Incoming Call Manager

Setup Guide

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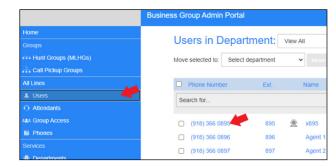## BUILDING AN INCOMING CALL MANAGER (ICM):

- An ICM requires a license. If you don't already have an ICM assigned to the phone number, you will have to contact your salesperson.

- An ICM can be built on an individual phone line, or as a virtual number to follow customizable routing rules for incoming calls.
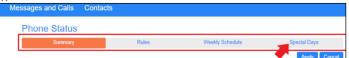
CUSTOMER ACCESS TO ICM

Step 1: Special Days

- You can access your ICM routing rules as long as you have a computer with internet access and you remember the BG Admin login, password, and the URL of the BG Admin Portal: https://voice.btcbroadband.com/login/bg/#bg/login.html or go to mybtcbroadband.com, click on **My BTC** then **Cloud Voice BG Admin**.

- Once logged in, click on Users, then find the Line assigned the ICM license. This will normally be your main business number.

- The ICM will open to this page.

- **When building an ICM, we work right to left starting with Special Days**. Special Days can be used for holidays or inclement weather days. Special rules can be created and applies on the summary page. To add a special day, click on the day, and click **Apply**.
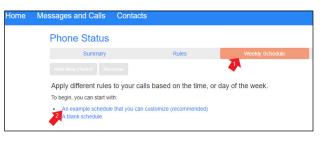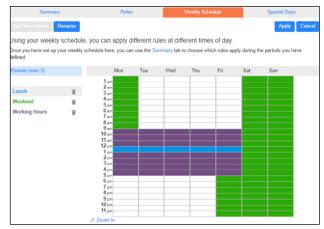
Step 2: Weekly Schedule

- If you are going to route calls by time of day or day of week, you must define the Weekly Schedule first. Click on **Weekly Schedule**, then select *"An example schedule that you can customize (recommended)."*

- The system automatically defines 3 periods. **Lunch (blue)**, **Weekend (green)** and **Working Hours (purple)**. The 4th period is called "all other times" on the summary page, shown in white below. Notice the Add new period is grayed out. The limit on defined periods is 3.

- You can change the period names to match the terminology you want to use. Click period name you want to change, then click **Rename** at the top. Type the new name and click **OK**.

- In this example, we are going to use the "all other hours" for a reoccurring office meeting on Monday from 2-3:30. If you click on the Zoom In, the schedule expands, and can schedule in 15-minute increments.

- Once the weekly schedule is set, click **Apply**, then click on the **Rules** tab to define the rules.

Step 3: Rules

- Click on **"an example of set of rules."**

- The system creates 3 Sets of Rules: Normal, Reject Calls and Screen Calls.

- The default "**Normal**" rule is to "ring my phone". The "**Reject Calls**" rule is to play a reject message and immediately reject the call.

- The "**Screen Calls**" set of rules gives you a set of options to select. You are going to choose "**an anonymous number**".

- Then it will prompt you of an action. In this example we are going to choose "**ask the caller to say their name before I accept the call**".

- Once you click **Finish**, the rule is defined and ready to use.

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Step 3: Rules

- Next, we are going to change the Normal set of rules. Click on **Normal**, then **Edit**.

- Click on **"ring more than one phone at the same time or in sequence"**, then click **Next**.

- Enter the first number you want to ring, how long you want it to ring for, and then click **Add**.

- Continue adding numbers until you have added all of the numbers you need to ring.

- You can adjust the time by dragging the start and end time arrow indicators to the time block needed.

- The first number will always start with 0.

- The max ring time is 120 seconds.

- If you do not want the caller to ring for a total of 30 seconds, the last number to ring should end at the 30 second mark.

- After 30 seconds, if nobody answers or all lines are busy, the caller is forwarded to its final destination. This destination can be the voicemail box of the ICM (*e-mail notifications only*), a user's phone number, a user's voicemail box, or an auto-attendant.
  In this example, we'll use an example auto attendant number "918-366-0900".

- When you click **Finish**, you rule is set and ready to use.

- Don't forget to click **Apply** at the Rules page to save the Rules you have just created or changed.

Step 3: Rules

- Click **Add New Set of Rules** to create a rule for After Hours, Extended Hours and Meeting.

- For **After Hours**, we are going to **Forward to the Auto Attendant.**

- For **Extended Hours** we are going to ring a cell phone for 15 seconds, the **send to voicemail of x901** (*example extension*).

- For **Meeting** we are going to forward to an off-site answering service.

- Click on **After Hours** and select **Edit**.

- We are forwarding to our example Auto Attendant number, 918-366-0900. Click **Finish**, then **Apply**.

- Click on **Extended Hours**, then **Edit**.

- If a number is added and the caller doesn't respond, the system will take the call back before the voicemail picks up (*after 15 seconds*) and transfers to voicemail.
    - For example, customer #7 transfers to voicemail and sent to extension x901.
    - In the "**If I don't answer...**" box, you'll see #7901.
    - Click **Finish**, then **Apply.**

- For **Meetings** we are going to forward to an off-site answering service at "918-394-0028" (*example number*). Click **Finish**, then **Apply**.

- All of our **Rules** have been created.

- Click on the **Summary**, since this customer wants to handle calls by time-of-day rules, click the "**Handle depending on the time or day**" radio button. Select the rule for each defined period and click **Apply**.
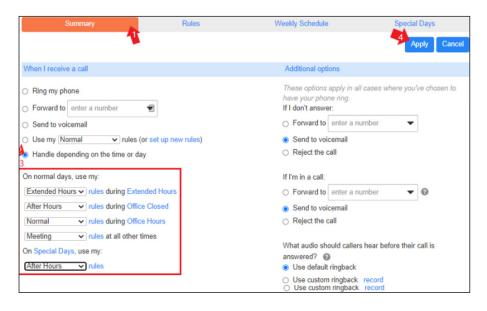
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When no rules apply in the "Meeting" set of rules

When no rules apply

○ ring my phone using [the Standard Ringtone ▾]

● forward to [918 394 0028   ▾]

○ send to voicemail

○ play a reject message and reject the call

○ ask the caller to say their name before I accept the call

○ ring more than one phone at the same time or in sequence

○ ask the caller to say their name before ringing more than one phone at the same time or in sequence

[< Back] [Next >] [Finish] [Cancel]

Sets of Rules | Meeting

After Hours 🗑

Extended Hours 🗑   Default: All calls will be forwarded to (918) 394 0028

Meeting 🗑   [Move Up] [Move Down] [Edit] [Add New Rule]

Normal

Reject Calls 🗑

Screen Calls 🗑

| Summary | Rules | Weekly Schedule | Special Days |

[Apply] [Cancel]

When I receive a call

○ Ring my phone

○ Forward to [enter a number   ]

○ Send to voicemail

○ Use my [Normal   ▾] rules (or set up new rules)

● Handle depending on the time or day

On normal days, use my:

[Extended Hours ▾] rules during Extended Hours

[After Hours ▾] rules during Office Closed

[Normal ▾] rules during Office Hours

[Meeting ▾] rules at all other times

On Special Days, use my:

[After Hours ▾] rules

Additional options

These options apply in all cases where you've chosen to have your phone ring.

If I don't answer:

○ Forward to [enter a number   ▾]

● Send to voicemail

○ Reject the call

If I'm in a call:

○ Forward to [enter a number   ▾] ❓

● Send to voicemail

○ Reject the call

What audio should callers hear before their call is answered? ❓

● Use default ringback

○ Use custom ringback record

○ Use custom ringback record