



**Management Portal  
Quick Reference**

**Release 3.1**



### ***Tips for Using the Management Portal***

The Web-based Management Portal lets you:

- Add new employees.
- Assign employees to extensions and initialize phones.
- Manage employee information such as telephone numbers, locations, passwords, and feature privileges.
- Enter and manage information about company contacts and Favorites.
- Manage company-wide services including phone templates, class of service templates, company administrators, group administrators, call groups, administrative groups, hunt groups, ComMerchant groups, and billing codes.

### ***Logging Into the Management Portal***

1. Open a Web browser on your computer. Microsoft Internet Explorer version 6.0 is supported.
2. Enter the URL for your Portal (the WWW location, provided by your office phone contact). Usually *http://www.<service-name>.com/wmi/servlet/login.jsp*.
3. Enter your tenant ID, administrator name and password provided by your service provider.
4. Click the **Remember Me** check box to keep your password for the next time, then click **Login**.

### ***Ensuring You Can Reset Your Password***

You can reset your own administrator password at any time if you enter a reset password hint and answer. The hint is a question that you select and the answer is specific to you, this feature provides a second way to authenticate your login.

1. Log into the portal using the tenant ID, and password provided by your service provider.
2. Click the **Support** tab, then click the **Company Info** tab.
3. Click **Reset Password**.



4. Select a hint question from the **Hint** drop-down box. Then enter your answer to the hint question in the **Answer** field and click **Save**.
5. To change your current password, enter your current password in the **Current Password** field. Then enter your new password in the **NEW Password** and **Confirm Password** fields.
6. To change your telephone registration password, enter your current registration password in the **Current Reg. Password** field. Then enter your new registration password in the **NEW Reg. Password** and **Confirm Reg. Password** fields. This action changes the default system administrator information for your tenant. The default system administrator is the person who logs in using the tenant ID for both the tenant name and the administrator name.

*The numeric sequence that appears before the New Reg. Password field is the tenant registration code, assigned by the service provider, followed by the admin registration code, which is assigned by the office administrator. You need to use the tenant registration code, admin registration code and the registration password to associate extension numbers with phones.*

### **Creating Class of Service Templates**

A class of service (COS) template is a set of services and features that can be assigned to one or more users. The default COS template is automatically assigned to all subscribers, unless you create and assign your own COS templates. To create a COS template:

1. Select the **Class of Service Templates** link from the **Services** page.
2. To add a new template, click **New** and enter the template name, the Service List on which this template is based, and an optional description. Then click **Save**.



3. To edit a new or existing template, select the template from the **Class of Service Template Name** drop-down list.
4. Check the Services and Dialing Restrictions you want to include in the selected template.  
All of the services and features available in the default COS template are listed.

Feature Name	Feature Description
Anonymous Call Rejection	Lets the user refuse all calls from callers who have their caller ID blocked.
Authorization Code	Lets a user make an external call on a phone that allows internal calls only. This feature is activated by dialing *80 followed by the user's extension, the authorization pin and the phone number the user wants to call, as follows: <i>*80* &lt;extension&gt; * &lt;pin&gt; * &lt;number&gt;</i> . The authorization pin is set to the last four digits of the user's extension, by default. The user can change his/her authorization pin in the User Portal.
Billing Code - Mandatory	User's with this service must enter a billing code before placing an outside call. Internal calls can be made without billing codes.
Billing Code - Optional	Let's the user enter a billing code for a specific phone call if they want using (*50). The billing code is not required.
Caller ID - Block Delivery All	Always blocks the caller ID on outgoing calls. Subscribers can selectively unblock and deliver their caller ID.
Caller ID - Block Delivery Per Call	Lets the user selectively block their caller ID on certain outgoing calls using *67.
Caller ID - Enable Delivery Per Call	For users with Caller ID - Block Delivery All set, lets the user enter a star code (*82) and selectively deliver their caller ID on certain outgoing calls.



<b>Feature Name</b>	<b>Feature Description</b>
Call Forward Busy	Enables the call forward busy (*62) feature for the user. This feature lets the user forward all of his/her calls to another number when his/her desk phone is busy and makes this option available in the Reach Me section of the user's portal. Enabled by default.
Call Forward Fixed to Voicemail	Lets the user forward their calls to voicemail and makes this option available in the Reach Me section of their portal.
Call Forward No Answer	Enables the call forward no answer (*92) feature for the user. This feature lets the user forward all of his/her calls to another number when he/she does not answer the desk phone and makes this option available in the Reach Me section of the user's portal. Enabled by default.
Call Forward Variable	Lets the user forward all of their calls to another number and makes this option is in the Reach Me section of their portal. Enabled by default.
Call Park	Enables the call park (*98) feature for the user. This feature is enabled by default because it is available in the base product. Enabled by default.
Call Pickup	Enables the call pickup (*99) feature for the user. This feature is enabled by default because it is available in the base product.
Call Pickup - Directed	Lets the user pick up a call ringing at a specific extension in their call group *53.
Call Pickup - Group	Lets the user pick up the call that is currently ringing at any of the phones in the user's call group using *54.
Call Waiting	Lets a second incoming call come to a single-line analog phone. If this feature is not enabled, the second incoming call receives a busy treatment.



<b>Feature Name</b>	<b>Feature Description</b>
ComCierge	The ComCierge module includes contact lookup and is required for ComOffice.
ComOffice	The ComOffice module lets the user install and use the Outlook plug-in to access their telephony features. If you want to enable ComOffice you must also enable ComCierge.
ComPortal	Provides access to the User Portal or the ComOffice Portal, if enabled. This feature is not included in some service packages.
ComTraveler	The ComTraveler module lets the user access his telephony features from any WAP-enabled device, such as a cell phone.
Contact Lookup	This feature matches the numbers of incoming callers with their names for ComCierge treatments and the call log display.
Distinctive Ringing	If the user's phone supports more than one ring, when enabled, the user will hear a double ring for calls from internal parties and a single ring for calls from external parties.
External Transfer	Lets users transfer an incoming call to another number that is not within the tenant. External transfer must be enabled for the ComRIO module.
Intercom within Group	Lets users press *96 to intercom other users within their call group. When a user receives an intercom call the line LED for the primary line blinks, and a beep tone is played on the speaker. The speaker phone goes off-hook and the user can speak.
Intercom within Tenant	Lets users press *96 to intercom other users within their company. When a user receives an intercom call the line LED for the primary line blinks, and a beep tone is played on the speaker. The speaker phone goes off-hook and the user can speak.



<b>Feature Name</b>	<b>Feature Description</b>
Last Call Return	Lets users automatically redial the number of the last incoming call using (*69).
Low Bit Rate CODEC	Lets users take advantage of low bit rate coding that uses less network bandwidth per call than a traditional call. If enabled, the phone on either end negotiate to the lowest bandwidth possible. Not all phones support this feature.
Remote Click-to-Call	Let's users with a browser make calls through the Sylanro system even if they are not using a Sylanro-hosted phone. If you want to enable ComRIO you must also enable the external transfer feature.
Simultaneous Ringing	Lets users direct incoming phone calls simultaneously to all phone numbers configured in their smart forwarding settings. If you want to enable Simultaneous Ringing you must also enable ComCierge.
SIP Forking	Lets users with multiple phones registered to the same extension have an incoming call ring all phones at the same time.
VoiceMail	Enables the voicemail feature for this user. A voicemail number for the user must still be entered into the user's profile.
Disable Carrier Select Calls	Disables calls to a specific carrier. For example, calls to a carriers special 800 number for long distance calling.
Disable Conference Calls	Disables the users ability to initiate a conference call.
Disable Information Calls	Disables calls to any information operator such as 411.
Disable International Calls	Disables all calls to international numbers.
Disable International Operator Calls	Disables calls to an international operator.



Feature Name	Feature Description
Disable Local Calls	Disables local calls.
Disable Local Operator Calls	Disables calls to local operators.
Disable Long Distance Calls	Disables long distance calls.
Disable Long Distance Operator Calls	Disables calls to long distance operators.
Disable Premium Service Calls	Disables calls to premium (fee) numbers such as 900 or 976 numbers.
Disable Toll Free Calls	Disables toll free calls to numbers such as 800 numbers.

5. After you have selected the features you want to include in the COS template, click **Save**.

When creating class of service templates note the following feature dependencies:

- If ComOffice is selected, ComCierge and contact lookup are automatically enabled.
- ComOffice must be enabled for each virtual user associated with ComConsole.
- If ComCierge is selected, contact lookup is automatically enabled.
- SIP forking must be enabled for users with multiple phones registered at the same extension to have the phones ring at the same time on an incoming call. If SIP forking is not enabled, the call is only presented to one phone, regardless of the setting selected by the user.
- If Remote click-to-call (ComRIO) is selected, external network transfer is automatically enabled.
- Special codes (\*) are not supported in click-to-dial, ComRIO, and ComCierge.
- Mandatory and optional billing codes are mutually exclusive.



## ***Adding a New Employee***

The Employees page lets you search for specific employees or groups of employees and display their information, list all employees and display their information, and add new employees and fax lines. To add a new employee:

1. From the Employees page, click **New** to open the General tab on the Add Employee page.
2. Fill in the form with the appropriate information, as described below (required items are red).

<b>Field</b>	<b>Description</b>
Name	Required field. The name of the user displayed in the company directory. The sum of the user's first name and last name must not be any greater than 25-characters; otherwise the name is not displayed correctly.
Alternate Name	Used for phonetic characters that are available in other languages.
Login Name (User ID)	The name that the user enters when they log into the Portal or ComTraveler. An easy to remember Login Name should be entered, otherwise the system defaults to the 10-digit tenant main number plus the employees extension, for example, 40862623002351. The Login Name is equivalent to the User ID as defined by the service provider. Once this value is set, it cannot be changed.
Work Phone	Enter any available public number for this employee if you want callers to have direct access to the user. Use the <b>Search</b> button to get a list of all numbers available to you. You must enter a public number for user's with SIP phones.
Work Extension	Required field. Enter a 3-, 4-, or 5-digit unique extension number. This is an internal extension number and is typically the same as the last few digits of the public phone number if one is assigned, but can be any number you choose. Each new employee must have an extension number assigned. Once you set the extension number, this number cannot be changed.



<b>Field</b>	<b>Description</b>
Work Fax	Enter a fax number for this user.
Work Email	Enter an email address for the user. If an email address is not entered, the user cannot receive the Welcome email that is automatically sent by the system when the user is created.
Alternate User ID	Enter an alternate user ID for all employees with SIP phones (optional for non-SIP phone user's). The alternate user ID should be the public phone number (in North America 10-digits) associated with this user. This ID is also referred to as the SIP URI. The alternate user ID lets the phone register.
Preferred Language	Select a language from the drop-down list. This information is used to sort the portal display elements.
Country Code	Select a country from the drop-down list. This information is used to sort the portal display elements
Add as Company Favorite/Speed Dial	Each company can have up to 30 company favorites. Select a speed dial number for this user if you want to make them a company favorite.
Set Time Zone	Select a time zone from the drop-down list. Setting the time zone ensures that the correct time is displayed in the user's call logs.
Administrative Group	Select one of the available groups using the drop-down list. Administrative groups are groups of users that can be managed by a specific group administrator.
Call Group	Select one of the available groups using the drop-down list. Call groups are used for some calling features such as group call pickup. Call groups must be created before they display in the drop-down list.
Voicemail Number	Enter the 4-, 5-, or 10-digit voicemail access number for this user. This is the number that the employee dials to retrieve voice mail messages. After this number is entered, the employee automatically has one button dialing for voice mail using the <b>Message</b> or <b>Voicemail</b> button on their phone. Voicemail must be enabled in the class of service for the employee to actually have the voicemail feature.



Field	Description
SIP User ID	Enter a SIP User ID for all employees with SIP phones (optional for non-SIP phone user's). The SIP User ID should be the 10-digit public phone number associated with this user because it must be unique across the system. This ID is also referred to as the SIP URI. The SIP User ID lets people dial this employee using the ID you enter, but only on a SIP-based network. You cannot use 'SOS' or the number 911 as the SIP User ID.
Max Forked Extensions	Enter the maximum number of forked endpoints that can be registered to this extension. If a user has multiple endpoints registered to the same extension and SIP forking is enabled in the user's class of service add-on, an incoming call rings all endpoints at the same time.

3. Click the **Company Info** tab and enter the information if available.
4. Click the **Personal Info** tab and enter the information if available.
5. Click the **Phone** tab to open it.
6. Select a phone template for this employee using the **Use Template** drop-down list.
7. If the employee has a phone connected to an adapter, select the adapter port for the extension that you assigned to this employee from the **Phone Location** drop-down list. For IP phones, you must follow the instructions in "Assigning Extension Numbers to Phones" on page 16.
8. If you do not know which ports are available, click Search.
9. Select whether you want to disable the call waiting tone on the employee's primary line. The default is **No**, which means that the employee will not hear a call waiting tone, while on a call, if another call comes in. Select **Yes** if you want to enable the call waiting tone. This setting only affects the call waiting tone, if the tone is disabled, the call is still presented to the phone and the LED for the second



line flashes but no tone is heard. This does not affect the call waiting feature, which is set using the COS templates.

10. If you see the **Edit BLA** button, you have the option of configuring multiple line appearances for this user. See the next section for more information
11. Click the **Settings** tab and select a class of service template from the drop-down list.
12. Click any additional features that you want this user to have. The additional features besides the ones in the selected template are called add-ons. You can only add, not remove features.
13. When you have selected all of the options for this employee, click **Save**.

### ***Configuring Bridged Line Appearances on MGCP Phones***

You can configure a user's phone with secondary lines of other phone numbers. You can configure a maximum of 32 secondary lines on a single phone. To configure BLA:

1. Edit the employee's phone to which you want to add appearances of other user's line.
2. Click the **Edit BLA** button on the Phone tab.
3. Click one of the available programmable buttons to assign another line appearance.
4. Enter a label for this line appearance. When entering a label, use a name because the extension number is automatically displayed on the label.
5. Enter the extension number you want assigned for this line appearance.
6. Select whether you want the **Ring No call waiting tone**, **Ring Call waiting tone**, or the **Lamp Only** option for this line appearance and click **Assign**.

***Sylantro recommends that when configuring a bridged line appearance, the first line should be set***



***to ring and all other lines should be set to lamp only. In this case, the call waiting tone is still used on the first line.***

7. When you are finished assigning line appearances, click **Close**.

### ***Configuring Bridged Line Appearances on SIP Phones***

Multiple line appearances (BLAs) for SIP phones can only be configured on other SIP devices. You cannot configure BLAs in a SIP/MGCP mixed environment. BLAs can only be assigned to SIP phones using the phone vendors configuration tools. However, there are several steps you need to perform using the Management Portal and the User Portal before you can actually assign BLAs to a SIP phone, as follows:

- Use the Management Portal to set up line authorization for each SIP user whose extension is to appear on another phone.
- Use the Management Portal to enable the SIP Forking in the COS template for each SIP user whose extension is to appear on another phone.
- Use the User Portal to set the ringing options in the My Phone page for the SIP phone that you want to configure with secondary line appearances to **Ring all devices**.

The process of configuring secondary lines on the SIP phone itself depends on the type of SIP phone and whether the phone software supports secondary line appearances.

#### **Authorizing Multiple Line Appearances for SIP Phones**

For SIP phones line authorizations must be configured on the Sylanro Control Server using the Management Portal and on the SIP phone itself.

To authorize a secondary line appearance for a SIP phone, follow these steps:



1. In the Management Portal, click on the name of the employee whose extension you want to appear on another phone. The Edit Employee page opens.
2. Click the **Phone** tab. The Phone tab page displays with the list of phones that are assigned to this employee.
3. Click the **Bridged Line Authorization** button.
4. Enter the extension number of the employee on whose phone you want this extension to appear in the **Extension** field, then click the **Assign** button. The phone's nickname and extension number appear on the page.
5. Click the **Visual Alert Only** check box if you want do not want calls to the secondary line appearance to ring the phone. Not all SIP phone vendors support this feature.
6. Click **Close**.

#### **Configuring a Bridged Line Appearance on the SIP Phone**

Secondary line appearances (BLAs) on SIP phones can only be configured using the tools supplied by the SIP phone vendor. Usually, the configuration is done via special configuration files that the phone downloads during the boot process. Depending on the type of SIP phone, it may also be possible to configure secondary line appearances using the phone's software menu.

Regardless of the SIP phone model you are using, the following statements are true for all SIP phones registered on the Sylantrio System:

- Secondary line appearances cannot be configured in a SIP/MGCP mixed environment. For example, you cannot put a SIP extension on an MGCP phone nor can you put an MGCP extension on a SIP phone.
- SIP secondary line appearances do not appear on the Management Portal Line Appearances report like the MGCP secondary line appearances.
- The calling name provided to all phones in a SIP-B BLA group is the same calling name that is provided to the BLA primary phone. On MGCP phones the provided to the BLA



members is the name that each of the member has stored for the caller.

- All SIP phones should be registered using the subscriber's portal Login Name (User ID) and the subscriber's SIP password. Otherwise certain SIP for Business features, such as SIP BLA will not work.
- A BLA number must have an extension that exists, but cannot be the same as the primary line number or an ACD pilot number.

### ***Searching for an Employee***

You can search for a specific employee from the Employees page or for specific contacts from the Contacts page.

1. Do one of the following:
  - On the Employee's or Contacts page, enter the first name, last name, a string of letters, or the full phone number of the employee you want to find in the **Find an Employee** or the **Find a Contact** field. Then press **Return** or click **Go**.
  - On the Employee Search tab, enter criteria in one or more of the following search fields: **First Name, Last Name, Extension, Public number, or Department**. Then click **Search**.
  - To display all of the employees, click **Search** or **Go** without inputting any search criteria.

The names and numbers for the employee(s) that match the search criteria are displayed. From this list you can click to call any employee, click to email, or edit the employee information by clicking the name of the employee.

### ***Resetting an Employee's Password***

To reset and employee's password:

1. From the Employee's page, locate the entry for the employee whose password you want to change.



2. Click the **Reset Password** link to create and display a new password. Depending on the type of phone the user has, the Reset Password tab for MGCP users or the Reset Password tab for SIP users is displayed.
3. Reset a user's portal login password and/or a user's SIP password, as follows:
  - To reset a user's portal login password, select the **Yes** radio button next to **Reset Login Password**. A random new password is displayed in the adjacent field. You can either accept this password or enter a new password.
  - To reset a user's SIP password, select the **Yes** radio button next to **Reset SIP Password**. A random new password is displayed in the adjacent field. You can either accept this password or enter a new password.

If you changed a user's SIP password you must also change the password on the SIP user agent, which generally is the user's SIP phone. If the SIP password on the user's SIP phone does not match the SIP password you set in the Management Portal, the phone does not register correctly with the Sylanro server.

After you have changed the SIP password on the phone, you must reboot the phone, so it re-registers with the Sylanro server.

### ***Assigning Extension Numbers to Phones***

Users are associated with extensions when they are added to the system, then extensions are assigned to phones using one of the following methods. You can assign extension numbers to telephones by physically going to each telephone and entering a series of numbers or by using the Management Portal.

#### **Using the Telephones for Assignments (MGCP)**

To assign an extension to a phone using the phone:

1. Go to the telephone that you want to assign to an extension number, lift the receiver or press the **Spkr** button.



2. Enter the following numeric series: \*51, tenant registration code, \*, admin registration code, \*, admin registration password, \*, extension number. For example:  
**\*5112345\*24\*54321\*2351.**  
Your tenant registration code and admin registration password are initially supplied by your service provider.
3. Repeat these steps for each telephone (adapter port) that you want to assign an extension to.

#### **Using the Management Portal for Assignments**

You can use the Management Portal to assign extensions to phones connected to adapters and IP phones that have already been assigned an extension once. To assign an extension to a phone using the portal:

1. Log into the portal, click the name of an employee, then click the **Phone** tab.
2. Use the **Phone Location** drop-down list to assign a physical port to the extension associated with this user. Then click **Save**.

#### **Assigning Extensions to SIP Phones**

If your service provider has set up configuration files for each SIP phone, the phones are plug and play. They obtain all of their configuration information during the bootup process. However, if the phone has booted and has no dial tone, you must manually configure the phone.

To configure the SIP parameters on the telephone and bind an extension, follow these steps:

1. On the phone itself, access the phone's SIP configuration menu. The way this is done depends on the SIP phone model. Generally, the phone has a Menu or Settings button.
2. Enter the SIP configuration information in the appropriate fields. In general, you must enter at least the following configuration information:



- Name or display name—Enter name you want to appear on the phone display.
  - Authentication name—Enter the User ID (Login Name) a subscriber uses when logging into his/her User Portal.
  - Password—Enter the SIP password of the subscriber.
  - SIP proxy address—Enter the virtual IP address of the Sylanro Control Server pair.
3. Save your changes, exit the SIP configuration menu, then reboot the phone.

### ***Moving an Employee's Extension***

Users are associated with extensions when they are added to the system, then extensions are assigned to phones using one the methods described previously. To move an employee's extension, they must first be unassigned from the phone to which their current extension is bound and then the extension (user) can be reassigned to a new phone.

### ***Configuring and Managing Contacts***

You can create a list of contacts accessible to everyone in your company. To create a contact:

1. Click **New** from the Contacts page.
2. Enter the contact name, title, company, work address, work phone, fax and email address. Then click **Save**.
3. Click **Save** if you are finished entering all of the contact information.
4. Click the **Home Address** and **Phone Numbers** tabs and enter data as appropriate.
5. Use the drop-down lists on the **Settings** tab to select this contact as a company favorite by choosing a speed dial code. Then click **Save**.



### ***Managing Phone Templates***

The company-wide telephone templates let you predefine the feature or speed dial function of one or more of the programmable buttons on the telephones assigned to your users.

To create or change telephone templates for your company:

1. On the Services page, click the **Phone Templates** link.
2. Use the **Template** drop-down menu to select an existing template, or click **New** to create a new template. If you click **New** you are prompted to name your template.
3. For digital and IP telephones, you can assign programmable feature buttons as follows:
  - (a) Click the first programmable feature button you want to assign.
  - (b) To assign a phone number to a feature button, (1) enter the feature button label in the **Label** field, (2) enter the telephone number in the **Phone #** field, and (3) click the **Assign** button below the **Phone #** field.
  - (c) To assign a feature to the feature button, select a feature from the **Feature** drop-down list and click the **Assign** button below the drop-down list.
4. When you are finished, click **Close**.

### ***Managing Office Administrators***

The first office administrator login account is automatically created by your service provider. An office administrator has full access for managing all of the services and users available to a tenant. The first office administrator can create other office administrators that have full access to all of the users and services available for the tenant. To add and manage office administrators:

1. Select the **Office Administrators** link from the **Services** page.



2. To edit the attributes for an office administrator, click the name of the administrator or add a new administrator, by clicking **New Office Administrator**.
3. Enter or edit the criteria for the administrator as follows, then click **Save**:

Field	Description
Office Admin Name	The administrator login name for the Management Portal. The sum of the user's first and last name must not be greater than 25-characters.
Description	Enter a description if desired.
Email	Enter an email address for the administrator that is used to send and reset the password.
Password	Enter the password you want the administrator to use to log into the Management Portal.
Confirm Password	Enter the same password again.
Tenant Registration Code	The tenant registration code is a read-only field that gives you the first set of numbers that must be entered to register telephones.
Registration Code	The 2- to 6-digit code that the administrator uses to register telephones by entering *51 <tenantregcode> * <adminregcode> * <adminregpassword> * <extension>. Each administrator's reg code must be unique.
Registration Password	The 4- to 6-digit password the administrator uses to register telephones. The registration password does not need to be unique.
Confirm Registration Password	Required field. Enter the same registration password again.

### ***Managing Administrative Groups***

Administrative groups are groups of users that can be managed by a group administrator. The group must be



created before the group administrator. To add and manage administrative groups:

1. Select the **Administrative Groups** link from the **Services** page.
2. To change the name or description of a group or to delete the group, click the name of the group. To add a new group, click **New**.
3. Edit the Administrative Group Name and/or the Description and click **Save**.

### ***Managing Group Administrators***

Office administrators can create group administrators, who are responsible for managing the services for a specific group of users. To add and manage group administrators:

1. Select the **Group Administrators** link from the **Services** page.
2. To edit the attributes for a group administrator, click the name of the administrator or add a new administrator, by clicking **New Group Administrator**.
3. Enter or edit the criteria for the administrator as shown in the table on the previous page, then click **Save**. For group administrator's you do not add a login password and you must select an administrative group that this administrator will manage.

### ***Managing Call Groups***

A number of system features can be enabled for a group of people instead of the entire tenant. Call groups only affect the use of features not how the members of the group are managed. The group features include intercom, group call pickup, and directed call pickup.

To add and manage call groups:

1. Select the **Call Groups** link from the **Services** page.



2. To change the name or description of a group or to delete the group, click the name of the group. To add a new group, click **New**.
3. Edit the Call Group Name and/or the Description and click **Save**.
4. Click the Edit Members link to add or delete people from this call group.
5. Click **Search** to display all employees or enter search criteria to display specific employees so you can add them to the call group.
6. Click the checkbox next to the employee's name to add them to this call group, then click **Save**.

### ***Managing Hunt Groups***

Hunt groups let you direct incoming calls to a group of users. The incoming call rings all extensions in the hunt group in series until the call is answered or forwarded to voice mail.

Contrary to ComMerchant groups, hunt groups do not queue callers. Either the telephone is answered or the call is sent to the final destination. You can create up to 10 hunt groups with 32 extensions each, that start at different extension numbers. An unused extension number must be available before you can create a hunt group. To add and manage hunt groups:

1. Select the **Hunt Groups** link from the **Services** page.
2. To change the name or description of a group or to delete the group, click the name of the group. To add a new group, click **New**.
3. Edit the hunt group Name, description, extension number, public phone number, and final destination, then click **Save**.
4. To edit the members of a hunt group, click the name of a hunt group and then click **Members**.
5. Select the check box next to the name of each user you want associated with this hunt group. Then, click **Save**.



6. To edit the answer order for users in a hunt group, click **Answer Order**.
7. Use the arrow to move users up and down in the list. The hunt group rings from the top of the list down. Then click **Save**.

### ***Managing ComMerchant Groups***

ComMerchant lets you create special phone numbers where callers are queued for answering by representatives who enter and exit the group on their own. You can configure up to 100 ComMerchant queues that can have up to 200 representatives at any given time. ComMerchant representatives can check themselves in and out of the queue and make themselves unavailable at any time using the programmable feature buttons on their telephone. Additionally, ComMerchant provides queuing, hunt groups do not. To add and manage ComMerchant groups:

1. Select the **ComMerchant** link from the **Services** page.
2. To change the name or attributes of a group or to delete the group, click the name of the group. To add a new ComMerchant group, click **New**.
3. Enter or edit the criteria for the administrator as follows, then click **Save**:

<b>Field</b>	<b>Description</b>
Name	The name of the ComMerchant group.
Description	Enter a description of the group.
PassCode Enable	Select the <b>Yes</b> or <b>No</b> radio buttons. If you select <b>No</b> , representatives will not need to enter a passcode when checking into this ComMerchant group. If you select <b>Yes</b> , users must dial the extension you specify, then the passcode in order to check into the group.



Field	Description
Pass Code	If you enabled the passcode, enter a 4-digit number in the <b>PassCode</b> field. Representatives need to enter this passcode on their telephone to check into this ComMerchant group.
Extension	Enter a unique 4- or 5-digit extension, which is typically equal to the last four digits of the group phone number you will give to your customers. This is also the groupID or pilot number for this group. Representatives must enter this number to check into the group if more than one ComMerchant group is created for this customer. Once the extension number is selected, it cannot be changed. Do not use an extension that begins with 9.
Number	Enter a phone number that you will give to customers. Click <b>Search</b> and select a number from the list that is displayed.
Final Destination	Enter a destination for calls that are not answered by any members of your ComMerchant group, such as a voice mail extension. You cannot make the final destination an external number.
Max. time a call waits in queue	Enter the maximum number of minutes a call should wait in the queue before being sent to the final destination. The recommended value for this setting is based on the average number of representatives that will be checked into the ComMerchant group at one time. Use the following formula to determine your call timer setting: Queue Timer = [(# of agents checked in) * Ring No Answer Timeout (16 seconds)]
Max. agents in this group	Enter the maximum number of agents that can be checked into this group at one time, default is 32.
Max. calls can wait in queue	Enter the maximum calls that can wait in the queue. The default is 32. Calls that exceed the number allowed go straight to the final destination number.
Music File Name	Select the announcement and music file you want to play for callers. Click <b>Play</b> to listen to each selection. The music files are added to the system by your service provider. If you want custom music and announcements contact your service provider.



## ***Managing Billing Codes***

Billing codes let employees assign specific codes to some or all of their outgoing calls. The Management Portal does not include a billing code report, so you need to contact your service provider and request that a monthly billing code report be made available to you.

After billing codes are added, you can specify whether they are optional or required for each of your employees. If billing codes are required, calls are not connected until the a valid billing code is entered. Billing codes can be entered when the click-to-call or the dial features are used from the portal.

- If billing codes are not required (optional), the user must enter **\*50** followed by the billing code then a secondary dial tone is heard and then a **9** and the calling number can be entered.
- If billing codes are required, the user dials the number they want to call then a secondary dial tone is heard, the user must then enter a valid billing code.

Optionally, the user can press **#** after they have entered the billing code. If they do not press **#**, there is a 4 second delay before the system initiates the call.

To add and change billing codes:

1. Select the **Billing Codes** link from the **Services** page.

***If you do not see the Billing Codes link on the Services page, your service provider has not enabled the billing codes feature for your company.***

2. To change the name or attributes of a billing code or to delete the billing code, click the name of the billing code. To add a new billing code, click **New**.
3. Enter a numeric-only billing code and a description. Then click **Save**. Never create a billing code that starts with the numbers 9, 0, or the first digit of your internal extension numbers. Billing codes can be 2 to 9 digits in length.

## ***Accessing Reports***

The Management Portal provides access to a number of reports. You can access the reports by clicking the **Reports** tab in the navigation bar.

You can request the following reports from the Reports page:

- Overall system report—Provides general information about all of the users configured on the system and their attributes including class of service attributes. The System Overview reports are displayed in a spreadsheet format. Since the complete overview report can be very large you can only view it if it is sent to you via email.
- System Report for an Extension Range—Provides general information about the extensions you specified and can be viewed immediately.
- Line Appearance report— Provides information about multiple line appearances configured on your company telephones.
- Line Authorization report—Provides information about line authorizations configured on your company telephones.
- Service Quantities report—Shows the COS templates and license quantities for each service list that is assigned to your company.

## ***Viewing IP Phone Information***

To view information about the IP phones configured in your company:

1. Click the **Support** tab in the Management Portal.
2. Enter search criteria (IP phone name, IP address, extension and model number) to locate the phones you want to view. Then click **Search**.

If you click **Search** or **Go** without entering any attributes, a list of all IP phones appears.

3. Click the model number in the left column for the IP phone you want to view more information about or click the user extension number (in the right column) to view information about the associated user.

### ***Viewing Sylanro Adapter Information***

To view information about the adapters configured in your company:

1. Click the **Support** tab in the Management Portal.
2. Enter search criteria (adapter name, IP address, serial number and extension) to locate the adapters you want to view. Then click **Search**.  
  
If you click **Search** or **Go** without entering any attributes, a list of all adapters appears.
3. To view information about an adapter, such as the model number, serial number, available ports, ports in use, and date and time of adapter installation, click the serial of the adapter.
4. From this page, you can view the employee telephones connected to ports on the selected adapter, by clicking **Employees**.

### ***Managing Company Information***

You can use the Company Info and Billing Address tabs on the Support page of the Management Portal to view and change any of the previously entered company information, such as the company name, address, contact person, billing address, billing contacts, and the login password and the admin registration code of the first office administrator created.

Click **Reset Password** to change any of your passwords. The changes apply to the office administrator that is currently logged in.

***The numeric sequence that appears before the New Reg. Password field is the tenant registration code, assigned by the service provider, followed by the admin registration code, which is assigned by the office administrator. You need to use the tenant registration code, admin registration code and the registration password to associate extension numbers with phones.***

To ensure that you will be able to change your password if you forget it, select a hint question from the **Hint** drop-down box. Then enter your answer to the hint question in the **Answer** field and click **Save**.

Billing address information can be changed on the Billing Address tab.

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