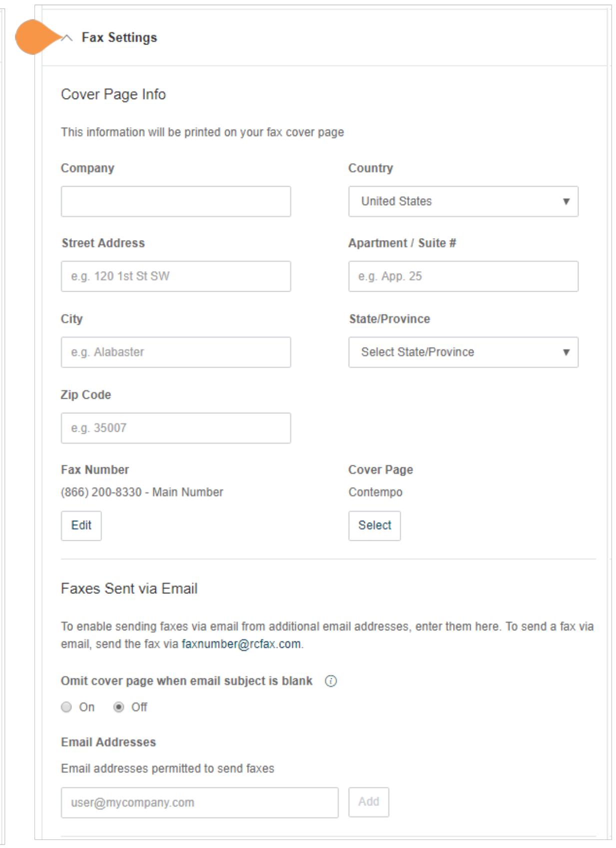
Outbound Caller ID

Click **Outbound Caller ID** to view and edit the selected user's outbound caller ID numbers.

Outbound Fax Settings

Click **Outbound Fax Settings** to view and edit the selected user's fax cover page settings and fax via email settings. For information about setting a custom callback number on the fax cover page, see "Fax Cover Page: Setting a Custom Phone Number" on page 151.



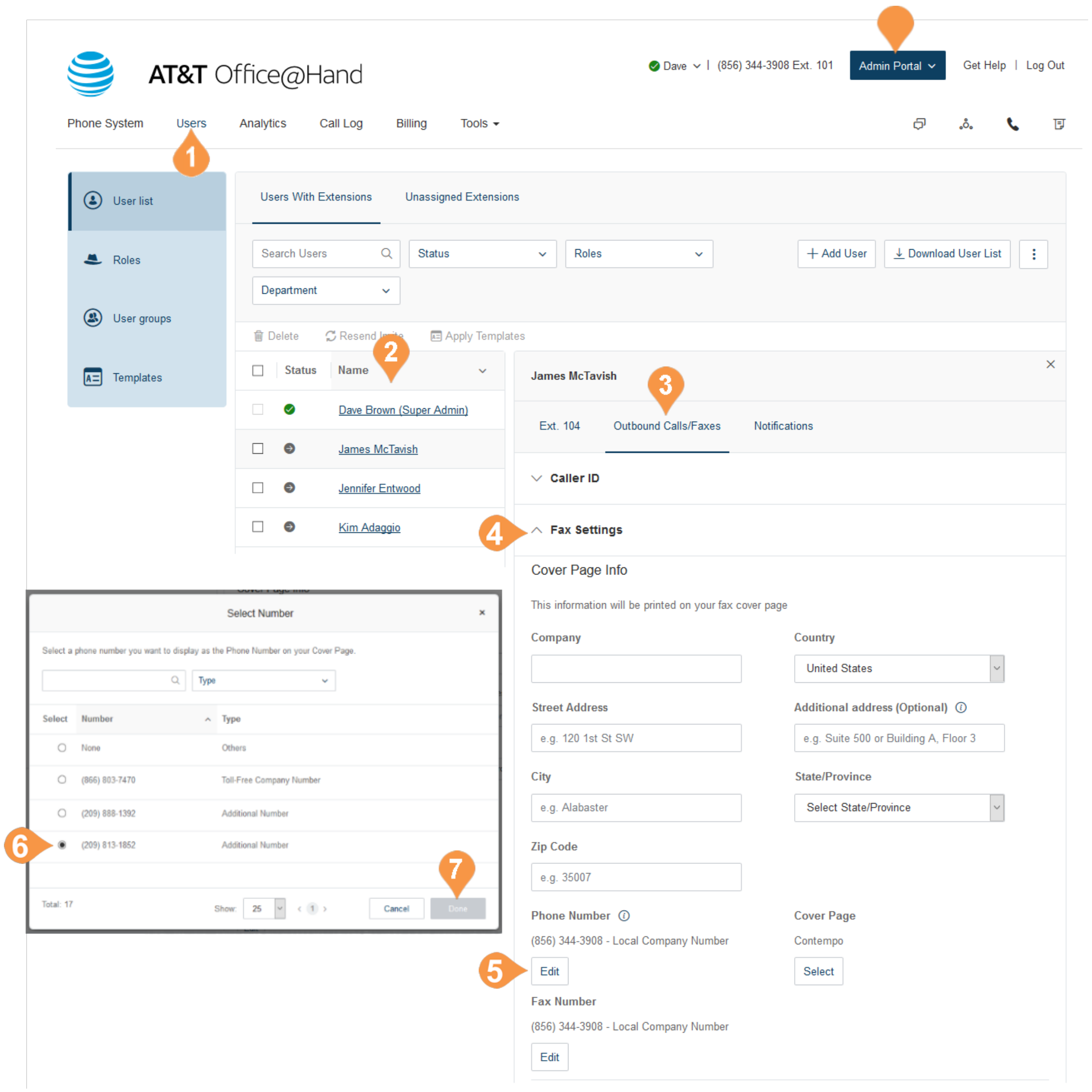


Fax Cover Page: Setting a Custom Phone Number

The fax cover page can also be customized with a callback number that can be configured to company numbers or numbers assigned to the fax sender. This gives the sender an option to provide the fax recipient with a way to call the sender directly rather than dialing the main number and navigating its menus.

To use the fax cover sheet with a custom number

1. From the **Admin Portal**, select the **Users** tab
2. From the list of names, choose the user for whom you want to designate a custom cover page phone number.
3. Choose the **Outbound Calls/Faxes** tab.
4. Select **Fax Settings.**
5. Beneath the Phone Number field, select Edit.
6. A pop-up appears with a list of available numbers. Click the button beside the number you want the cover page to show.
7. Click **Done**.



Roles and Permissions

Manage Roles and Permissions

Roles and permissions allow you to enforce your company security policy by providing a flexible, role-based access control in your Office@Hand phone system.

You can delegate access to certain areas without giving full admin access, or by retaining control over certain areas. You can use templates and bulk upload options to efficiently apply roles among users across an organization.

Predefined Roles

You can grant access privileges by assigning users one of seven predefined roles. These roles cannot be modified.

- Super Admin: Complete system administrator level access.
- Phone System Admin: Phone System settings access plus full access to user level settings.
- Billing Admin: Full access to billing functions, user level settings, international dialing, features plus analytics features.
- User Admin: Full access to user administration (self and others), international dialing, system features/ apps.
- Manager: Provide users with all capabilities of Standard (International) along with access to key functions such as Reports and Company Call Log.
- Standard (International): Full access to user level settings, access to features plus international dialing.
- Standard: Full access to user level settings, access to features and no international dialing.

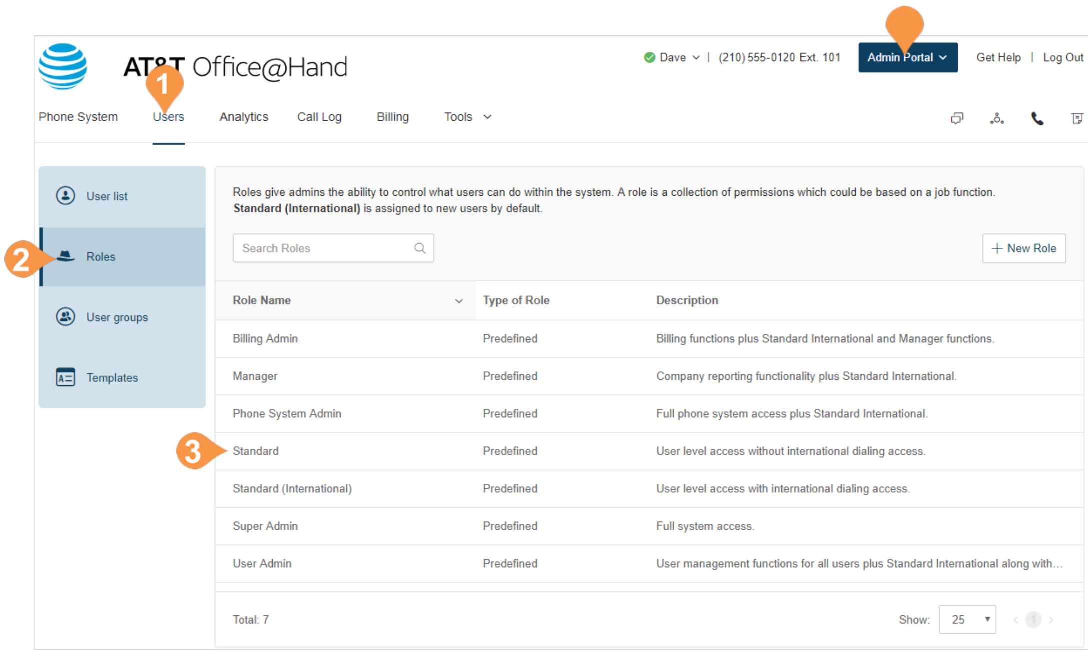
Custom Roles

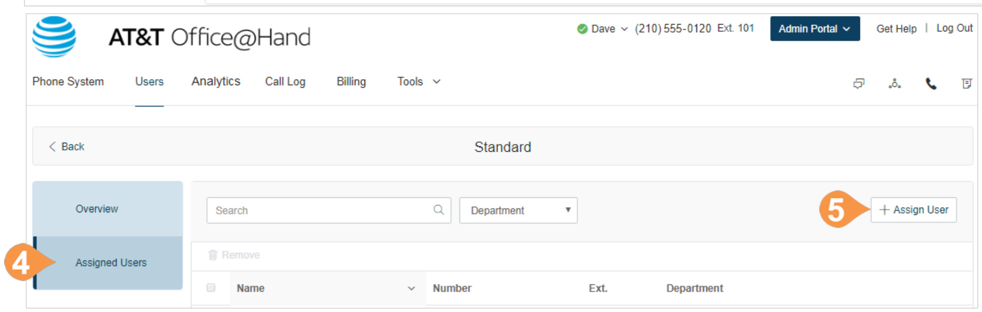
You can create custom roles to meet your business needs. When creating a custom role you select an existing role as a starting point, and select the permissions to be assigned to the role.

Assign Users to a Role

To assign users to a role:

1. From the Admin Portal, select the **Users** tab.
2. Click **Roles**.
3. Select one of the roles to assign users to.
4. Click the **Assign Users** tab to view the users currently assigned to the role.
5. Click **Assign User**.
6. A list of users and their currently assigned roles is displayed.
7. Select the users to assign to the role.
8. Click **Assign**.
9. The users' roles are assigned and the new role assignments are displayed in the User list.

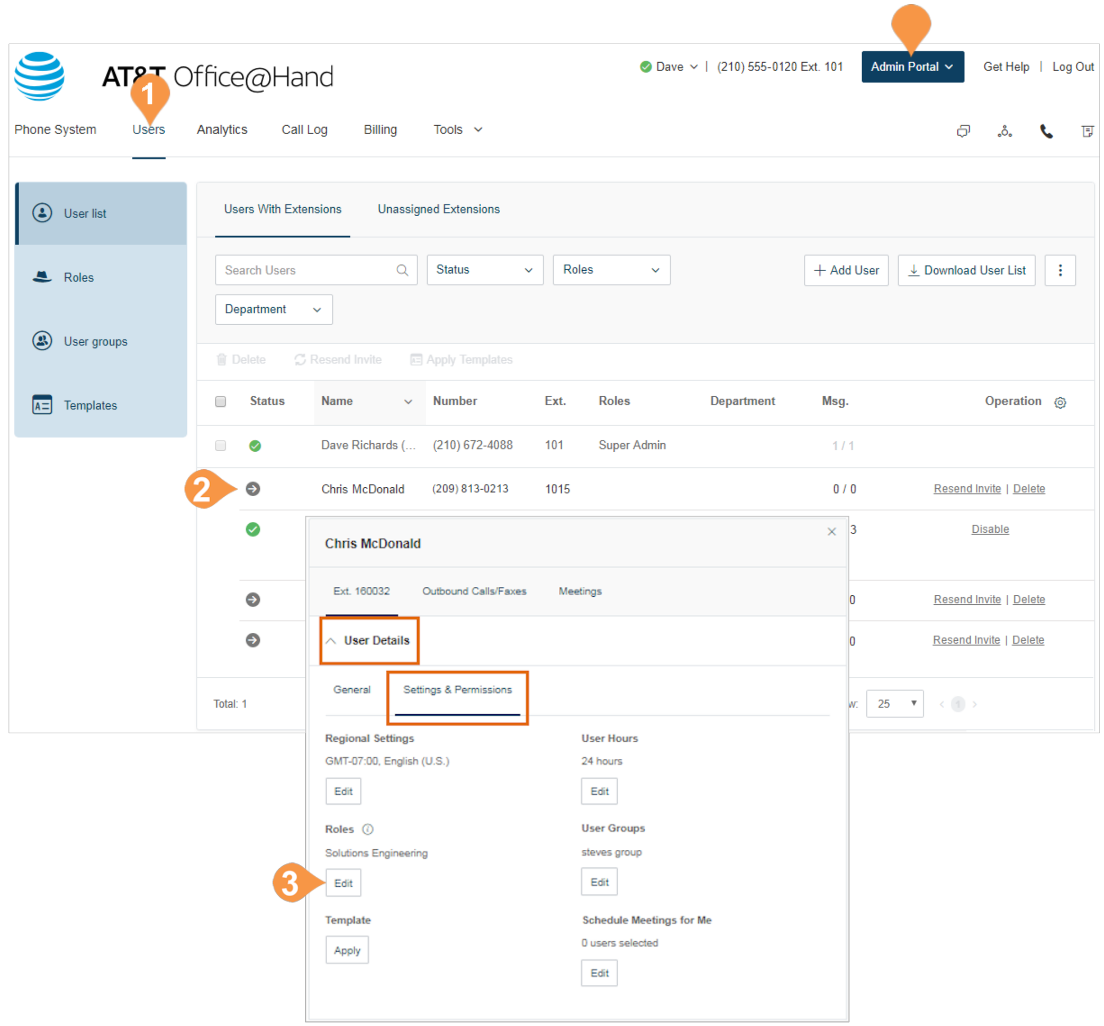




Modify a User's Role

You can modify a user's role by editing the user's settings page.

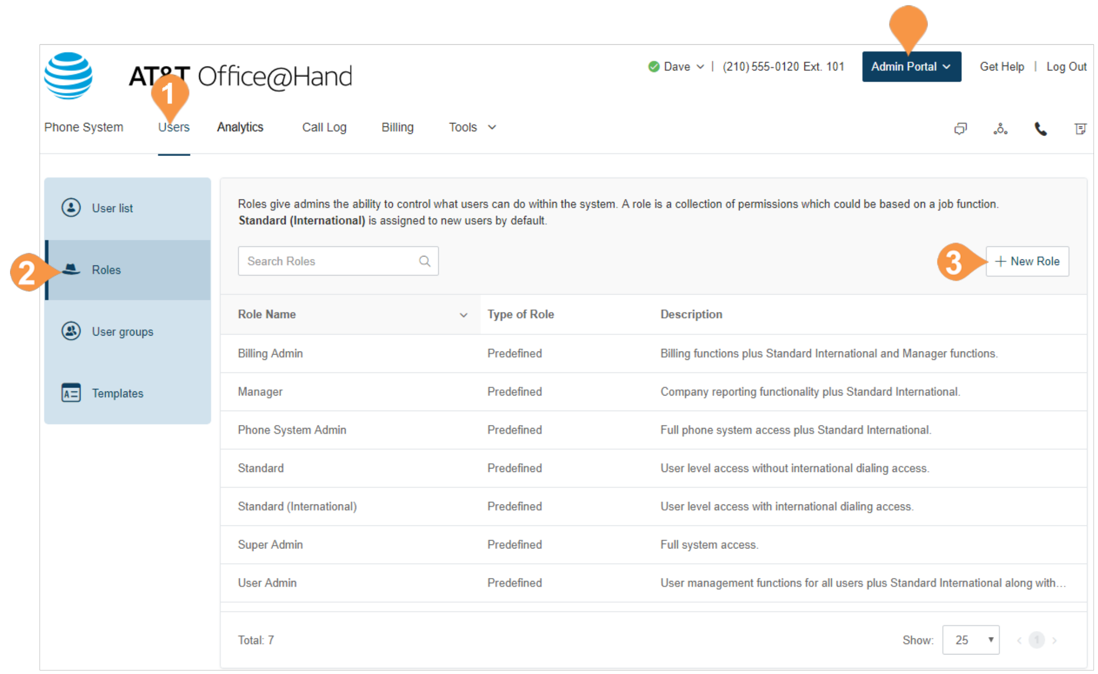
1. From the Admin Portal, select the **Users** tab.
2. Click the user whose role you will modify.
3. Click the **Edit** button next to **Role**.
4. Select the role.
5. Click **Save**.



Create a New Role

To create a new custom role:

1. From the Admin Portal, select the **Users** tab.
2. Click the **Roles** panel.
3. Click **New Role**. to launch the Create New Role wizard.

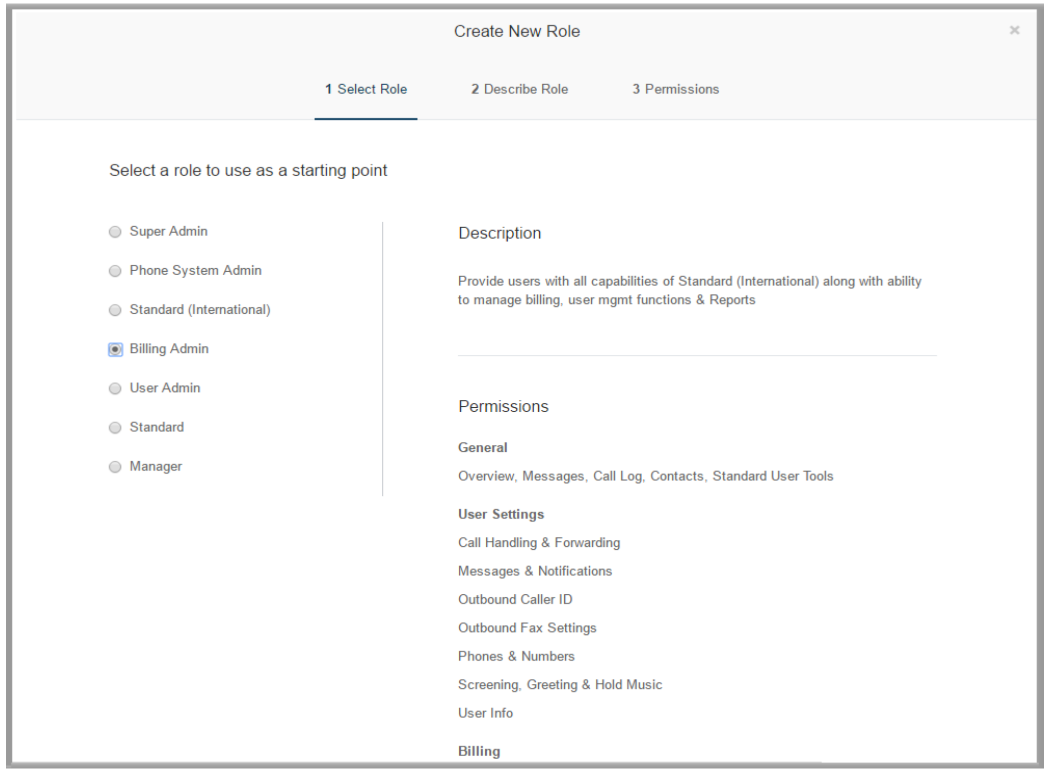


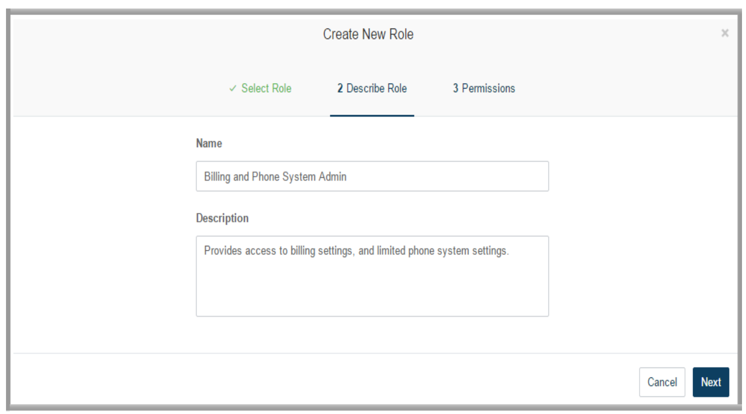
Step 1: Select Role:

Select a role to use as a starting point. The permissions included in the starting role are displayed. You will be able to modify these permissions when creating the role.

Step 2: Describe Role

Enter a **Name** for the role and a **Description** of the permissions of the role.



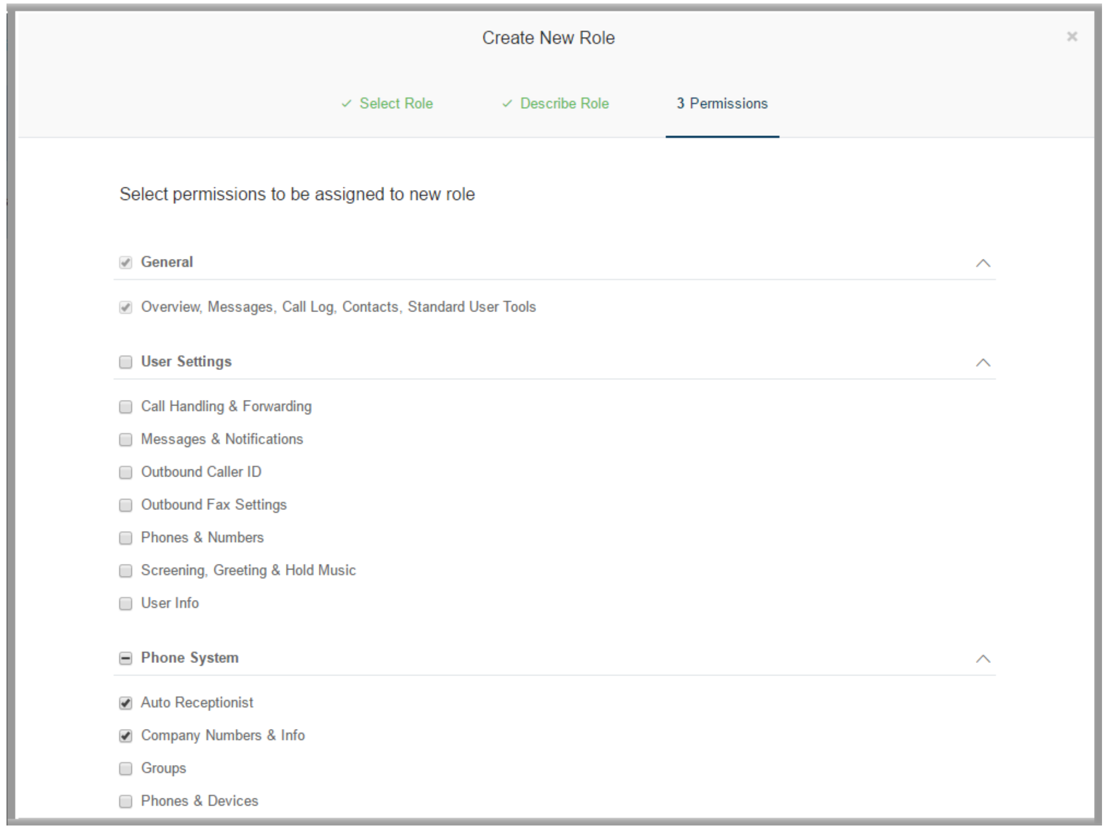


Step 3: Permissions

Select the permissions for the role by adding to or removing permissions as required.

The role is created and appears in the list on the Roles panel. To assign users to the role, see “Assign Users to a Role” on page 154.

Call Log permission names are aligned with existing permission names to make finding and assigning the desired permission easier. Additionally, a “Company Call Log - View Only” permission has been added to enable Administrators to assign the ability to view the company Call Log to other Users without granting full access.

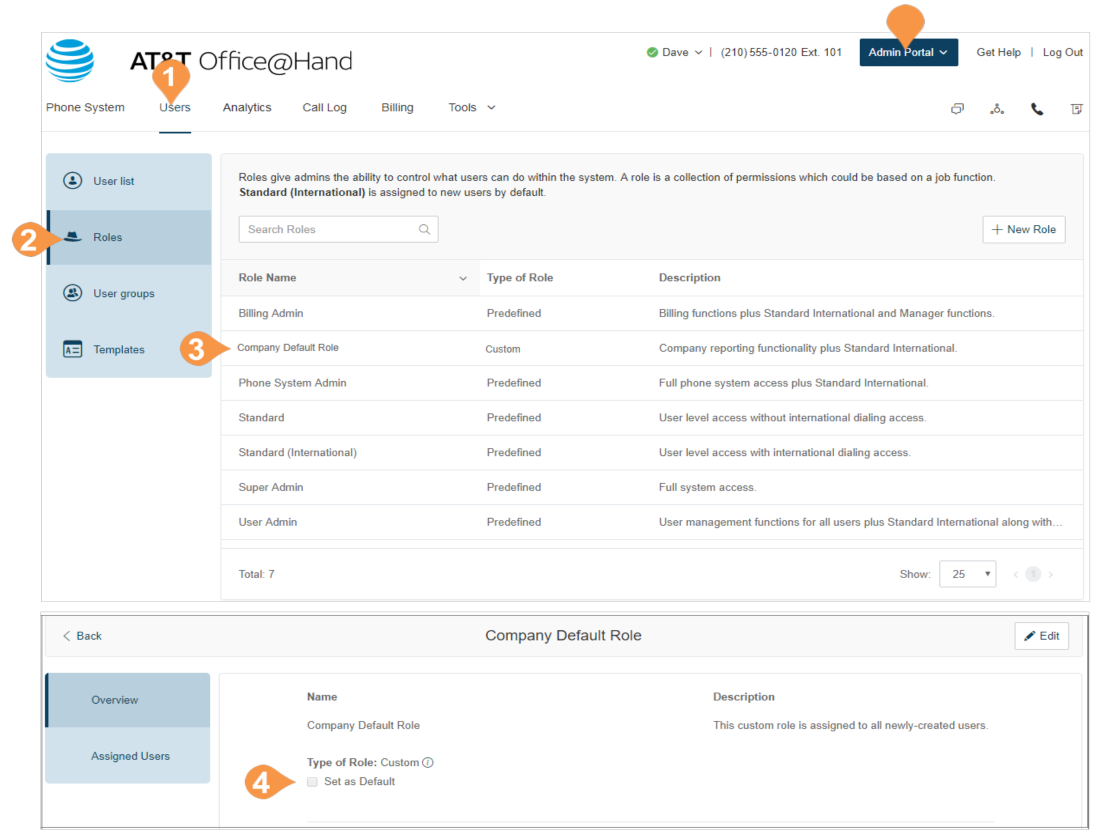


Setting a Custom Default Role

For ease of use, you can create a custom role and then set that role as the default role assigned to all newly-created users. To create your custom role, see “Create a New Role” on page 156.

If you do not set a default role, all newly-created users are automatically set to the Standard (International) role.

1. From the Admin Portal, click **Users**.
2. Click **Roles**.
3. Select the custom role you created.
4. Click the check box, **Set as Default**.

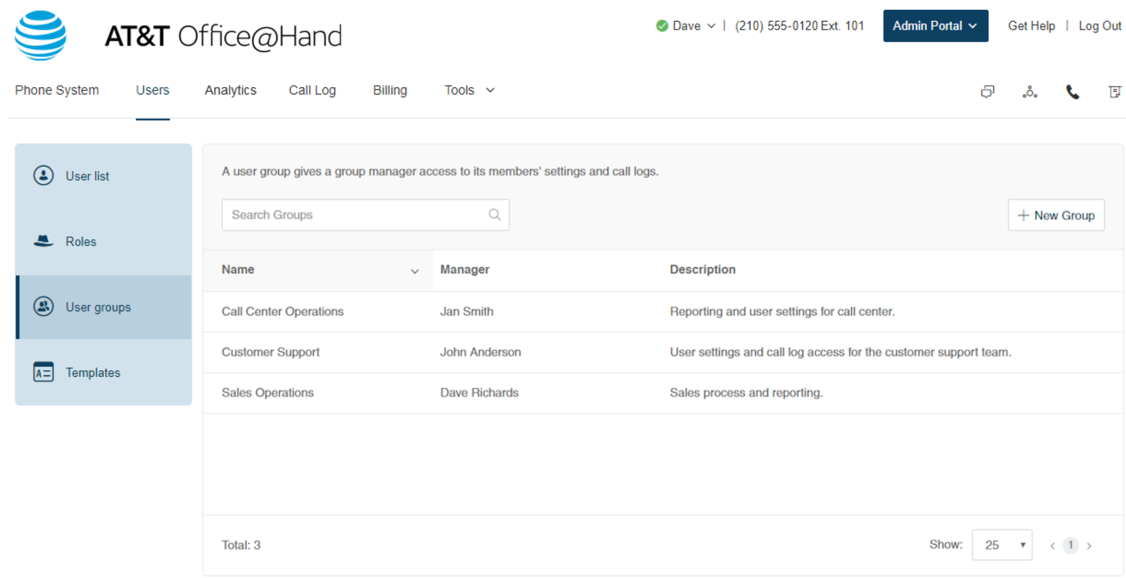


User Groups

Manage User Groups*

A User Group is a grouping of users based on an organization hierarchy. A user group is managed by a user group manager who can access and modify group members' settings and view their call logs and reports. The account administrator controls who gets access to view or create user groups.

The account administrator can create multiple groups as required for your organization. A flat, non-nested group structure is supported. Users may belong to multiple groups. For example, for a director with two team managers (and their team members) reporting to the director, you might create three user groups: one group for each of the team managers, and an overall group for the director that includes all the members.



When a user is assigned to be a user group manager, the user automatically inherits certain permissions. These permissions work in conjunction with the role assigned to the user in the Roles section of user administration. You must ensure that the primary role has the correct permissions so that user access is controlled when the user is given user group manager access.

* Available for Office Premium and Enterprise only.

User Group Management Tasks

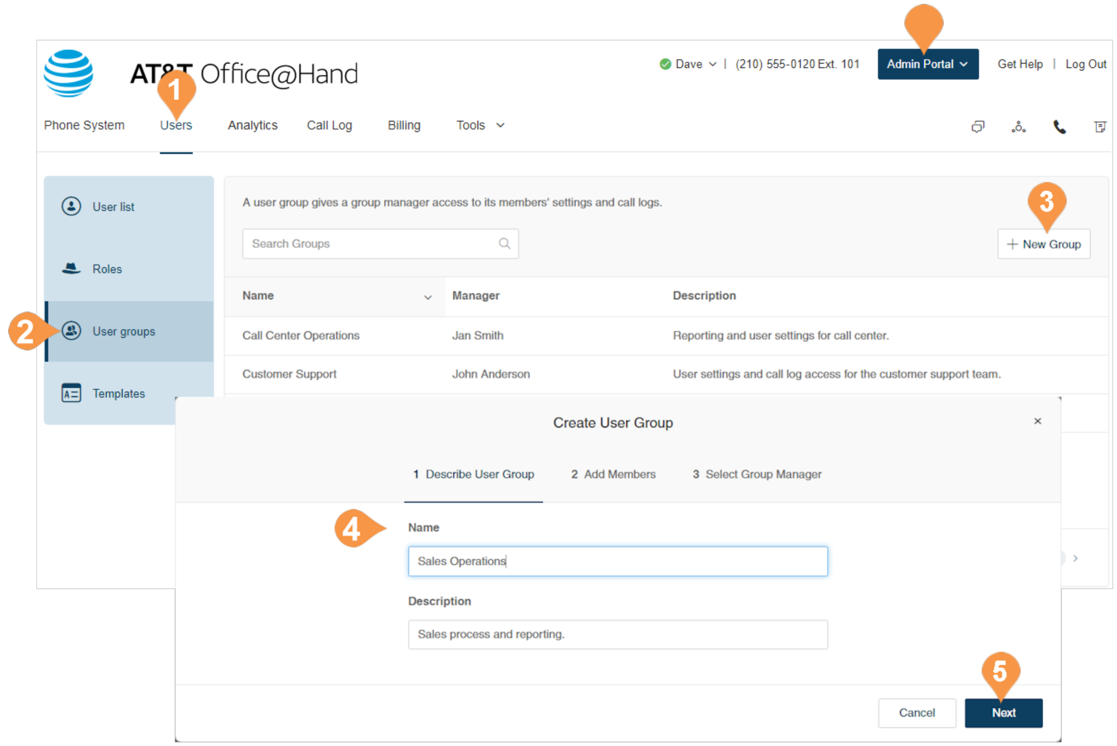
The tasks involved in managing user groups include:

- **Assigning Users to User Groups:** See the Templates section in user management to streamline assigning users to user groups. Do this using the User Groups option in Templates. See “Templates” on page 167.
- **Viewing and modifying User Settings:** See the User Settings section, in the user management User List to view and modify the settings assigned to a group member, including the roles and user groups in the User Details section. See “Users Settings” on page 144.
- **Accessing Reports for your group members:** Office@Hand Reports help admins and user group managers optimize the phone system by presenting usage analysis and trending metrics in an easy-to-read graphical format. When logged in as a user group manager, you can see your group members’ data only. See “Analytics” on page 174.

Create a User Group

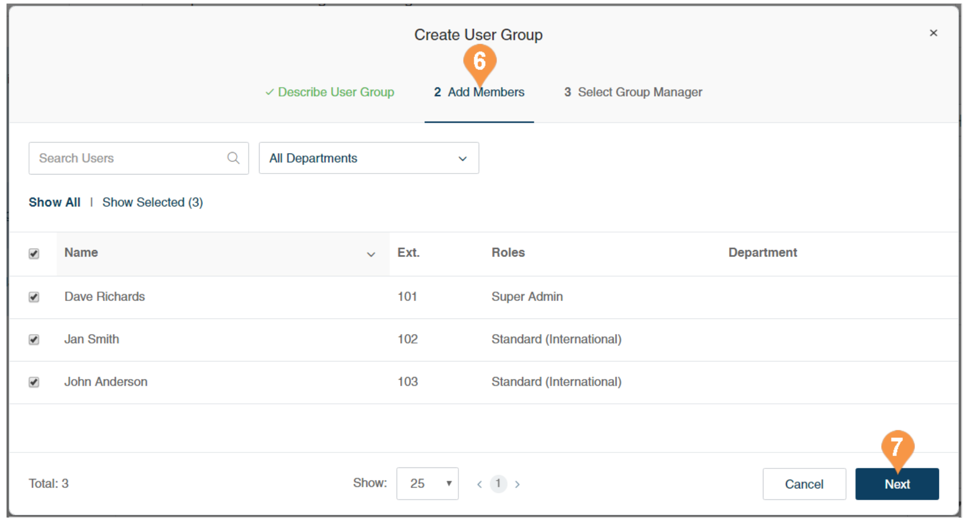
When you create a user group, you describe the group, add members to the groups, and assign a group manager who can modify members' settings and view their call logs.

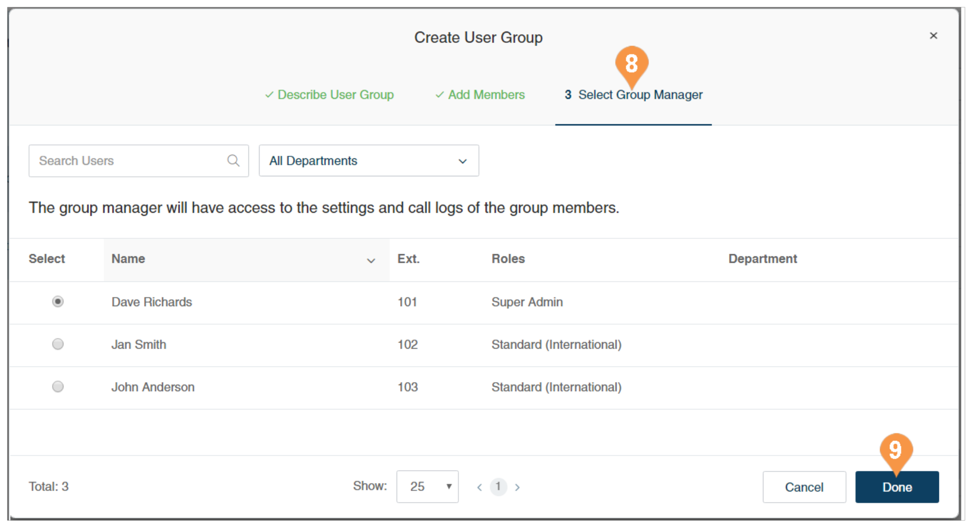
1. From the **Admin Portal**, click the **Users** tab.
2. Click **User Groups**. You will see a list of existing user groups, if any.
3. Click **Create** (if no user groups exist), or click **New Group**.
4. Enter a **Name** and **Description** for the user group.
5. Click **Next**.

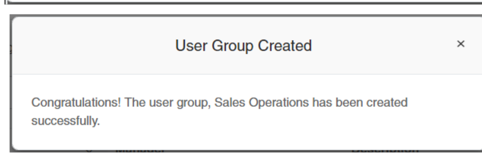


6. Add members to the user group. Search by department or all departments, and check to select the users.
7. Click **Next**.
8. Select a member of the user group to be the user group manager. (The manager must be a member of the user group).
9. Click **Done**.

The user group is created and a confirmation message is displayed. The user group's name and manager are displayed in the User Groups view.





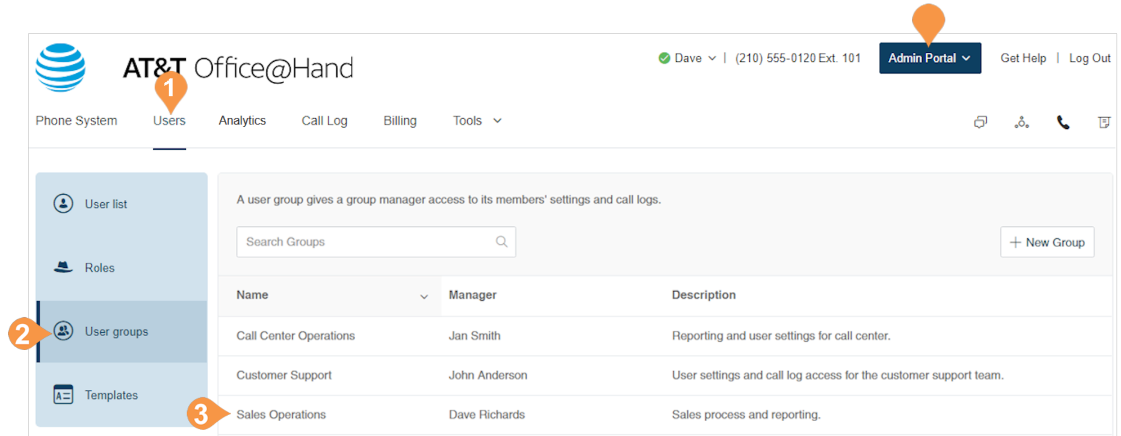


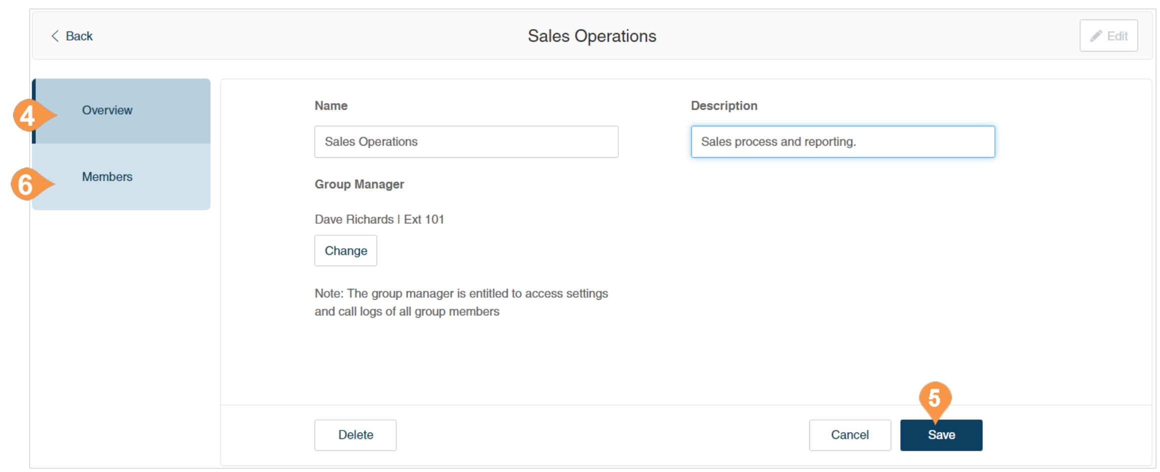
Edit a User Group

To edit or delete an existing user group:

1. From the **Admin Portal**, click the **Users** tab.
2. Click **User Groups**.
3. Select an existing group from the list.
4. On the **Overview** page, click **Edit** to change the name or description of the user group. To change the manager of the user group, click **Change**, select a new manager, and click **Done**.
5. Click **Save** to save the group's changes.
6. On the **Members** page, add to or remove members from the group as needed. To add a member click **Add Member**, select members to be added, and click **Add**.

To delete a user group, click **Delete** and confirm the deletion. Deleting a group will result in members being removed from the group and the group manager losing some privileges.





Templates

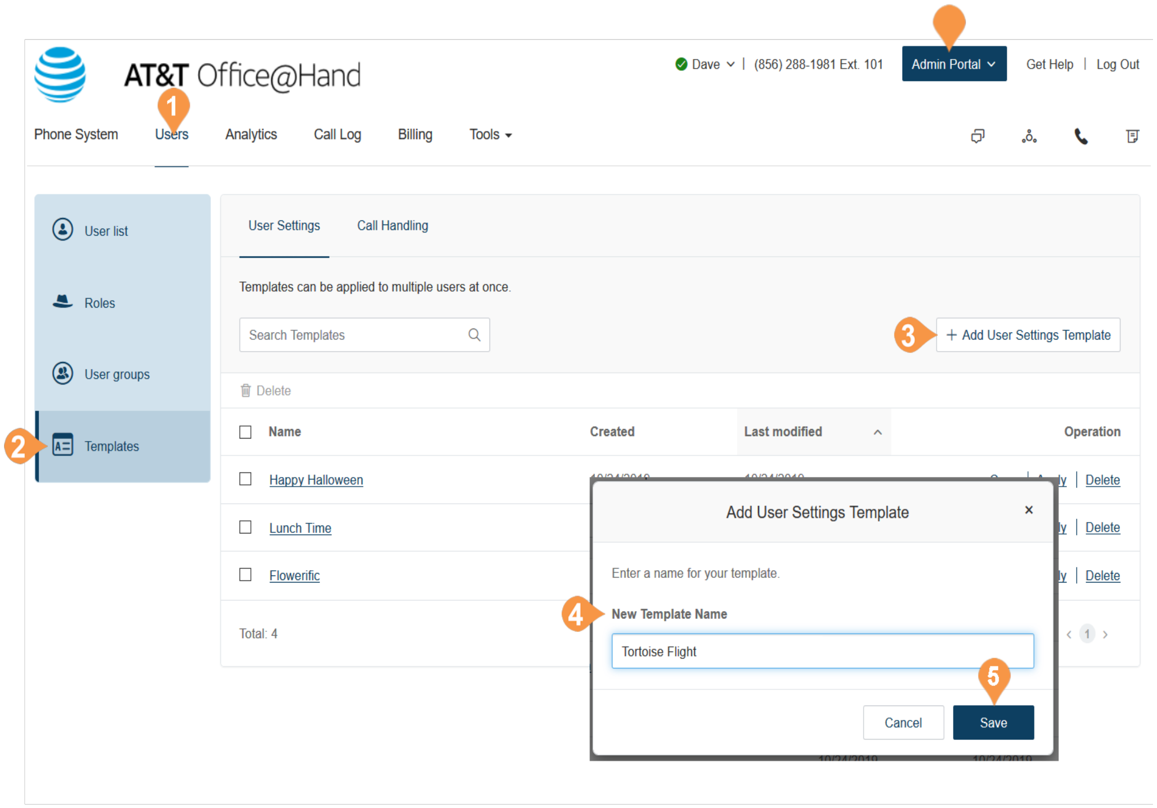
Templates

Office@Hand Templates will save you time and repetitive manual effort by streamlining your administrative routine. Create or edit the template for all settings for a user and apply it to users as you need.

Create a Template for User Settings

1. From the **Admin Portal**, click the **Users** tab.
2. Click **Templates.**
3. Click **Add Template**.
4. Enter a **New Template Name**.
5. Click **Save.**

Create a new template or select one from the list. A new panel pops up on the right with options you can set for the template, grouped into categories of settings for Inbound calling, Outbound calling, and Notifications. For each group of settings, you can specify whether the settings override each users' settings by checking **Override User Settings**.



Inbound

Template Information

Edit the name of your template and see the last time it was modified and when it was created.

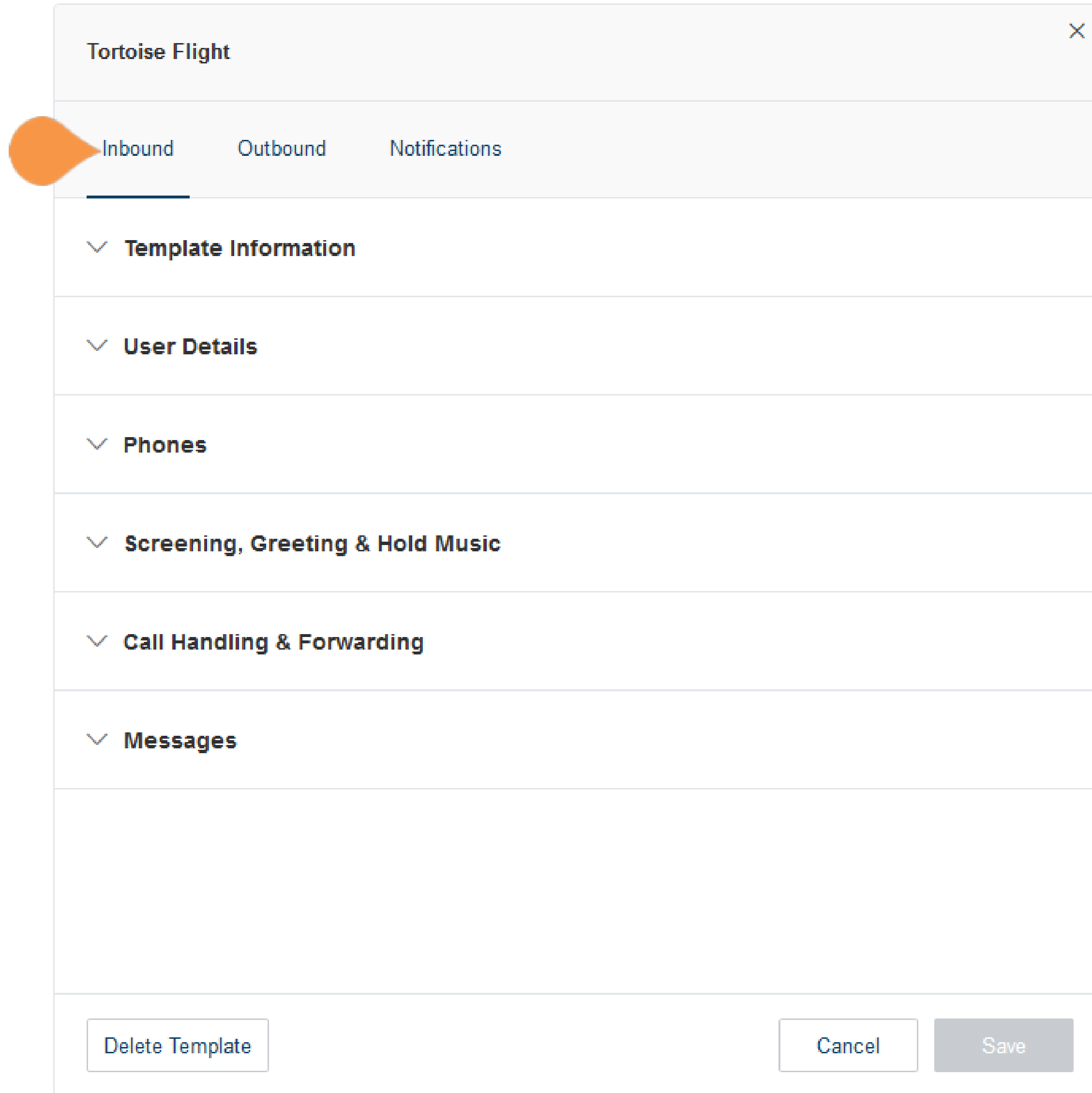
User Details

Settings and Permissions:

- **Regional Settings:** Specify regional settings for users such as timezone and time format
- **Roles**: Select the role to be applied to the users. Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function.
- **Confirmation Message** duration.
- **User Hours:** Set user hours to 24 hours or Specify hours.
- **User Groups**: Specify the user groups where the user is to have membership.
- **Job Title**

Phones

- **Emergency Address**: Provide a physical address for First Responders.
- **Bandwidth Settings**: To improve the quality of your calls, you can set how much network bandwidth to use for calls: **High Bandwidth** gives you better sound quality, but calls can become choppy when it is not available, **Low Bandwidth** give you lower sound quality, but ensures no interruptions during your conversation.



Screening, Greeting, & Hold Music

- **User Greeting:** Turn on this option when you want the system to answer the call with a recorded welcome message so callers know they've reached the right person. This is not a personal voicemail announcement.
- **Connecting Message**: Set a recorded message you want callers to hear to let them know the call will now be transferred to your line.
- **Hold Music**: Turn on this option when you want callers to hear music whenever you put a call on hold.
- **Call Screening:** Turn on this option when you want callers to announce their name before continuing to connect the call. This option lets you identify the caller so you can pick up the call immediately. After turning on this option, go to **Call Handling & Forwarding** > **Settings** > **Incoming Call Information** to set your preferences.
- **Audio While Connecting**: Incoming callers will hear the music selection that is configured with this setting. The music selection callers will hear when they are placed on hold can be set in the Hold music selection. Note that the **Audio While Connecting** setting is applied on a rule basis, whereas the **Hold Music** setting is applied for all calls.

Call Handling & Forwarding

- **User Hours:** Specify whether to notify your Desktop app(s) and smartphone(s) before forwarding the incoming call to your desk phones and forwarding numbers, and specify a wait time.
- **After Hours:** Customize business hours.
- **Settings**
  - **Display Number:** Choose whether you want the Incoming Caller ID or Called Number to display.
  - **Play Announcement:** Choose options for when to play announcement before connecting.

Messages

- User Hours:
  - **Take Messages:** Allow or deny users to take voicemail messages; specify a default or custom voicemail greeting.
  - **Voicemail Greetings**: Specify a default voicemail greeting.
  - **Message Recipient:** Choose whether to override user's settings, select users at This Extension to be included as message recipients when applying the template, or select a specific extension.
- **After Hours:** Customize business hours.

Outbound

Click the **Outbound** tab to configure settings for outbound calls such as caller ID and fax settings.

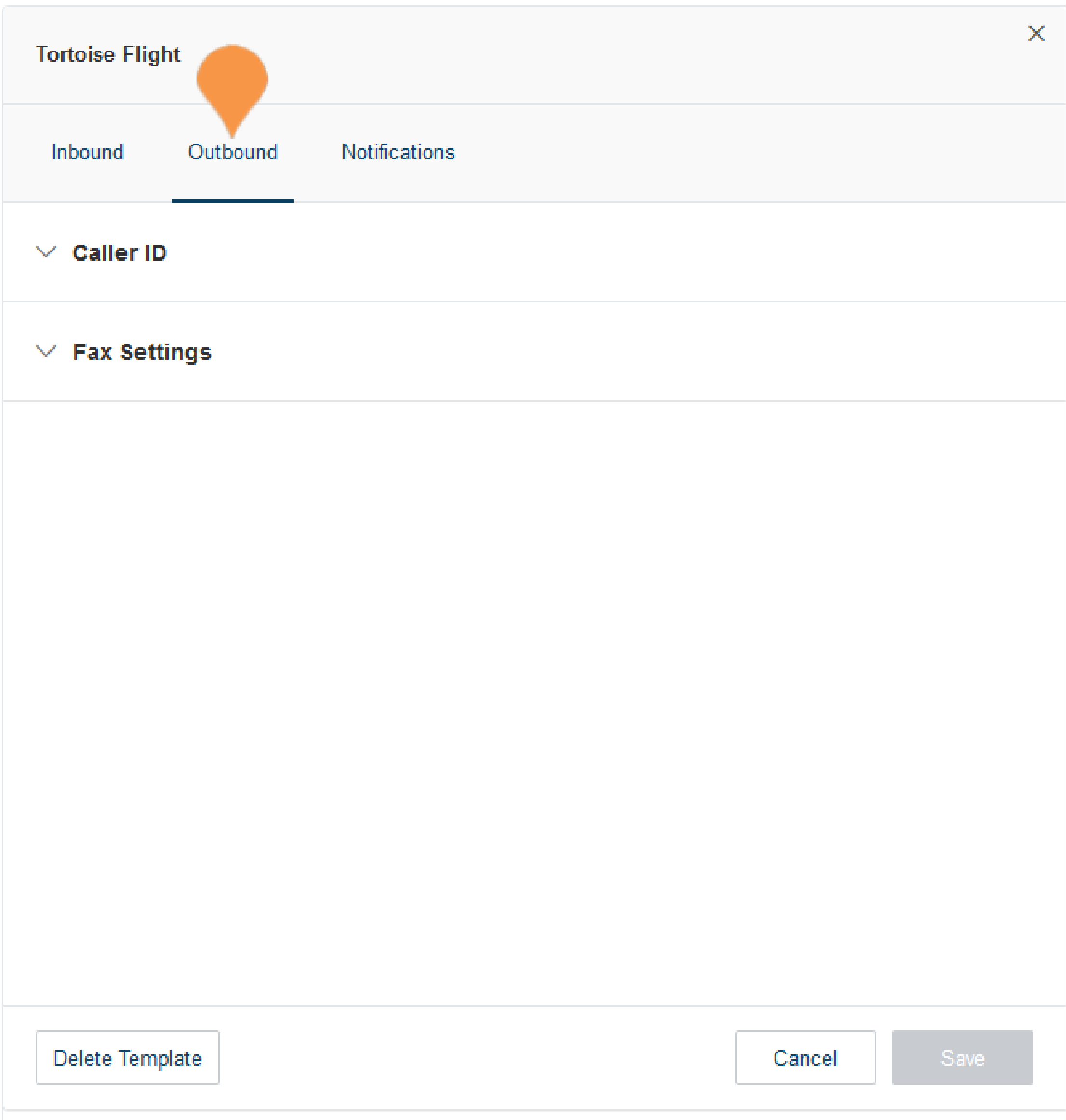
Caller ID

Specify caller ID settings by phone or by feature. If you select Toll-Free number or Blocked as your Default Caller ID for any of your endpoints/calling features, you can also select an alternate local number to use in case we detect that your call will not go through. Choose which phone number will display as Caller ID for outgoing calls:

- By Phone
- By Feature
  - RingOut from Web
  - Call Flip
  - Mobile App
  - Delegated Caller ID
  - RingMe (Outgoing to Caller)
  - Fax Number
  - Common Phone
  - Alternate Caller ID

Fax Settings

Specify fax settings including fax cover page information and settings for faxes sent through email.

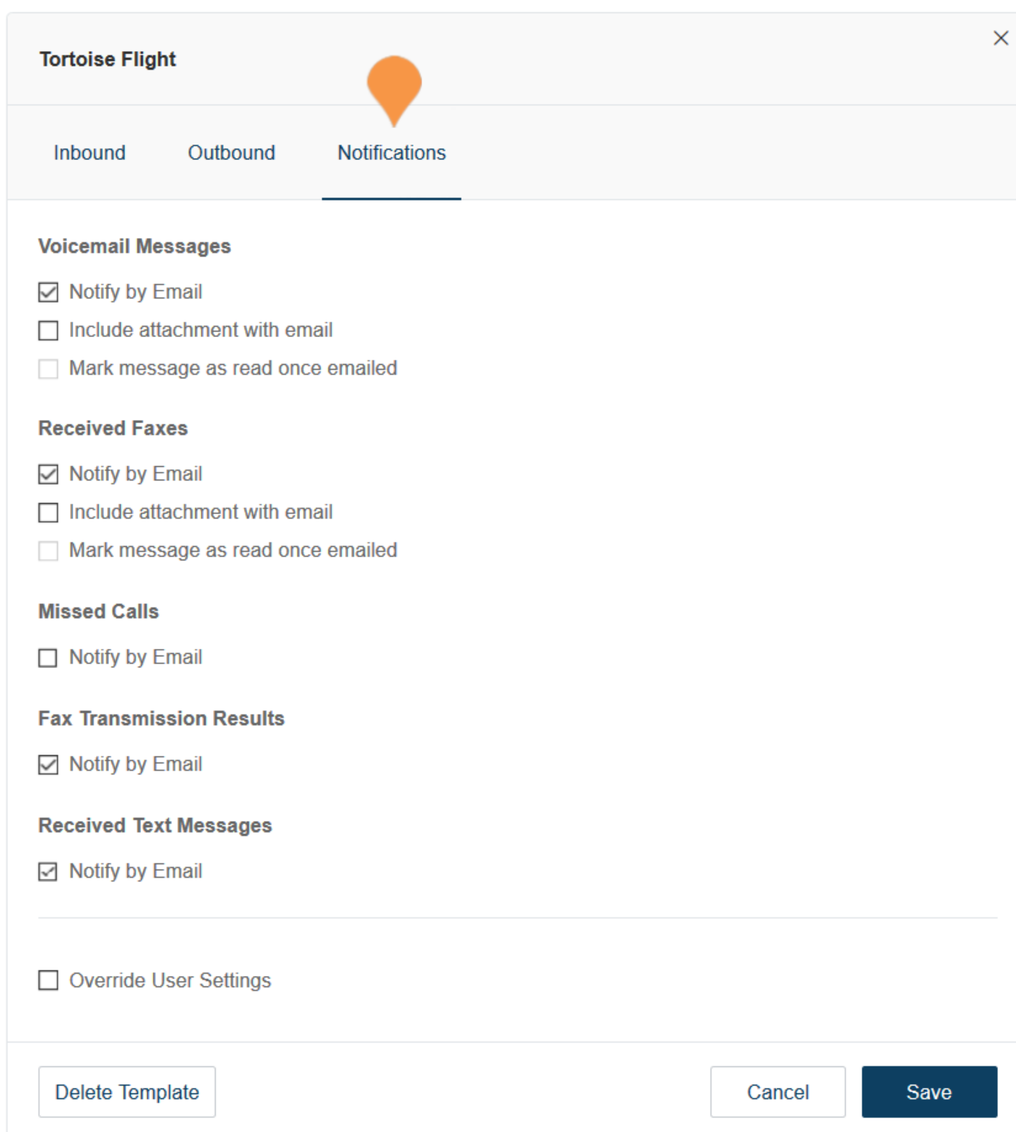


Notifications

Choose how to be notified about voicemail messages missed calls, fax transmission results and received text messages.

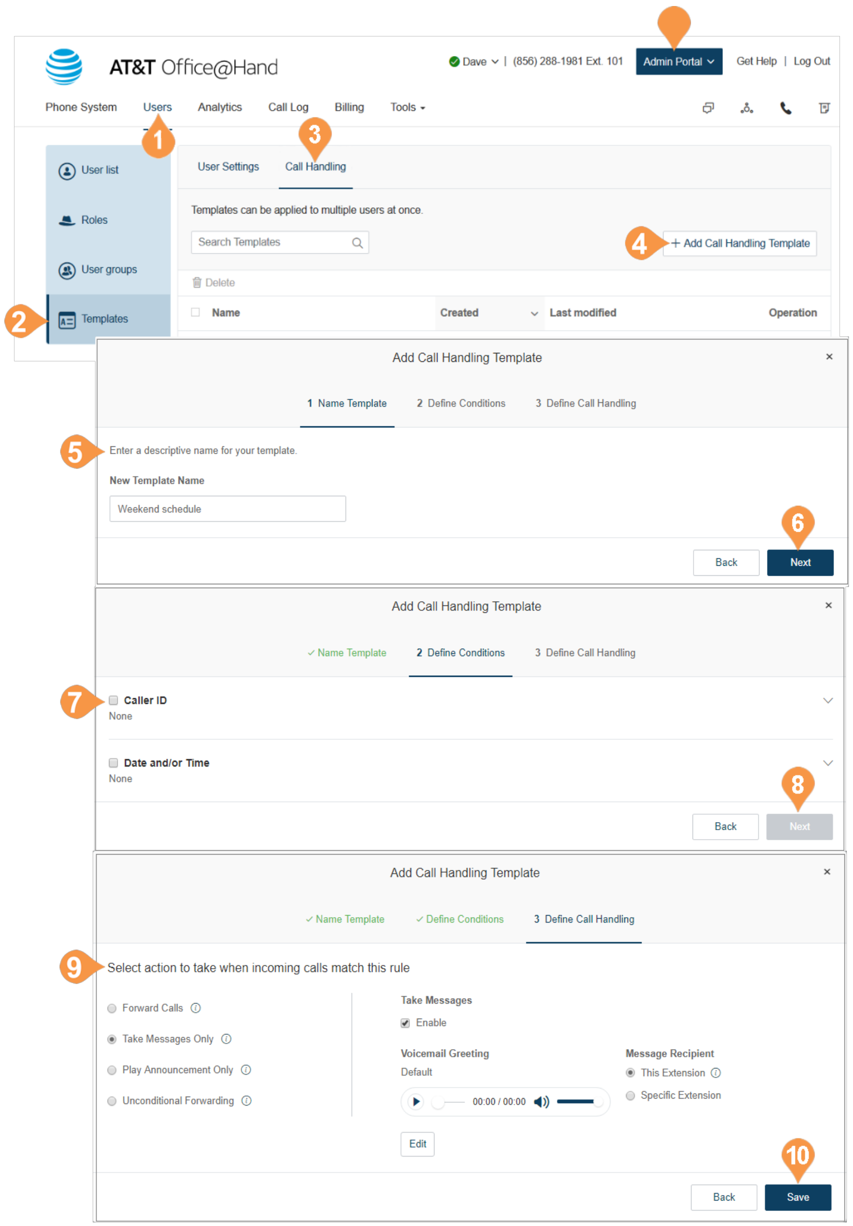
Determine notification rules for:

- Voicemail Messages
- Received Faxes
- Missed Calls
- Fax Transmission Results
- Received Text Messages



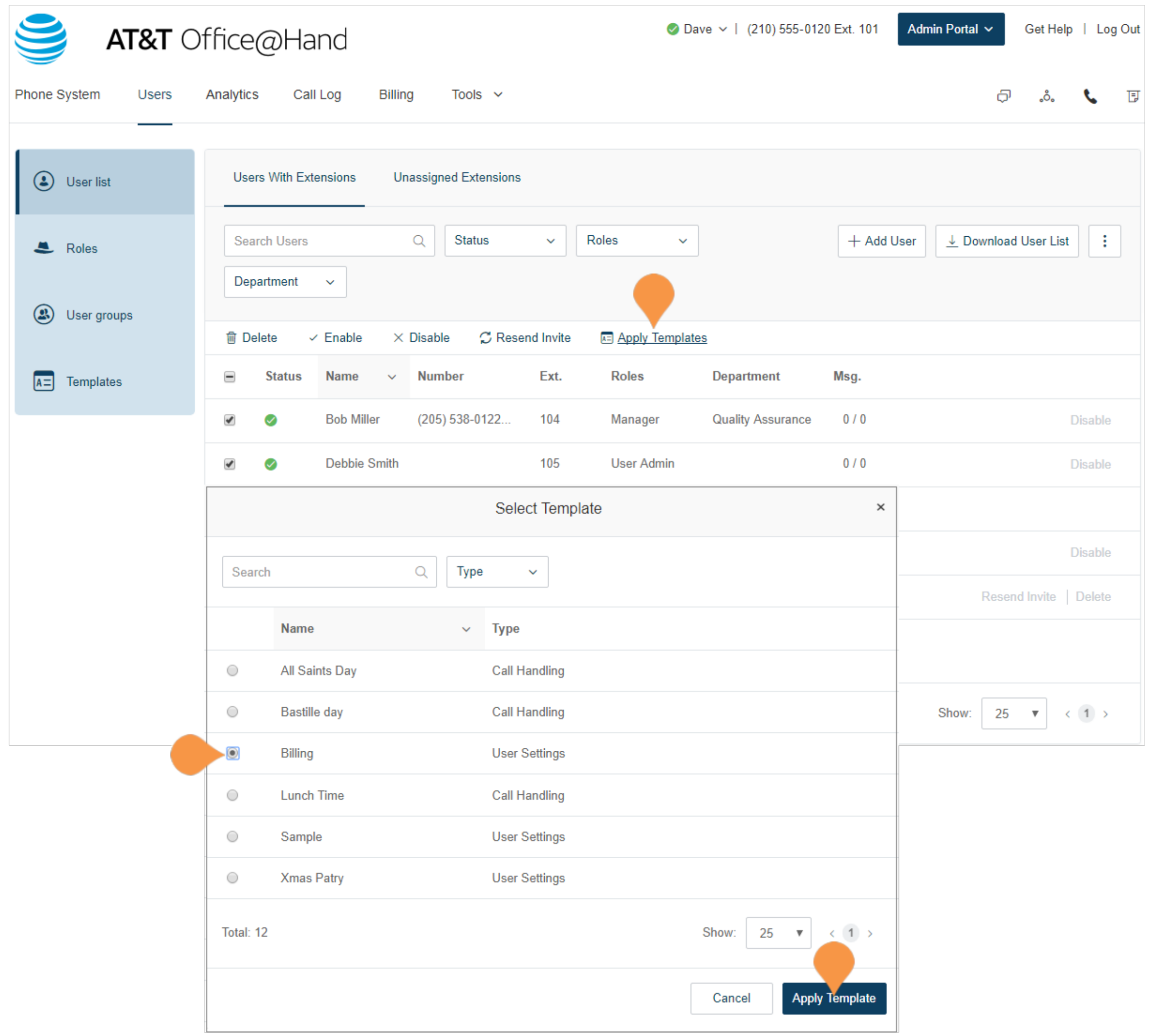
Create a Template for Call Handling Settings

1. From the **Admin Portal**, click the **Users** tab.
2. Click **Templates**.
3. Click **Call Handling**
4. Click **Add Call Handling Template**.
5. Enter a **New Template Name**.
6. Click **Next**.
7. Specify the caller ID or date conditions that will trigger the application of this template.
8. Click **Next**.
9. Specify the action to take when incoming calls match this rule.
10. Click **Save**.



Apply a Template to Users

1. From the **Admin Portal**, click the **Users** tab.
2. Select a number of users.
3. Click **Apply Templates**.
4. Select a template to apply.
5. Click **Apply Template**.
6. Click **Yes** to confirm that you are about to make settings changes for all the selected user(s). This will overwrite any configuration the user might have done previously.



Analytics

Analytics Portal

The Office@Hand Analytics Portal allows you to access real-time and historical metrics including call quality, users' calling performance, and hard phones status.

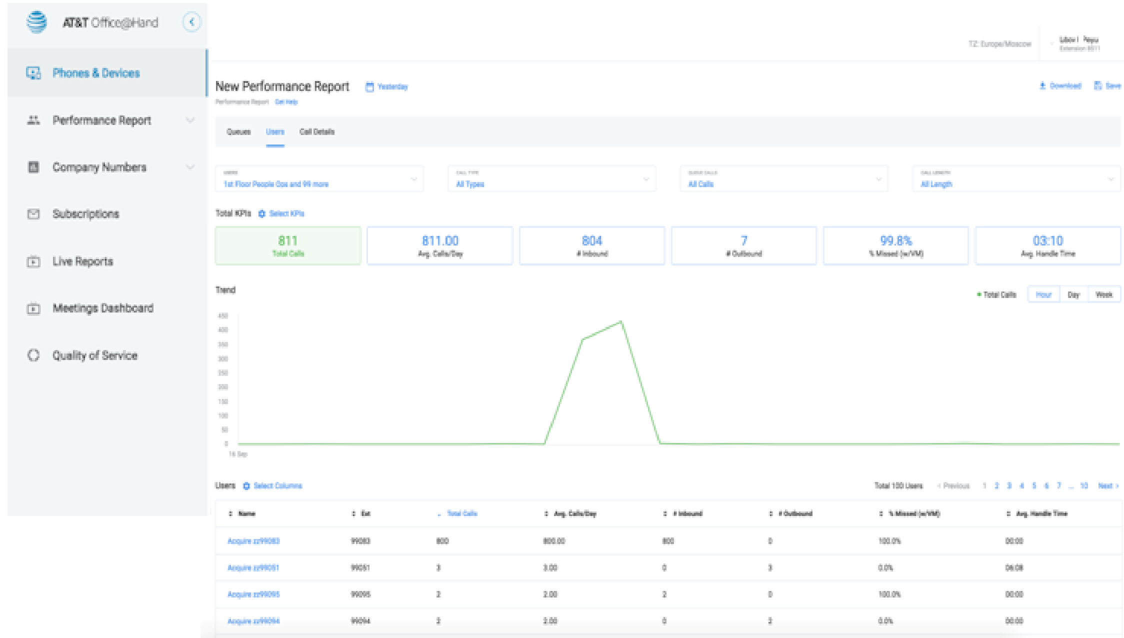
You can use the data from portal to determine:

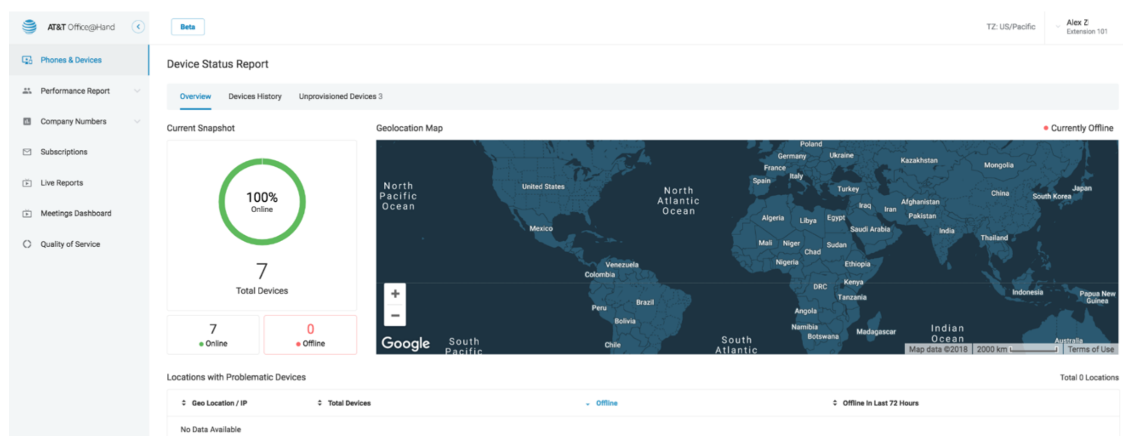
- the quality of your company calls; improvements
- if queue/group users handle calls as expected
- whether you need more users to minimize the number of missed calls
- the current status of your queue

Additionally, Enterprise Edition accounts can access a Device Status report.

For more information see these guides:

- Office@Hand QoS Reports User Guide
- Office@Hand Performance Reports User Guide
- Office@Hand Device Status Reports User Guide

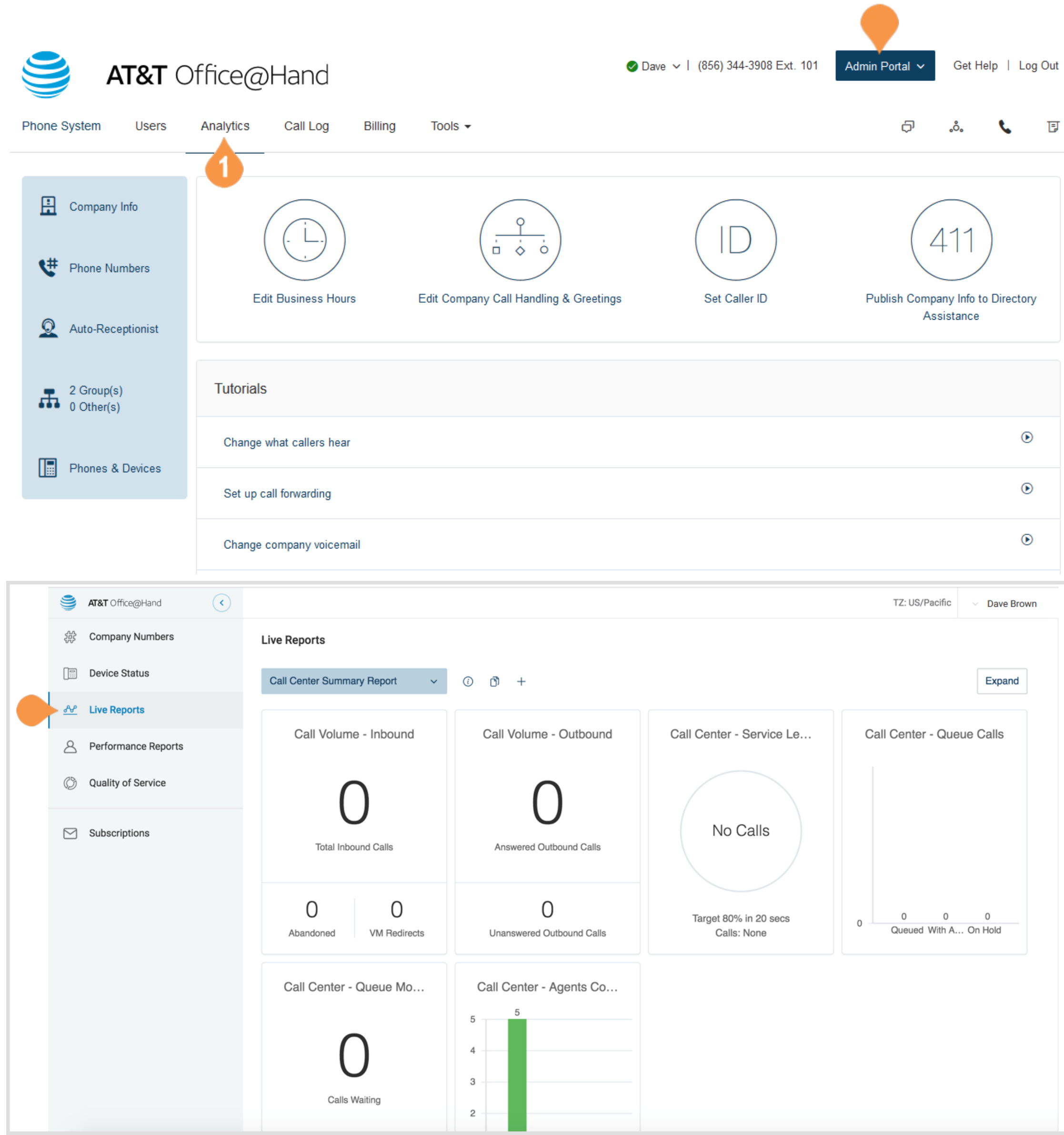




Live Reports

Live Reports provides on-demand access to reports on inbound and outbound calls close to real-time, which can be displayed on dashboards. It helps an IT admin optimize the advantages of the phone system by presenting usage analyses and trending metrics in an easy to read graphical representation. This feature requires an add-on license.

- Over 30 metrics for both inbound and outbound calls are supported.
- Real-time reporting on queues
- Easy to manage dashboards
- Drag and drop widgets
- Service Level identification and management.
- Show data for queue level visibility, such as customers waiting, SLA, and AHT
- Show data for agent level visibility, such as status, talk time, hold time, transfer rate, and call count.
- Data export capabilities.



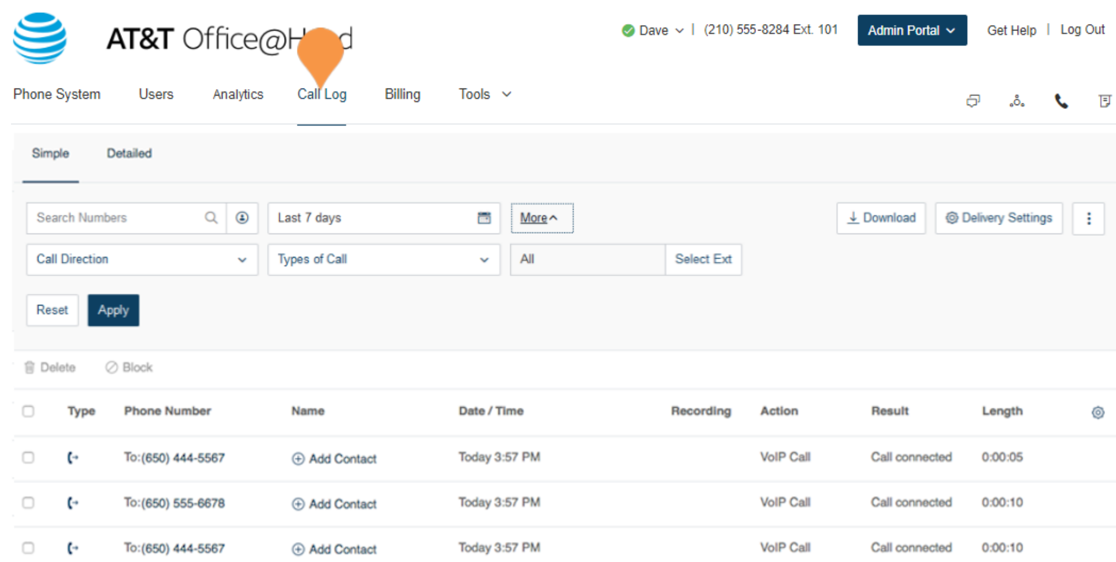
To access Live Reports:

1. From the **Admin Portal**, select the **Analytics** tab. A new window opens with the **AT&T Dashboard**.
2. From the **AT&T Dashboard**, choose **Live Reports**.

Call Log

Call Log

The Call Log reports inbound and outbound calls and faxes for the company number and specified extensions. The Call Log is available as a **Simple** view which concisely summarizes the calls, and as a **Detailed** view, which shows additional call record details.



You can filter the call log records by number, time period, call direction or type of call (inbound or outbound). Select your filter criteria, and click **Apply** to refresh the log. In **Delivery Settings**, you can set delivery of the call log to an email address on a daily, weekly, or monthly basis, on a specified day.

In the **Type** column you can see the type of calls. In the **Recording** column, you can see if the call has been recorded. Click the play icon to hear a recording.

Inbound Call

Outbound Call

Missed Call

Listen to a call recording

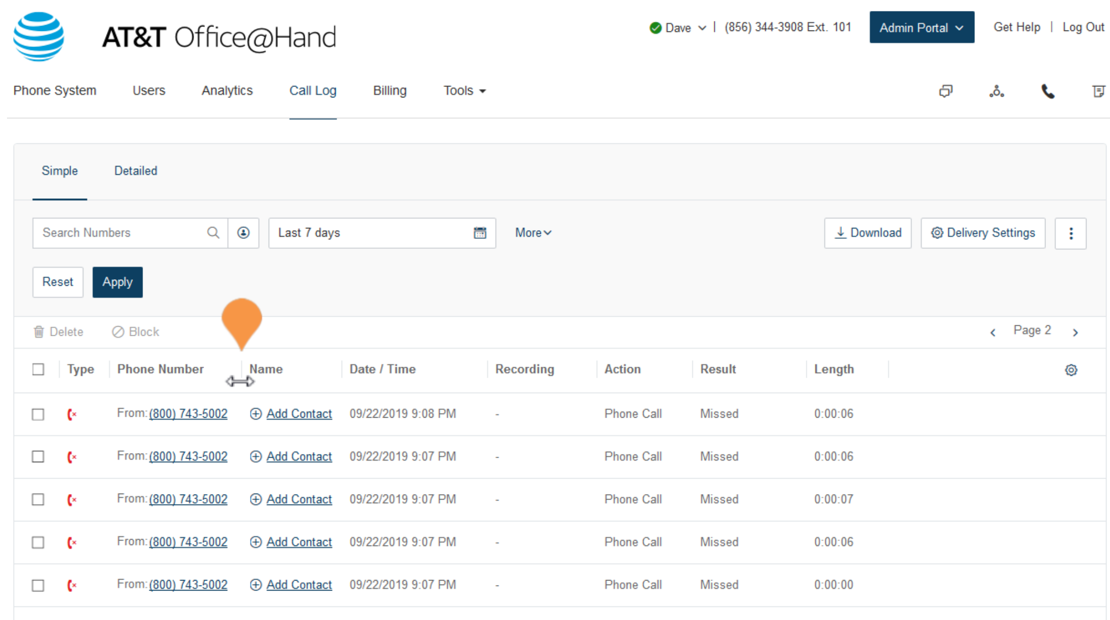
Administrators can enable the bad call quality indicator for a given account. After this feature is enabled, the **Quality** column is displayed. In the Quality column you will see thumbs down icons for calls that were connected. Click the white thumbs down if you were not satisfied with the quality of a call.

To mark as a bad call, click

Confirmed marked as bad call

Adjustable Column Width

Column widths can be adjusted to see more data. Hover over any column break and drag the column to the desired width.

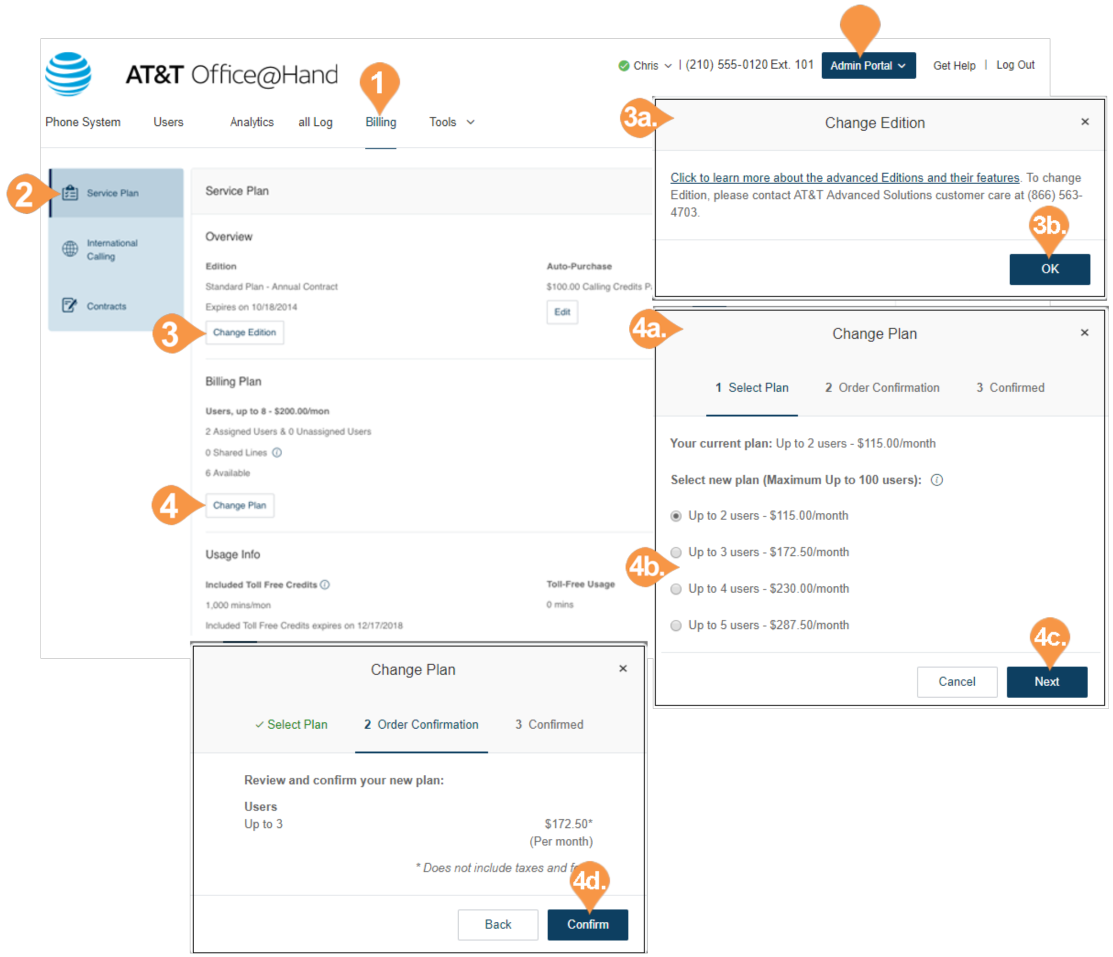


Billing

Billing

The Billing tab houses menus for managing your Service Plan, International Calling, and Contracts. View and edit your service plan, payment information, and international calling plans here.

Note: Billing is an Admin function only. This option will not be available to standard users.



Service Plan

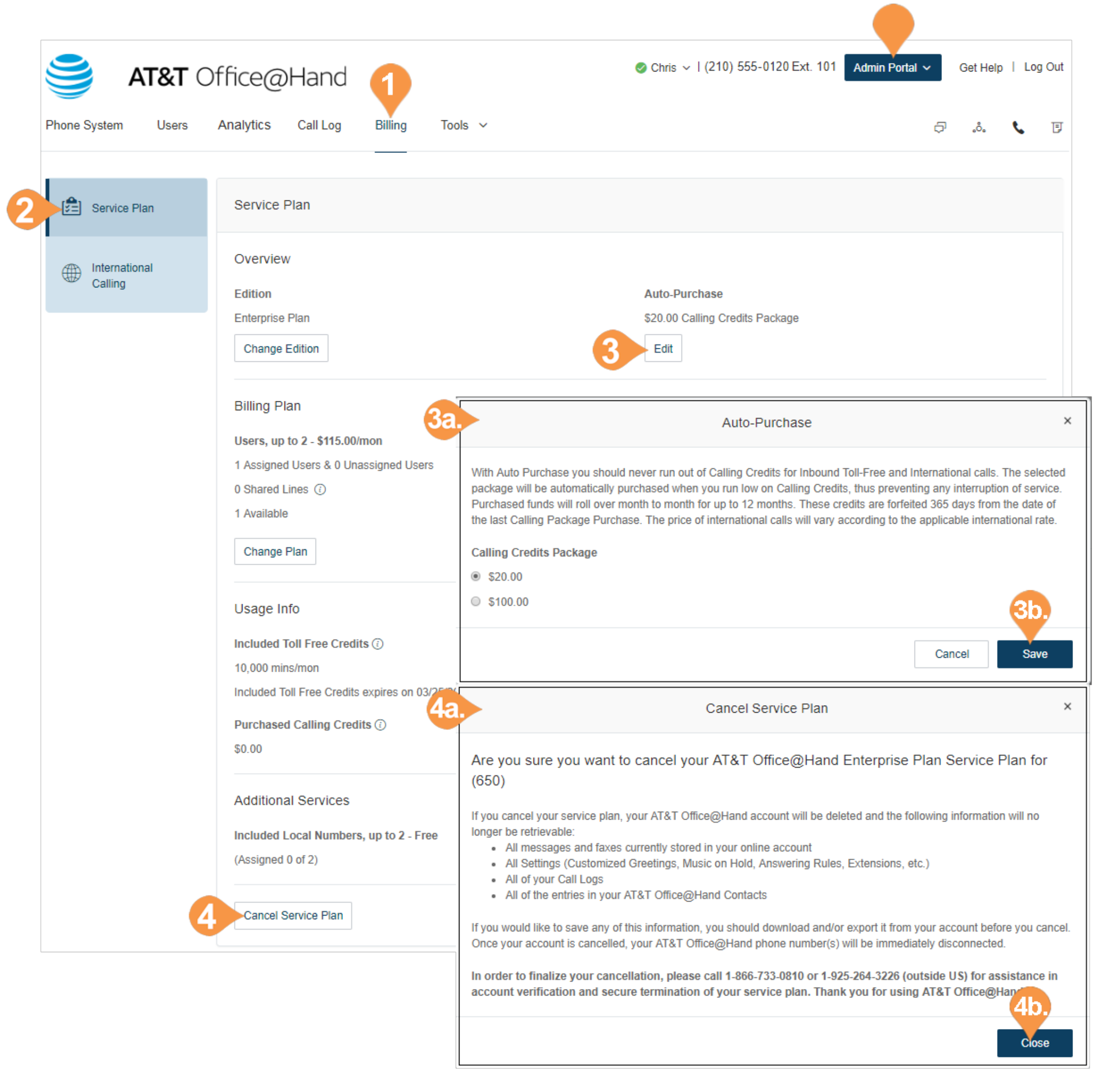
To view or change your service plan:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan** to view your plan details.
3. Click **Change Edition**.
   a. Follow the instructions on the pop-up to change editions or learn more about different editions.
   b. Click **OK**.
4. Click **Change Billing Cycle**.
   a. View options for monthly or yearly subscriptions.
   b. Select the button next to the plan you'd like.
   c. Click **Next**.
   d. Review your order and click **Confirm**.

Other Service Plan Options

To view options for billing history and auto-purchase:

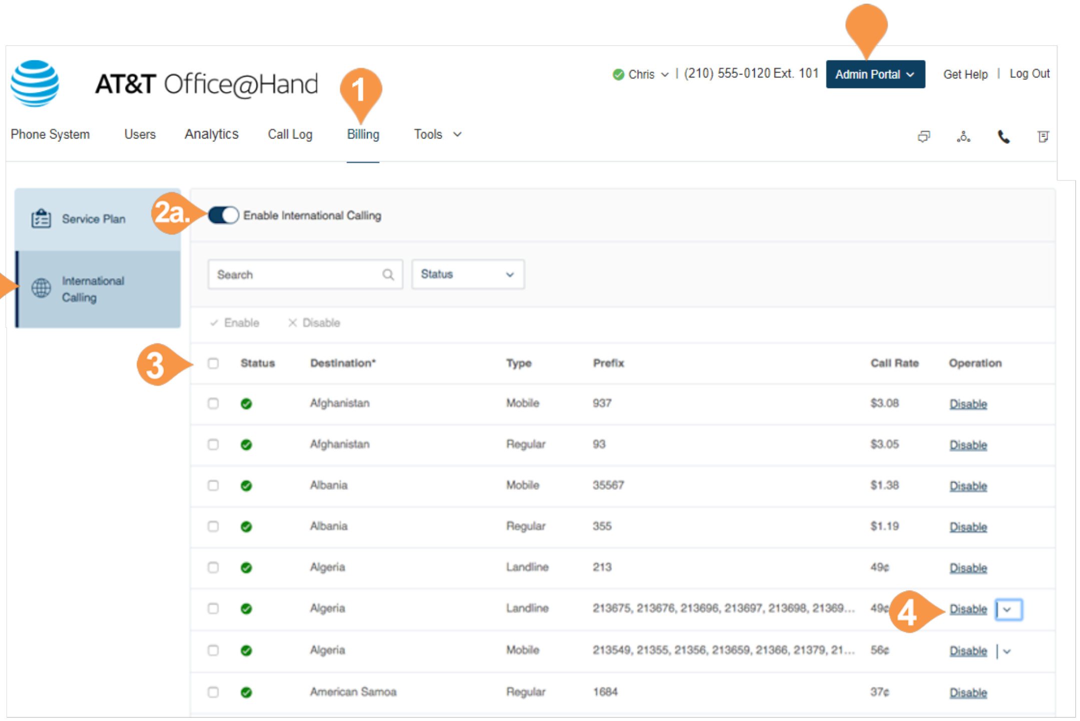
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan**.
3. Click **Auto-Purchase**.
   a. Select the button next to the **Calling Credits Package** you wish to purchase.
   b. Click **Save**.
4. Click **Cancel Service Plan**.
   a. If you would like to cancel your service plan, follow the instructions on the pop-up.
   b. Click **Close**.



International Calling

To enable, disable, and view international calling rates:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **International Calling**.
   a. If International Calling is not enabled, click **Enable International Calling** to enable it. You can disable international calling completely by clicking **Disable International Calling**.
3. View the countries international calling is available to and the price for each country.
4. Turn calling to a specific country on or off by selecting **Enable** or **Disable**.

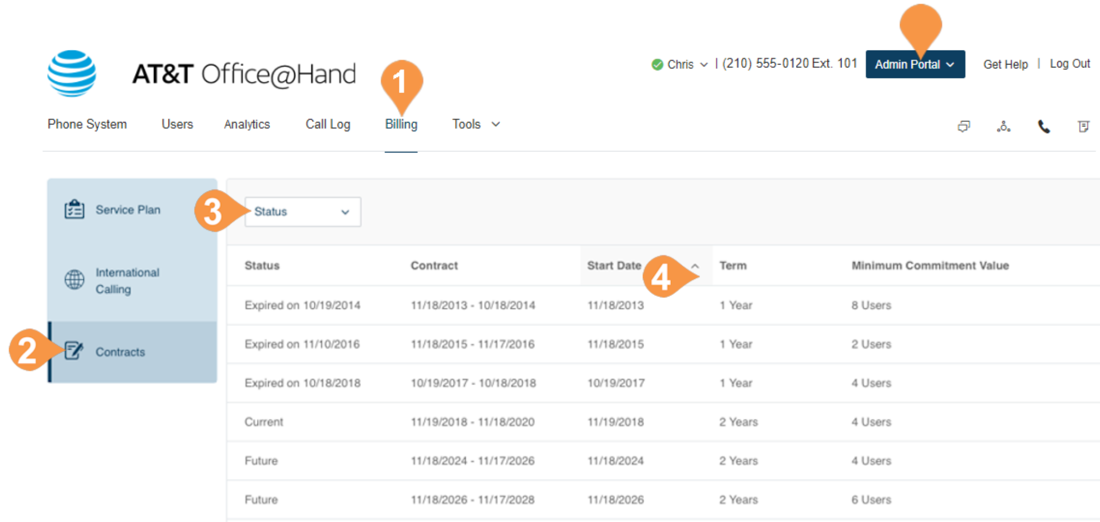


Contracts

The Contracts menu allows you to see the status of your Office@Hand contracts, including the contract Status, Start Date, Term, and Minimum Commitment Value, and to filter and sort the contracts.

To view contracts:

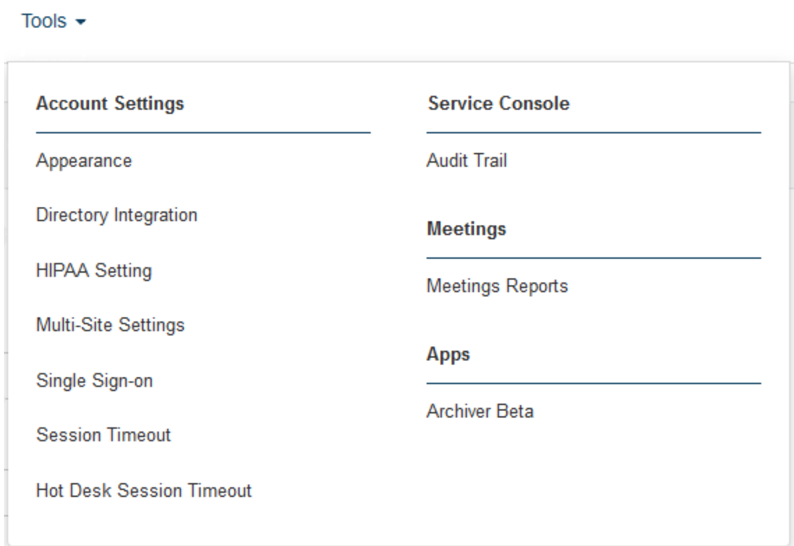
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Contracts**.
3. Filter the list of contracts by **Status**.
4. Sort the contracts by the available columns.



Tools Menu

Tools

In the Admin Portal, the Tools tab houses many important features for your company's phone system.



Appearance lets you add your company logo to your Office@Hand online account. You can also link your company logo to your company's website for smoother navigation. To learn more about this, see "Appearance" on page 187.

Directory Integration[2] see allows lets you automatically provision users from your Active Directory or G Suite corporate directory into Office@Hand. To learn more about this, see "Directory Integration" on page 188.

HIPAA Setting is a functionality designed to delete information to help you maintain compliance with HIPAA or other privacy laws. To learn more about the HIPAA setting, see **"HIPAA Setting" on page 189**.

Multi-Site Settings allows you to configure and manage your different office locations under one account. To learn more about this, see "Directory Integration" on page 188.

Single Sign-On[1] lets employees in a company access multiple applications with one set of credentials. To learn more about this, see "Single Sign-on" on page 202.

Session Timeout lets you configure a session timeout for all users. To learn more about this, see "Session Timeout" on page 205.

Audit Trail allows a Super Admin or a user assigned a Billing Admin role to track changes on the account, generate a report, see changes made by other admins, and detect failed logins and locked accounts. To learn more about this, see **"Service Console" on page 207**.

Hot Desk Session Timeout specifies the time period when guest users will be logged out from phone endpoints, or sets no timeout for enterprises with mobile workforces. To learn more about this, see "Set the Hot Desking Session Timeout" on page 135.

Meeting Reports includes tools for Office@Hand Meetings, such as reports to help optimize the operation of Office@Hand Meetings by presenting usage analysis and trending metrics in an easy-to-read graphical format. To learn more about this, see, "Meetings" on page 211.

Archiver Beta lets you securely save your messages and recorded calls automatically and easily search the stored data at any time from within your Dropbox account to quickly retrieve the records. To learn more about this, see "Archiver Beta" on page 212.

Outbound Call Prefix is a feature of the Enterprise Dial Plan that allows you to configure a prefix to help users explicitly indicate when dialing an internal extension versus an external call. To learn more about this, see "Directory Integration" on page 188.

1 Single Sign-On available for Office Premium and Enterprise users only
2 Active Directory available for Office Premium and Enterprise users only

Account Settings

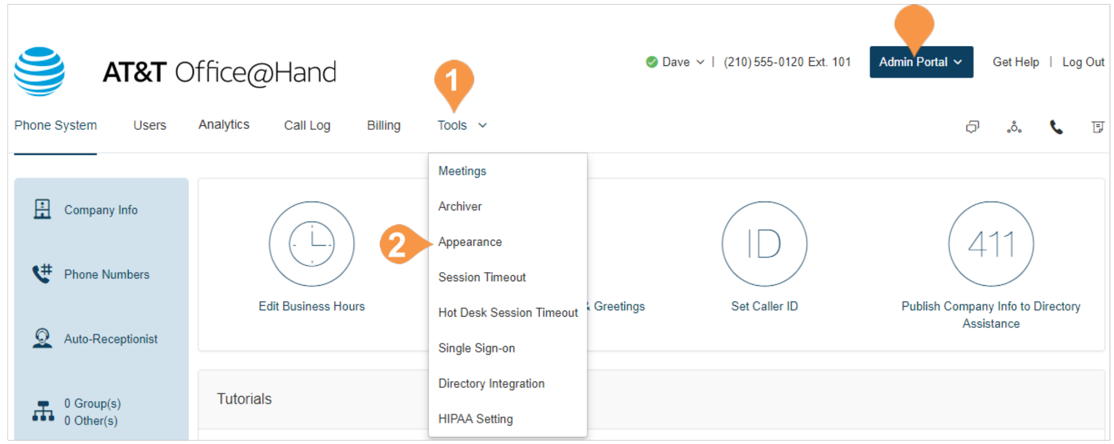
Appearance

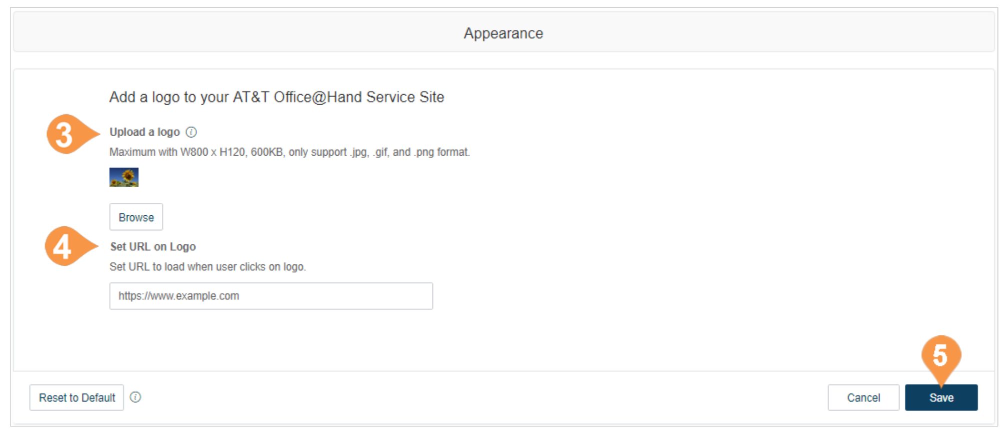
Add your company logo to your Office@Hand online account for a custom look. Take one step further and link your company logo to your company's website for easy navigation.

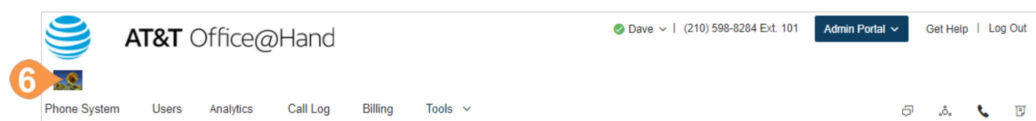
To upload and link an image:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Appearance**.
3. Click **Browse** to browse your computer for an image to upload and select the file you want to use. The file must meet the requirements of a maximum dimension of W800 x H120, 600KB, and must be a JPG, GIF, or PNG format.
4. Enter the URL that will be opened when a user clicks on your image.
5. Click **Save**.

View your logo in your online account and click the image to test that you can access the URL.







Directory Integration

Directory Integration lets you automatically provision users from your corporate directory into Office@Hand.

Active Directory

Office@Hand integrates with Microsoft Active Directory to let you automatically provision users from Active Directory to Office@Hand.

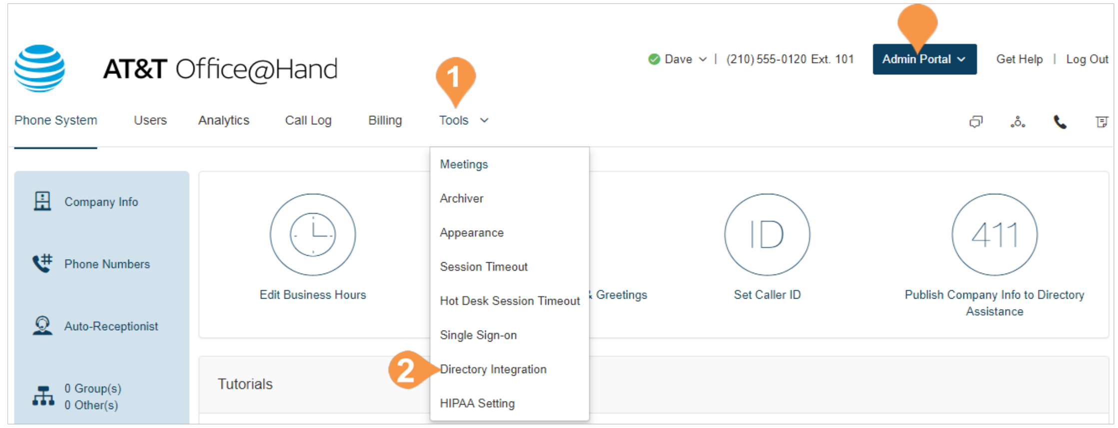
The service leverages Okta so you can perform an initial import from Active Directory to Office@Hand, and to synchronize Active Directory and Office@Hand on user status. Users are automatically enabled or disabled in Office@Hand as they join or move around your organization.

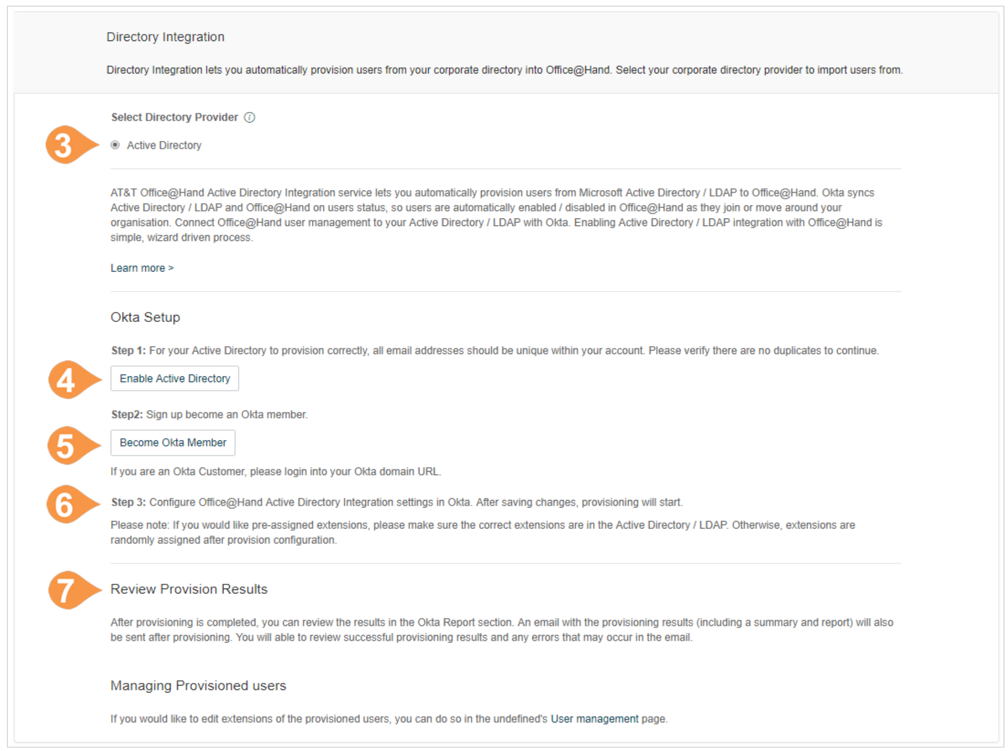
For more details on integrating Office@Hand with Active Directory, click here for the Active Directory Implementation Guide.

To set up the integration service:

1. From the Admin Portal, click the **Tools** tab.
2. Click **Directory Integration**.
3. Select **Active Directory**.
4. Click **Enable Active Directory**.
5. If you are not already an Okta member, sign up for Okta by selecting **Become Okta Member**.
6. Configure in Okta the settings for integration with Active Directory, and save the settings in Okta. The provisioning process starts.

Review the provisioning results. You will receive an email containing the provisioning results, including a summary and report. If required, edit the extensions of provisioned users in User Management in the Admin Portal.





HIPAA Setting

The HIPAA Setting (HS) is a functionality designed to delete information, in support of your HIPAA compliance efforts. Activation of the setting does not guarantee you will be compliant with HIPAA or any other privacy law, including European data privacy regulations. It is your responsibility to determine whether your data privacy and security measures comply with applicable law.

Note: You must be the Account administrator to have access to this setting. If you have more than one account with AT&T Office@Hand, the setting must be activated for each account.

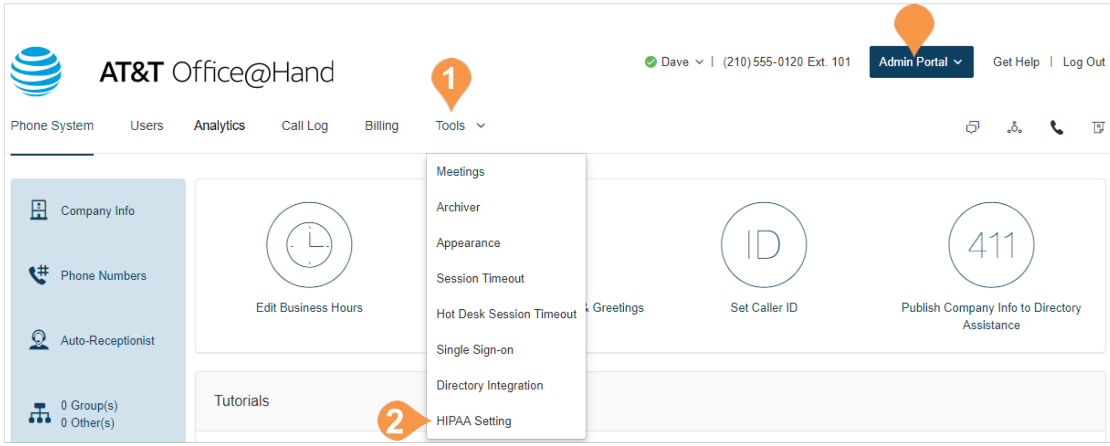
To turn on the HIPAA setting, f

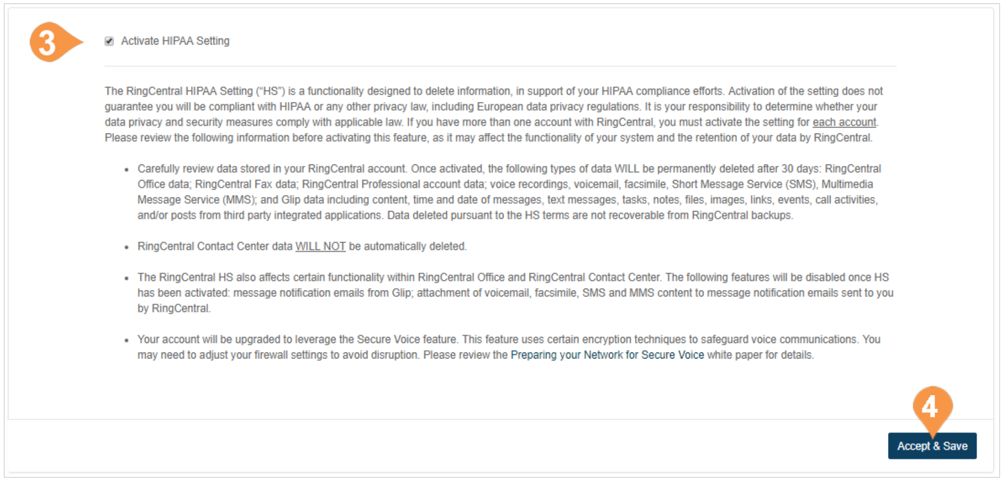
1. From the Admin Portal, go to Tools.
2. Select the HIPAA entry.
3. Click the Activate HIPAA Setting box.
4. Click Accept & Save.

IMPORTANT: When activated, this setting will enforce temporary-only storage of the customer's RingCentral Office voice and fax messages and voice messages for a maximum of 30 days. Data will not be saved in AT&T Office@Hand back-ups and cannot be retrieved.

The following will take effect once this setting is activated:

- Automatic forwarding of messages to email as an attachment is disabled.
- RingCentral Contact Center data will not be automatically deleted.
- Automatically delete the following types of data after 30 days:
- RingCentral Office data





- RingCentral Fax data
- RingCentral Professional account data
- Voice recordings
- Voicemail
- Faxes
- Short Message Service (SMS)
- Multimedia Message Service (MMS)
- Glip data including content, time and date of messages, text messages, tasks, notes, images, links, events, call activities, and/or posts from 3rd-party integrated applications.
- Session Timer - Automatically log out the account access if it has been idle.
- Secure Voice - TLS/SRTP secure call on desk phones, RingCentral Phone, and RingCentral Phone or Mobile.

Multi-Site Settings

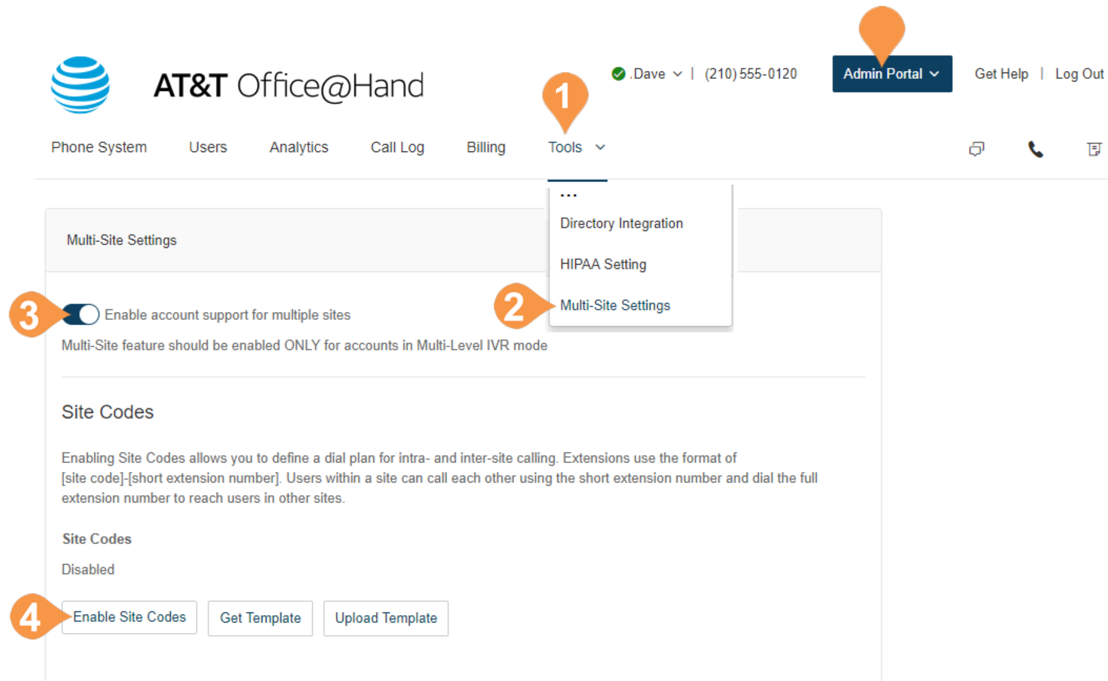
Multi-Site Support provides a management solution for customers with multiple branch locations. Multi-Site Support is available for Office@Hand Office Premium and Ultimate users with Multi-Level IVR enabled.

Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This feature allows the administrator to allocate account user or group extensions for defined sites.

To enable Multi-Level IVR mode, configure the dial-by-name directory, create at least one IVR menu and enable the feature in Auto-Receptionist.

To enable your account to support multiple sites:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Multi-Site Settings**.
3. Check the box beside **Enable account support for multiple sites**.
4. Configure site codes, if required for your dialing plan. See Manage a Dial-Plan Across Sites.



Your online account can now create and configure multiple sites. Site filters are available on pages with site assets to allow you to view the list of assets by sites.

For more information on Multi-Site support, see:

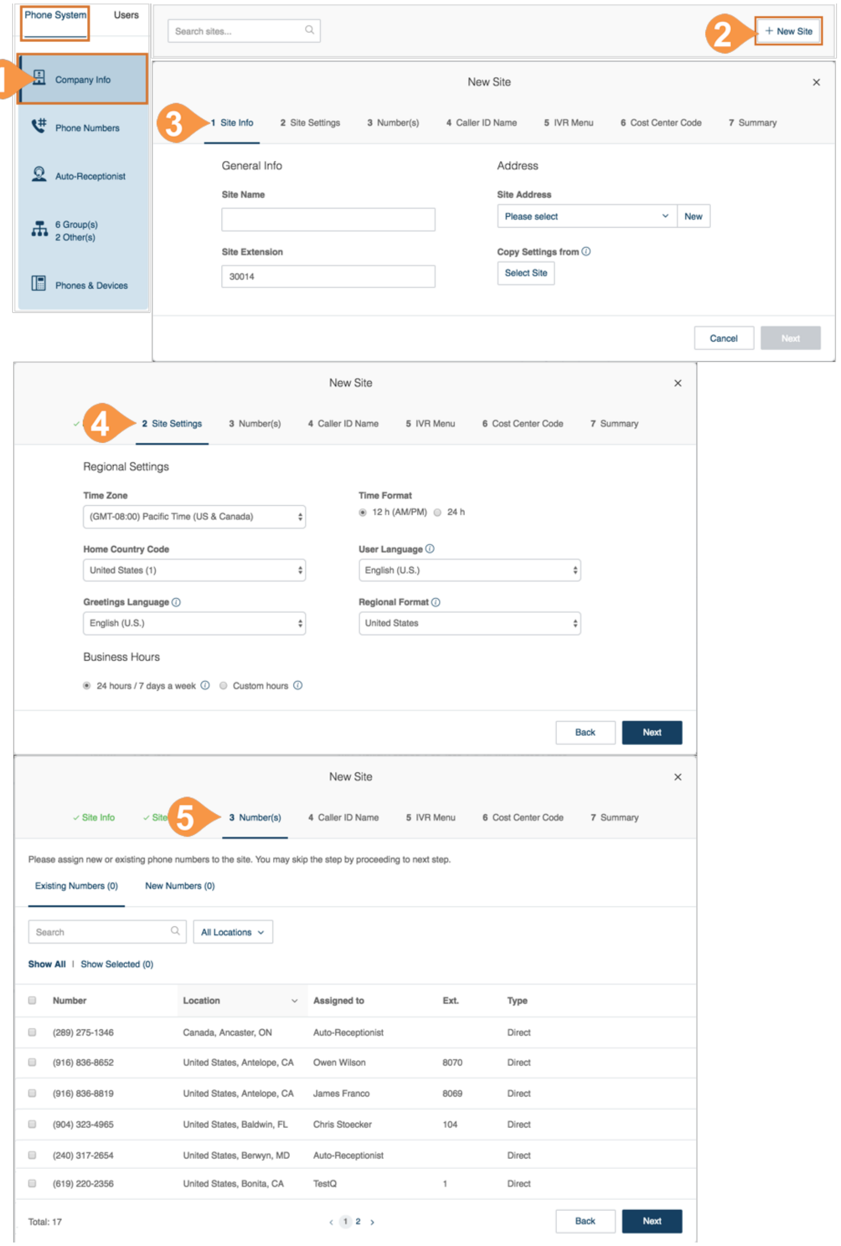
- Create a New Site
- Manage a Dial-Plan Across Sites
- Move Assets Across Sites

Create a New Site

RingCentral Multi-Site support allows you to provision independent account configurations for your individual sites, to enable you to uniquely register and manage each site from your account. Once Multi-Site Support is enabled, you can create additional sites as needed.

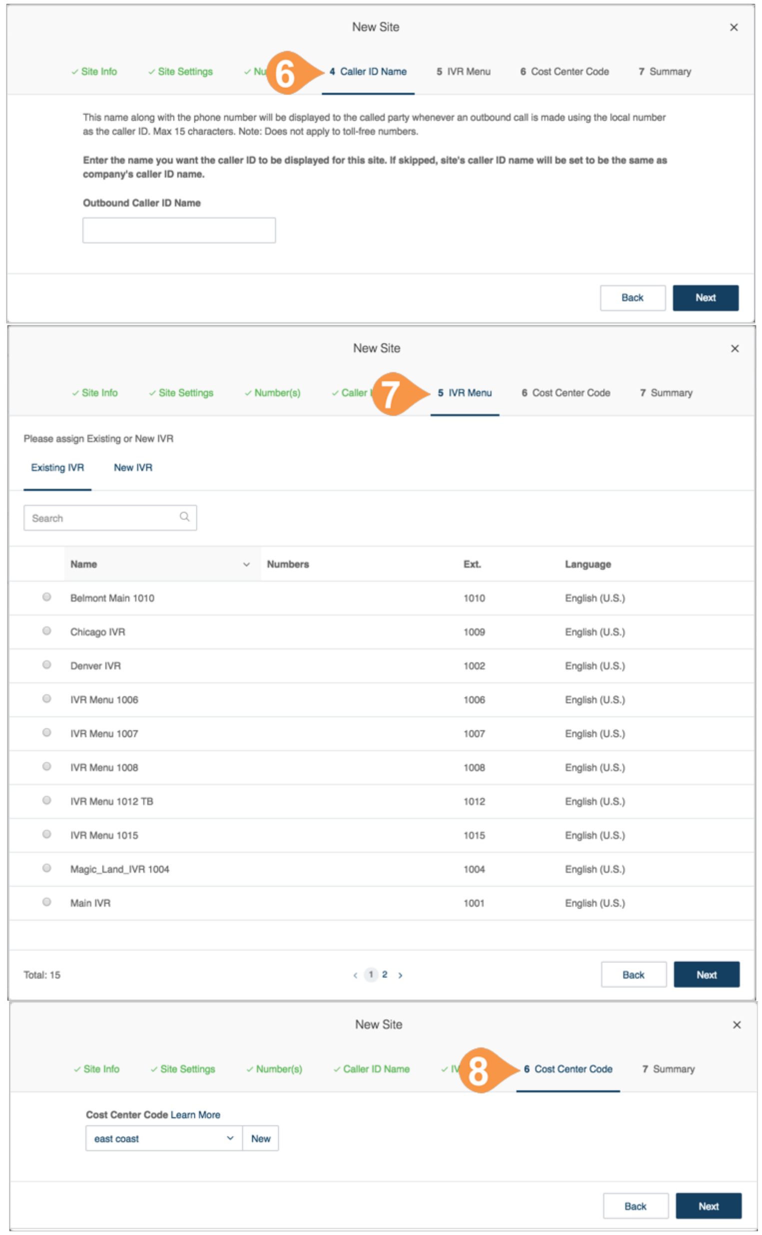
To create a site:

1. From the **Admin Portal**, click the **Phone System** tab.
2. On the **Company Info** page, click **New Site**.
3. On the Site Info page, enter the **Site Name**, **Site Address**, and **Site Extension**. Or, you may click **Select Site** under **Copy Settings** from" to copy settings from another site. Click **Next** to proceed.
4. On the Site Settings page, configure the Regional Settings and Business hours. Click **Next** to proceed.
5. Assign Numbers to the Site. You may assign existing numbers or add (and purchase) new direct numbers. Click **Next** to proceed.



6. On the Caller ID Name page, enter the **Outbound Caller ID Name.**
7. Menu page, select an **Existing IVR** or a **New IVR**.
8. On the Cost Center Code page, select the site's cost center code. For more information on Cost Center Codes, see Cost Center Management.

On the Summary page, you will be notified that the site is created successfully. Click **Done**. You can view or edit site information within **Phone System** > **Company**.



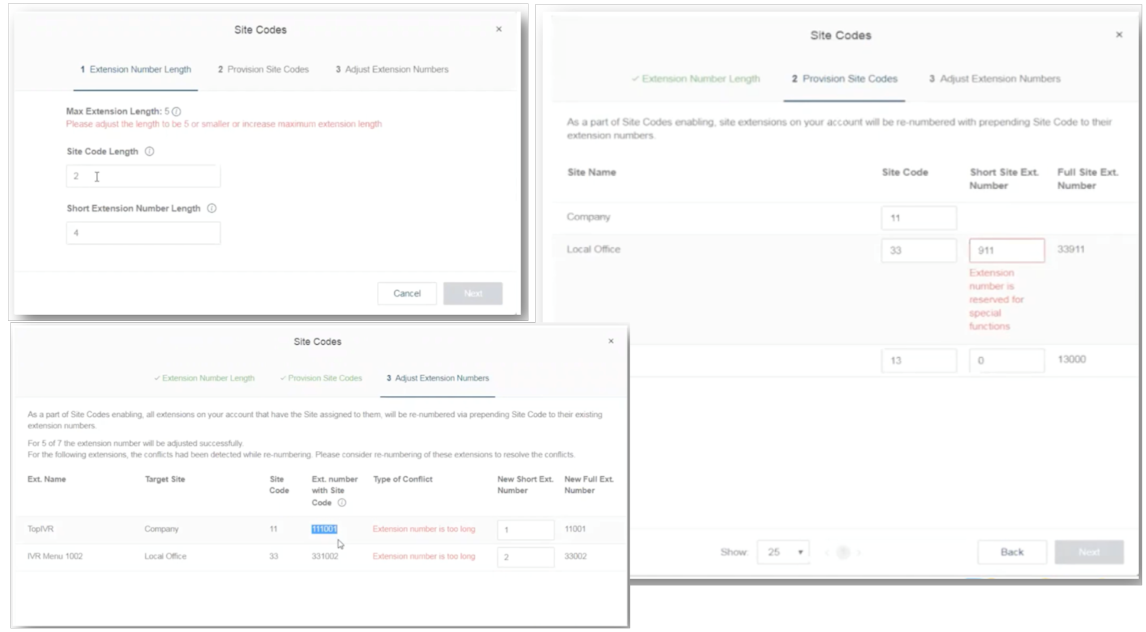
Manage a Dial-Plan Across Sites

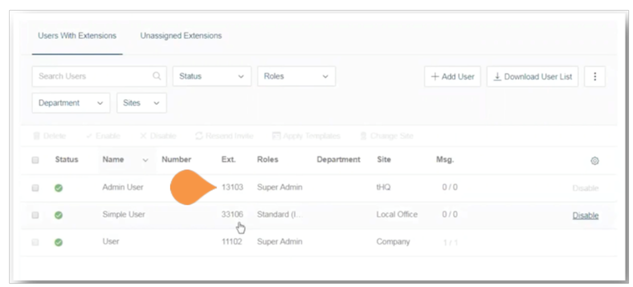
Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This allows users within a site to call each other using a short extension number, and users between sites to use a full extension number, consisting of a site code plus the short extension.

To set up your multi-site dial-plan:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Multi-Site Settings**.
3. Verify that multi-site support is enabled.
4. In the **Extension Number Length** window, select an appropriate digit length for the short extension and the site code. The values must fall within the limits of the full extension number length, per the maximum extension length of five digits.* Click **Next**.
5. In the **Provision Site Codes** window, the system will suggest site codes for all sites, per selected lengths for site code and short extension. The User and Group extension per site will be allocated per site code selected. Click **Next**.
6. In the **Adjust Extension Numbers** window, Existing extensions that have more digits than enabled with site code need to be adjusted or use system suggestions. Click **Done**.

Extensions in the **Users with Extensions** view display a site code plus a short extension. For example: Site Code: 11, Short Ext. #: 001, and Full-Ext #: 11001.
Note: a maximum extension length of six digits is available on-demand for certain international cases.





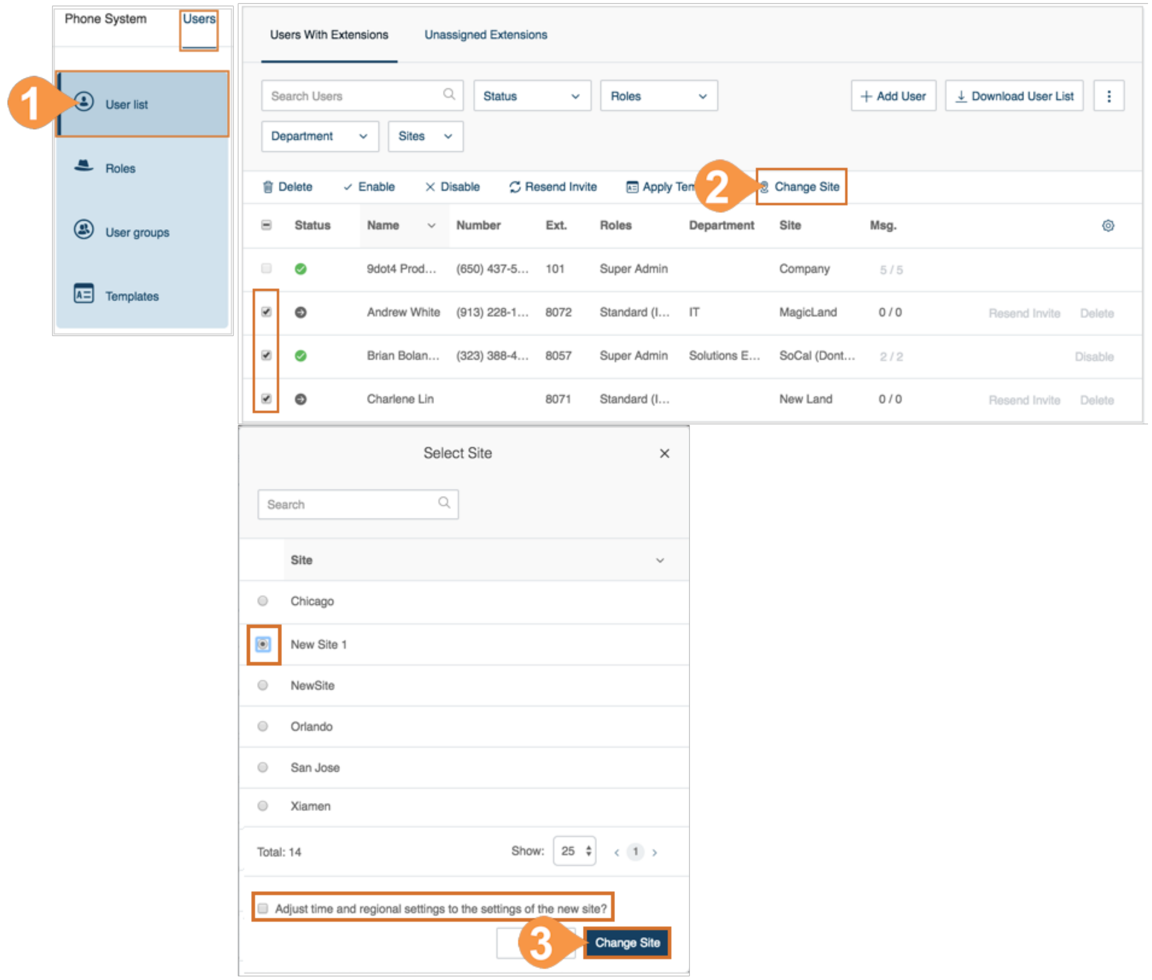
Move Assets Across Sites

The Change Site function of Multi-Site Support allows you to move selected Users, IVR Menus, and Call Queues to another site. This feature allows for individual or bulk movement of Users, IVR Menus, and Call Queues between sites.

Move Users Across Sites

To move users between sites:

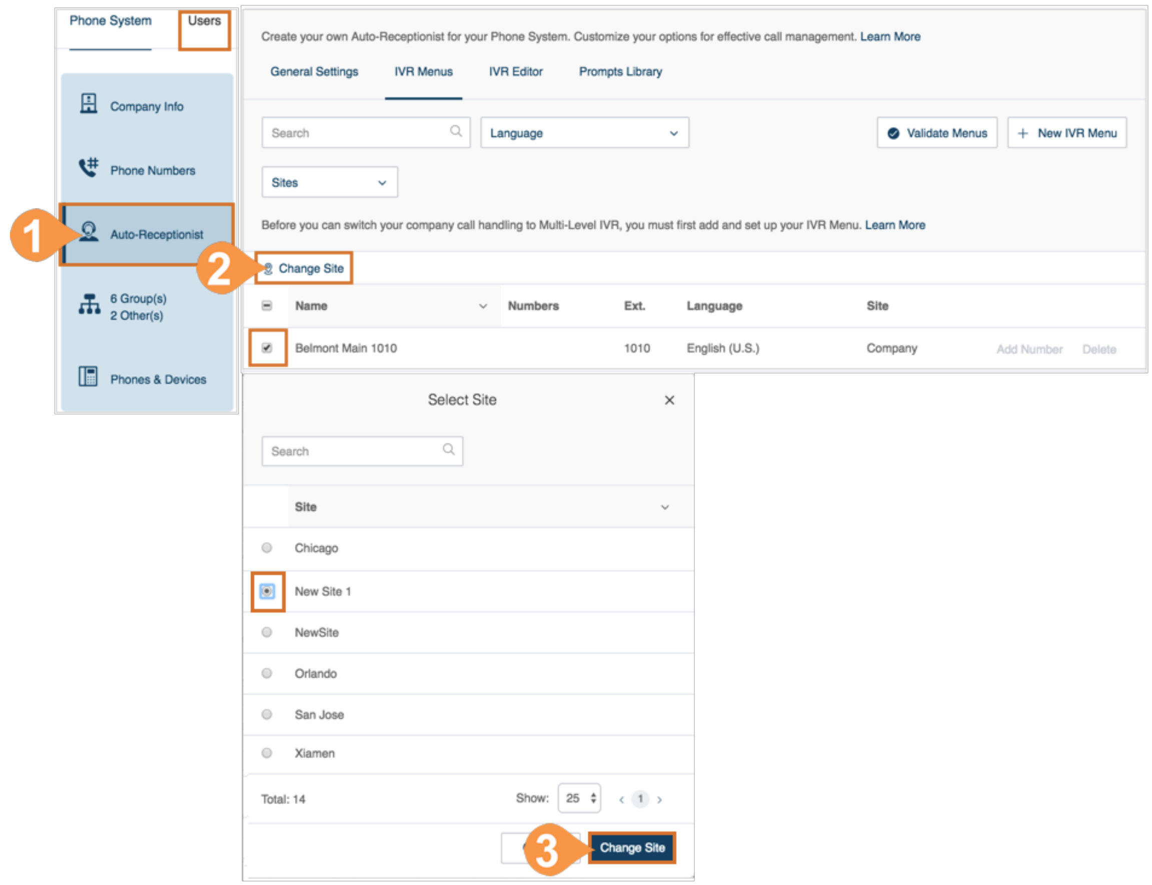
1. From the **Admin Portal**, click the **Users** tab.
2. On the User list tab, check the box of the users you want to assign to a different site, and click **Change Site**.
3. Select the site then click **Change Site**. Note: You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved users.



Move IVR Menus across Sites

To move IVR menus between sites:

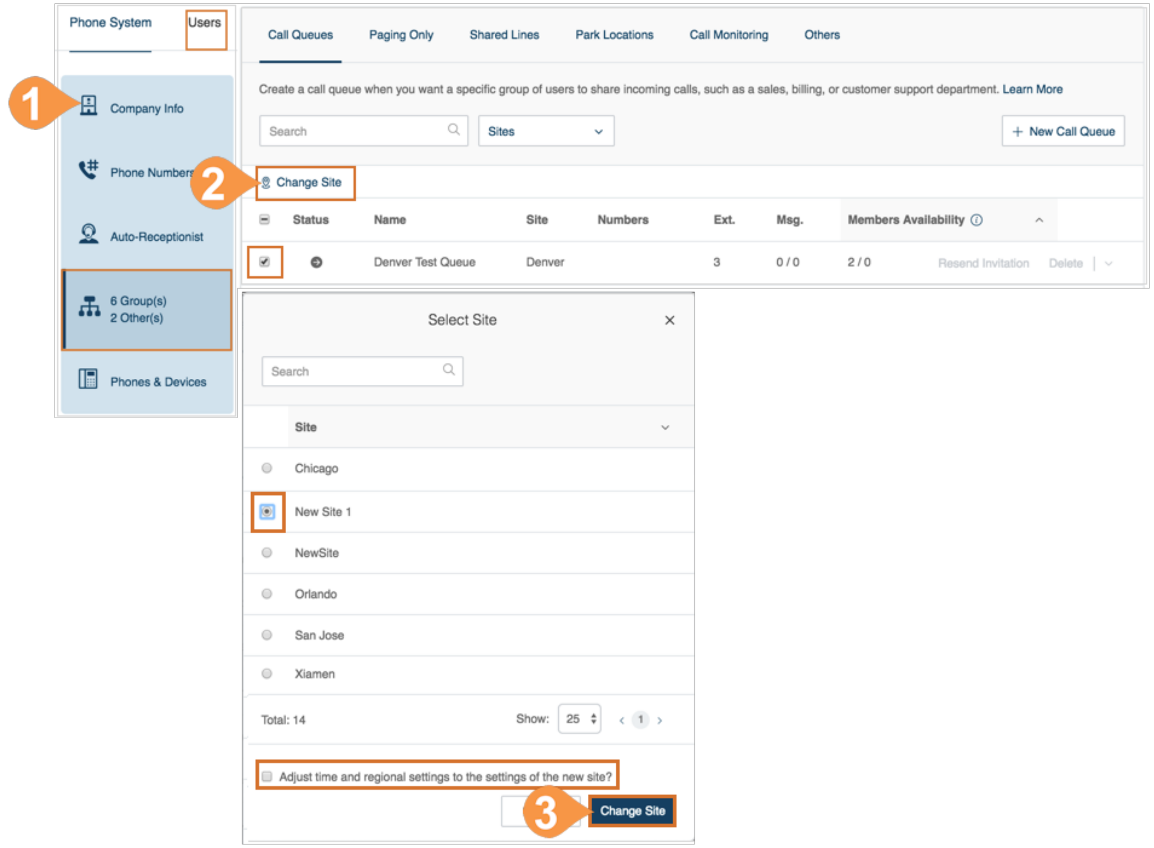
1. From the **Admin Portal**, click the **Phone System** tab, and click **Auto Receptionist**.
2. Click the **IVR Menus** tab. Select from the list of IVR Menus and click **Change Site.**
3. Select the site then click **Change Site**.



Move Call Queues Across Sites

To move call queues between sites:

1. From the **Admin Portal**, click the **Phone System** tab, and click **Groups**.
2. On the **Call Queues** tab select the Call Queues that you want to move, and click **Change Site**.
3. Select the site then click **Change Site**. Note: You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved Call Queue.

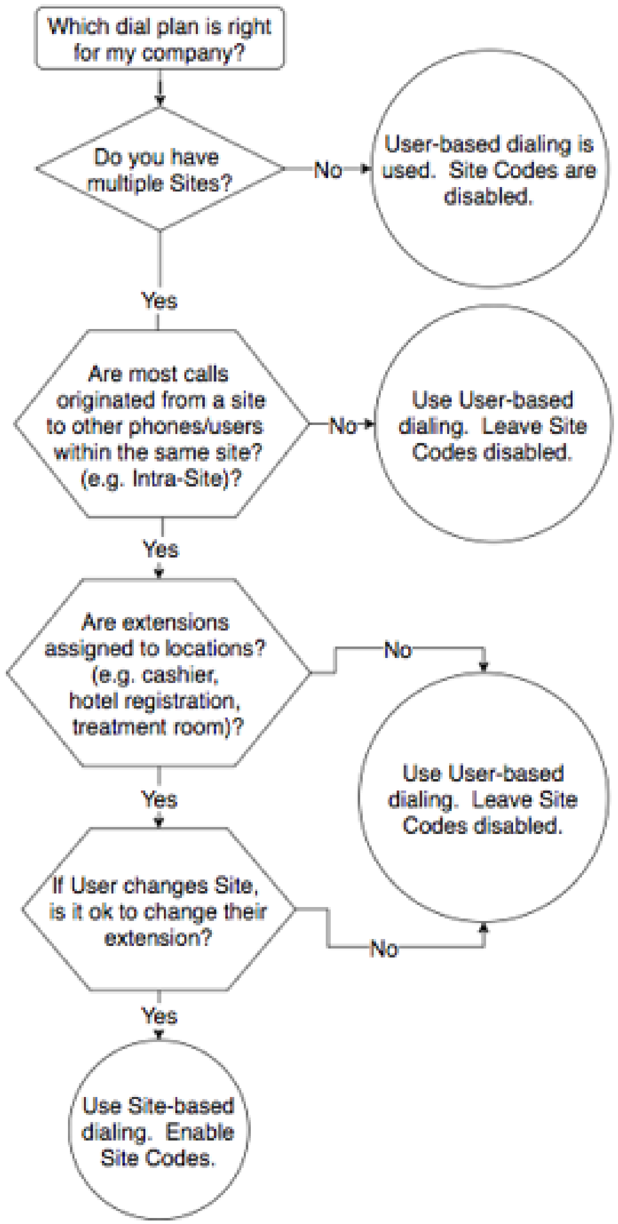


Configure an Enterprise Dial Plan

Office@Hand supports enterprise dialing plans for customers who require 6 to 8-digit extension lengths. These plans add an optional Outbound Call Prefix when using 7 and 8-digit extensions to help users indicate when they are dialing internal extensions versus external numbers. Multi-Site customers can configure Site Codes and Short Extensions. Review the decision tree for selecting a plan, and contact Office@Hand support to enable this on-demand feature.

For more information, see:

- Maximum Extension Length
- Outbound Call Prefix
- Site Codes
- Site Codes Template



Maximum Extension Length

When enabled for your account, this feature increases the maximum extension length from 6 to 8 digits. This feature is ideal for enterprises with more than 1,000 users. The enablement of this feature requires a reboot of your phones (active calls are not affected).

Requirements for Maximum Extension Length

To help reduce conflicts, the Default Area Code (DAC) feature is disabled. To reach external destinations, users must dial full external numbers. For example, 6505551212 or 16505551212).

If there is an overlap between internal and external numbers, enable an Outbound Call Prefix. Once enabled, configure the feature in your online account. For more information see Outbound Call Prefix.

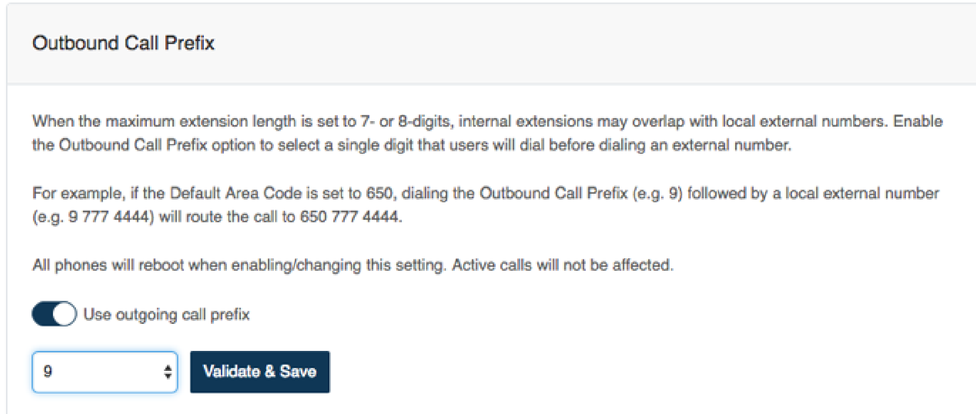
Outbound Call Prefix

Set an optional Outbound Call Prefix when using 7 and 8-digit extensions to help users indicate when they are dialing internal extensions versus external numbers. The admin enables the feature, and specifies a prefix.

To set an Outbound Call Prefix:

1. From the **Admin Portal**, click the **Tools** tab, and click **Outbound Call Prefix**.
2. Choose **Use outgoing call prefix**.
3. Select a single digit that users will dial before dialing an external number. For example, if the Default Area Code is set to 650, dialing the Outbound Call Prefix (e.g., 9), followed by a local external number (e.g., 9 555 1212), routes the call to 650 555-1212.
4. Click **Validate and Save**.

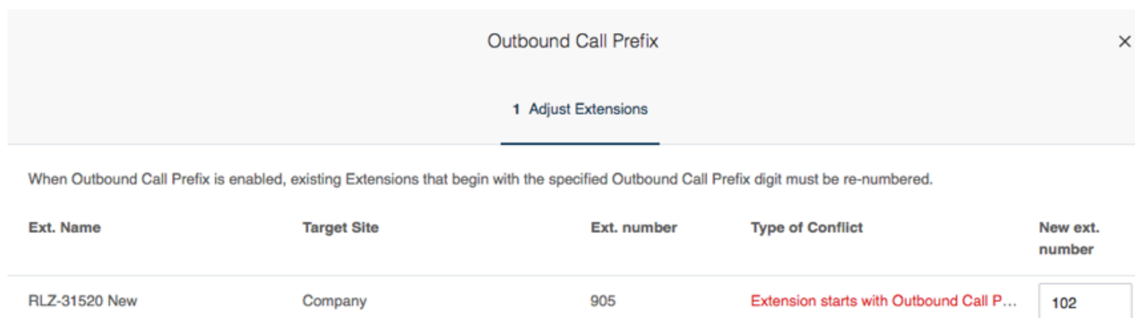
All phones reboot when changing this setting. Active calls are not affected.



Resolve Extension Conflicts

You are prompted to change any extensions that start with the selected prefix digit. Review the conflicts and adjust the extensions.

Additionally, if Site Codes are enabled, you are prompted to change any Site Codes or Short Extensions that start with the selected prefix digit.

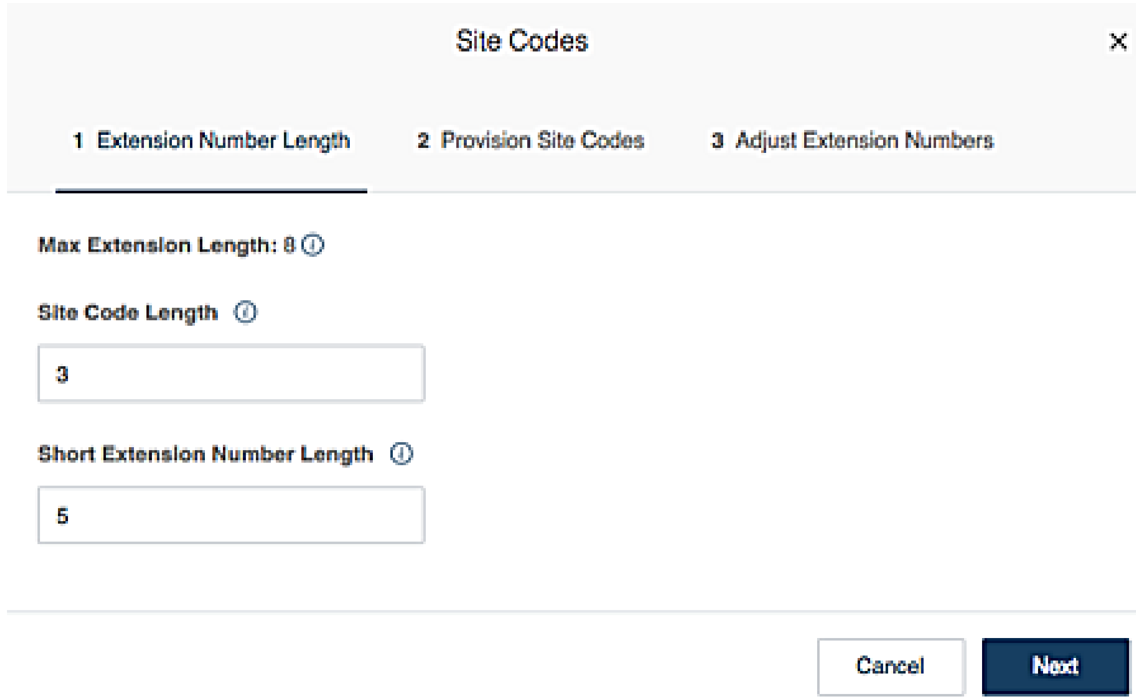


Site Codes

The Enterprise Dial Plan expands the lengths of Site Codes and Short Extensions to a maximum of 6 (site codes) or 7 (short extension numbers). You can easily configure Site Codes by providing a configuration template so that you define company-wide dial plan changes offline can and implement them quickly.

This feature is suited for enterprises with 1,000+ sites which require Site Code lengths of 4 or more digits, or 1,000+ users per site which require Short Extension lengths of 4 or more digits. Customers may also prefer to configure Site Codes offline using a template.

The maximum extension length is the value configured for your account when you enabled the feature with Office@Hand support. For instructions on configuring site codes, see Manage a Dial-Plan Across Sites.



Site Codes Template

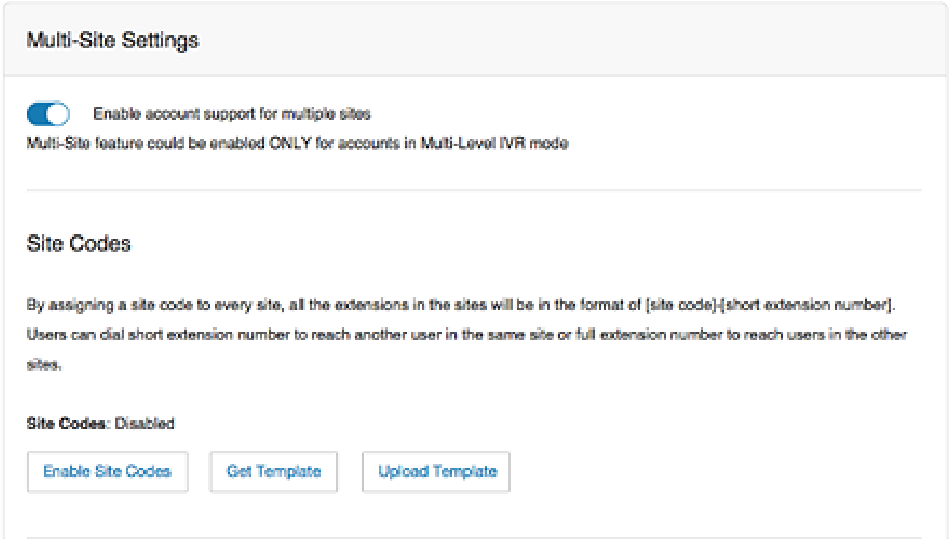
The Site Codes template allows you to configure site codes and short extension dial plans offline. By assigning a site code to every site, all the extensions in the sites will be in the format of *[site code]-[short-extension-number]*. Users can dial the short-extension number to reach another user in the same site, or a full-extension number to reach users in the other sites.

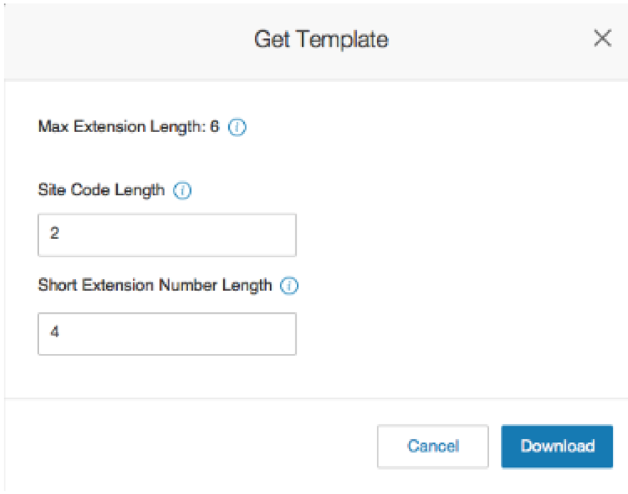
To configure and upload the template:

1. Enable Multi-Site in **Tools** > **Multi-Site Settings**.
2. Select **Get Template** (in the Site Codes section).
3. Specify the site code and short extension lengths. A dynamic template, based on the specified lengths, is generated and downloaded locally.
4. Review and make changes to the template:

   Check the “Beginning of Site Data” and “Beginning of Extension Data” sections. Update and review the proposed codes or numbers.

   Confirm no conflicts are detected, such as length too short or too long, duplicate site codes or short extensions, duplicate full extensions, or a site code or short extension that starts with the Outbound Call Prefix.
5. Select **Upload Template** to enable Site Codes. If any errors are found, you are prompted to make changes.





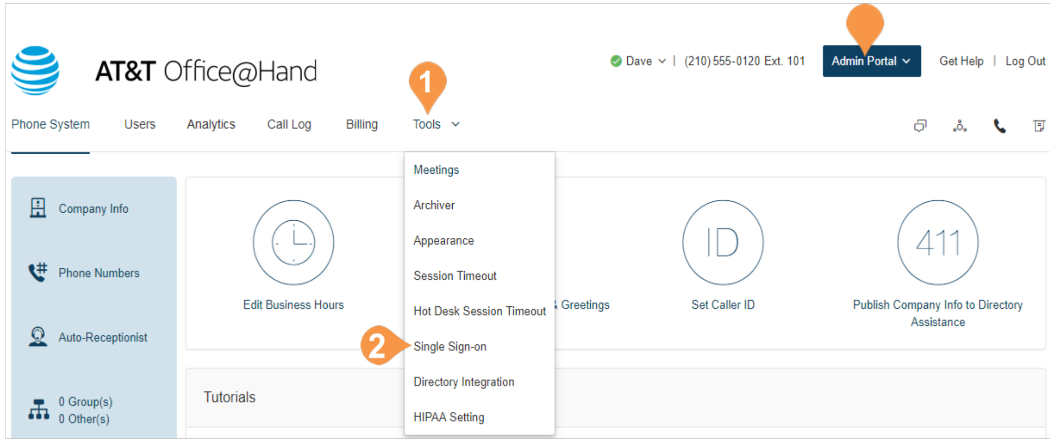
Single Sign-on

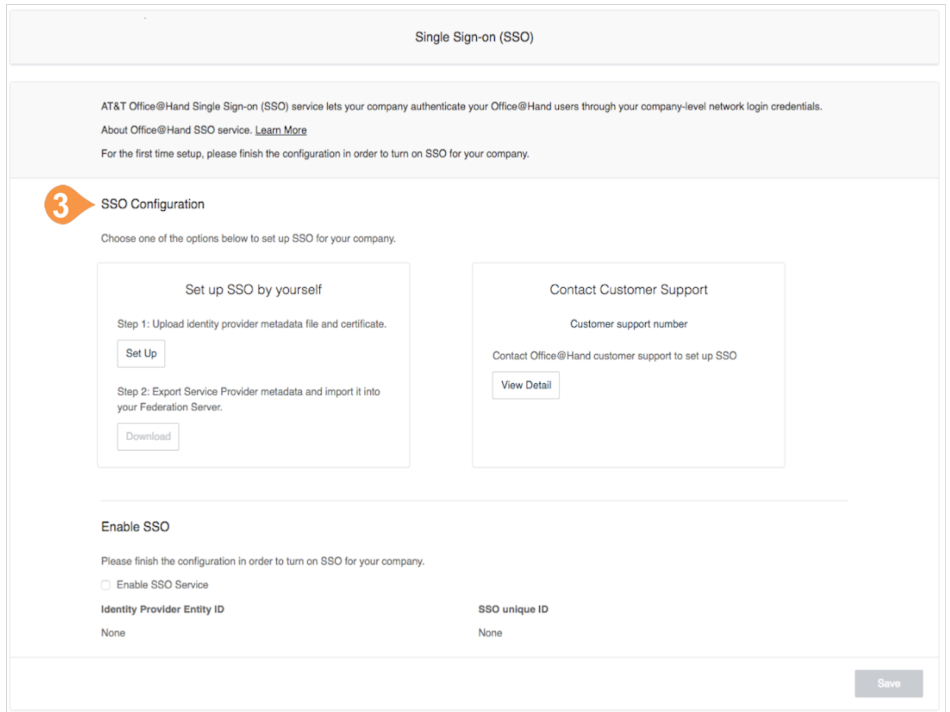
Single Sign-on allows employees in a company to access multiple applications with one set of credentials. You can work with AT&T Office@Hand Customer Support to set up Single Sign-on for your Office@Hand services, or you can set it up by yourself.

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Single Sign-on**.
3. Choose an option to set up SSO:
   - **Set up SSO by yourself**: use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself.

Contact Customer Support: use Office@Hand Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and perform the steps in Contact Support to Enable SSO

*Available for Premium and Enterprise users only.





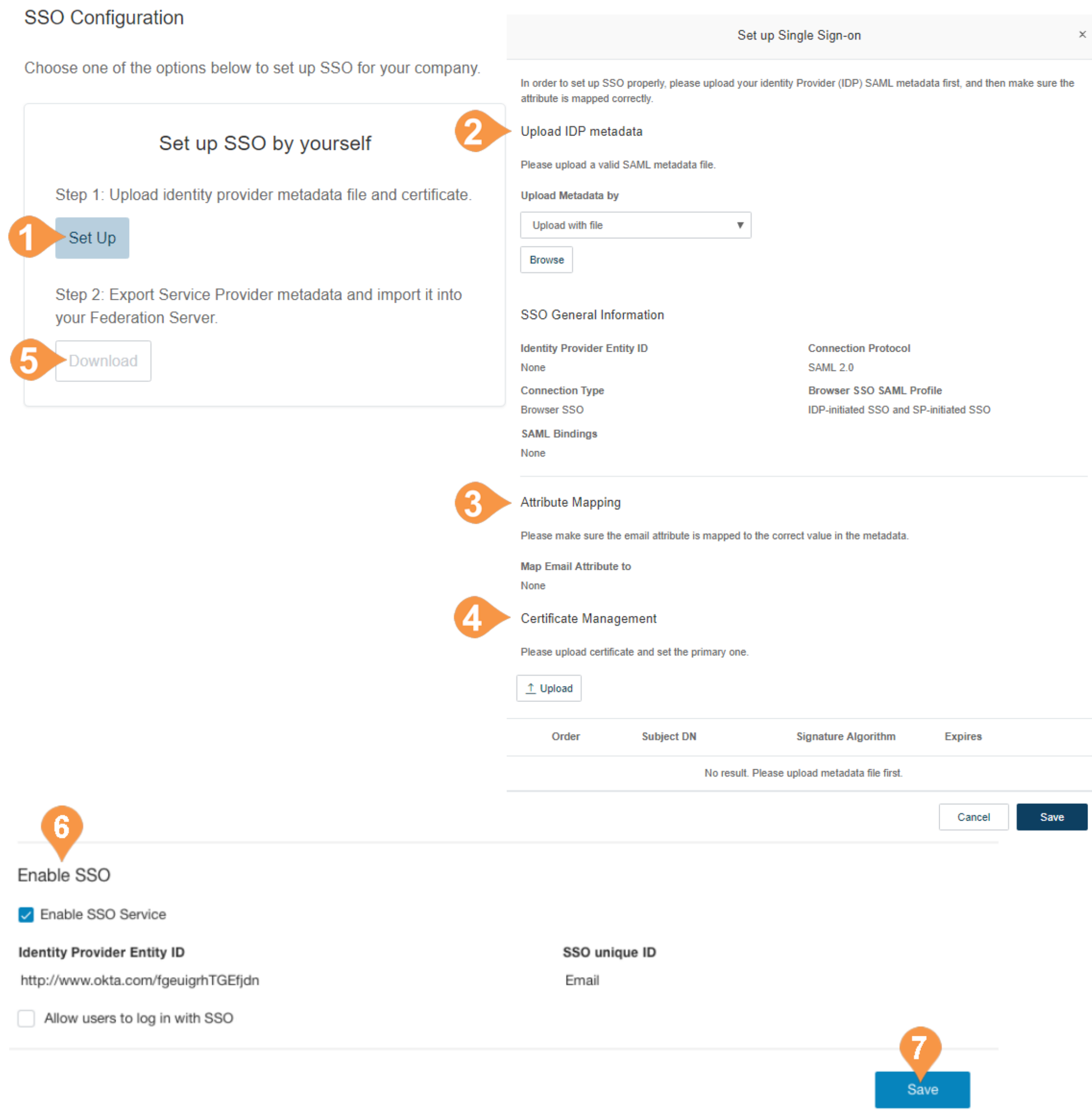
Set up Single Sign-On by Yourself

To set up SSO by yourself, upload your Identity Provider (IdP) SAML metadata, make sure the attribute is mapped correctly, and download the metadata for importing it into your Federation Server:

1. In the Set up SSO by yourself box, click **Set Up** to set up SSO for the first time, or **Edit** to change your configuration.
2. Upload the Identity Provider metadata from either a local file or an URL from your IdP. If the IDP entity ID has already been used by another account, you need to contact support for manually configuration.

   Once uploaded, the information will be parsed from the metadata and displayed automatically.
3. Select the attribute in your metadata which should be mapped to email on Office@Hand. The **Map Email Attribute To** menu lists all the attributes parsed from the IdP metadata.
4. If the metadata already contains the certificate information, it will show in the list. Otherwise, add the certificates manually. You can add multiple certificates, but only the ones ordered as Primary and Secondary certificates will be used. Click **Save**.
5. Click **Download** to export the Service Provider metadata and import it into your Federation Server to complete the configuration.
6. Check **Enable SSO Service**.

Click **Save.**

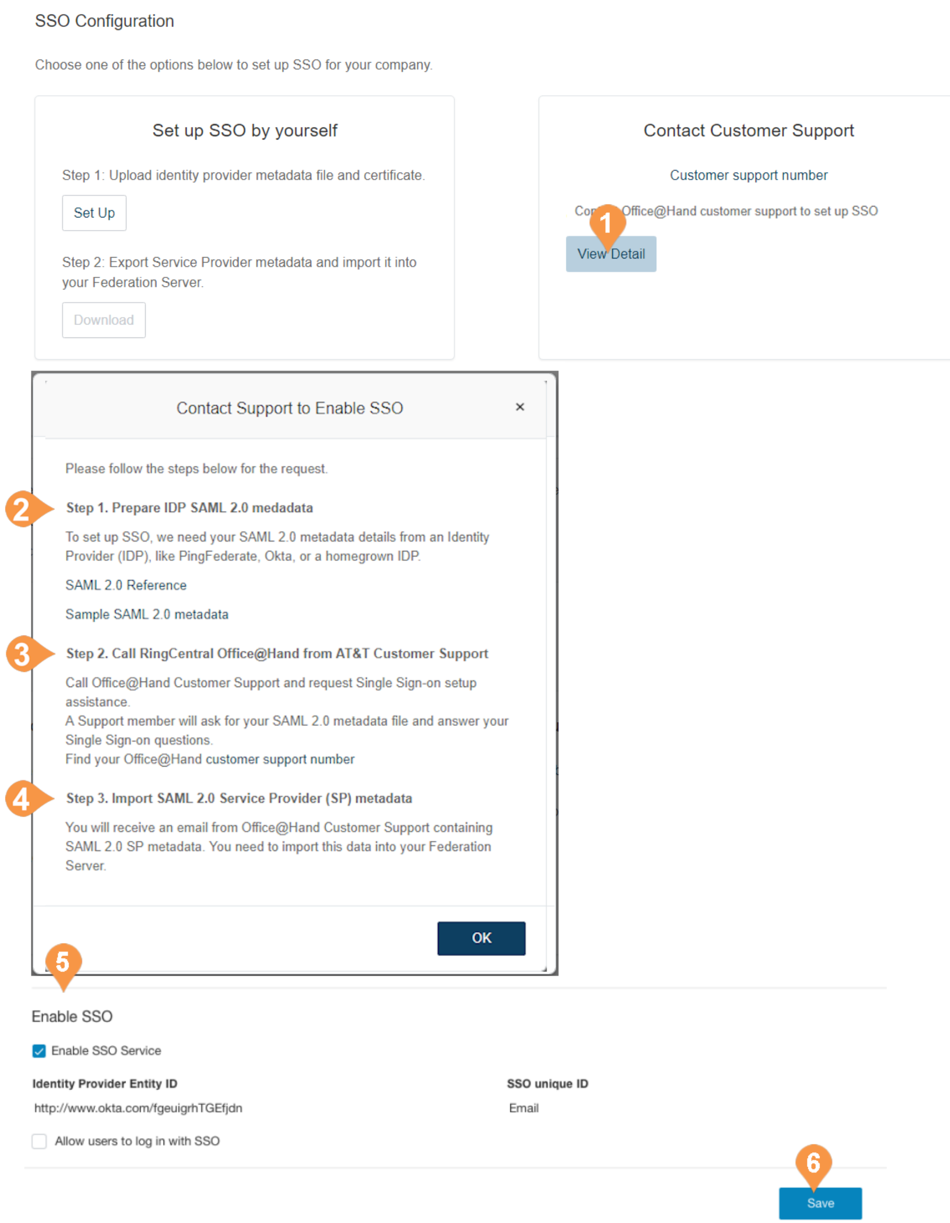


Contact Support to Enable SSO

This section describes how you prepare the request, and contact AT&T Office@Hand Customer Support to configure the Service Provider (SP) settings required to enable SSO on your IDP server:

1. In the Contact Customer Support box click the **View Detail** link, and perform the steps as described.
2. Get your SAML 2.0 metadata details from your Identity Provider (IDP), such as PingFederate, Okta, or a homegrown IdP.
3. Click **Office@Hand customer support number** and call support to request Single Sign-on setup assistance. A support member will ask for your SAML 2.0 metadata file and answer your Single Sign-On questions.
4. You will receive an email from support containing your SAML 2.0 SP metadata. Import the metadata into your IdP server to complete the configuration on your IdP.
5. Check **Enable SSO Service.**

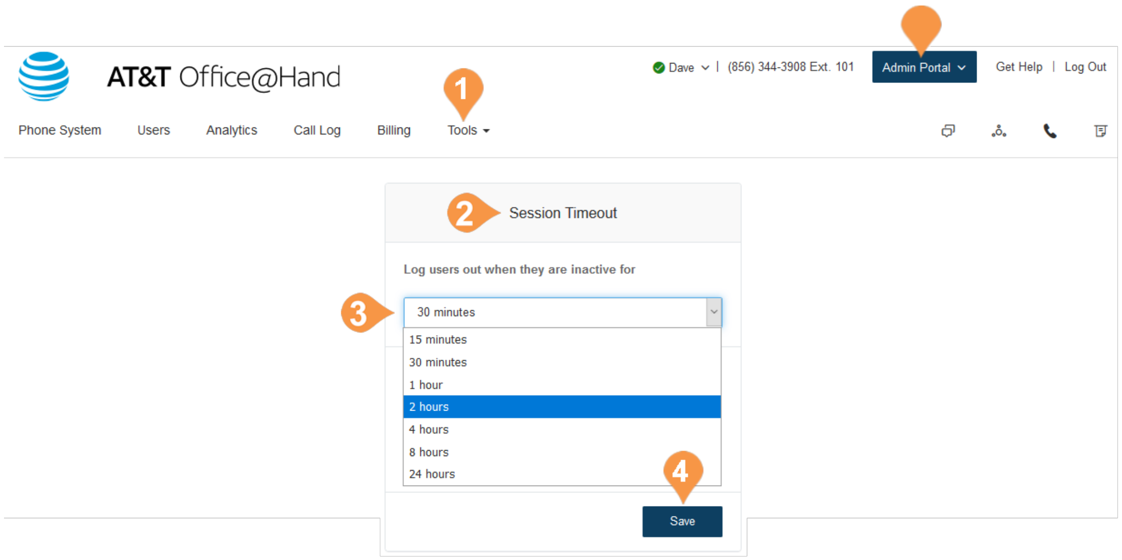
Click **Save.**



Session Timeout

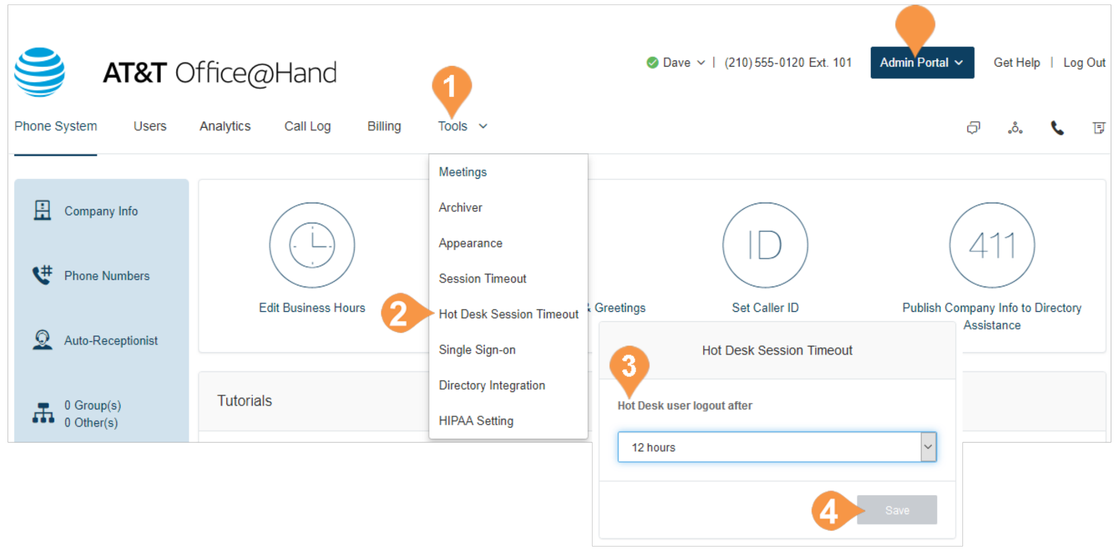
Session Timeout lets an administrator customize the length of time a user can be inactive before being automatically logged out.

1. From the Admin Portal, select the Tools menu.
2. Select Session Timeout
3. From the drop down menu, choose a length of time for the system to remain active.
4. Click Save.



Hot Desk Session Timeout

The hot desking session timeout specifies the time period when guest users will be logged out from phone endpoints. The default session timeout is 12 hours.



No Timeout

Certain enterprises with a mobile workforce may use the 'Never' value for the timeout to configure that all hot desk sessions in the account will not timeout. When using this option, the hot desk session can only be logged out by a user from the phone.

Set the Timeout

To set session time out for all common phones:

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Hot Desk Session Timeout**.
3. Set the session timeout from the menu. To configure no timeouts, select the **Never** value.
4. Click **Save**.

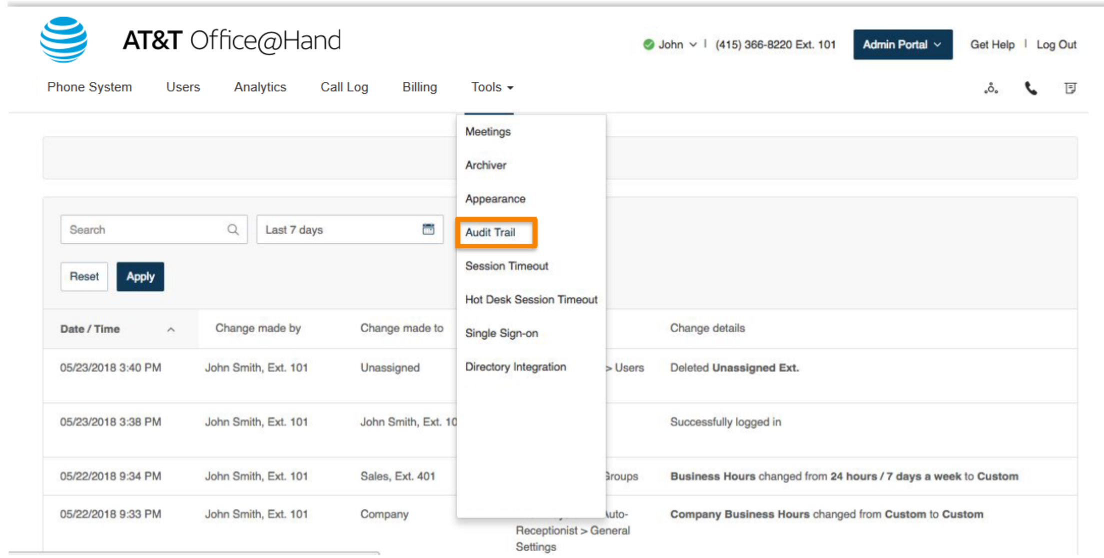
Service Console

Audit Trail

Find and capture changes made by users that affect system events, configuration, and user accounts. Admins can see the changes made to the software without the need to contact Office@Hand support.

A search tool is added so you can find information without digging through service logs or reports. You can check the latest system changes, add corrective actions, see changes made by other administrators troubleshoot an issue, and detect failed logins or locked accounts. Only the Super Admin, the Billing Admin or those roles assigned a custom role that enables Audit Trail, have access to the Audit Trail log function.

This feature provides the admin with an efficient way to control systems. It is enabled for all customers automatically. To disable, you must contact support.



Access Audit Trail

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Tools > Audit Trail**.

Audit Trail Report Details

Audit Trail captures changes to the following events:

- **System events**
  Successful/failed login and locked accounts
- **Phone System**
  Company Info, Company Address, Directory Assistance, Caller ID,
  Phone numbers: company and assigned
  Auto-Receptionist: general settings, IVR menus.
  Phones & Devices: user phones, common area phones, paging devices, shared lines.
- **Users:**
  User lists, Roles
- **Call Queues:**
  Add, update, rename, or delete a Call Queue, extension detail changes, call handling settings, greetings, message settings, notification settings, changes made to hours, overflow setting changes, custom answering rule settings.

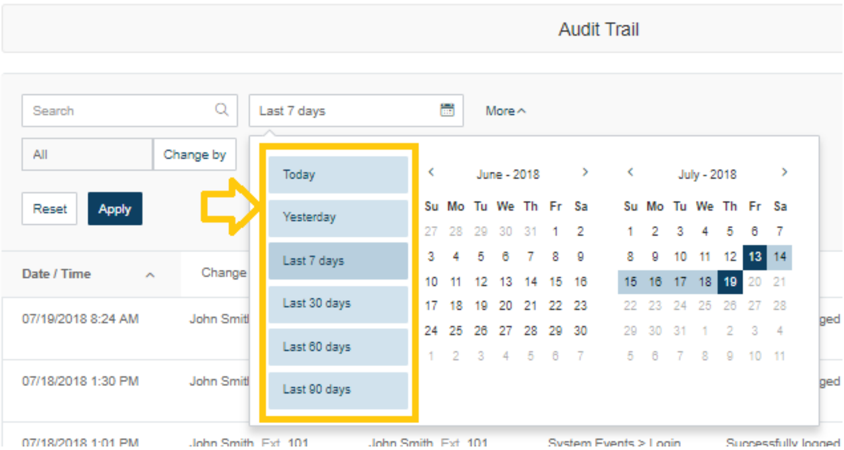
Each event that is captured reports these details:

- **Date/Time -** changes logged using Coordinated Universal Time (UTC) and displayed based on logged-in user's regional timezone setting.
- **Changes made by -** person who made the change.
- **Role***- permission level of person who made the change.
- **Change made to -** indicates which item was changed.
- **Item affected -** indicates the configuration that was changed.
- **Change details -** description of the change.
- **Endpoint***- application name.
- **IP Address***- application IP address.

* Indicates these report fields are only available in a downloaded comma-delimited (CSV) log file.

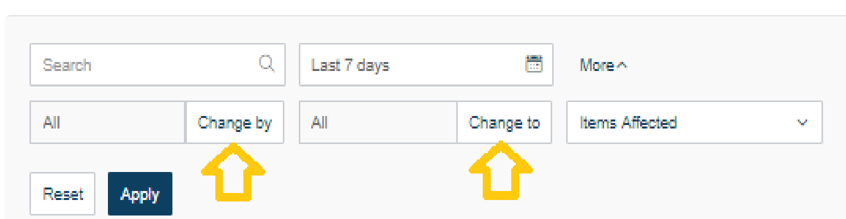
Search Capability

You can search records that provide report details by time periods: **Today**, **Yesterday**, **Last 7 days**, **Last 30 days**, **Last 60 days**, **Last 90 days**.



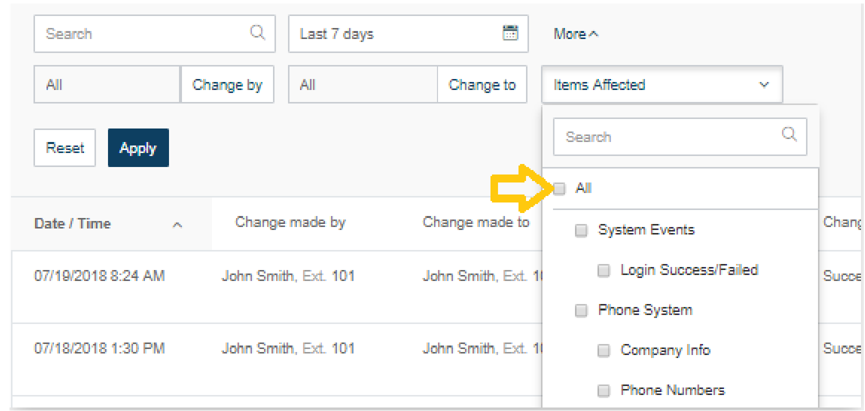
Search by Change

You can also search by specific change, such as a change made by a user (**Change by**) or a change made to (**Change to**) a particular extension. This can be done by selecting one of these options in the menu. When you select **Change by** or **Change to**, a list of extensions is displayed for you to choose which one of these is affected.



Search by Items Affected

The **Items Affected** menu lets you select the specific event items that can be searched. You can either select from this list or choose **All**.

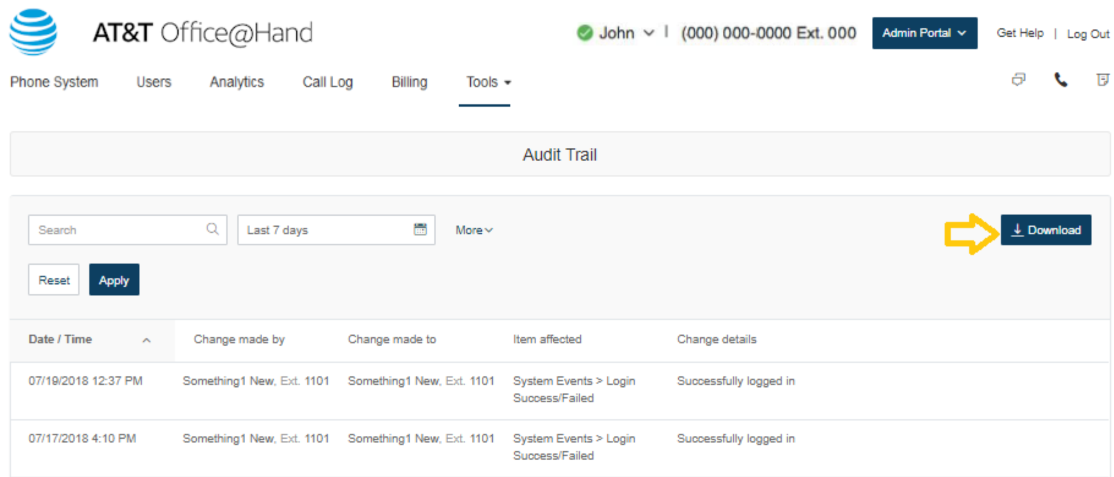


Downloading an Audit Trail Report

Once you have searched and found information in Audit Trail, you can download an Audit Trail report in CSV format.

From the Admin Portal,

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Tools > Audit Trail**.
3. Do an Audit Trail search.
4. When you would like to generate a CSV file containing the Audit Trail result, click **the Download** button.
   A Confirmation window appears.
5. To confirm, click **Download**.



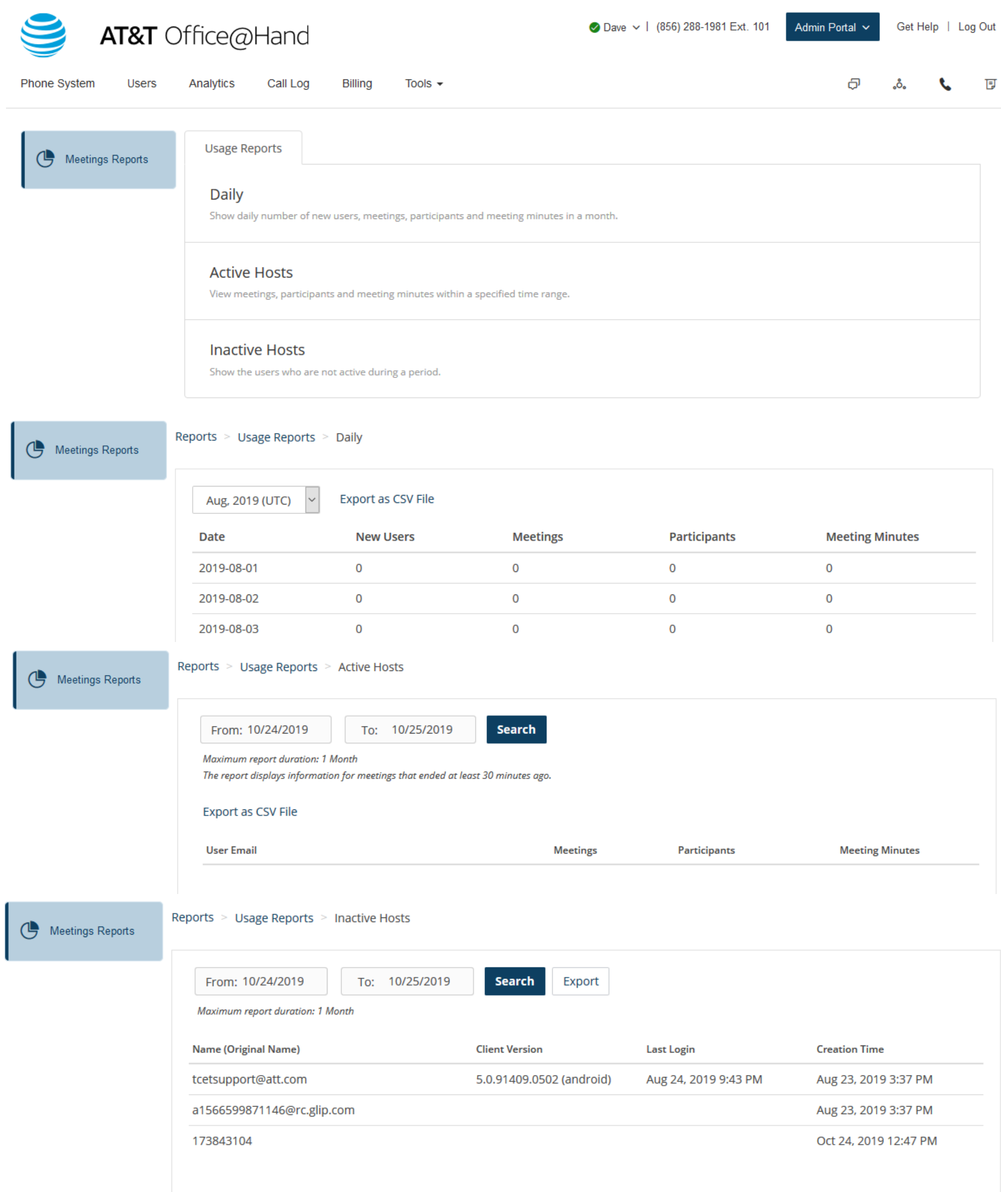
Meetings

Meetings Reports

Meetings Reports helps administrators optimize the operation of Office@Hand Meetings by presenting usage analysis and trending metrics in an easy-to-read graphical format. You can view the following reports:

- Daily Report: provides metrics for each day in the specified month, including the number of new users, meetings, participants, and meeting minutes.
- Active Hosts: two types of reports are available: you can sort by Meetings or by users. Provides metrics for a specified range of dates, including meeting topics, participants, and meeting duration.
- Inactive Users: provides information about inactive Meetings users.

Click **Export** to export a report.

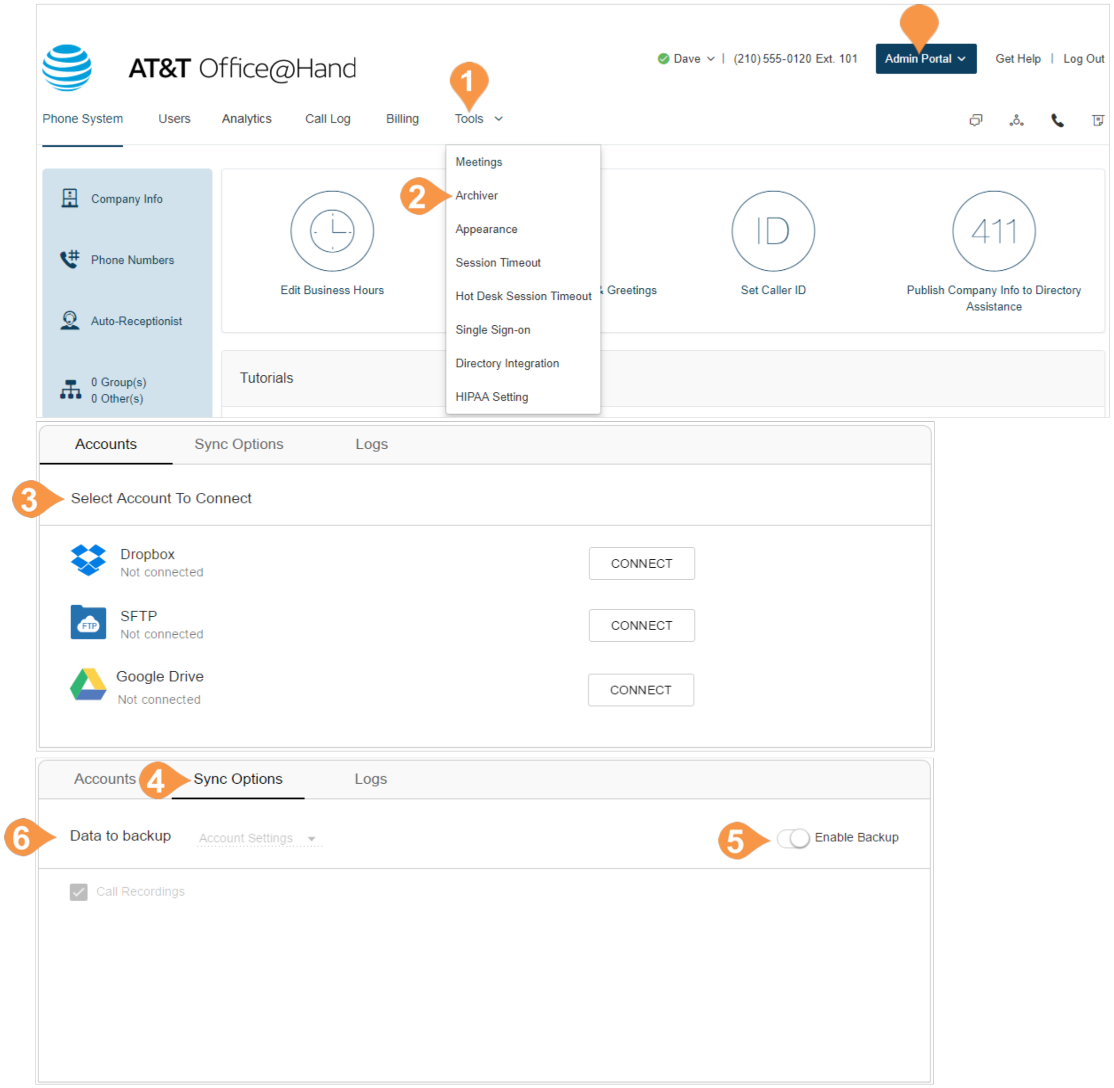


Apps

Archiver Beta

Office@Hand Archiver makes archiving important communications data simple and convenient through the seamless integration of SFTP, or Dropbox or Google Drive cloud storage with your Office@Hand service.

With Office@Hand Archiver, you can securely save your messages and recorded calls automatically and easily search the stored data at any time from within your account to quickly retrieve the records you want.



Configure Office@Hand Archiver

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Archiver** and log in to the tool with your Office@Hand or Salesforce credentials.
3. The Accounts tab displays the connection status of your accounts. Click **Connect** and enter the credentials to connect Office@Hand to your Dropbox, Google Drive, or SFTP account.
4. Click **Sync Options**.
5. When connected to an account, you can enable or disable data backup from Office@Hand to the account by selecting **Enable Backup**.

   Office@Hand Archiver will run the job on an hourly basis and archive to Dropbox, Google Drive, or SFTP all of the extensions' call recordings generated within the hour before last Archiver job run.

Select the types of **Data to backup**. By default, Call Recordings are backed up for admins and users. Users can select for their own extensions whether to backup Call Recordings, Voice Mails, SMS and/or Fax.

Account Federation

Account Federation (account linking) is a solution that provides a set of features to support customers who are split across different accounts, and allows account users to find one another across accounts on all endpoints. Large customers may have this split because of a limit of number of users per account, or business needs for having different accounts or billing.

Accounts are linked into a federation that includes:

- The ability to create accounts in multiple tiers, allowing for a mix-and-match of certain feature sets.
- A consolidated company directory.
- Non-metered extension-to-extension and direct number dialing support in the federation.

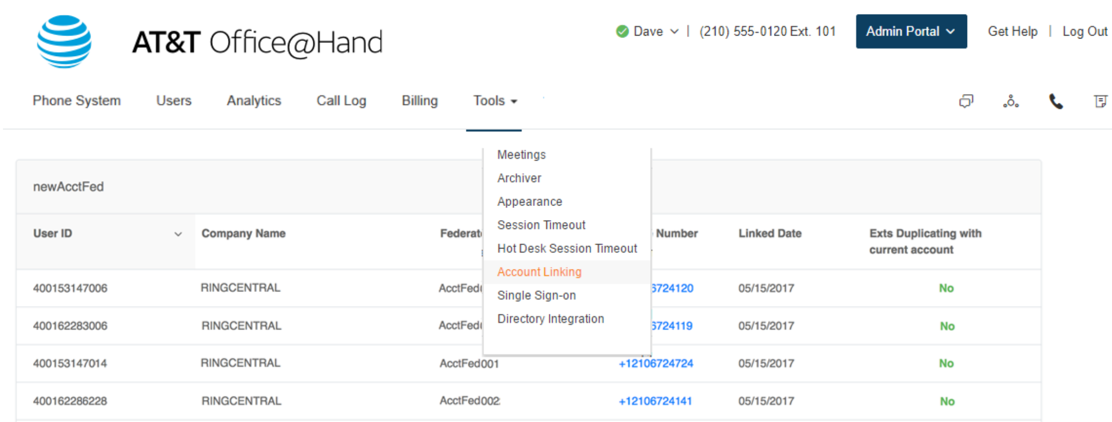
Before setting up Account Federation:

1. Contact support to request access to the Account Federation feature. Support will help evaluate if your account qualifies for the feature.
2. The support agent enables the Account Federation feature and adds your linked accounts within your online account.
3. Unique extensions in the federation are preferred. If extensions are not unique, the support agent may be able to update the extensions number of the linked account for you by applying a template.
4. When the Account Federation setup is complete all the account users can find one another across accounts on all endpoints.

Setting up Account Federation

Account Federation provides the administrator a list of linked accounts. To access Account Federation:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Account Linking**.
3. Your list of linked accounts is displayed. **Federated Name** helps differentiate one account from another.



Appendix A: Express Setup for Admins

Welcome to Office@Hand

Welcome to the Office@Hand business phone system. Once you have purchased the system, you'll receive an email to activate.

If this is your first login, it will take about 25 minutes to initially set up your account. As the administrator you'll be able to add users during the Express Setup or after you complete these steps. You will set up user profiles, set the company greeting, operator extension, and My Info profile. You'll also verify your regional setting, provide emergency calling location, and setup how you would like phone calls to be routed.
Note: *If you leave the Express Setup without finishing, the changes you have made might not be saved.*

Activate Your Account

You will receive a Welcome Email after you have purchased an Office@Hand system.

To start your setup,

1. Open the email message.

   The Welcome message appears.
2. To begin your set up, do one of the following:
   - Click **Set Up Account**
   - Copy the link into your browser

The setup instructions continue on the following page.

AT&T Office@Hand

Your account now ready

Dear service representative,

Congratulations! Your account is now active and ready to use!

Your account number is: **(210) 555-8284.**

A customer implementation service representative will call you within the next 48 hours to schedule a convenient time to provide an overview of all the advanced features. This service, provided to you at no extra charge, will help you set up your company preferences and assist with efficiently porting your existing business numbers to AT&T Office@Hand. If you would like to speak to a customer implementation service representative now, please call 888-389-1758.

Alternatively you can set up your new business phone system at any time with easy to use, self service features online or through the AT&T Office@Hand mobile app for select smartphones.

Set Up Account

Or copy-and-paste this link into your browser:
https://www-att.com/web/setup/?hash=D22A0F009356510B9D19A42459D699519135B9

Set up and take the following steps:

1. Identify your users and departments
2. Configure your company greeting and operator extension
3. Decide on how calls will be forwarded to your departments and users

To learn more about AT&T Office@Hand click here. For technical assistance please call AT&T Advanced Solutions customer care at (866) 563-4703.

Thank you for using AT&T Office@Hand!

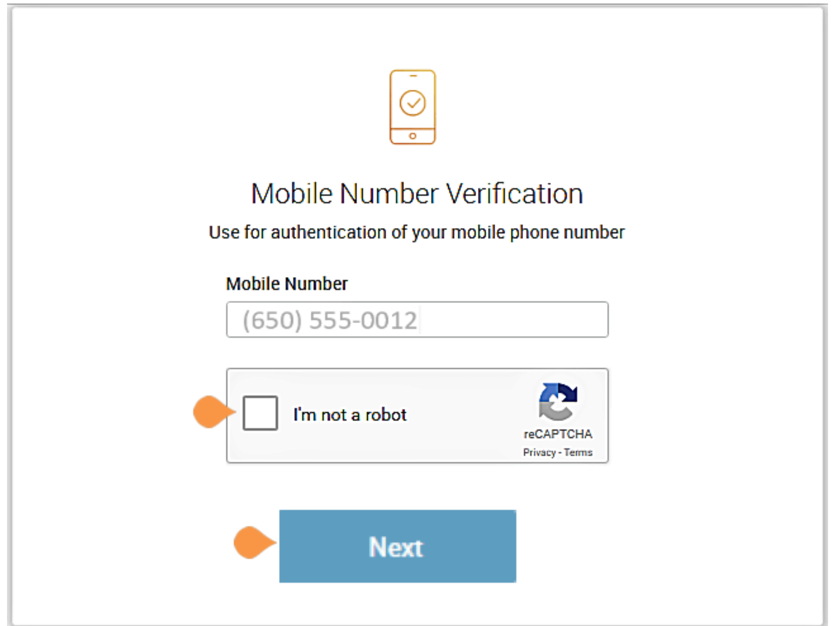
Powered by RingCentral

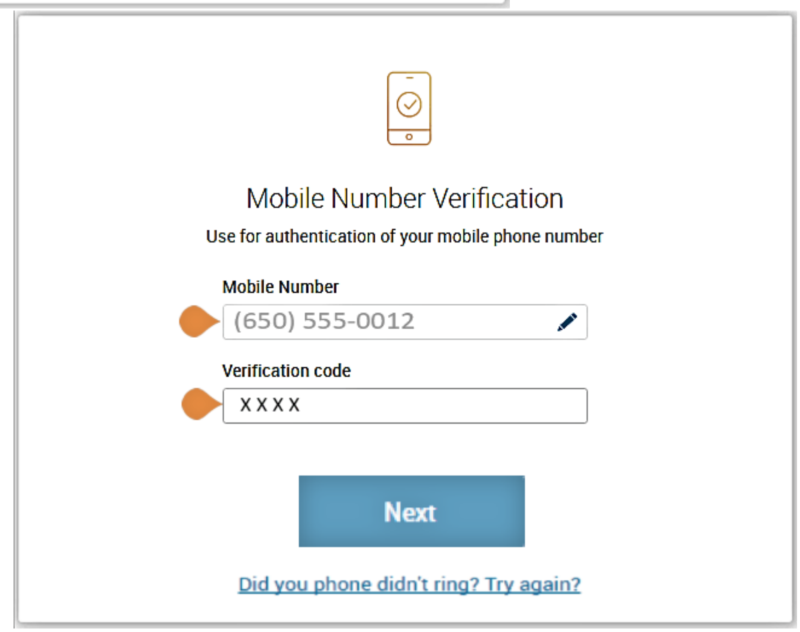
Your Account Security

After clicking **Activate Account**, authentication begins with a mobile app verification.

1. Click the **I'm not a robot** box, then **Next**.

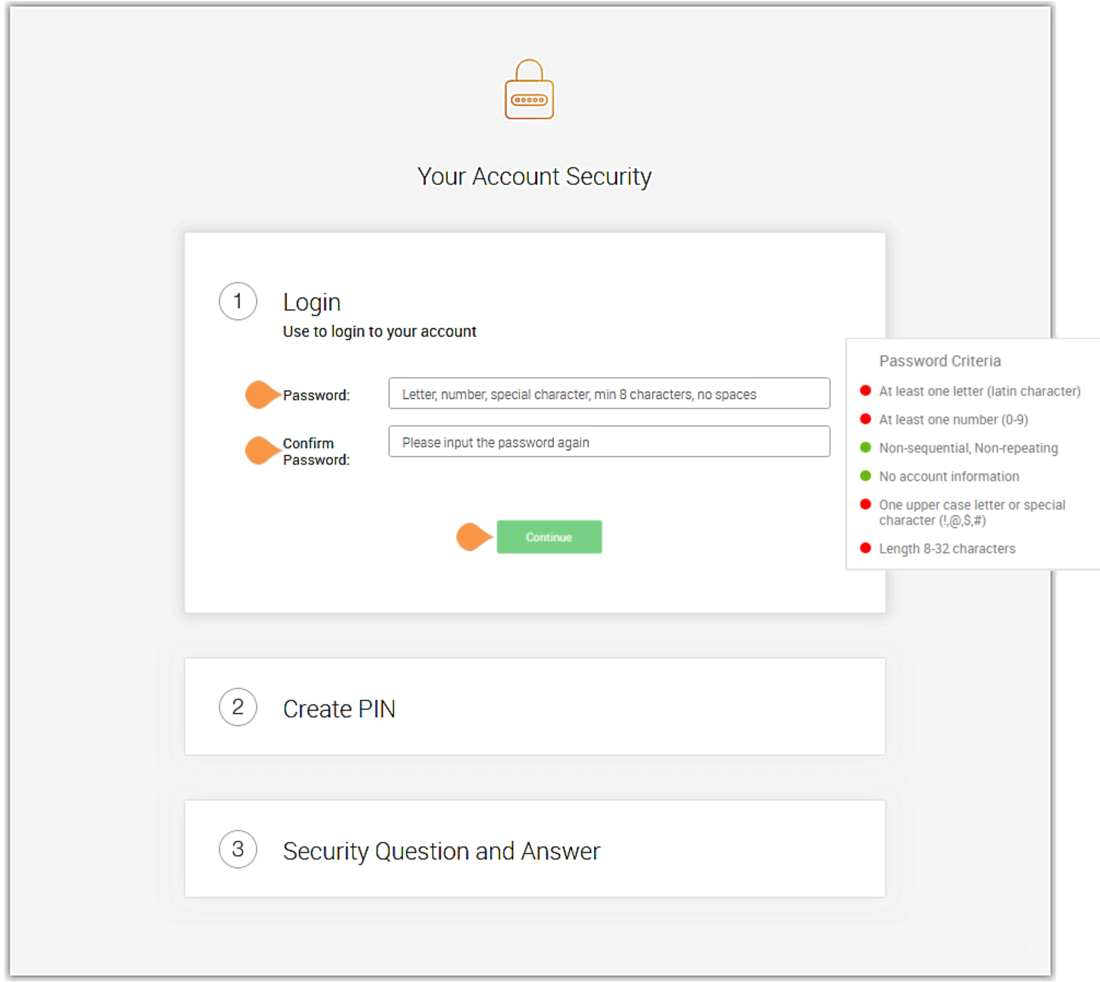
   A message informs you that you'll be receiving a phone call providing you with a verification code.
2. Enter the verification code.
3. Click **Next**.





A window opens for you to enter three account security settings:

- A password
- A PIN (Personal Identification Number)
- A Security Question and Answer



Create Your Password

Passwords and Security Questions on your online account maintain your account's confidentiality and privacy. The **PIN** is used to verify the User's identity when checking voicemail. The **Security Question and Answer** is requested by the agent when contacting Customer Support.

Follow the on-screen prompts. For each security setting, certain requirements must be met. For your convenience, these requirements are listed next to the setting as you enter the information.

Note: If your extension is configured as a Google tagged account, your Express Setup will have different setup options.

1. Create your **Password**.

   Follow the requirements listed next to the **Password** and **Confirm Password** fields. A green check mark indicates when you have met a requirement and all requirements must be met for the password to be accepted.
2. After you **Confirm Password**, press **Continue**.

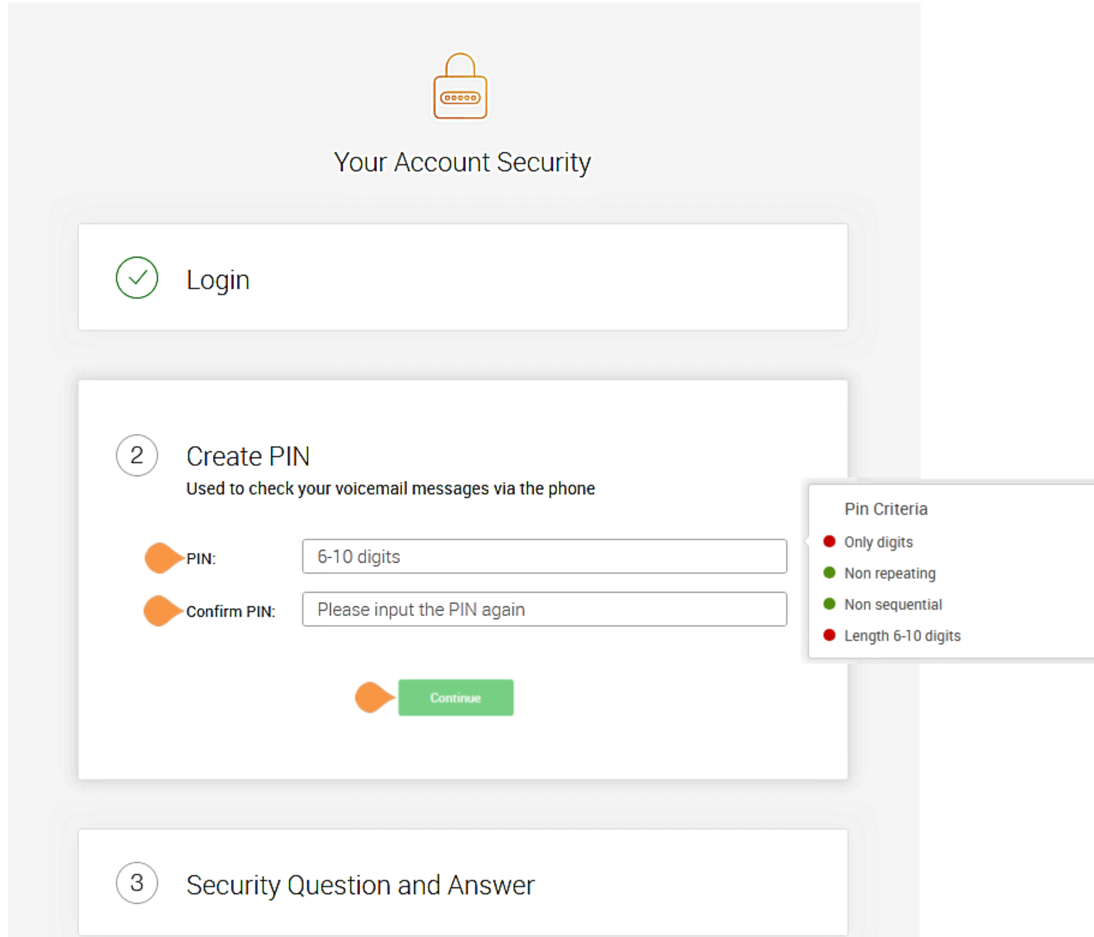
Set Your PIN

The next step in **Your Account Security** is to set your PIN.

1. Create your **PIN**.

   Follow the requirements listed next to the **PIN** fields. A green check mark indicates when you have met a requirement. All requirements must be met before the PIN is accepted.

   You'll need this PIN when checking voicemail.
2. Press **Continue**.



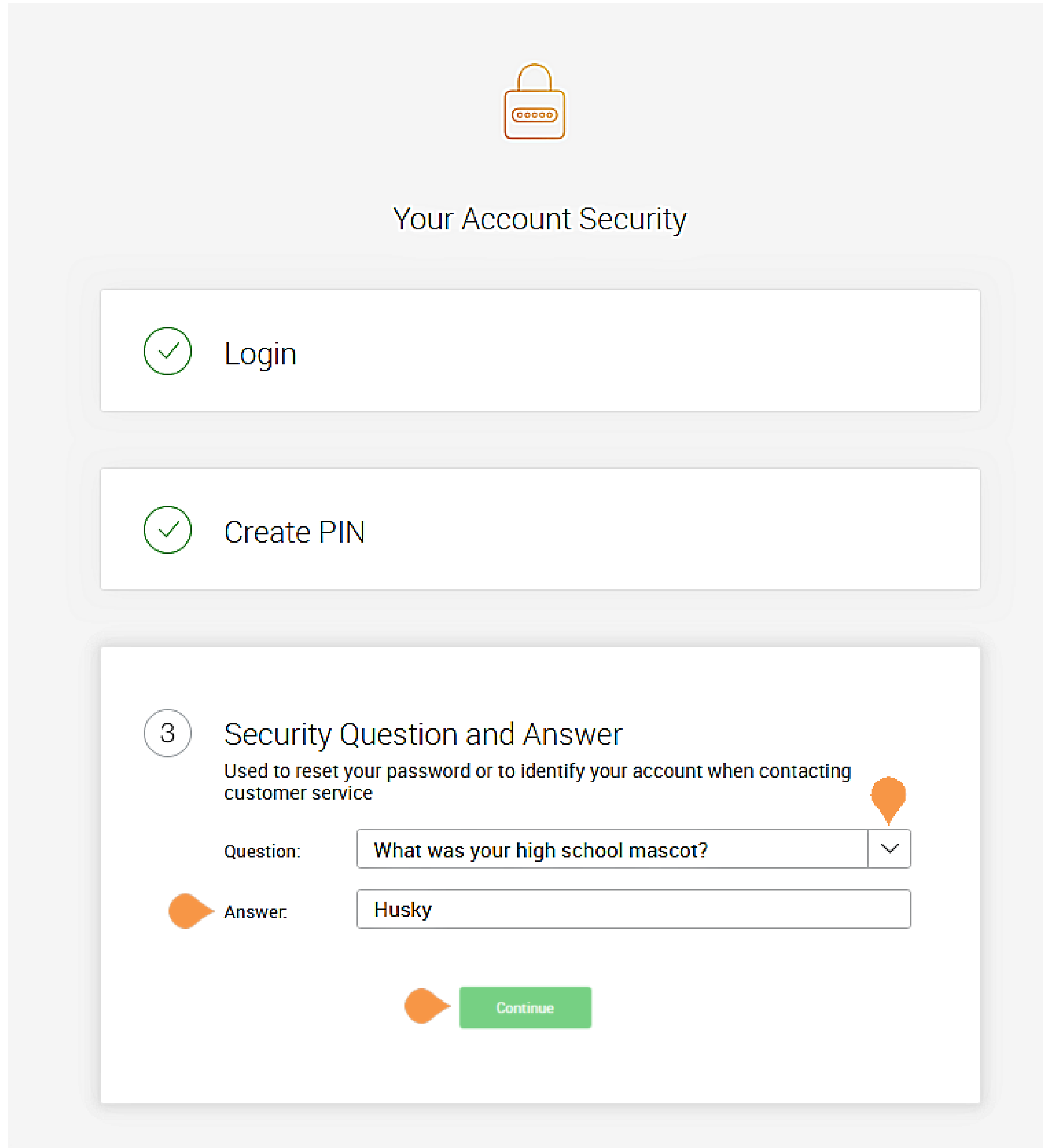
Set Your Security Question and Answer

The last step in **Your Account Security** is to select a **Security Question and Answer**.

Note: *You may be asked for your* ***Security Question and Answer*** *each time you contact AT&T customer support. Keep a record of the question and answer for future reference.*

1. Select one of the questions listed in the **Security Question and Answer** menu.
2. Enter your answer to the security **Question** in the **Answer** field.
   Note: Your answer must be at least four letters.
3. Press **Continue**.

Should you lose your password, PIN, or Security Question, see this Knowledge Base article, "Changing a User's Password, Pin, or Security Question."

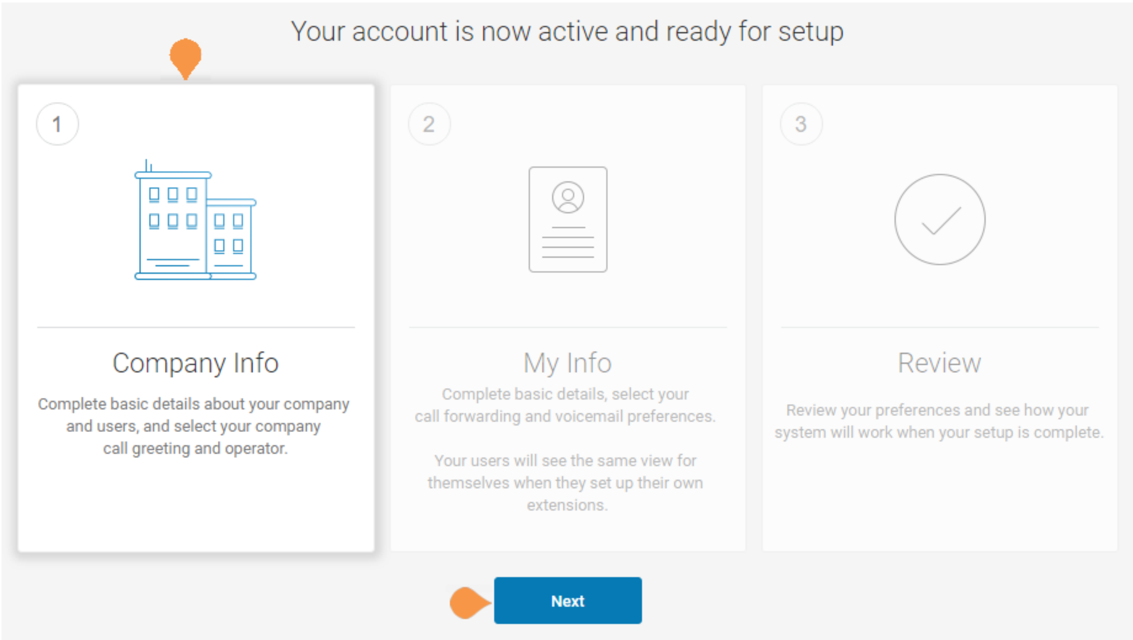


Your Company Account is now ready for setup

The next steps include setting up basic details about your company, users, call greeting and operator.

Your company's main number was assigned by Office@Hand at the time of purchase in **System Setup**. At that time, your company number and fax number could have been changed. You can change the company and fax number by logging into your account after setup and navigating to the **Settings** > **Phone System** configuration tab.

- Click **Next**.



Setting up Users

In this step, you'll complete information about your users.

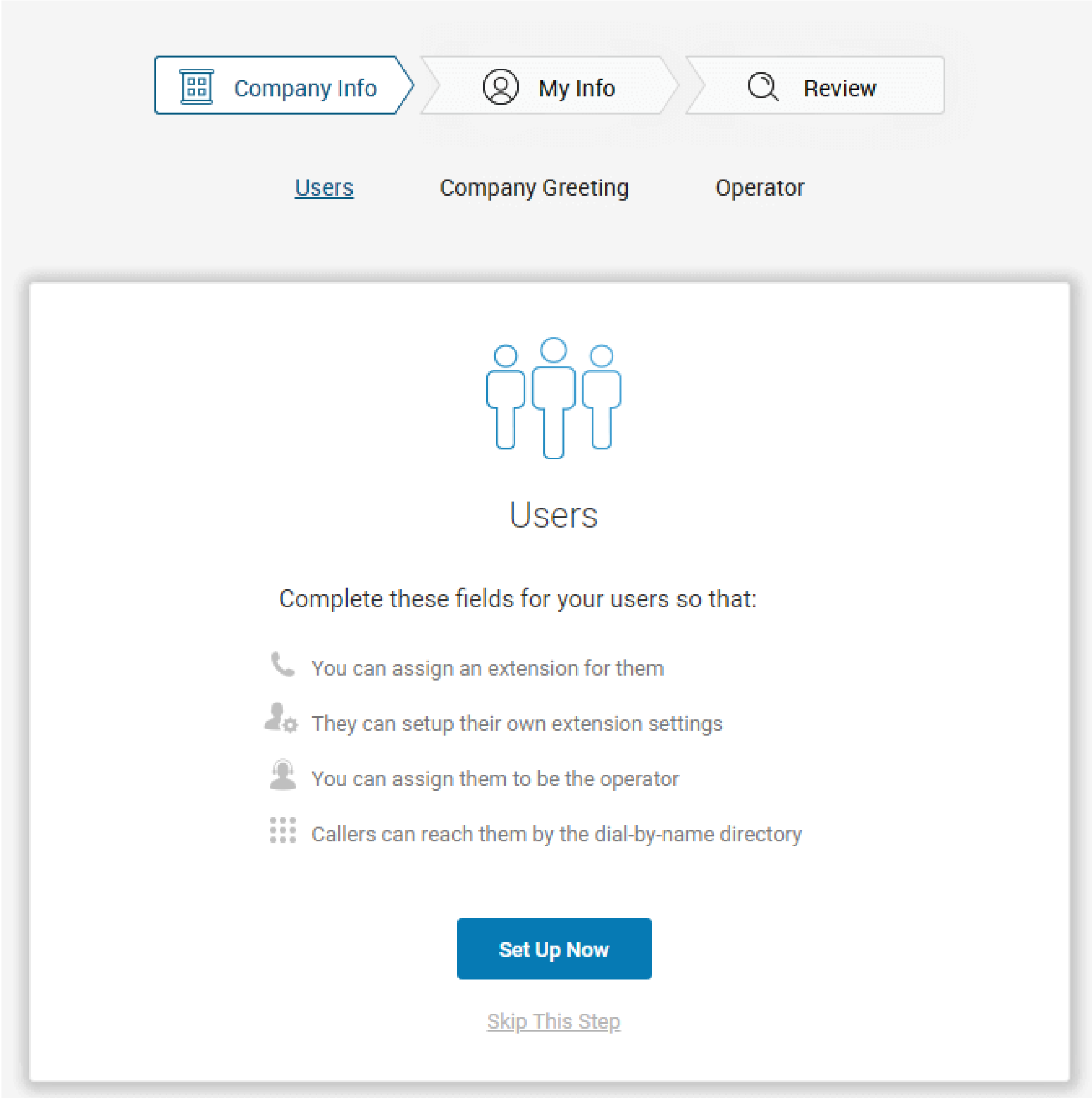
- Assign user extensions
- Enable users to change their own extension settings
- Assign an operator
- Add users to the dial-by-name directory

Before you click **Set Up Now**, have information ready, such as, first and last names, email addresses, contact numbers, for each user.

Note: If you click **Skip This Step**, the setup continues to "Company Greeting" on page 224.

As you set up users, each of them will be sent a "Welcome Email" so they can begin setting up their extension.

- Click **Set Up Now**.



Set up User Profiles

In this step, you'll assign your users to a device.

When purchasing the Office@Hand service, a number of phones or lines were bought for your account. Here you'll enter the details for those phones purchased.

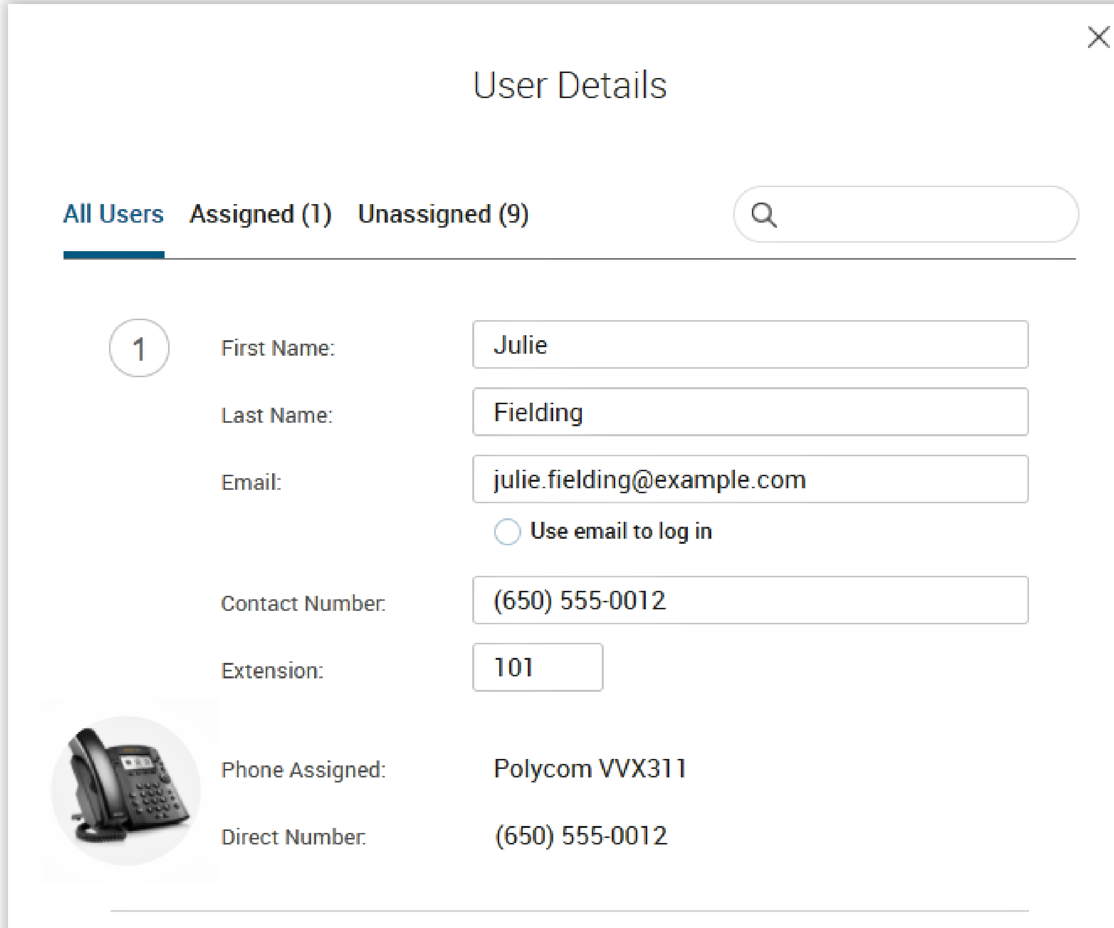
Enter the details for each of your users. This information is used for the company directory. Except where noted, this information is set by the administrator.

- First Name
- Last Name
- Email
- Enable Email to log in - The email address entered must be used for only one person and cannot be associated with more than one person or phone number.

If **Use email to log in** is not checked, the user can only log in with their phone number.

- Contact Number
- **Extension**
- Direct Number
- Scroll down to complete each User Details profile. Any User you do not assign at this time can be added to the system later. Go to the Users tab in the Admin Portal and click Add User.

When you are finished, scroll down and click **Next**.



Company Greeting

In this step, you'll set the greeting callers will hear when they dial your company's main number.

The default company greeting is shown in text below the playback controls. You can either use the default greeting or customize it.

If you choose to record a custom greeting, it can be recorded now or later.

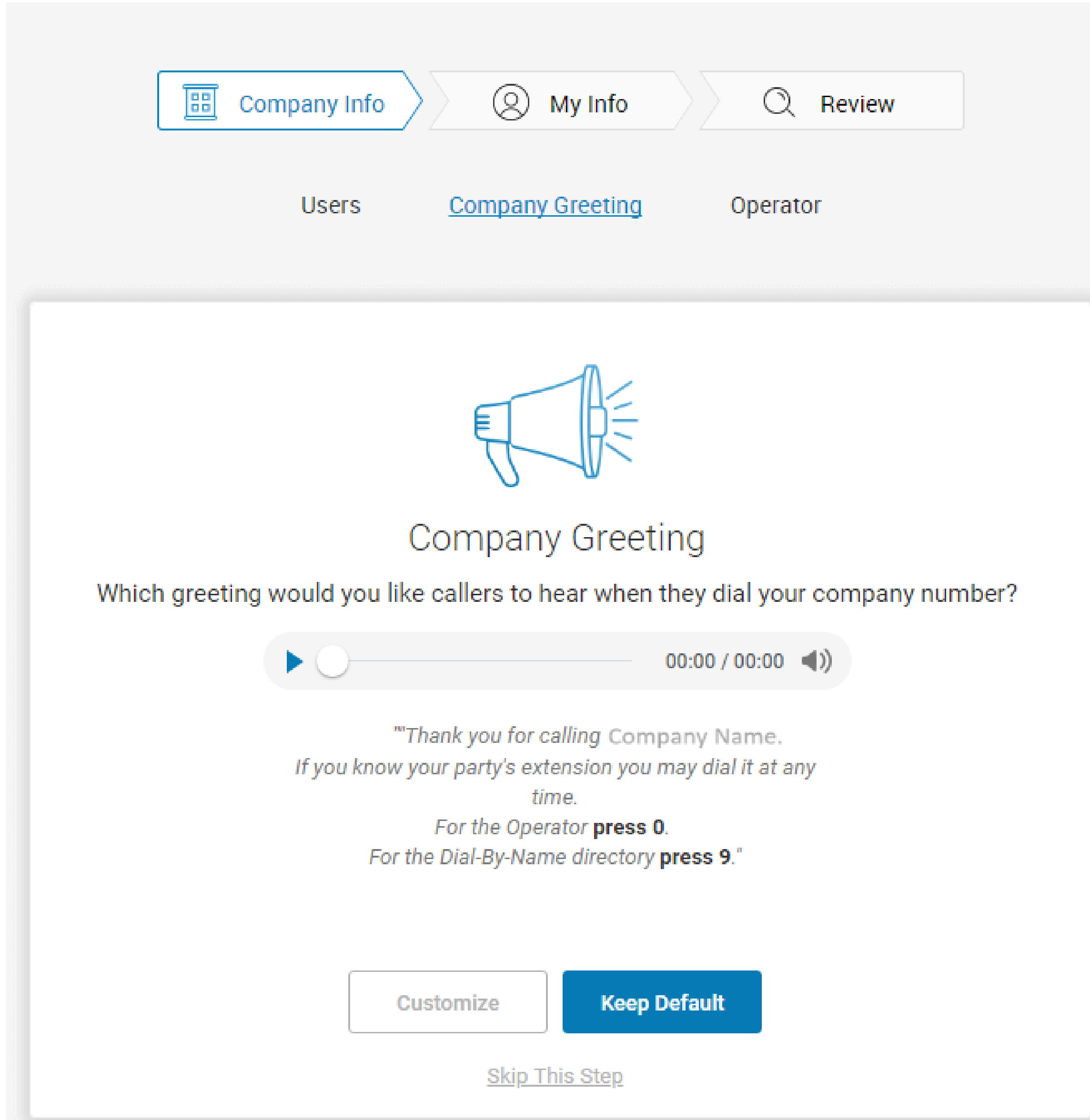
To skip this step now and record it later, click **Keep Default** and go to **“Set the Operator Extension” on page 225**.

To customize your company greeting, click **Customize**.

Select **RECORD OVER THE PHONE** or **IMPORT**.

- To RECORD OVER THE PHONE, follow the on-screen instructions to record your greeting. When you are finished, click **Next**.
- To IMPORT a .WAV or .MP3 file, click IMPORT, then browse and attach the filename.

When you are finished, click **Next**.



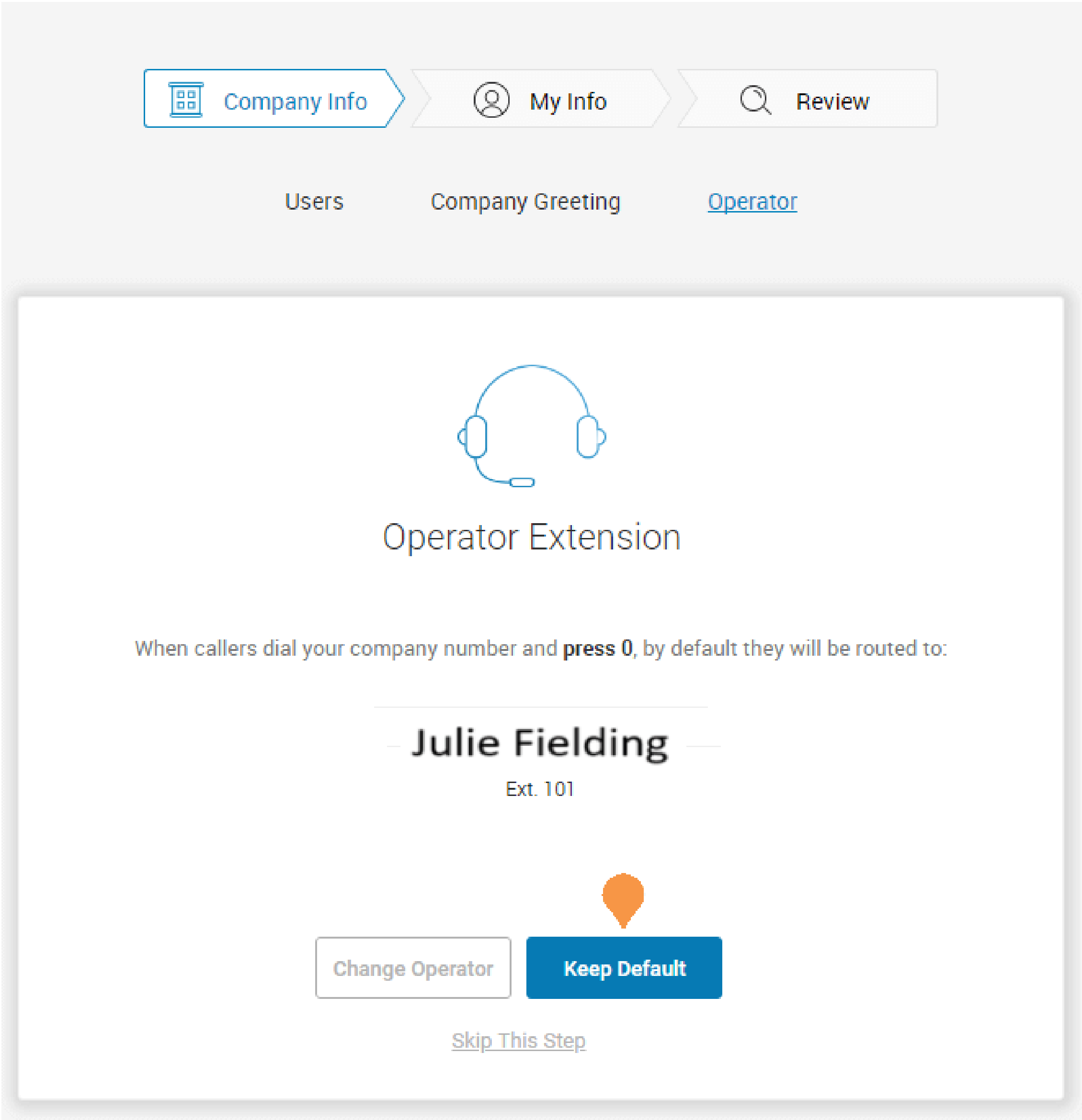
Set the Operator Extension

When callers dial your company number and press 0, the call is routed to the extension you designate.

Extension 101 is the Operator extension by default. You may reassign the Operator extension to other numbers in the system.

Note: Extension 101 has specific account authority.

1. Select **Customize** or **Keep Default**.
   - To change the Operator Extension, click **Change Operator**, then select a different extension number.
   - You can also reassign the operator extension after setup.
2. Click **Keep Default**.



Verify My Info Profile

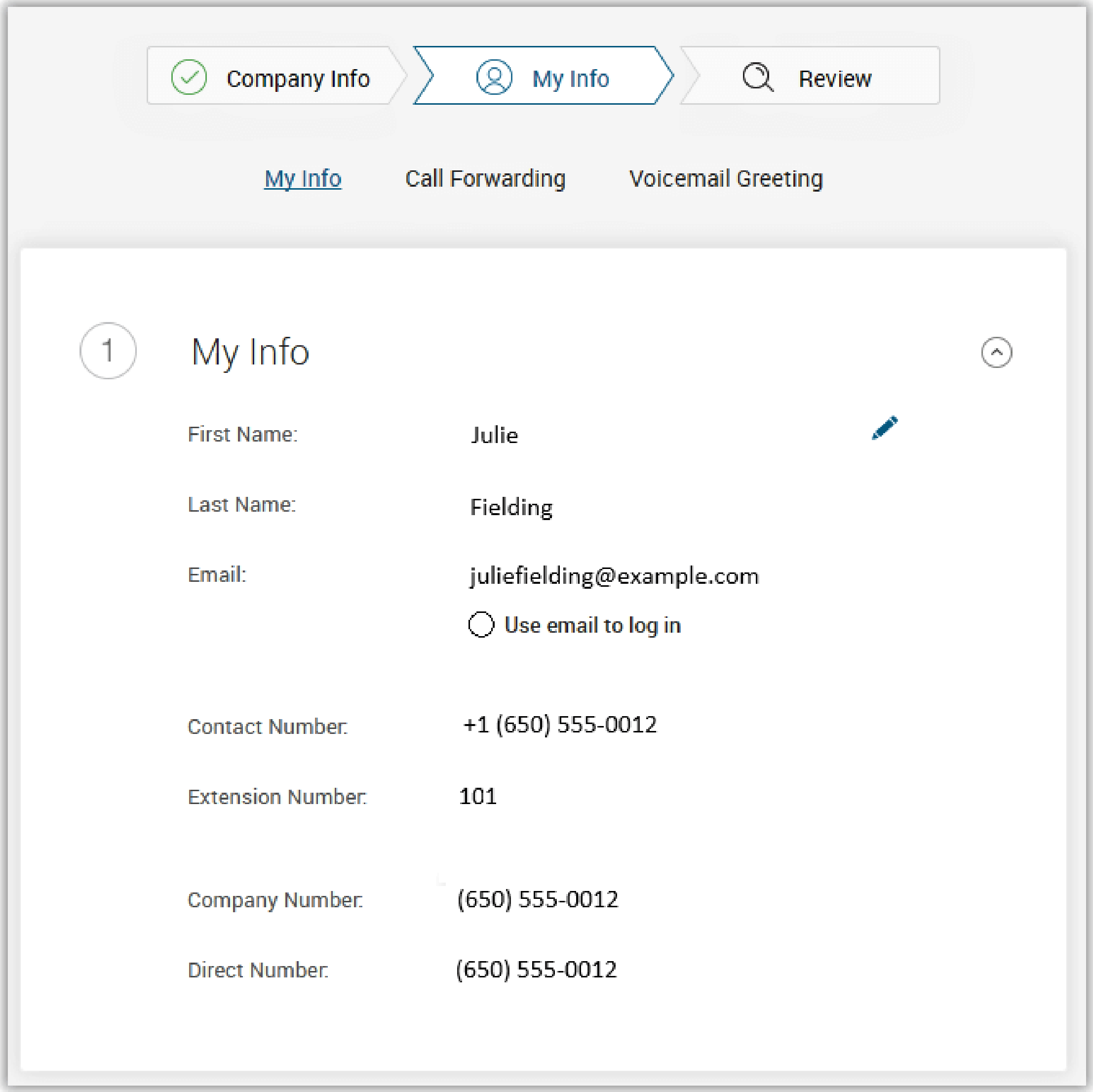
For this step, you'll make sure that your own information is correct.

1. Verify your information.
   If it not correct, update it.
   - The name shown in your **My Info** will appear in your company directory for others to contact you.
   - Select **Use email to log in** to enable login to your account using a unique corporate email address.

If **Use email to log in** is not checked, you can only log in with your phone number.

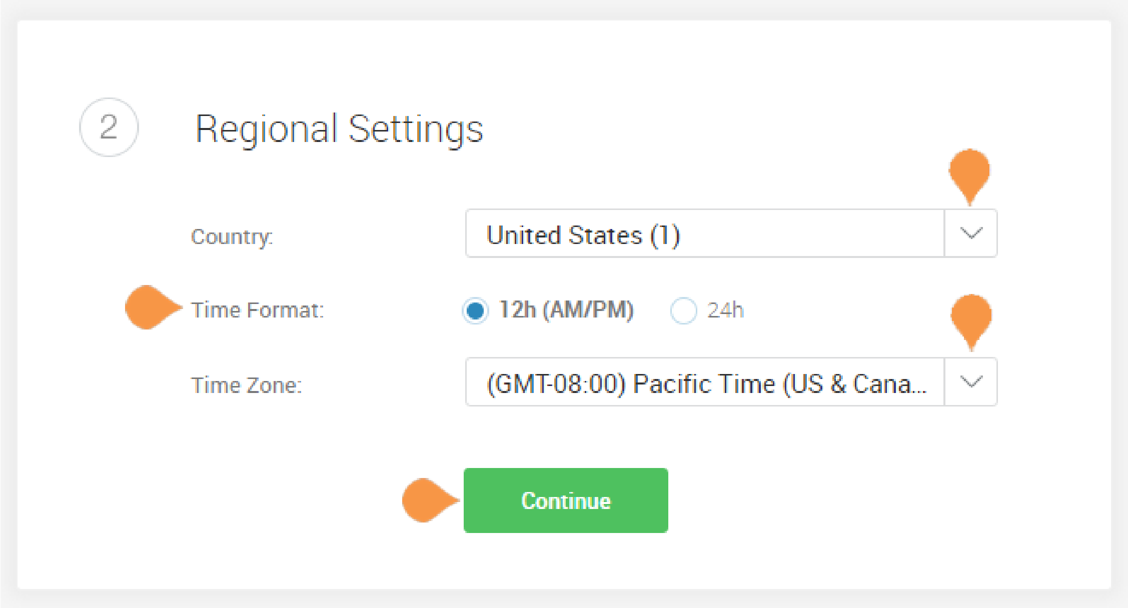
The email address must be used for only one person and cannot be associated with more than one person or phone number.

2. Scroll down to **Regional Settings**.



Check or Reset your **Regional Settings**

3. Verify **Regional Settings** specified for your account. These are: **Country**, **Time Format**, and **Time Zone**.
4. Click **Continue**.

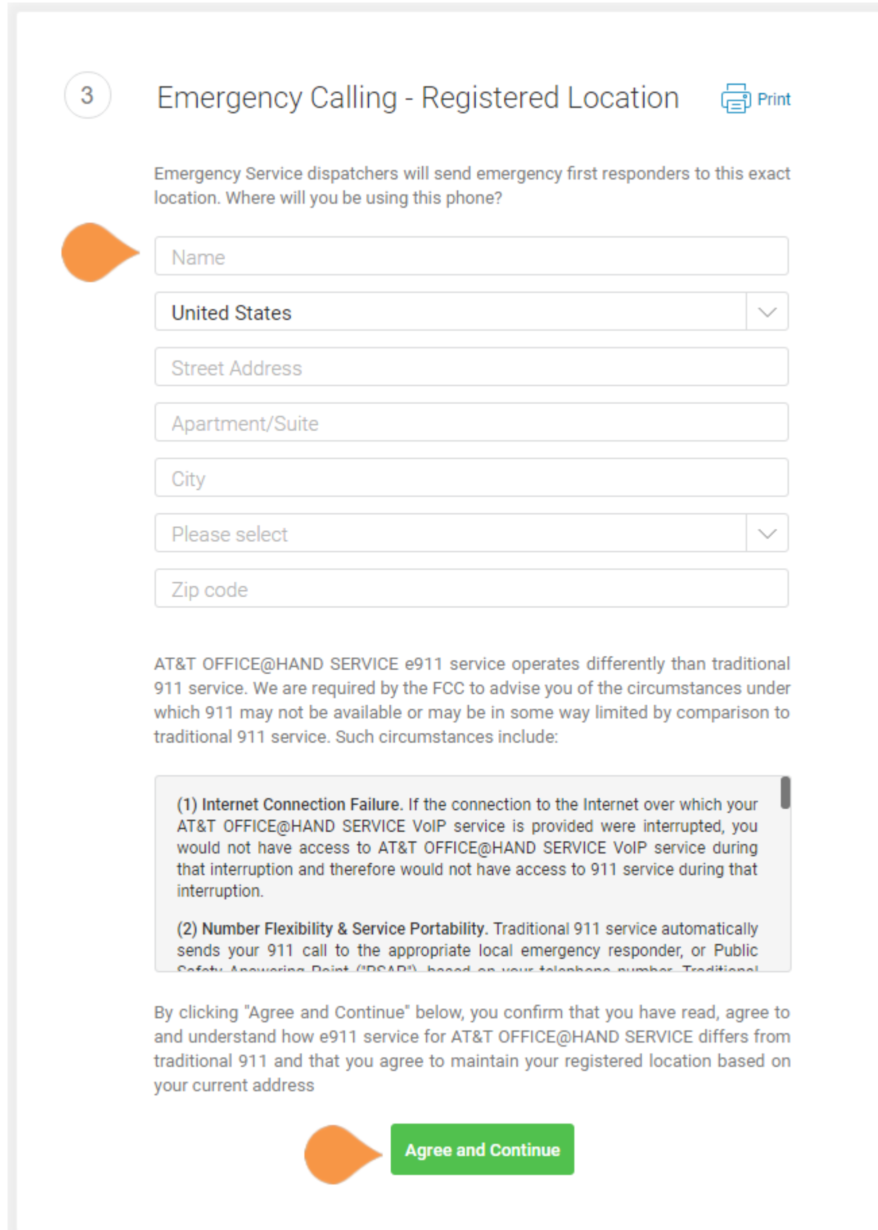


Emergency Calling - Registered Location

The **Emergency Calling - Registered Location** is the physical location of your phone that is using the digital line. Emergency dispatchers (Emergency Call Service) will send first responders to this exact location.

For more information, see the Knowledgebase article, “Updating the Emergency Address.”

1. Fill in the **Emergency Calling - Registered Location** form.
   - Enter your name
   - Enter your country
   - Enter your address
   - Enter your state
   - Enter your postal zip code
2. Read the agreement describing Emergency Calling - Registered Location.
3. Click **Agree and Continue**.



My Info > Call Forwarding

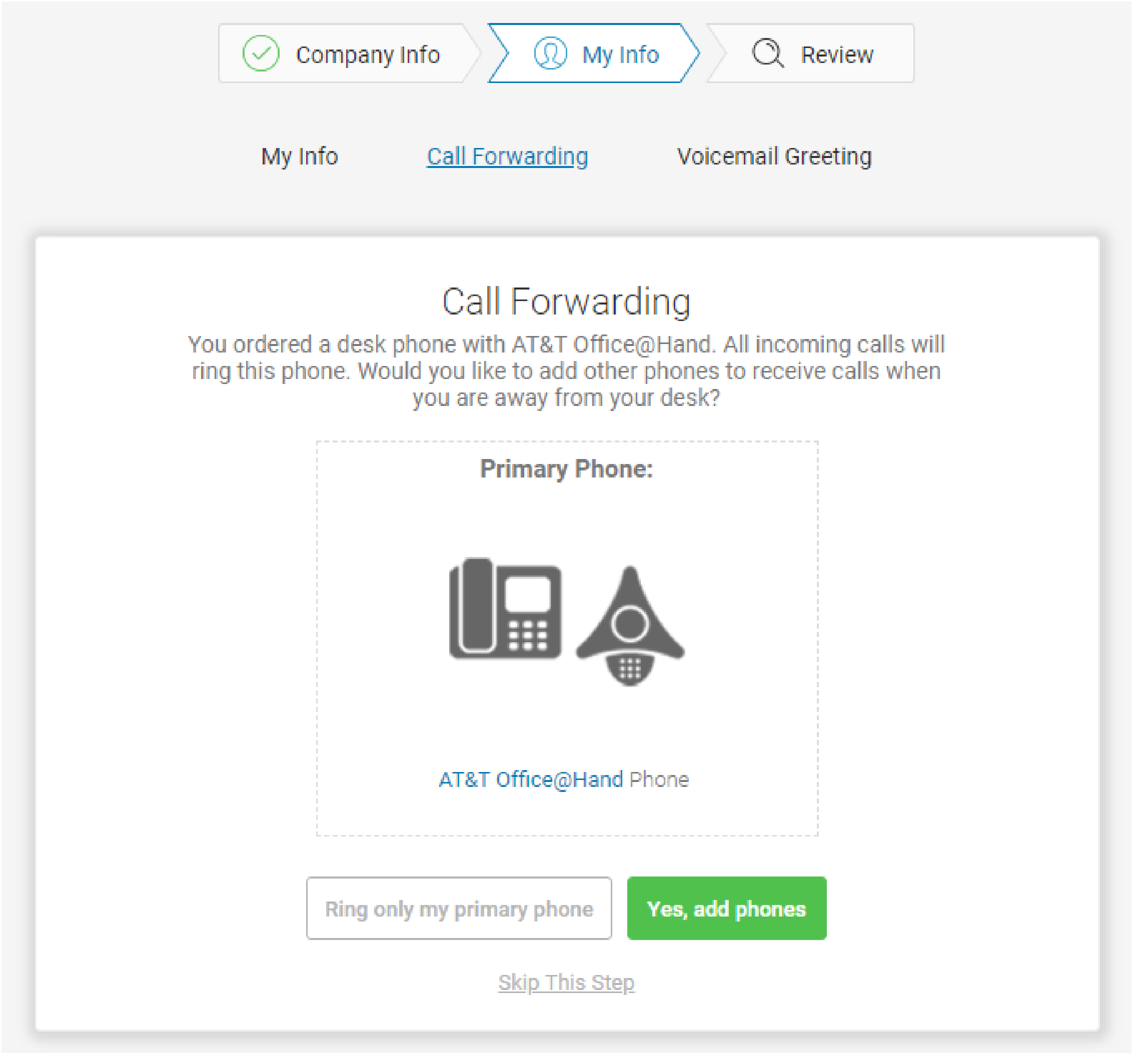
As a user, you can set up call forwarding rules for your extension. You can add up to 10 forwarding numbers for each extension assigned to you and set calls to ring sequentially or simultaneously.

In this step you'll enable call forwarding to another number. First, note the phone extensions to which you might want to forward your calls.

You can either skip this step or set your phone to route your calls to another phone.

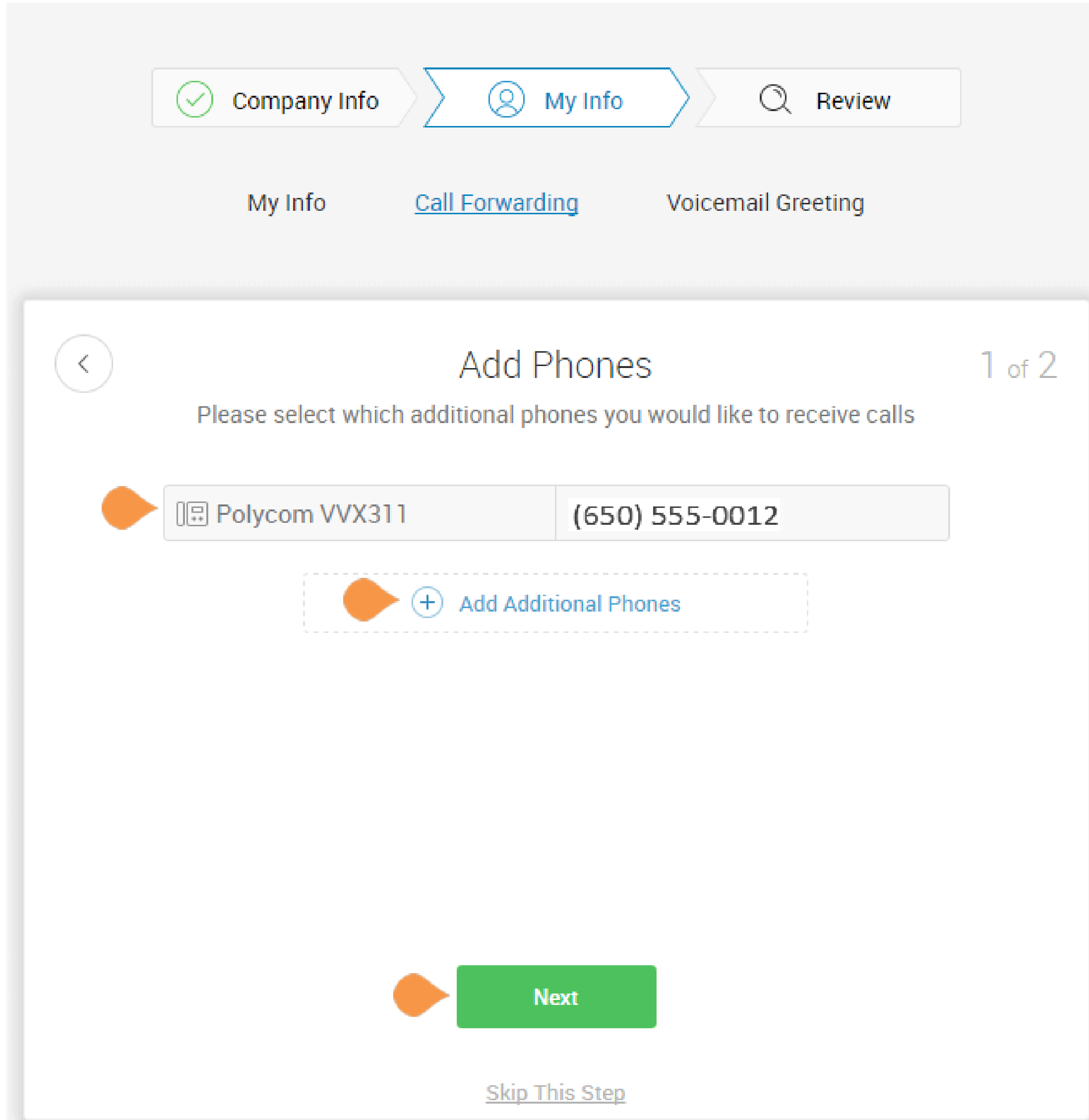
- To omit this step, click **Ring only my primary phone**. Then go to "My Info > Voicemail" on page 232.
- To add desk phones or a home phone (not mobile phone, see note) to which you can forward calls, click **Yes, add phones**.
- Click **Yes, add phones**.

Note: If you intend to use the Office@Hand mobile app, do not enter the mobile number using these steps. The mobile app's function is integrated into the Office@Hand system.



Select additional devices (if any) you would like to ring when you receive an incoming call to your business number. Any purchased phone or your home number can be selected.

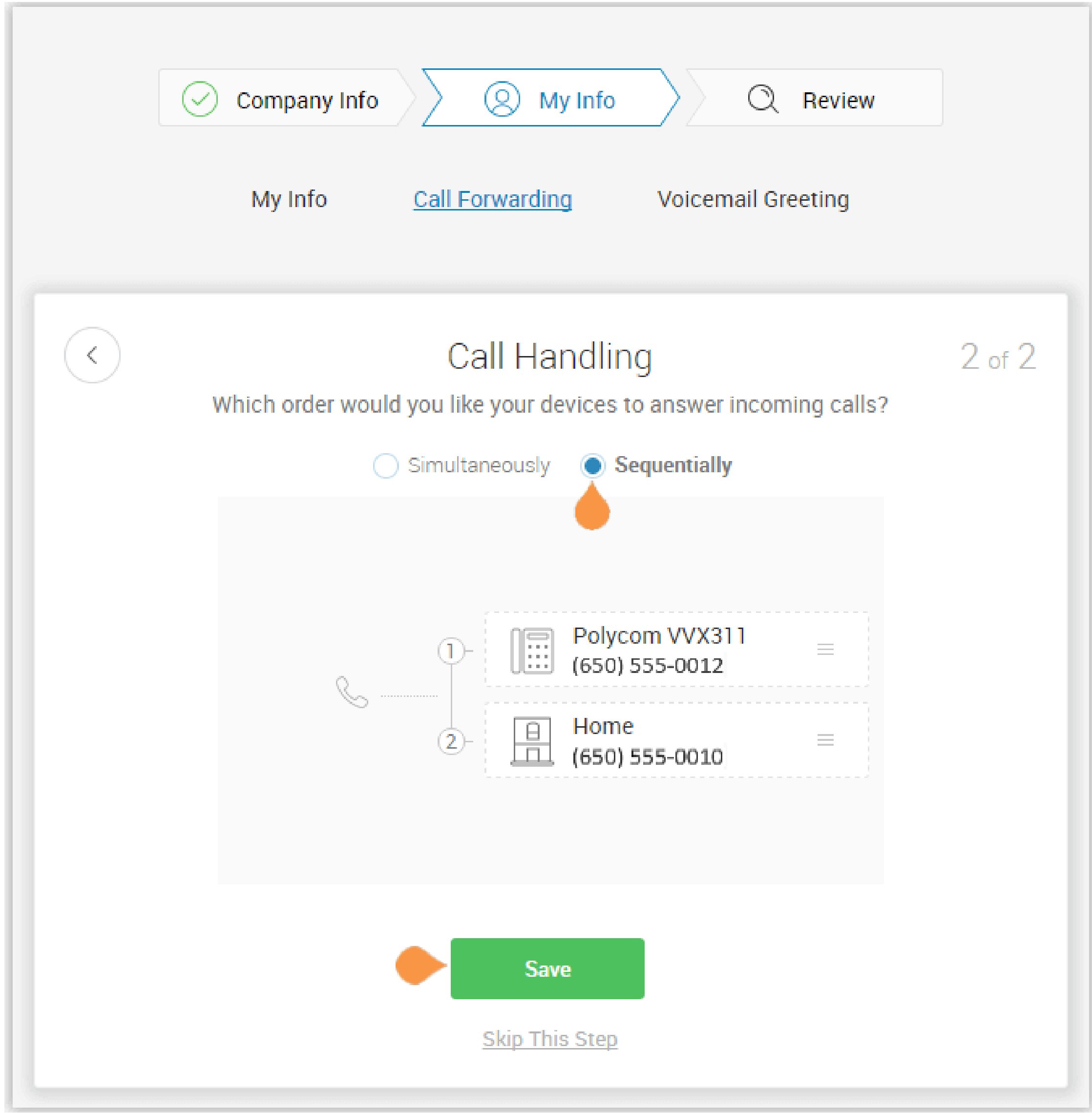
1. Select the phone to which the forwarded call will be sent.
2. Enter the number of the selected phone. Continue adding phones, by clicking **Add Additional Phones** as needed.
3. Click **Next**.



Call Handling - Simultaneously or Sequentially

1. Select whether the forwarded phones ring **Simultaneously** or **Sequentially**.
   - Select **Simultaneously** if you prefer the call to ring on all forwarded phones at the same time. Because of different networks, ringing to some devices, such as mobile devices may be delayed.
   - Select **Sequentially** if you prefer the call to ring on forwarded phones in a sequential order. Arrange the forwarding order by dragging up or down.
2. Click **Save**.

The setup instructions continue on the following page.



My Info > Voicemail

Now, set up the message your callers will hear when Office@Hand forwards your calls to Voicemail. In this case, this is the voicemail for extension 101.

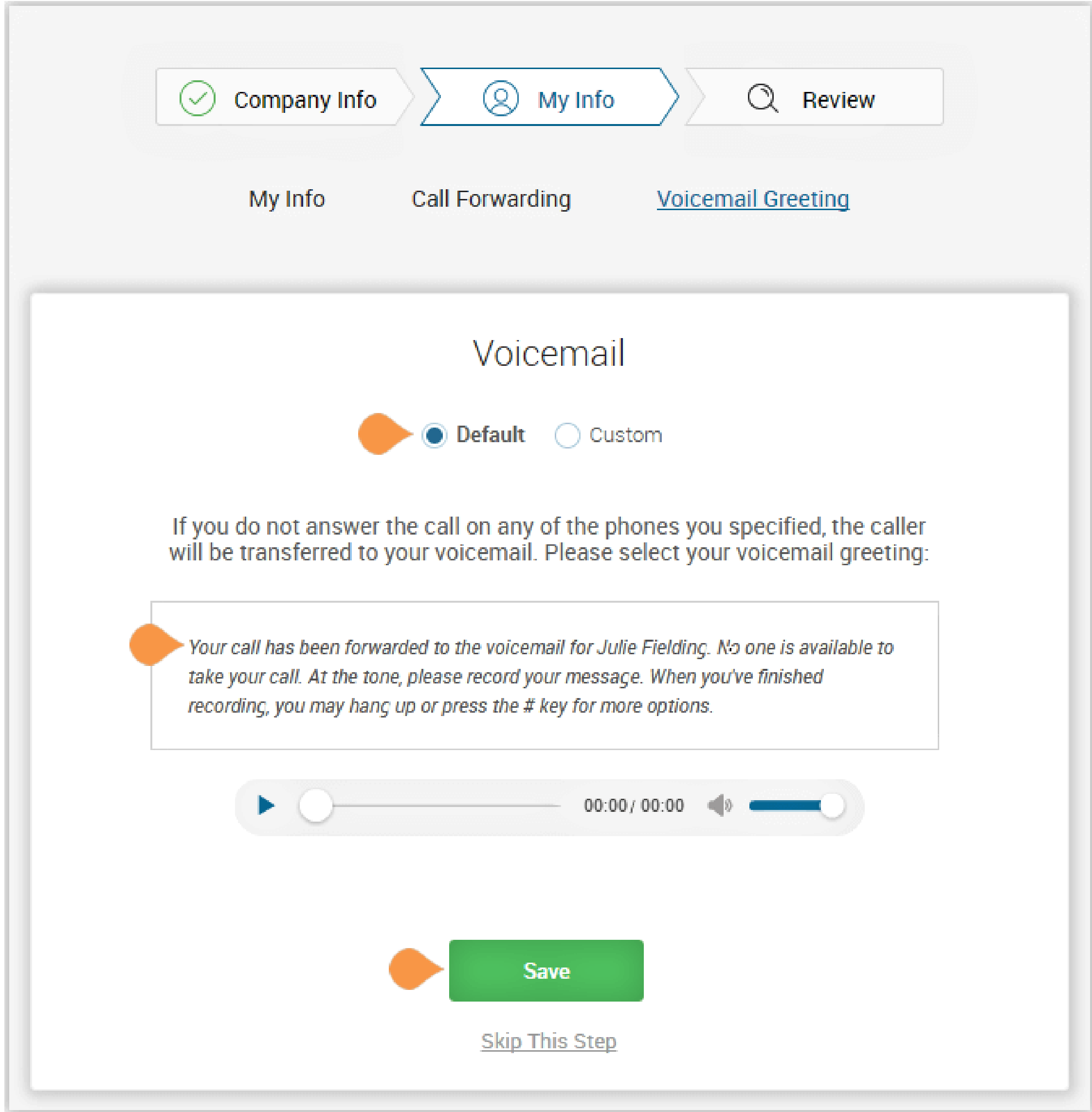
You can choose the default voicemail greeting or you can select "**Custom**" to record or import your greeting. See the default greeting text shown below the playback button.

To keep the default greeting, follow these steps:

- Click **Default**.

To keep the default, follow these steps:

- Click **Save** and skip to "Review Your Company Settings" on page 233.



Record or Import a Voicemail Custom Greeting

1. To record or import a new greeting, click **Custom**.

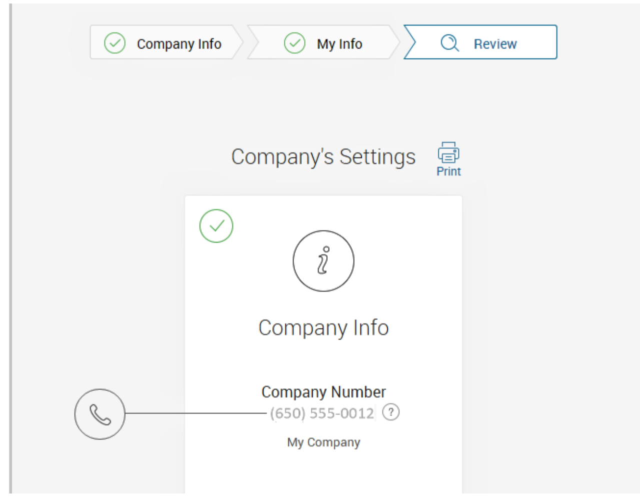
   Record your greeting over the phone, or import a custom greeting.
   - To record your message over the phone, click **RECORD OVER THE PHONE**, enter a number in **Call me at** field and click **Call**.
   - To import a previously recorded message, click **IMPORT** and follow the instructions. (Use an .MP3 or .WAV formatted file.)
2. Click **Save**.

Review Your Company Settings

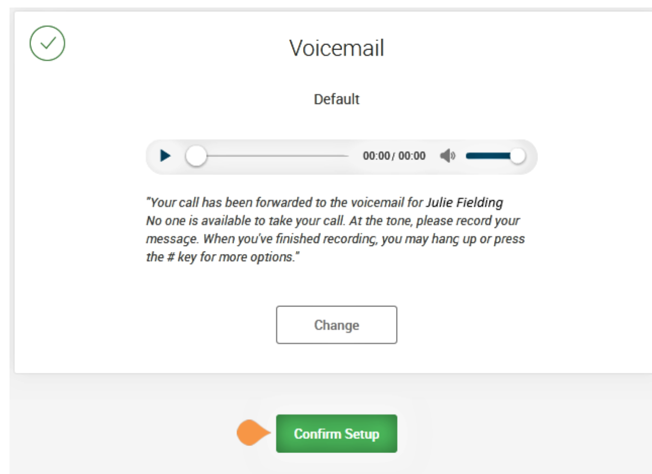
In this step, you'll review the settings set up. Check that these are correct. Continue scrolling to check or adjust all of the settings:

- Company Settings
- Company Greeting
- Users
- Operator
- The Operator Settings
- Call Handling
- Voicemail

If all settings are correct, click **Confirm Setup**.



Continue to final step.

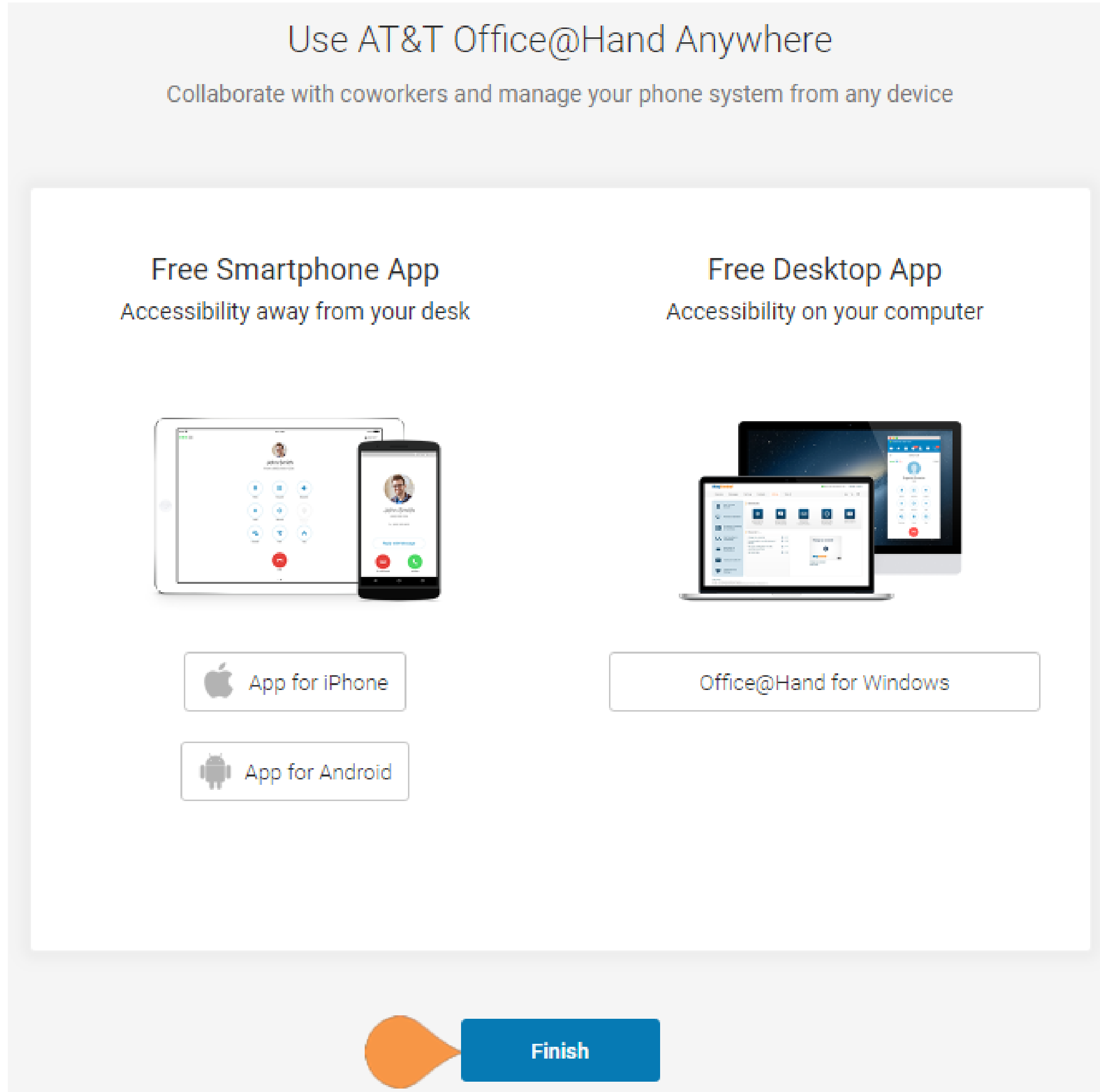


Use Office@Hand Anywhere

Collaborate with co-workers and manage your phone system from any device. Apps are available for download that expand your ability to collaborate with others using Office@Hand applications.

- You can download apps by clicking on this page.
- For more information about apps you can use with Office@Hand, see the Office@Hand User Guide.
- Click **Finish**.

Continue to the following page.

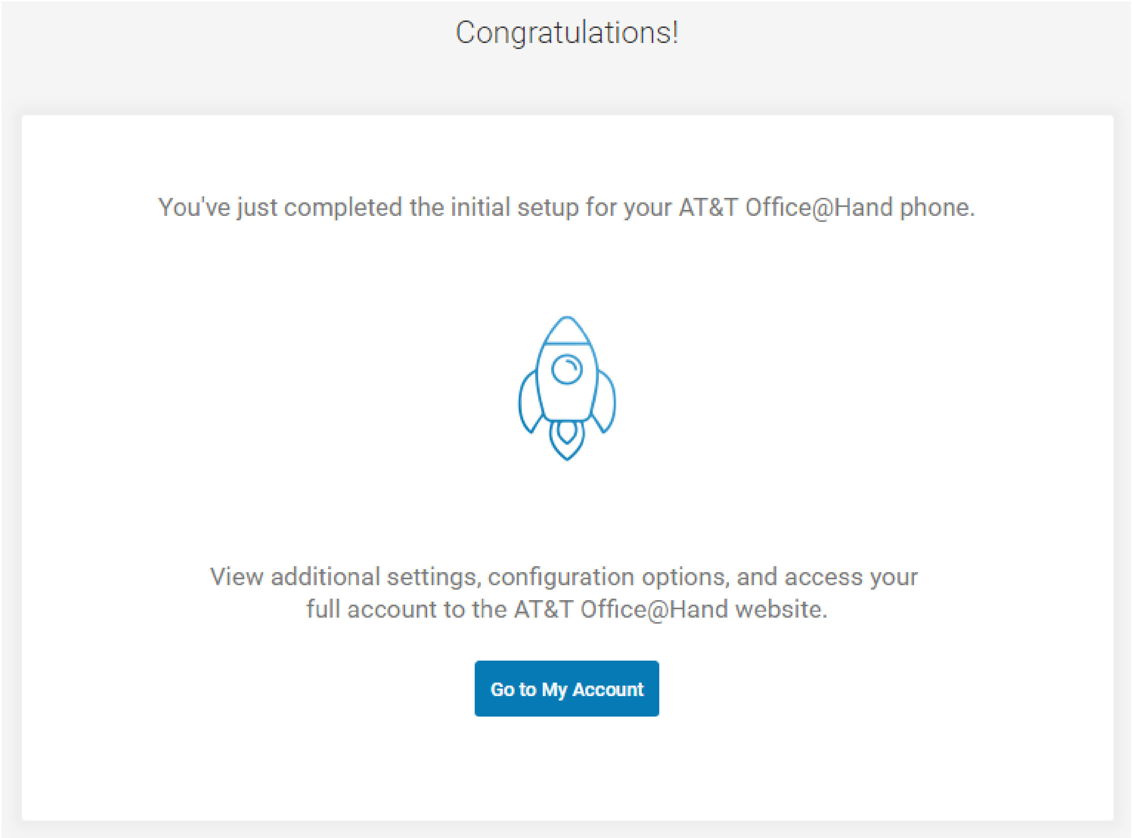


Congratulations!

You have completed the initial setup of your Office@Hand business phone system.

- Click **Go to My Account** to access your account and view additional settings and configuration options.
- Click **Go to My Account**.

In the following pages, you'll log in to your Office@Hand account.



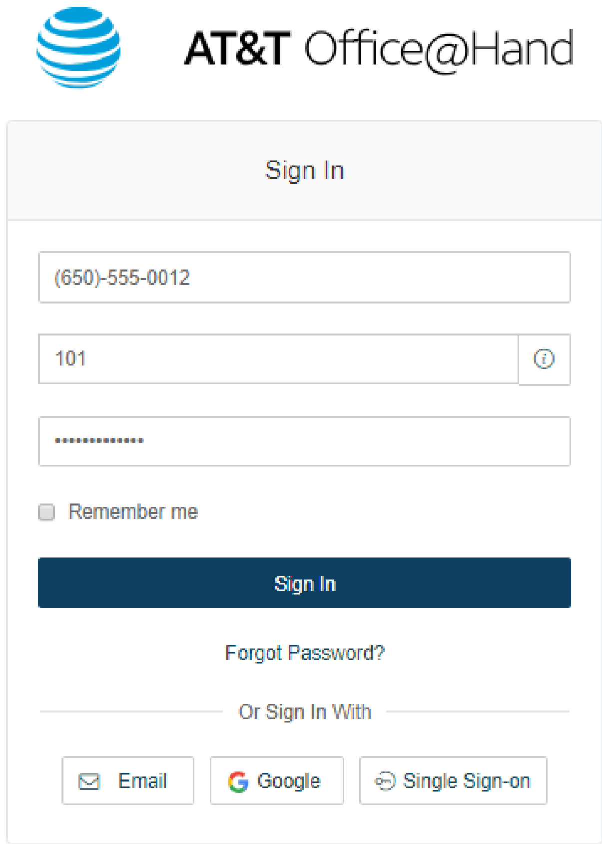
Sign In

The Office@Hand **Sign In** screen appears.

1. Enter your Office@Hand phone number and your password.
   - If you have an external phone number assigned, enter it here.
   - If you have only an extension assigned, enter the company's main Office@Hand phone number, your extension, and then your password.
2. Click **Sign In**.

You can sign-in with a valid Email, Google Gmail (or G Suite), or via Single Sign-on.

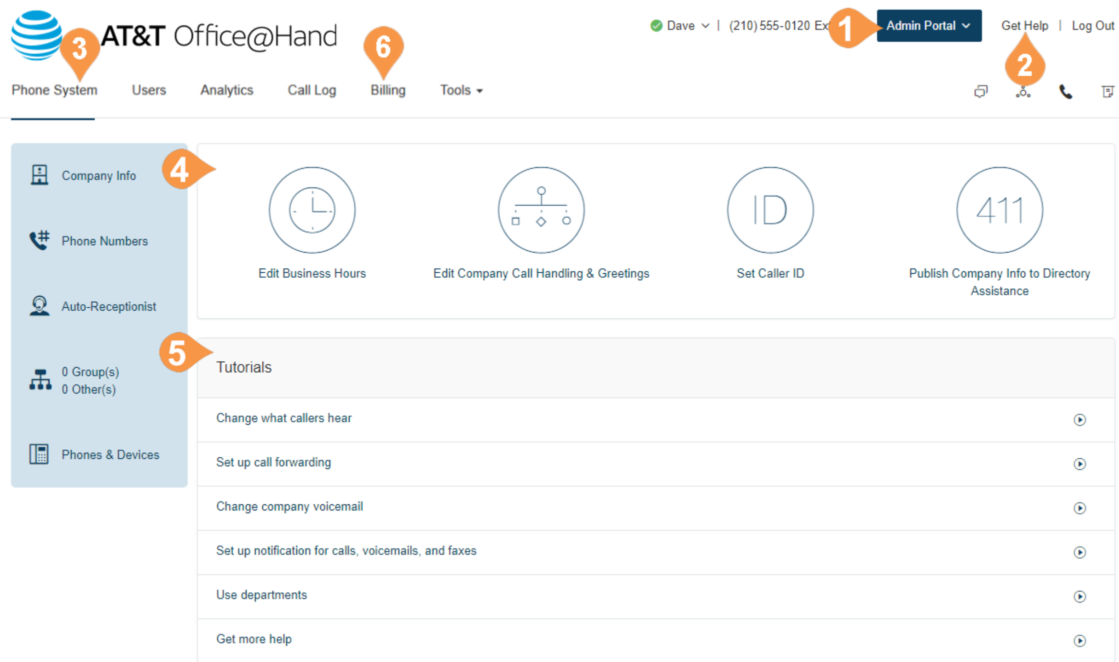
- To log in with **Email**, log in with your corporate email account.
- To log in with **Google**, your account must have been set up with a valid Google gmail address and password. The administrator configures a Google email address when assigning an extension and verifies the uniqueness of the email address. By default, users can log in with their Google email address. Click **Google** and enter your gmail address and password.
- To log in with **Single Sign-on**, click **Single Sign-on** at the bottom of the screen and enter your email address on the following screen, then log in with your corporate credentials. Note: Single Sign-on must be enabled for your account by your system administrator.



The Admin Portal

Your Office@Hand Admin Portal opens. Take a tour of your Admin Portal page:

1. The **Admin Portal** button lets you toggle between the admin interface or the user interface, **My Extension**.
2. **Get Help** lets you find answers to most of your questions or request Support.
3. Menu tabs lead you to a tab-specific menu on the left. Each tab has a different menu list. For example, the menu list for **Phone System** tab is **Company Info**, **Phone Numbers**, **Auto-Receptionist**, **Groups-Others**, and **Phones and Devices**.
4. **Company Shortcuts** provide buttons to frequently accessed settings.
5. **Tutorials** lists available admin-specific videos.
6. Check the **Billing** tab for questions relating to your account.



Appendix B: Bulk Purchase/Upload

Introduction

Office@Hand streamlines large-customer on-boarding with bulk purchase, upload, and activation for up to 1000 users at a time.

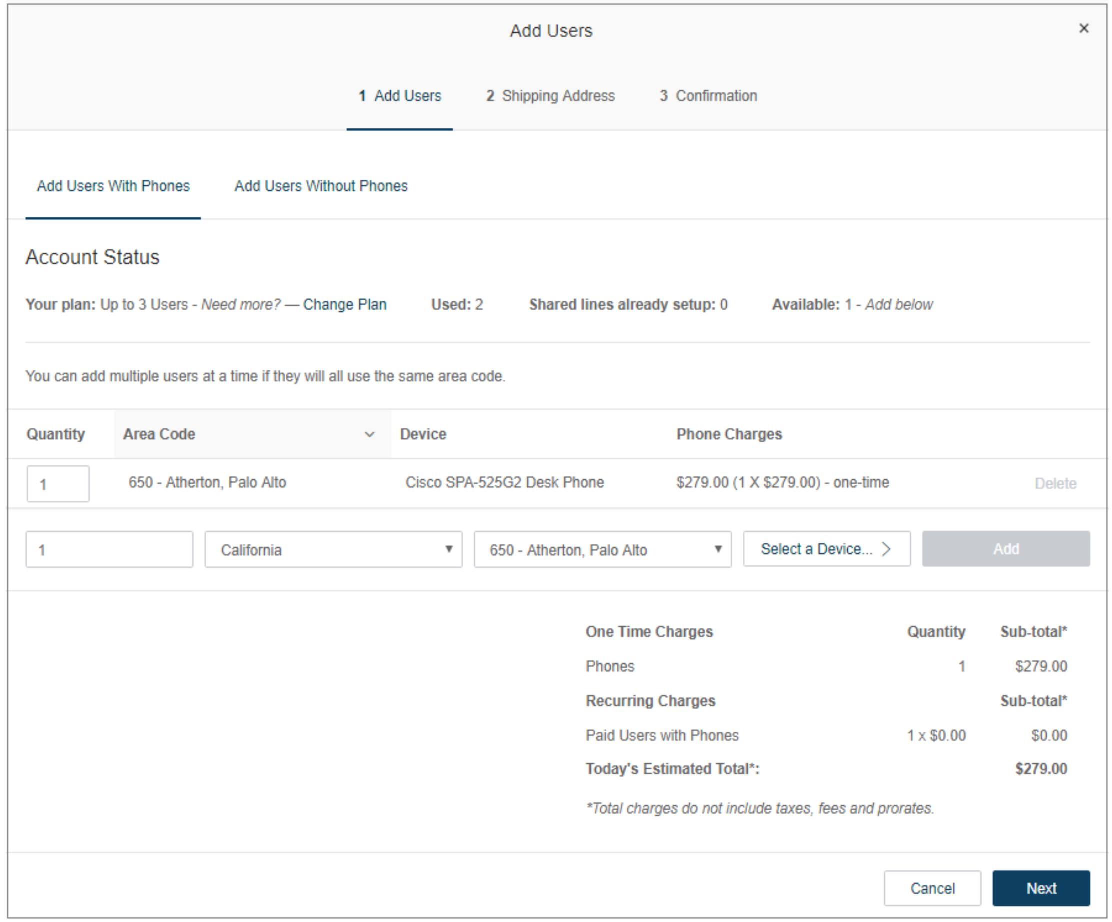
Let's say a customer is doing a major expansion of sales offices in multiple cities and wants to add hundreds of users and purchase hundreds of phones for them.

Bulk Purchase of Users

In the Admin Portal, select the **Users** tab. Then select **Add User**. The Account Status section in the panel shows your current plan.

Select the tab **Add Users with Phones** (or **Add Users without phones**). Enter the number of users who will be in a specific area code and assigned a specific model of phone. Click **Select State/Province** and then the **Area Code** or **City** for the phone numbers for these users.

Click **Select a Device** in the **Device** menu. Review the phone devices listed. Click **Select** next to the phone type to be purchased for these users. Click **Add** to add the users (and selected devices), then review the order summary.



Repeat this process to add users in a different area code, or to add users with a different phone model: Enter the number of users, select the state and area code or city, then select a model of telephone. Click **Add** each time.

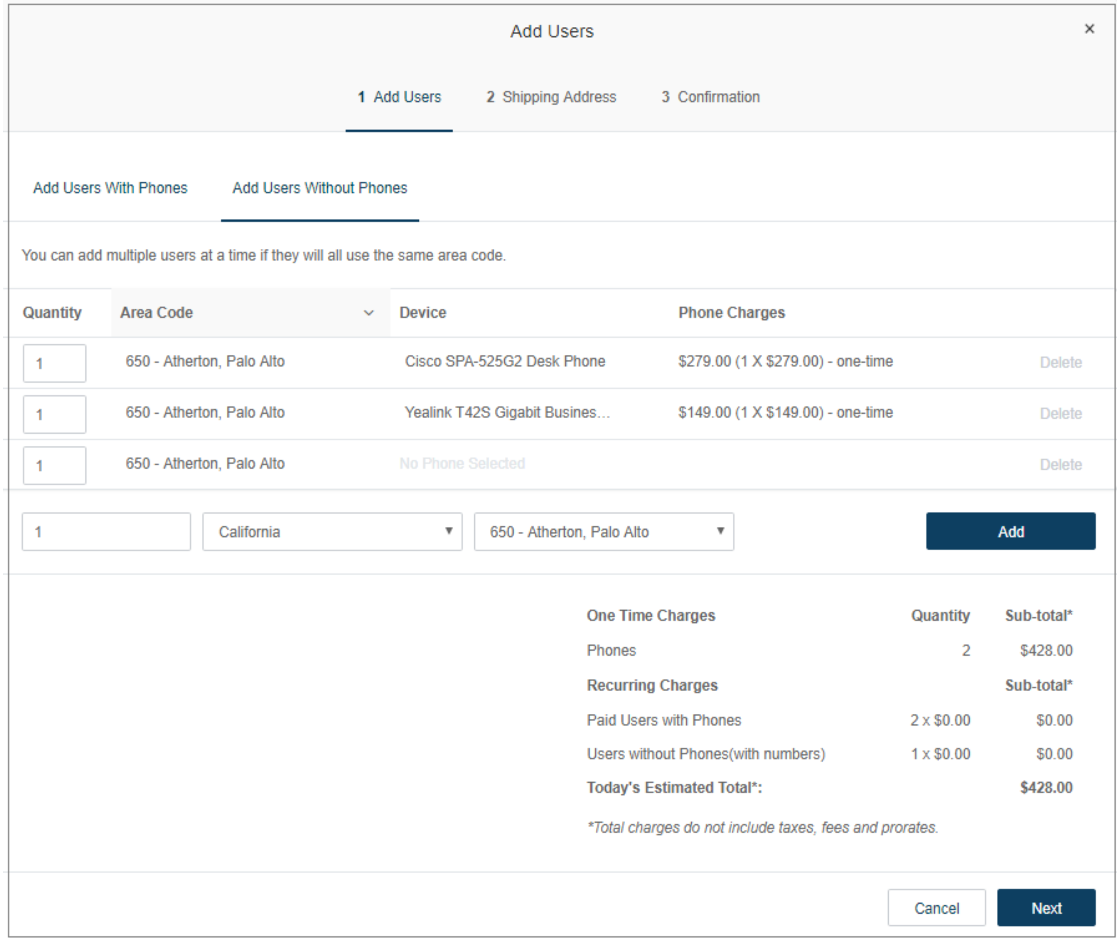
Now click the tab **Add Users without Phones** if you want to add any users without a phone. Select a location (State/Province and Area Code/City), and click **Add**.

Repeat this process until all the users, with or without phones, in various area codes, and assigned various phones, have been ordered.

Review the order summary for accuracy. Your order summary shows the running total of recurring or monthly charges for users, and the one-time charges for phone devices.

When ready, click **Next**. (If the city or area code you selected for a group of users doesn't have enough phone numbers available for this order, you will get a pop-up error message at this point. Click **Edit** to select another city or area code. (Or contact your sales representative if you're having trouble.)

If your billing plan has reached its limit for user, you will receive a message indicating the limit has been reached and asking you if you want to upgrade your plan to support the users you want to add.



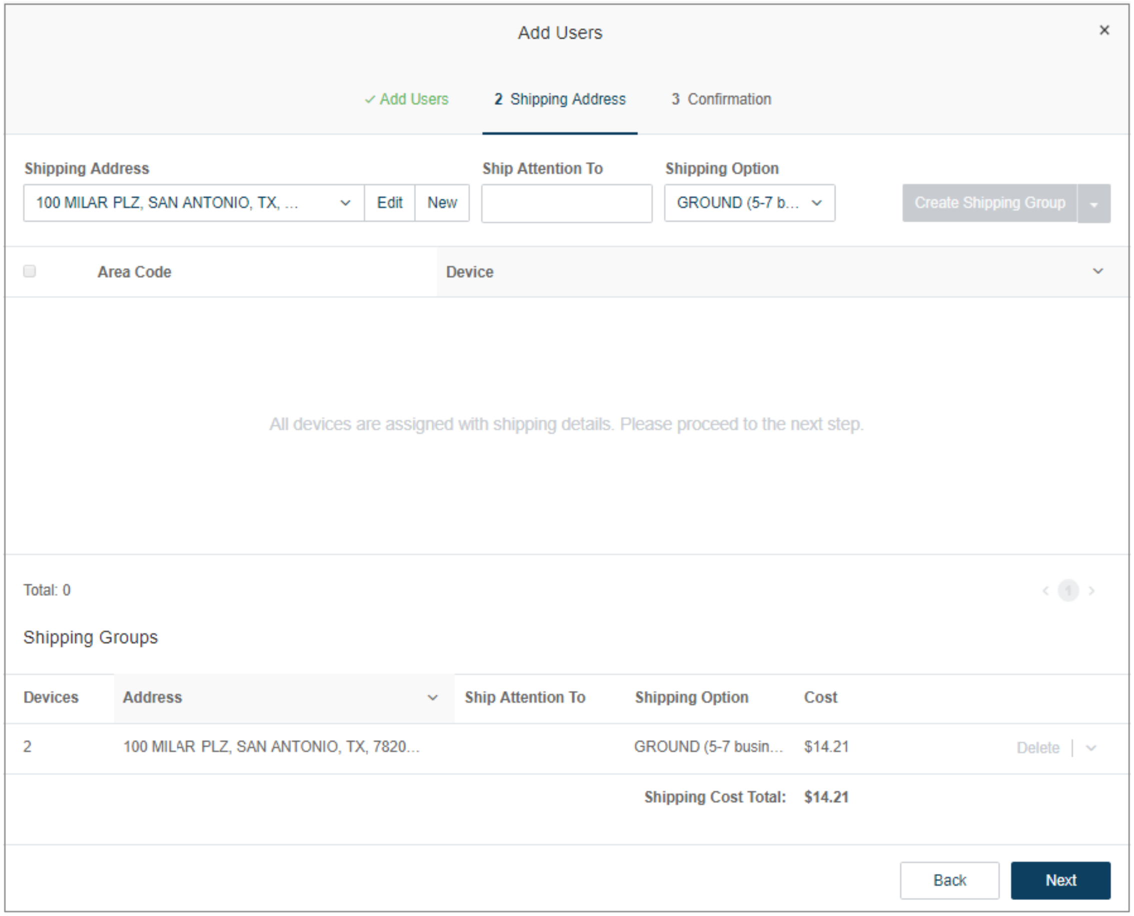
On the Shipping page, check and if necessary update the account information displayed, including the shipping address if you ordered phones.

Please allow five to seven days for Ground delivery. Note: Each order can be delivered to only one address. To deliver phones to several addresses, enter separate orders for each address.

Click **Next**. On the Confirmation screen you will have a chance to review your itemized and total phone order. The order total may not include taxes and fees.

Click the Back button if you want to revise your order. If satisfied, click **Confirm**.

An email confirmation of your order will be sent to the email address for your account.



Bulk Upload of User Information

A customer who wishes to activate a large number of purchased users at once should contact their sales agent for assistance.

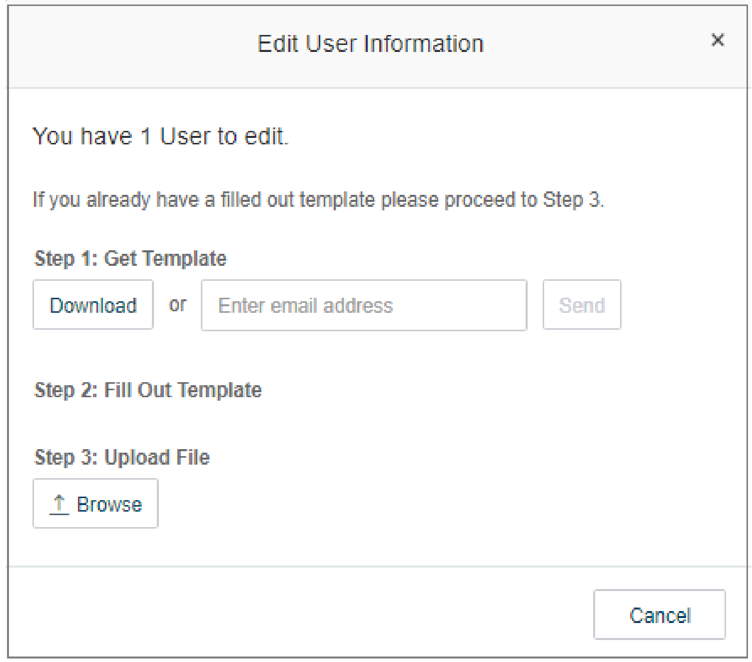
Rather than entering users' information one user at a time, the sales agent can use a template file to upload and activate up to a thousand users at a time.

The sales agent accesses the customer account through the sales administrative screen, and can review the account with the customer.

The agent's template file will contain all the Unassigned User phone numbers and extensions currently in the customer account.

The customer must provide the data on the users to assign to each number or extension: user name and email address, and for users who will be assigned direct lines, E911 emergency location information such as street address.

The sales agent can assist the customer in providing the right data. The customer can send this data to the sales agent to be transferred into the template and make necessary edits. Or the sales agent can email the Template to the customer to be filled out and returned. The template contains instructions for proper use.



Activation of Users

The sales agent checks the finished template to ensure that the customer's users are assigned to the area codes and direct lines or extensions desired by the customer. The sales agent will also ensure that users with direct lines provide the required E911 address information.

Once the template is completed and checked it is uploaded into the system for processing. The system generates a preview, with problem areas highlighted on the screen in red, and an Errors column spelling out the problem with any field that needs to be corrected.

Common errors include missing required information; bad email addresses (usually typos); using a postbox address where a street address is required; and duplicate extensions.

The customer or the agent downloads the file, corrects the problems, and re-uploads the file. (Don't edit out the Errors columns; that will be handled automatically.) Once the template has been processed and checked, and found to be correct, the Activation process begins.

The sales agent will enter one or more email addresses that will be notified when the processing is done. An activation email will be sent to the email address on file. The activation email will allow the user to create a pin, password and security question to activate the extension.

Appendix C: Multi-Account Access

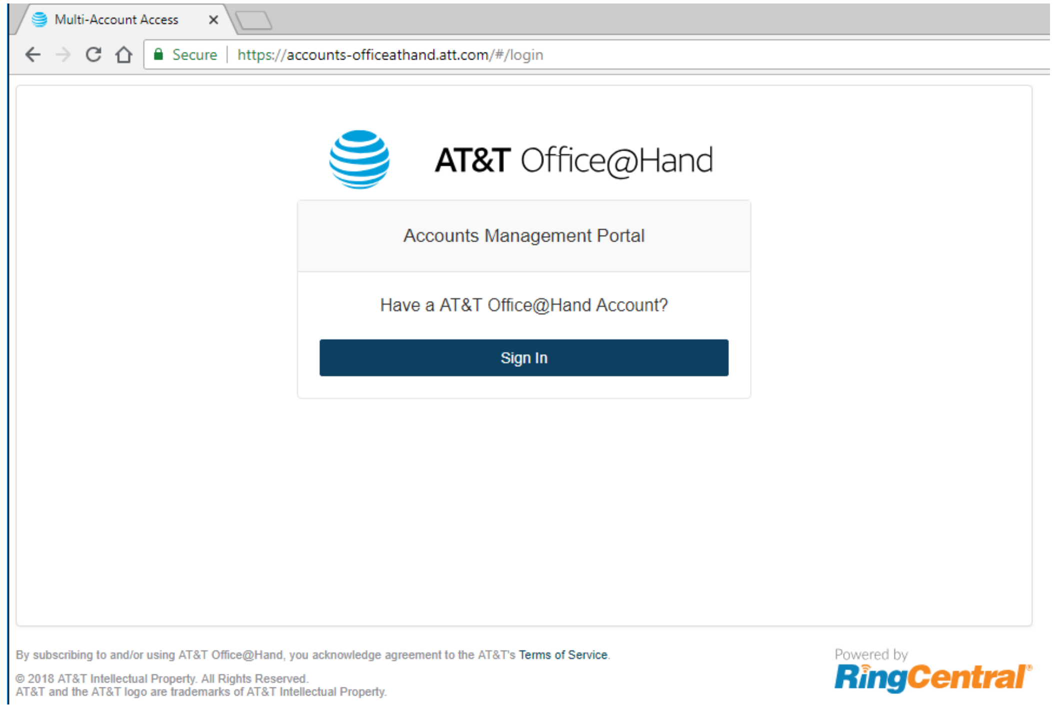
Account Management Portal

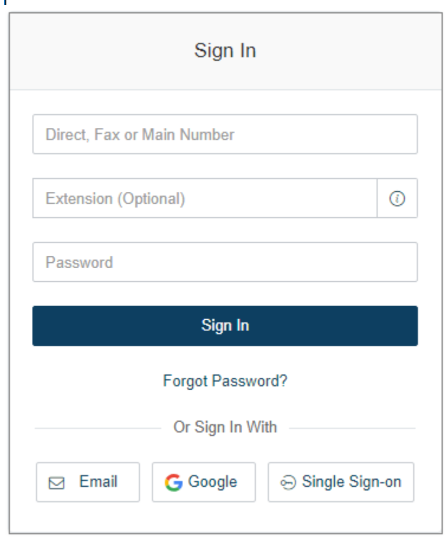
The Multi-Account Access feature centralizes access for customers with multiple Office@Hand accounts, and allows them to link all their accounts in the accounts management portal. It allows company admins to access their Office@Hand accounts from a single log in. It also allows administrators to view services for all accounts from a single location.

The Multi-Account Access feature increases the efficiency of multiple account management for those administrators who manage multiple accounts, or who support multiple clients. From the management portal, you can easily switch from one account to another. The portal provides a consolidated view of all accounts, while they remain separate entities.

To access the management portal:

1. Go to accounts-officeathand.att.com.
2. Enter credentials for an account.Click **Log In**.





Manage Linked Accounts

You can manage any number of accounts from the account management portal. Each page in the portal can display up to 20 linked accounts, and different pages are identified by page numbers.

To add accounts to the portal:

1. Click **Link Account**.
2. Enter credentials of the account.
3. Click **Log In**.
4. Repeat for each account to add.

To unlink an account:

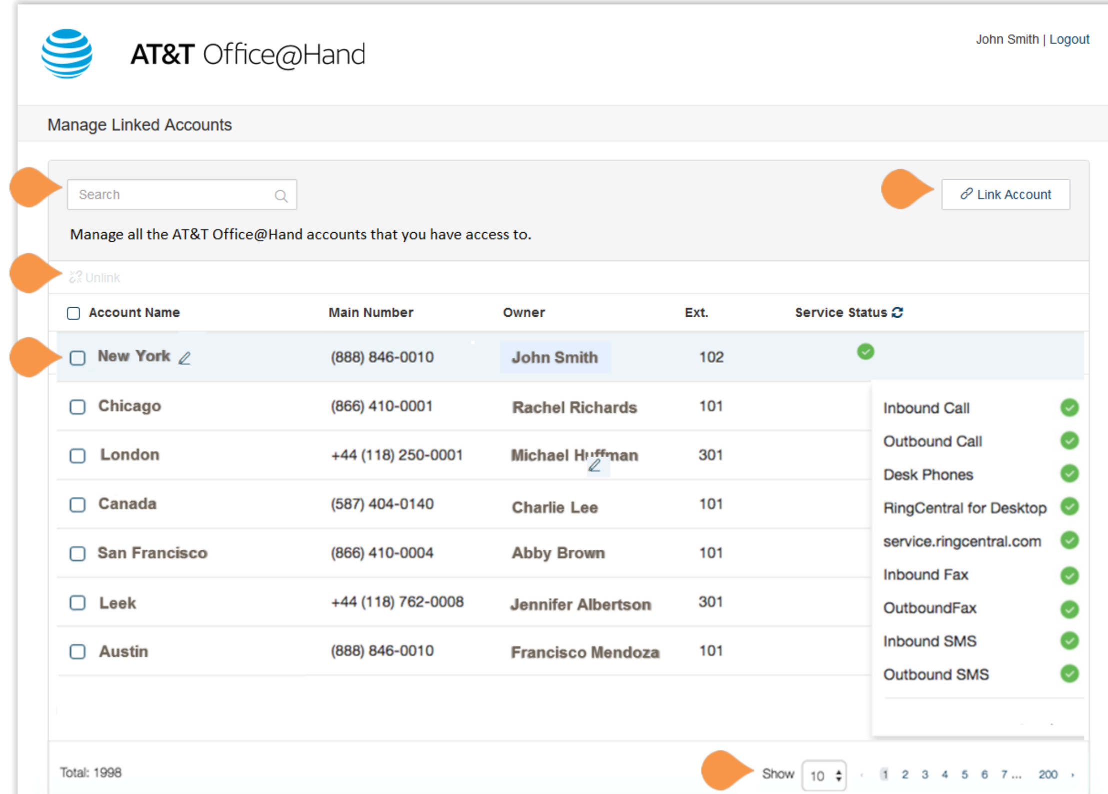
1. Select one or more account(s).
2. Click **Unlink selected account**.
3. The account is removed from the view.

To edit the account name with descriptive text:

1. Click the **Edit** icon beside the account.
2. Enter the new **Account Name**.
3. Press **Enter**.

To search for an account, enter text in the search field.

To scroll between pages, click controls at bottom right.



Access Accounts

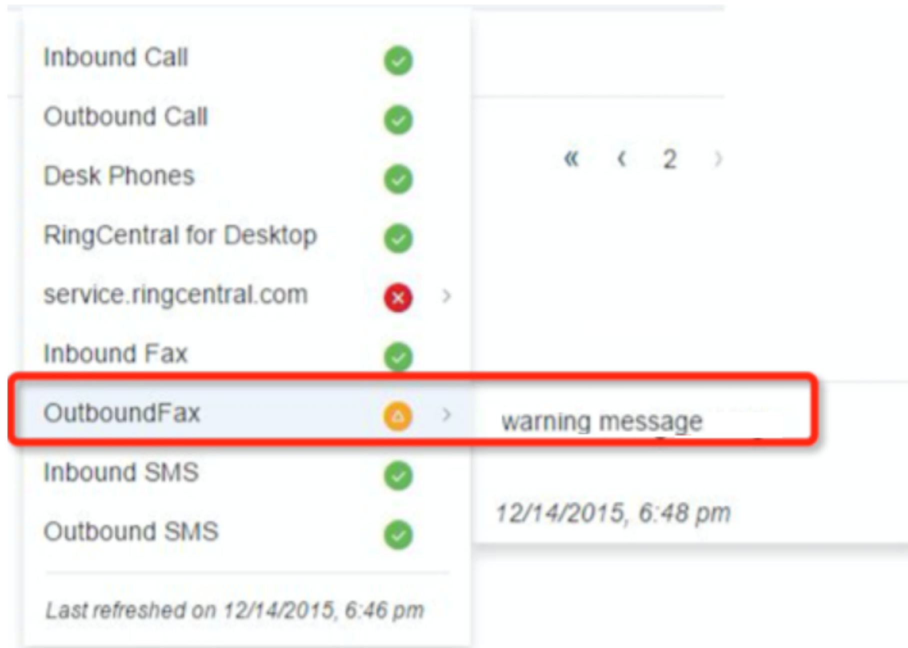
The account management portal allows you easily launch the Admin Portal for any of your accounts, avoiding the complexity of logging in to multiple accounts.

To trigger a login to an account:

1. Click **Open** beside the account.
2. A new browser tab is launched and you are automatically logged into the Admin Portal for the account.

Manage your account as normal.

View Service Status



The account management tool reports status for the following services:

- Inbound Calls
- Outbound Calls
- Desk Phones
- Office@Hand for Desktop
- service.officeathand.com
- Inbound Fax
- Outbound Fax
- Inbound SMS
- Outbound SMS

Service status is refreshed automatically every three minutes. Service status details and the date of the last refresh are displayed when you hover. To manually refresh the service status, select the **Refresh** icon:

An abnormal service status results in the display of an error reason when you hover on the status. The following statuses are reported:

Green: the service is available.

Yellow: there is an error related to the service.

Red: the service is unavailable.

Grey: service status has not been reported.