

Incoming Call Manager Setup Guide





BUILDING AN INCOMING CALL MANAGER (ICM):

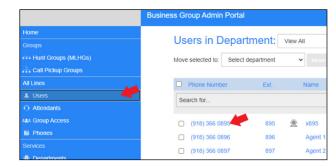
- An ICM requires a license. If you don't already have an ICM assigned to the phone number, you will have to contact your salesperson.
- An ICM can be built on an individual phone line, or as a virtual number to follow customizable routing rules for incoming calls.

CUSTOMER ACCESS TO ICM

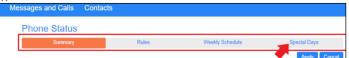
Step 1: Special Days

- 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: <u>https://voice.btcbroadband.com/login/bg/#bg/ login.html</u> 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.

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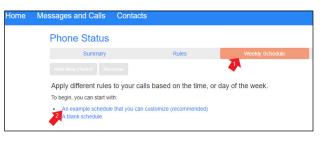


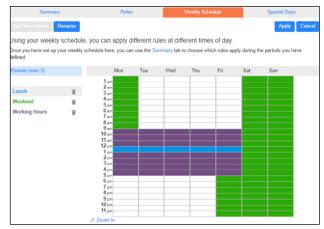


Step 2: Weekly Schedule

- 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.

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Phone Status			
Summary	Rules	Weekly Schedule	Special Days
Add New Period Rename			Apply Cancel



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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Summary	Rules	Weekly Schedule	Phone Statu	S			
Add New Set of Rules Rename			Summary	y	Rules	Weekly Schedule	Special Days
Add New Set of Rules Rename	· · ·		Add New Set of Rule:	s Rena	me		Apply Cancel
			Rules give you advance	ed options f	for handling incoming calls. You can ch	oose which set of rules is active from	the Summary tab.
Create rules to handle calls differently, depending on who is			Sets of Rules		Screen Calls		
Once you've set up some rules, use t	he Summary tab to start using the	n.					
You can also use the Weekly Schedule to choose when different sets of rules are used.			Normal When I receive a call from an anonymous number, ask the caller to say their name before I accept the Relect Calls a call				
To begin, start with an example set of rules			Screen Calls	W	Default: The call will ring your phone	e using the Standard Ringtone	
					Move Up Move Down Edit	0	
			L				
When no rules apply in the "Normal"	set of rules	When no rules apply in the "Reje	ct Calls" set of rules				
When no rules apply		When no rules apply					
ring my phone using the Standard Ringtone	×	ring my phone using the Standard Ring	⊖ ring my phone using the Standard Ringtone ∨				
O forward to enter a number 🔹	nd to enter a number 💌						
⊖ send to voicemail							
play a reject message and reject the call		play a reject message and reject the cal	play a reject message and reject the call				
o ask the caller to say their name before I account of the caller to say their name before I account of the caller to say their name before I account of the caller to say their name before I account of the caller to say their name before I account of the caller to say their name before I account of the caller to say the caller to s	ept 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	⊖ ring more than one phone at the same time or in sequence					
⊖ ask the caller to say their name before ringir in sequence	g more than one phone at the same time	or or ask the caller to say their name before ringing more than one phone at the same time or in sequence					
	< Back Next > Finish Cano		< Back Nost >	Finish	Cancel		

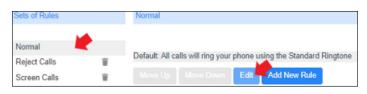
Edit a rule in the "Screen Calls" set of rules	Edit a rule in the "Screen Calls" set of rules
When I receive a call from an individual contact: <select></select> a group of contacts: <select></select> anyone on my contact list anyone in my business group this number or group of numbers: enter a number • an anonymous number	When I receive a call from an anonymous number oring my phone using the Standard Ringtone origin or phone using the Standard Ringtone origin or origin origin or origin o
<back next=""> Finish Cancel</back>	<back next=""> Finish Cancel</back>



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.

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When no rules apply in the "Normal" set of rules When no rules apply oring my phone using the Standard Ringtone forward to enter a number of forward to enter a number of send to voicemail original reject message and reject the call original reject message and reject the call original region of the same time or in sequence original region of the same time original region of the same time or in sequence original region of the same time orin sequence original region of the

Enter the phone number you want to ring, and for how long.

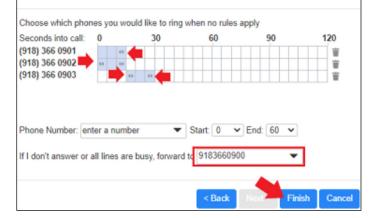
The first phone will always start ringing immediately and you can have more than one phone ring at the same time. If a line is busy, the next available phone will start ringing immediately.

All phones will stop ringing as soon as one phone is answered.

If you don't answer or all lines are busy, the action selected here will be applied instead of any global configuration you may have configured on the Summary page.



When no rules apply in the "Normal" set of rules





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 offsite 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.

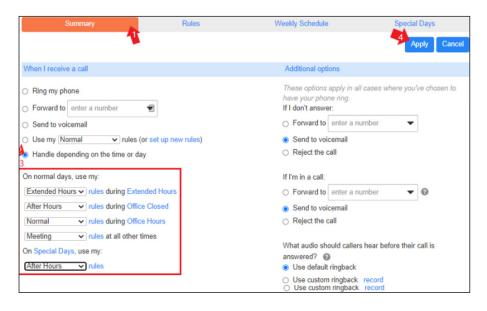
Phone Status				
Summary	Rules	Weekly S	ichedule	Special Days
Add New Set of Rules Ren:	me			Apply Cancel
Rules give you advanced options	for handling incoming calls. You Normal	u can choose which set of r	ules is active from the Su	mmary tab.
Sets of Rules	Normai			
Normal	Default: All calls will ring mo	re than one phone		
Reject Calls	Move Up Move Down	Edit Add New Rule		
Choose a name	for this new Se	t of Rules.		
Pick a name which w might choose "Family				or example, you
Name: After Hours				
			1	OK Cancel
After Hours	a			
Normal	-	Default: All ca	lls will ring you	ir phone using th
Reject Calls	W			Edit Add
Screen Calls	Ξ.			
When no rules ap	ply			
O ring my phone	using the Standard	Ringtone V		
forward to (918)) 366 0900	•		
o send to voicem	ail			
		ha anll		
 play a reject me 	essage and reject t	ne call		
○ ask the caller to	o say their name be	efore I accept the	e call	
⊖ ring more than	one phone at the s	ame time or in s	equence	
⊖ ask the caller to in sequence	o say their name be	efore ringing mor	e than one pho	ne at the same tir
		< 8	lack Next >	Finish Ca
When no rules	apply in the "I	Extended Ho	urs" set of r	ules
Choose which pho	nes you would like	to ring when no	rules apply	
Seconds into call:	0 3	0 6	9 9	0 120
(918)	0			
Phone Number: e	nter a number	▼ Start:	0 ¥ End:	60 🗸
If I don't answer or	all lines are busy,	forward to #790)1	•
		< E	ack Next >	Finish Ca

Example Images Continued on next page >



When no rules apply in the "Meeting" set of rules

Sets of Rules		Meeting					
After Hours	Ξ.						
Extended Hours	÷.	Default: All calls will be forwarded to (918) 394 0028					
Meeting	Ξ.			Edit	Add New Rule		
Normal							
Reject Calls	Ŧ						
Screen Calls	Ť.						



For additional assistance, please call: (918) 366-8000