Advanced Functions

These functions are only available to users on the Tranquil Small Business VoIP package.

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Address Book

Address books provide a useful means to not only aid in the process of dialing out, they can help you make sense of your inbound callers too. There are 3 main categories of address books to be aware of:

Company		This "company-wide" address book will appear for all users within an account. It's an ideal solution for sharing internal or important names and numbers.
Group		These address books are only made available to members of an internal group of users (eg sales team). All users associated to the call group will see this address book and can review and contribute to it.
Personal		These are only visible to the end user themselves via the end user control panel. There is no other mechanism for these entries to be viewed.

Creation

Telecoms → VoIP → Edit VoIP Account → Address Book → Add Address Book

Start the process by picking a reference name for the address book along with a category for application (eg company / group / personal). Personal or group selections will require you to select an association. Once saved your book is available to accept entries.

Adding Entries

Telecoms → VoIP → Edit VoIP Account → Address Book → Contacts

Add Individual Contact
Select the 'Add Contact' button at the top of the page. We allow you to enter a wide variety of details about a caller, although it should be noted that only a small proportion of this can be synced with handsets via LDAP. Mandatory fields ae shown without an [optional] label beside them.

Import Contacts
We provide various methods to upload existing data. This can be currently completed via CSV, vCard, syncing with Pipedrive or uploading an export from Freshdesk. Any file you upload, you can match the various data columns up to categories we support. As a minimum we require first name, surname and at least 1 phone number.

You can import a CSV into an address book, columns can then be matched to the relevant fields. You can **add multiple columns** for the same field (i.e add several columns for phone numbers, websites or email addresses).
Each data type that can be imported has a different set of fields which are detailed below:

- **First Name:** Text (First Name or Surname required)
- **Surname:** Text (First Name or Surname required)
- **Address:** Text
- **Company Name:** Text
- **Company Position:** Text
- **Company Department:** Text
- **Phone:** Text/Numeric
- **Email:** Text
- **Website:** Text
- **Photo URL:** Text

Call Diversion

Telecoms → VoIP → Edit VoIP Account → Call Diversion

Call diverts can be controlled on a per DDI basis. You can choose to enable or disable a diversion, which will take immediate effect. When a call is diverted, to an external number there is a cost associated depending on the destination dialled. If you have bundled or bolt-on minutes applied to your account, these can be used to cover these calls. If not, you will simply be charged for the additional leg of the call. For example, if you choose to divert calls to a mobile, you will be charged a per minute cost for the leg to the mobile provider dialled.

IMPORTANT: It is not possible to divert calls to international or premium rate numbers.

Callflows

Callflows are key to how your Hosted VoIP platform works. Callflows are a visual tool which allows you to pull together existing settings and rules. The key to making this quick and easy is to build your other components first, whether that be users, groups, opening hours or media files. Once these are ready the call flow creation process can be very quick, with most of your decisions already made outside of the flow.

The tool works by dragging in the components you want, and joining the nodes in the order desired. For example, your first step may be to check the opening hours. Drag in the opening hours component, and join the 'start' node to the 'opening hours' node by clicking and dragging between the two elements. This ensures that when a call comes in, opening hours are the first thing which is checked. You can then build in the rest of your rules based on whether the phone system is open or closed at the time of the all taking place.

To put this into perspective, here is a video tutorial guiding you through a simple

Caller Menus (IVR)

Telecoms → VoIP → Edit VoIP Account → Caller Menus (IVR)

A caller menu, or IVR menu, is an automated greeting that routes callers through options on the keypad. They help provide information to callers and automate call routing. With a phone menu, calls are managed through to groups or individuals.

Menu Options

The options you pick are the key options the end user can select from. For example, if you want to present the call with option 1 to go to the support team, enter the option as 1 and for a friendly reference enter support. The menu you build can be used as part of a call flow, and the friendly references you enter will help you in your flow design.

As per of the menu you can introduce hidden menu options which can work for your staff, but simply won't be announced as part of your selected audio file. For example, you can announce options 1 to 4 to your call, as well as additional options if you know they exist. This can include the * button. If you choose the option to 'Allow Extension Dialling?' at any point during the menu announcement you can enter the extension of a user for direct access.

There are no limits to the number of menus you can create. One menu can lead to another. However for the sake of caller frustration it is worth trying to limit the possible where possible.

Audio Prompts

If you have files within the Audio Library of this account, for the purpose of Caller Menus, they will appear in the drop-down menus for the following options.

Recording PIN (optional)	When a menu is built it is auto-assigned an extension number. Unless you set a PIN number, any extension on the account can access said extension and record a greeting. We recommend that a PIN is set to restrict access. When you access the recording menu, it will simply request the PIN entry before proceeding.
Allow External Recording?	Ticking external recording allows you to be able to remotely make a recording. You must apply the IVR to your call flow, dial in, and enter the recording PIN whilst the menu greeting is played.

Audio Greeting	This is your recording announcing the options to the caller. It doesn't matter when during the greeting the digits are pressed, that path will be taken. ***Example*** "*Welcome to our company. Press 1 for...*".
Audio On Exit	Should all retries of the menu announcement be exhausted, then this announcement will be played. ***Example*** "*Sorry, we did not receive an option selection. Thank you for your call.*"
Audio On Transfer	Once a selection is made, this audio is played. ***Example*** "*Thank you. Your call is being transferred*".
Audio On Invalid Entry	If the caller enters digits which are not supported as an option, this audio message can be played. ***Example*** *Caller enters 4, but you have not setup an option number 4.*

Menu Details

Menu Name	A friendly name as a reminder as to the purpose or application of this menu.
Allow Extension Dialling?	Provide the ability for specific user extensions to be dialled as part of the menu.
Maximum Extension Length	Specify the maximum size of the extension that can be dialled. The minimum is 3 and maximum is 6 digits.
Interdigit Timeout	Specify, in seconds, the time the system waits for the entry of a secondary digit (if applicable).
Timeout	The amount of time (in seconds) to wait for the caller to begin entering digits.
Repeat Menu Options	The number of times the menu options are replayed. Should a valid entry not be received the call will end.

Call Conferences

Conference Room

You can think of a Conference Room as a physical meeting room, in as much as it can only support one meeting at a time. If you are set to need to hold multiple simultaneous conference calls, multiple conference rooms need to be built. To aid the management of conference rooms, and avoid double bookings, a schedule facility is available within a room.

Conference Details

Room Name	An internally visible reference for the room (eg sales team)
Extension	The extension number will make dialing into the conference easy from devices associated to the account. They only need to dial the internal extension as opposed to an external number.
Maximum Participants	A maximum limit of 10 applies to a room. If you wish to lower this limit you can.
Lock Conference?	It is recommended that a conference room is locked by default. This ensures that unless a meeting is scheduled the facility cannot be used.
Ask Participant Names?	If selected callers to the confernece will be asked to announce their name and this will be played back upon entry.
Play Entry Tone?	A tone will be played when callers join a conference.
Play Exit Tone?	A tone will be played when callers leave a conference.
Lock Conference?	It is recommended that a conference room is locked by default. This ensures that unless a meeting is scheduled the facility cannot be used.
User Assignment	Assigning a user will grant that user the ability to oversee the conference room in the VoIP User control panel. Facilities include the option to schedule meetings as well as access live overviews.

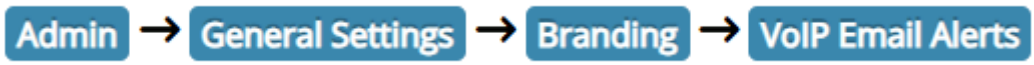
Participants Details

Join Muted?	Choose to mute participants upon entry. This may be suitable for broadcast conferences where participation isn't required.
Member PIN	Choose to pick your own PIN or generate a random one.
Moderator PIN	Choose to pick your own PIN or generate a random one.

Edit Conference

Schedule Meetings
Scheduling is important, especially if you are set to lock the room by default. Any locks are removed **10 minutes before** a scheduled meeting is set to start. Using the scheduling tool meeting timings can be applied, along with the ability to override the default PIN number for the room, and optionally send invites.

Sending Invites / Branding
The invitations are sent out as a generic email along with a calendar integration attachment. The branding of which is applied across the platform and cannot be altered on a per user basis.



Live View
Provides users with a visual representation of the virtual room. As participants enter or leave they will appear on-screen. If they are in an associated address book their name / photo will appear. Various controls are available including the option to mute all or individually, and to lock the room (thus preventing new participants entering).

Itemised Call Records
A simple means of seeing all previous conferences with access to a call recording (if enabled).

Call Monitoring

Call Monitoring enables users to listen to an in-progress call without the other parties being alerted. Used by supervisors and managers to take notes and provide feedback after the call.

It is a permission based solution which can be enabled for specific users. If permissions are applied then that user can make use of a feature dial code to listen in on a call either from within a call group they are a member of, or for all calls across the account.

How to Use

Once the correct permissions are applied to a user from the 'Call Monitoring' page, the authorised party can **dial *68** followed by the extension number to tap into. Confirmation of this and other dial codes can be found within the Feature Dial Codes page.

Devices

Telecoms → VoIP → Edit VoIP Account → Devices

Add Device

From the *Devices* page select the *Add Device* button.

You will be presented with 2 options:

- Desk Phone
- Soft Phone

For all physical phones, select Desk Phone, and for software based phones for desktops and mobile devices select Soft Phone.

Desk Phone

Manufacturer	We provide support for a number of manufacturers. Simply select the manufacturer for your desk phone to proceed. **Other Manufacturer** If your manufacturer isn't listed, select *Other*. Selecting the Other option will simply take you through a wizard of data collection. You will be presented with the authentication details you'll need to apply to your device. Other devices can't be auto-provisioned, and the number of in-life controls will be limited.
Model	Upon selection of a manufacturer, you can now see a list of supported models. If your device is listed, select to proceed. **Other Model** Should your model not be listed, you can still proceed to add it, however, we can't provide auto-provisioning control, and the number of in-life device controls will be restricted. Proceeding to add an 'Other' model you'll be taken through a wizard to collect details about the device, as well as present you with the user credentials you'll need to apply manually to the configuration.

Device Details	**Friendly Name** This is a mandatory field to allow you to make better sense of who will be utilising this phone. **MAC Address** Located on the underside of your desk phone, it is a unique reference for your device. **Public IP** If you intend to connect your device to the same network you are using to access the control panel, select 'Use Current IP'. This is important as we restrict what IP the phone can pull its config from.
VoIP User	You choose to assign the device to an existing user, create a user, or simply add un-assigned.
Location	By selecting a location you can make greater sense of where this device resides. If the device is set to be mobile, you may prefer to select the generic Planet Earth option.
Completion	Upon adding your device to the panel, you are ready to connect your device. The provisioning window will be open for the supplied IP address. The phone will contact the manufacturer, the manufacturer should direct the phone to our servers (based on the fact we have already sent them your MAC address), and your phone should download automatically our configuration. Within minutes your phone will be ready for use.

Distinctive Ringing

Distinctive ringing can help you audibly distinguish different types of calls, for example, internal calls, or calls routed to specific callflows. They can act as a means to draw attention without the need to refer to the screen.

Provisioned Phones

Telecoms → VoIP → Edit VoIP Account → Devices → Edit Device → Settings → Distinctive Ringing (tick box)

For phones provisioned through the control panel, distinctive ringing can be enabled to separate internal and external calls. Simply visit the settings page for the device in question, and enable the distinctive ringing tick box.

Call Flow

Telecoms → VoIP → Edit VoIP Account → Call Flow → Edit Call Flow

Distinctive ringing can be applied within a call flow. Simply drag in the distinctive ringing node into a flow. You are required to enter in the notification code based on your manufacture of phone. Open the modal for examples to use.

Use

Set an Alert-Info SIP Header that can be used by your device to play a distinct ringtone. The following format can be used depending on the manufacturer:

- Yealink & Grandstream: info=Bellcore-drX (where X starts from 1 up to the device available ringtones).
- Snom & Gigaset: ;info=alert-event
- Polycom: info=event

If a device does not recognize that header, it would simply ignore it and play the default ringtone.

If you have different device manufacturers, you can concatenate multiple headers inside the same Distinctive Ringing box (i.e. ";info=alert-event;info=Bellcore-dr3")D

Follow Me

The Follow Me function allows you to tell the system what users, devices, groups and external numbers you would like to ring when a call comes in for a particular user. This can be particularly helpful if you are on the move, and would like your mobile to ring as well as your desk phone, or perhaps a user is on annual leave, so to direct calls to a group as opposed to a voicemail.

Telecoms → VoIP → Edit VoIP Account → Users → Edit User → Follow Me

Strategy

There are 2 strategy options:

Single
This option allows you to choose the order in which devices ring and for how long. For example you may want your desk phone to ring for the entire duration of a incoming call, and after 5 seconds you would then like it to ring your external mobile phone. This gives you the option to pick up from your desk first without alerting you on the mobile. To choose the order and ringing duration, use the sliders next to the end points.

Simultaneous
Selecting this will ring all your end points at the same time.

Endpoints

There are 4 endpoint options:

User
You can pick from a list of users on this account. The drop down list shows the users name and associated extension number.

Device
A list of associated devices on the account are provided, whether they be desk or soft phones.

Group
You may wish to ring a group of users when a call comes in. This can be helpful of you need to pass your calls to a team because of absence, for example.

External
You can dial an external phone number to receive you calls. Please note that if you choose this

option you will be billed for the minutes to this destination.

Groups

Telecoms → VoIP → Edit Hosted VoIP Account → Groups

Groups are designed to associate entities together for the purpose of receiving calls. A group can be made up of:

- Users - Individual users setup within the account
- Devices - A selected device can form part of a chain to call
- Groups - You can assign existing groups to another group
- External Numbers - Outbound calls can be made. The caller will receive notification they are set to receive a forwarded call

Groups contain the following attributes:

- Unlike a user, there are no additional costs associated with a group.
- Each group has it's own extension number. If dialled internally the associated users devices will ring as per the rules set.
- An address book is created for each group as a shared pool of contacts that group may wish to reference or share between their users.
- Call management facilities allow you to access group related call records, statistics, and heatmaps.

Adding Assets to a Group

Edit a group and choose the 'settings' icon. From here you can select an asset category (eg users / devices etc) and from here you can 'add' them into your group. To save, select 'Update Group'.

Call Routing Strategy

There are 2 options available for call handling:

Single
This is where each phone rings individually. If you select the option then beside each of associated group assets, will be the option to select a ring pattern / distribution. You may choose to prioritise certain phones to ring first before others start to ring, as an example. Simply drag the distribution

marks to indicate your ring strategy (shown in seconds).

Simultaneous
When selected, all users will have their devices ring when an incoming call is received. As soon as one user in the group picks up the call, the other devices will stop ringing.

Users

Telecoms → VoIP → Edit Hosted VoIP Account → Users

Users are created where there is a requirement to make and / or receive calls. Traditionally this would be applied to individuals within a company, or for the purpose of a room (eg boardroom phone). By creating a user:

1. Subscription charges are applied on a per user basis.
2. If you choose a subscription with inclusive minutes, the minutes from each user is pooled for access by all users across the account.
3. Users are assigned a unique extension ID, used for internal dialing. This is typically a 4 digit number.
4. Multiple devices can be assigned to a user. These can include physical desk phones as well as softphone applications. Rules can be set as to which devices ring and in which order.
5. A user can belong to a group. If the group is called as part of a call flow the users phone can be dialed as part of incoming calls.
6. Each user can access their own optional control panel. Permission controls allow you to specify the functionality the user will see.
7. Permission to allow hot desking can be applied, allowing a user to login to phones to access call facilities.
8. A user can have a voicemail mailbox assigned.
9. Users can access associated address books (eg company wide or group books), and they can create multiple personal books. The content of personal books can only be accessed by logging into the users control panel.
10. User specific usage can be accessed via call management controls. These include, but not limited to itemised calls (inbound and outbound), call statistics, call heatmaps, and call recordings.

On Hold Music

Telecoms → VoIP → Edit VoIP Account → Music on Hold

Ready-Made Playlists

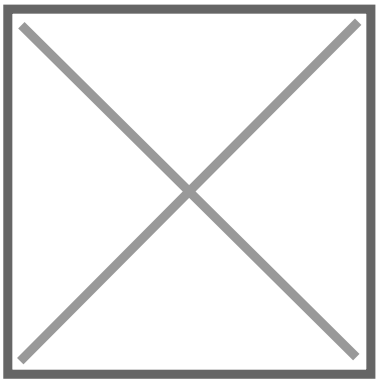
We have secured a selection of 16 royalty free and PPL & PRS playlists for encompassing tastes and scenerios (including Christmas). The license we have allows us to:

- Provide access worldwide
- License term is in perpetuity (forever)
- Provide access for commercial and non-commercial usage
- No restrictions on the number of VoIP accounts using them
- Permission to use for music on hold
- We are unable to provide the files for download or re-purpose

As such, they can provide a very simple solution for lots of businesses, without the need for additional licenses.

Music From Audio Library

You can choose to upload your own hold music to the Audio Library. Please note that at present we can only accept 1 file for use as your hold music. If you want to create a compilation of music then please use a service, such as audio-joiner.com to stitch them together to form one file. The maximum file size is 8MB.



Copyright Notice

To play on-hold music you may require a license. Tranquil IT accepts no responsibility for the gathering of copyrights and licenses required for the music held within our platform. There are exceptions which include classic music out of copyright (copyright on written music expires 70 years after the composer has died), or royalty-free music. We cant offer advice or pricing information, please contact PPL PRS for all further enquiries regarding licensing and costs. At the time of writing, the tariff relating specifically to music on hold can be viewed here.

Opening Hours / Holidays

Telecoms → VoIP → Edit VoIP Account → Schedules / Opening Hours

Opening Hours

Opening hours schedules help define your availability to answer calls and can be referrenced as part of your call flow design. To create a schedule:

1. Enter a friendly reference name in the empty form field and click on +
2. Click on the + button next to the newly created schedule.
3. You will be presented with a blank calendar view of the week
4. Click on a day of the week and and entry will start to be built. You can drag to increase or decrease the availability window in 30 minute blocks.
5. Click on 'save' at the bottom of the page before exiting.

Holidays

Holidays are whole days where you want to pause existing schedules. A classic scenario would be to factor in a Bank Holiday where your business may be closed.

1. Enter a friendly reference name in the empty form field
2. Enter the start date and either choose to leave it open ended (ie permanently close the lines) or select an end date by ticking the range box.
3. Click on + to apply your holiday entry.

NOTE: Holidays can't be edited, you can only choose to delete and recreate.

Reset BLF State

BLF stands for Busy Lamp Field. Typically this is a light, or LED light with buttons, on an IP phone that indicates whether another extension or phone is available, ringing or busy.

Resetting BLF

Telecoms → VoIP → Edit VoIP Account → Reset BLF State

Sometimes the BLF state may not be reflecting the correct state of the user. In this event, you can use the reset BLF state tool to refresh. Simply find the user in question and click on the 'Reset Presence State' button.

Voicemail

Telecoms → VoIP → Edit VoIP Account → Voicemail

Mailbox Creation for User

Each user can have a single mailbox. From the voicemail page select 'New Voicemail Mailbox'.

Voicemail Name (mandatory)	This is a mandatory friendly name for the mailbox.
Voicemail Extension (mandatory)	This is a mandatory field which needs to be unique (eg the voicemail extension can't match the extension of the user). It must be 4 digits in length
PIN (optional)	To aid security of your mailbox a PIN number can be assigned. This should be between 3 and 15 digits long.
Unavailable Message	
Temporary Unavailable Message	
Assigned User	Each user can have only 1 mailbox. The users presented are those without a mailbox.
Email Addresses To Notify (optional)	You can add multiple email addresses to notify when a voicemail is available. The email will contain a copy of voicemail as an MP3 attachment.

Mailbox Creation for Group

We do not support the creation of Group Voicemails, but the work around is to create a Voicemail Mailbox but do not assign it to a user (leave User Assignment blank) and assign a PIN to it. Once created, from within a Callflow include the 'Leave Voicemail' node and choose the Voicemail.

Any User in the VoIP account can then access the Voicemail by dialling *98 + the Voicemail extension. That will then prompt the caller to input the PIN to access the Voicemail. Management of the greeting can be achieved through the main control panel, as opposed to on a user level.

Accessing Messages

Control Panel
From the voicemail page of the control panel, next to each mailbox is a 'messages' button. From here you can view, play, download and delete messages. We do also provide a bulk delete option by selecting multiple messages using the tick box on the right hand side of the table.

Local Access
From an associated device on this account two options to dial:

	This is the standard access path where you will be prompted for the mailbox extension and PIN (if set).
	As long as the device is associated to your user profile, this will skip the need to enter the mailbox extension.

External Access
Should you wish to access voicemail from any device, anywhere in the world there are a couple of paths available:

Option 1 - Build voicemail into your callflow. You could choose, for example, to dedicate a DDI which could take you straight to the assistant which would prompt you for the PIN. Alternatively include it as part of your IVR such as a hidden option your staff know about (eg press 9, but 9 is not announced in your IVR recording). These options would only be achievable with a Hosted VoIP account, and not the Basic VoIP.

Option 2 - Alternatively, as long as you have a PIN set on your mailbox, you can access your voicemail by:

- Call your phone number.
- Allow it to play the voicemail introduction.
- Press the * key during the introduction.
- You will be prompted to enter your PIN followed by #.
- You are now in control of your voicemail mailbox.

Advanced

Maximum number of voicemail messages (per mailbox)	100
Maximum message length (seconds)	500

PIN number length	3-15
File format of recordings	MP3