APPTIX®
Connecting Your Business. Anywhere.

VoIP Admin Portal

User Guide

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Contents

Introduction

Guide Explanation

This guide is to be used as an aid to understand the portal in order to utilize all the functionality that VoIP has to offer. This user guide is split up into different license types. Although not every feature for every license type is touched upon here, the features included in this sheet are the most popular and most difficult to configure.

Access to site

In order to access the site, you will need Internet explorer or Firefox. The address to the portal is http://Voiceportal.Apptix.com. You will need to obtain a username and password from Apptix.

Site Navigation

The Apptix Portal is setup in a hierarchal fashion, with the group services at the initial home or group level, and the user functions on the user level. You can determine which level you're at by looking at the top left of your portal screen.

In the picture above, we are in Test_User_1's account under users, which is under the group level. To return to the group level, simply click the **"Group"** link on the top left, or the **"Home"** link on the top right of the portal.

Help

Each page in the portal has a help button on the upper right part of the screen as displayed above.

Each help button is catered to the page you're currently on. If you wish to know more information about a certain feature, click that feature and press the help button. You will be given some information about what the feature does plus all the configurable options that the feature has.

Changing Passwords

In order to change the password for your web account, you should do the following:

1. Click **"Change Passwords"** at the initial Welcome Screen shown above.
2. Enter current password then the new password twice.
3. Click **"Apply"** or **"OK"** to save changes.

Setting Time Schedules

Time / Holiday Schedules can be created to be used for other features of your portal. You will need to create time schedules if you wish to utilize the following features: Call Forwarding Selective, Selective Rejection, Selective Acceptance and Priority Alert (optionally sequential ring and simultaneous ring). Multiple time schedules can be created in order to enhance these features. A time schedule can be created and applied to an auto attendant in order to control when the day and night auto attendant greetings play. To make a time schedule you must do the following:

1. Click **"Profile"** on the left under the group level.
2. Click **"Time Schedule."**
3. Click **"Add"** to create a new time schedule. To edit an existing schedule, click the schedule name and skip to step 5.

Schedules

Add a new schedule or manage existing schedules.

OK	Apply	Add	Cancel			
Delete	**Schedule Name** ▲			**Type**		**Edit**
☐	After Hours			Time		Edit
☐	Business Hours			Time		Edit
Schedule Name ▼	Starts With ▼				Find	Find All
OK	Apply	Add	Cancel			

4. Enter the name of the schedule you wish to have under **"Time Schedule Name"** and choose the type of schedule you'd like to have (Holiday).

Schedule Add

Add a new schedule.

OK	Cancel

* Schedule Name: [   ]

Schedule Type: ○ Holiday ● Time

OK	Cancel

5. Modifying Schedule Times: After clicking into the schedule, you will come upon a Schedule Modify screen. On this screen you can add multiple events that can constitute the schedule you wish to create. For example, If we wanted to create business hours for Monday to Thursday 9:00AM to 5:00PM and Friday 9:00AM to 3:00PM we would first click Add and you'll be brought to the following screen:

First thing we would do is create the Monday to Thursday. Since it's the same starting and ending time, we will group that under the same Event. If you plan to change the times a lot, it's recommend you put each day under its own event.

▶ Enter an **Event Name** that uniquely identifies this particular time schedule.
▶ Enter the **Start Date**. In this example, it's any Monday before the schedule is to take effect.
▶ Enter in **Start Time**. In this example it's 9:00 AM.
▶ Check **"All Day Event"** if the schedule is to last all day (mostly used if you were creating a holiday schedule.)
▶ Enter the **End Date.** In this example, it's the same date as the start date.
▶ Enter in the **Start Time.** In this example it's 5:00 PM.
▶ Set the **Recurrence Pattern.** You can set the schedule to recur daily, weekly, monthly, or yearly (or none). In this example, we want the schedule to occur weekly, and to occur every Monday, Tuesday, Wednesday, and Thursday. We also want the pattern to end never. You can set the schedule to not occur after a certain number of occurrences or after a certain date.
▶ Once the schedule is filled out, click **OK.**

Next steps would be to create an event for Friday. You will click the **Add** button to add another event to the schedule. It will look like the below screen:

Once this schedule is filled out, click **OK**. Once the schedule is created and the events are added, you can apply the schedule to the appropriate service.

Group Services

Auto Attendants

Auto Attendants provides a service where users can hear an automated greeting and choose through a variety of options to get to their intended destination. Auto Attendants can have multiple DID's and services like Call forwarding selective, busy and always. A group can have multiple Auto Attendants.

To configure an Auto Attendant you must do the following:

1. On the Group level, click **"Services."**
2. Click **"Auto Attendant."**
3. Choose the auto attendant you wish to edit by clicking the name.
4. Click **"Profile."**
5. In this menu, you are able to edit the following:

Auto Attendant Add
Create a new automated receptionist (auto attendant).

▶ **Name:** Changes the display name in the portal.
▶ **Department:** Allocates the selected Auto Attendant to a specific department. This comes in handy if you wish for an administrator who only has department access to make changes to this Auto Attendant.
▶ **Time Zone:** Set to company's current time zone.
▶ **Business Hours:** If you wish to utilize the after-hours menus, choose the correct business hours from the drop down box. To create the business hours, see the Section labeled **Business Hours** above.
▶ **Holiday Schedule:** You can use the dropdown box to choose a holiday schedule or leave it at **"None."**
▶ **Scope of Extension Dialing / Scope of Name Dialing:** If you are an enterprise company, you may have the scope of extension dialing or Name Dialing in the auto attendant be everyone in the enterprise, everyone in the group, or everyone in a certain department.
▶ **Name Dialing Entries:** the first radio button means that callers will have to enter in the persons last name then first name to reach the desired user. The second radio button specifies that callers can enter the desired users first or last name to reach them.

6. Once an Auto Attendant has been edited or created, you may change the actual Auto Attendant options by clicking on either one of the highlighted links below. You will then be brought to the following screen:

7. **Business Hours / After Hours Greeting:** The default greeting should be overwritten with a personal greeting. The personal greeting can be uploaded onto the computer or recorded through your Apptix Phone system. To upload an auto attendant greeting, you will need to convert the audio file into the following format:

- ▶ CCITT u-Law or A-Law
- ▶ 8.000 kHz
- ▶ 8 bit Mono
- ▶ .WAV file Type

If you wish to use your Apptix Phone System to record the greeting, please contact an Apptix Support representative in order to receive those instructions.

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8. **Enable first-level extension dialing:** When checked, will allow users to enter the extension of the party they're trying to reach without listening to the full Auto Attendant Greeting.

9. You can configure any key to do one of the following options:

   ▶ **Transfer with Prompt:** Plays the message "Your call is being transferred, please hold" Then transfers the call. You are capable of putting an extension or a full DID into the phone number field.

   ▶ **Transfer without prompt:** Does the same and Transfer with prompt but does not play the message.

   ▶ **Transfer to Operator:** Does the same as Transfer with Prompt but the message says "Please stay on the line while your call is transferred to the operator."

   ▶ **Name Dialing:** Brings the user to the automated name directory where the user can dial by first or last name as specified on the previous screen

   ▶ **Extension Dialing:** Prompts for the user to enter in an extension then transfers the user.

   ▶ **Repeat Menu:** Replays the Auto Attendant Greeting

   ▶ **Exit:** Terminates the call.

10. Press **OK** to save the changes.

Hunt Groups

Hunt groups provide a way for calls to reach a number of users in your group using different call distribution options. To use the hunt group feature you must do the following:

1. On the Group level, click **"Services."**
2. Click **"Hunt Group."**
3. Choose the hunt group you wish to edit by clicking on the name.
4. Click **"Profile."**
5. You should see a screen like below:

6. You will need to configure the following options:

▶ **Hunt Group ID:** Enter in a unique hunt group ID.
▶ **Name:** Enter in a unique name.
▶ **Calling Line ID Last Name / First Name:** Enter in the calling Line ID first and last name. This Calling Line ID will precede the calling line ID name of each caller displayed on the phone.
▶ **Department:** Use the drop-down to select a department or keep it as None.
▶ **Time Zone:** Choose the time zone the hunt group is currently in
▶ **Allow Call waiting on agents:** When checked, calls that are routed to a particular caller when their on the phone will receive a call waiting tone on their phone. When

unchecked, the hunt group will check to see if the caller is on the phone. If the caller is on the phone, it will bypass the caller and go to the next designated caller.

▶ **Group Policy:** Choose one of the following hunt group distribution policies:

- **Circular:** Incoming calls come in the order appeared on the list. Once a call is answered the next incoming call picks up where the last call left off and circles around.
- **Regular:** Incoming calls hunt through agents in the order they appear in the list, starting from the top each time.
- **Simultaneous:** Incoming calls alert all agents at the same time. The first agent to answer handles the call.
- **Uniform:** Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
- **Weighted Call Distribution:** Incoming calls are assigned to idle agents based on percentages you assign on the Hunt Group's Profile – Weighted Call Distribution page.
- **No Answer Settings:** This option sets how the service behaves if a user doesn't answer the call.
- Check the **Skip to next agent after X rings** check box to pass incoming unanswered calls to the next user after the specified number of rings, as determined by the current group policy.
- Check the **Forward call after waiting X seconds** check box to forward calls that have not been answered by any user after the specified number of seconds to the phone number specified in the **Calls Forward** to text box. This box accepts values from 0 to 7200 seconds (2 hours.)
- Enter a number in the **Calls Forward** to text box to transfer calls to the specified number when a call is not answered in the time specified by the **Forward call after waiting X seconds control.**

▶ Next, assign users to the hunt group by clicking the search button and adding them to the Available users column. Use the Move Up and the Move Down buttons to re-arrange the order for circular and regular call policies.

7. Click **"OK"** to save.

Apptix Anywhere

Apptix Anywhere enables you to make and receive calls from any specified phone just as if it were your primary device. To use the Apptix Anywhere feature, you will need a local DID to route calls to and from. To use Apptix Anywhere you must do the following:

1. On the Group level, click **"Services."**
2. Click **"Broadworks Anywhere."**

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3. Choose the Apptix Anywhere name you wish to edit by clicking on the name.
4. Click **"Profile."**
5. You should see a screen like below:

You are able to configure the following options:

▶ **Can Be Used By:** If you have an enterprise, you can choose to make an Apptix Anywhere on the enterprise level or the group level.
▶ **Prompt to Confirm Calling Location:** "Never Prompt" is for not prompting for calling address, "Always Prompt" is for always prompting for calling address, and "Prompt If Not Available" is for prompting if the calling address is not available (Default.)
▶ **Prompt for Passcode:** Has the Portal prompt for a password once the user is identified.
▶ Click **"OK."**

Your Apptix Anywhere will now be setup... for instructions on how to use it, please reference the separate Apptix Anywhere document provided by Apptix.

Music On Hold

Music on hold allows callers to hear music when a call is place on hold or parked. Music on hold can be configured as follows:

1. At the group level, go to **"Services."**
2. Click **"Music on Hold."**
3. If you wish to edit the group level music on hold, click **Group.**

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You will be brought to the following screen:

4. To enable "**Music on Hold"**, click the first check box (default checked.)
5. To enable **"Music During Park"**, click the second check box (default checked.)
6. To enable **"Music During Busy Camp On"**, click the third check box.
7. **"The Type of Music"** can be defined by one of three ways:

   ▶ **System Defined Music/Video:** Default music that comes with your phone system.
   ▶ **External source:** Music from a separate device on or off your network. If you wish to setup an external Music on Hold, please contact Apptix for assistance.
   ▶ **Custom Music/Video File:** If you wish to add your own music, you may upload an audio file in the following format:

      ▪ CCITT u-Law or A-Law
      ▪ 8.000 kHz
      ▪ 8 bit Mono
      ▪ .WAV file Type

6. To apply changes, click **"OK"** or **"Apply."**

User Functions

As the Administrator, you have the ability to edit all of the user accounts in your group (unless you are an administrator of a department, then you can only see users in your department). You will also have some control over users that individual users don't have. These next two sections highlight some of the more important Admin functionality that you will most likely come upon with some frequency.

Changing Usernames

Apptix sets up usernames for clients in a very systematic way. Sometimes those usernames are hard to remember or difficult to use. As Administrator of a group, you have the ability to change the login username of a user in your group. Any username change done on the portal will change login access for the employee's web portal, toolbar, call center client application, receptionist console, and call center supervisor application. Below is how to change employee's usernames:

1. At the Group level click **"Users."**
2. Either enter in the last name and press the search button or press the search button to populate all the users.
3. Choose the user you wish to edit by clicking on their name or the edit button next to their name.
4. Click "**Profile."**
5. Click the link labeled **Change User ID (Also saves current screen data).**
6. Enter in the desired User ID and click **"OK."**

Changing Names

In order to change the name of the employee of a phone and their calling line ID, you must do the following:

1. At the Group level click **"Users."**
2. Either enter in the last name and press the search button or press the search button to populate all the users.
3. Choose the user you wish to edit by clicking on their name or the edit button next to their name.
4. Click **"Profile."**
5. Enter in the **Last Name** and **First Name** of the new employee. Repeat entries in the **Calling Line ID Last Name** and **Calling Line ID First Name.**
6. Click **"OK"** or **"Apply."**

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