



# Incoming Call Manager

## Setup Guide

# INCOMING CALL MANAGER



## 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.btcbbroadband.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**.

Continued on next page ►

Phone Number	Ext.	Name
<input type="checkbox"/> (918) 366 0895	895	x895
<input type="checkbox"/> (918) 366 0896	896	Agent 1
<input type="checkbox"/> (918) 366 0897	897	Agent 2

Phone Status

Summary Rules Weekly Schedule **Special Days**

When I receive a call

Additional options

These options apply in all cases where you've chosen to have your phone ring. If I don't answer:

☒ Ring my phone

☐ Forward to:

☐ Send to voicemail

☐ Use my  rules (or set up new rules)

☐ Handle depending on the time or day

☐ Forward to:

☒ Send to voicemail

☐ Reject the call

If I'm in a call

Phone Status

Summary Rules Weekly Schedule **Special Days**

Apply Cancel

Go To Today Clear All Add Public Holidays Apply Cancel

Special Days are exceptions to your normal weekly schedule.

For example, vacations or business trips are special days, when you may want to handle calls in a different way. You can use the Summary tab to choose a different rule which applies for the whole of these days.

Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.

March 2022							April 2022							May 2022						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6		1	2	3					1						
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22
28	29	30	31				25	26	27	28	29	30		23	24	25	26	27	28	29
														30	31					

# INCOMING CALL MANAGER



## 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.

Continued on next page ►

Home Messages and Calls Contacts

Phone Status

Summary Rules **Weekly Schedule**

Add New Period Rename

Apply different rules to your calls based on the time, or day of the week.

To begin, you can start with:

- An example schedule that you can customize (recommended)
- A blank schedule

Summary Rules **Weekly Schedule** Special Days

Add New Period **Rename** Apply Cancel

Using your weekly schedule, you can apply different rules at different times of day.

Once you have set up your weekly schedule here, you can use the Summary tab to choose which rules apply during the periods you have defined.

Periods (max 3)

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

Zoom In

Choose a new name for this period.

For example, you might choose "Lunch" or "Working Hours".

Name:

**OK** **Cancel**

Periods (max 3)

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

Zoom In

Phone Status

Summary **Rules** Weekly Schedule Special Days

Add New Period **Rename** **Apply** **Cancel**

# INCOMING CALL MANAGER



## 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.

Continued on next page ►

The screenshot shows the 'Rules' tab selected in the Incoming Call Manager interface. The tab has three sub-tabs: 'Summary', 'Rules' (active), and 'Weekly Schedule'. Below the tabs are two buttons: 'Add New Set of Rules' and 'Rename'. The main content area has a heading 'Create rules to handle calls differently, depending on who is' followed by two paragraphs of instructional text. At the bottom, there is a link 'To begin, start with an example set of rules' with a red arrow pointing to it.

The screenshot shows the 'Phone Status' page. It has four tabs: 'Summary', 'Rules' (active), 'Weekly Schedule', and 'Special Days'. Below the tabs are buttons for 'Add New Set of Rules', 'Rename', 'Apply', and 'Cancel'. The main content area explains that rules give advanced options for handling incoming calls. It lists three sets of rules: 'Normal', 'Reject Calls', and 'Screen Calls', each with a brief description of its default action. At the bottom are buttons for 'More Info', 'More Done', 'Edit', and 'Add New Rule'.

Two side-by-side screenshots showing the configuration for 'When no rules apply' for two different rule sets. The left screenshot is for the 'Normal' set of rules, and the right is for the 'Reject Calls' set. Both screens have a heading 'When no rules apply' and a list of options with radio buttons. The left screen has options like 'ring my phone using the Standard Ringtone', 'forward to enter a number', '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', and 'ask the caller to say their name before ringing more than one phone at the same time or in sequence'. The right screen has similar options, but the 'ask the caller to say their name before I accept the call' option is selected. Both screens have '< Back', 'Next >', 'Finish', and 'Cancel' buttons at the bottom.

Two side-by-side screenshots showing the configuration for 'Edit a rule in the Screen Calls set of rules'. Both screens have a heading 'Edit a rule in the Screen Calls set of rules' and a list of options with radio buttons. The left screen has options like 'When I receive a call from', 'an individual contact: <Select>', 'a group of contacts: <Select>', 'anyone on my contact list', 'anyone in my business group', 'this number or group of numbers: enter a number', and 'an anonymous number' (which is selected). The right screen has options like 'When I receive a call from an anonymous number', 'ring my phone using the Standard Ringtone', 'forward to enter a number', 'send to voicemail', 'play a reject message and reject the call', 'ask the caller to say their name before I accept the call' (which is selected), 'ring more than one phone at the same time or in sequence', and 'ask the caller to say their name before ringing more than one phone at the same time or in sequence'. Both screens have '< Back', 'Next >', 'Finish', and 'Cancel' buttons at the bottom.

# INCOMING CALL MANAGER



## 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**, your 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.

Continued on next page ►

This screenshot shows the 'Sets of Rules' interface. The 'Normal' set is selected and highlighted with a red arrow. Below it, there are options for 'Reject Calls' and 'Screen Calls', each with a trash icon. To the right, a default message states: 'Default: All calls will ring your phone using the Standard Ringtone'. At the bottom right, the 'Edit' button is highlighted with a red arrow, along with 'Add New Rule', 'Move Up', and 'Move Down' buttons.This screenshot shows the configuration page for the 'Normal' rule set. The title is 'When no rules apply in the "Normal" set of rules'. Under the heading 'When no rules apply', there are several radio button options. The option 'ring more than one phone at the same time or in sequence' is selected and highlighted with a red arrow. Other options include 'ring my phone using the Standard Ringtone', 'forward to enter a number', 'send to voicemail', 'play a reject message and reject the call', 'ask the caller to say their name before I accept the call', and 'ask the caller to say their name before ringing more than one phone at the same time or in sequence'. At the bottom right, the 'Next >' button is highlighted with a red arrow, along with '< Back', 'Finish', and 'Cancel' buttons.This screenshot shows the page for adding a new rule. The title is 'Enter the phone number you want to ring, and for how long.'. Below the title, there is explanatory text: '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.' and 'All phones will stop ringing as soon as one phone is answered.' Another line of text says: '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.' At the bottom, there is a form with 'Phone Number' set to '9183660901' (highlighted with a red box), 'Start' set to '20' (highlighted with a red arrow), and 'End' set to '60' (highlighted with a red arrow). The 'Add' button is also highlighted with a red arrow.This screenshot shows the configuration page for the 'Normal' rule set, similar to the previous one. The title is 'When no rules apply in the "Normal" set of rules'. Below the title, it says 'Choose which phones you would like to ring when no rules apply'. There is a grid with columns for 'Seconds into call' (0, 30, 60, 90, 120) and rows for three phone numbers: '(918) 366 0901', '(918) 366 0902', and '(918) 366 0903'. Red arrows indicate that the first three seconds of the first two phone numbers are selected. Below the grid, there is a form with 'Phone Number' set to 'enter a number', 'Start' set to '0', and 'End' set to '60'. At the bottom, there is a form with 'If I don't answer or all lines are busy, forward to' set to '9183660900' (highlighted with a red box). At the bottom right, the 'Finish' button is highlighted with a red arrow, along with '< Back', 'Next', and 'Cancel' buttons.



# INCOMING CALL MANAGER



## 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**.

Phone Status

Summary Rules Weekly Schedule Special Days

Add New Set of Rules

Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.

Sets of Rules

Normal

Normal Reject Calls Screen Calls

Default: All calls will ring more than one phone

Move Up Move Down Edit Add New Rule

Choose a name for this new Set of Rules.

Pick a name which will help you remember what this Set of Rules does. For example, you might choose "Family Calls Only" or "Forward Urgent Calls".

Name: After Hours

OK Cancel

After Hours

Normal

Reject Calls

Screen Calls

Default: All calls will ring your phone using the

Move Up Move Down Edit Add

When no rules apply

ring my phone using the Standard Ringtone

forward to (918) 366 0900

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 in sequence

< Back Next > Finish Ca

When no rules apply in the "Extended Hours" set of rules

Choose which phones you would like to ring when no rules apply

Seconds into call: 0 30 60 90 120

(918) [phone number]

Phone Number: enter a number Start: 0 End: 60

If I don't answer or all lines are busy, forward to #7901

< Back Next > Finish Ca

Example Images Continued on next page ►

# INCOMING CALL MANAGER



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

Meeting

Normal

Reject Calls

Screen Calls

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

Move Up Move Down Edit Add New Rule

Summary Rules Weekly Schedule Special Days

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

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