

# TELUS Business Connect™

## Mobile App Guide



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# Overview

## New Look, New Functionality—Improved Usability and Security

Extend your TELUS Business Connect business phone system beyond your office, take and make calls, access voicemail, manage group settings, view faxes, monitor call logs, and more.

The TELUS Business Connect Mobile App provides you and your employees with easy and convenient integrated communications—anytime, anywhere. Now they can easily connect and collaborate through voice, and fax.

The mobile app is fully integrated with company directories. It allows individuals to see their contacts' availability and eliminate phone tag or on-hold time. This new “Presence” feature shows the real-time status of co-workers' extensions (busy or not) across all devices, including their smartphones and tablets.

The new TELUS Business Connect mobile app also enables administrators to partition business and personal call logs separately for easy call tracking and phone expense control.

The TELUS Business Connect Mobile App supports Bring Your Own Device (BYOD) initiatives, and empowers you and your employees with solutions such as company directory and a single business identity for voice, text and fax— all while reducing your costs on devices, improving employee productivity, and safeguarding your business data.

**NOTE:** This document discusses managing and using the Mobile App with screen illustrations from an Android smartphone; the iPhone platform operates the same and look almost identical.

# Express Setup for Administrators

## How to Start

Configure and set up your system by logging in to your TELUS Business Connect online account from a Web browser. Follow the steps to activate Express Setup and configure your account.

Next, from your smartphone, go to your device's App store, search for TELUS Business Connect mobile app, download and install. Launch the App and log in with your TELUS Business Connect number, extension, and password.

Or from your TELUS Business Connect online Web account, click the Tools dropdown menu on the far right of the menu bar, and select Mobile Apps.

Select the appropriate app to install on your smartphone. It will start your app store interface so you can download the app. Follow your usual procedure for synchronizing the download to your mobile device.

**NOTE:** The TELUS Business Connect mobile app requires the account owner to have a Business Connect Office plan.

# Setup for Managers

Download and install the TELUS Business Connect mobile app onto your smartphone, if you haven't already done so. Go to the App Store of your smartphone, search for TELUS Business Connect, and follow the instructions to install the mobile app.

Managers are Users who are designated by the Administrator to manage Groups, such as Call Queues and Paging Groups.

Once your organization's TELUS Business Connect Administrator sets you up as a manager on TELUS Business Connect, you'll receive an email with a link giving your manager extension, and creating a password.

**NOTE:** You must use the link provided in the email and create a password before you can begin using TELUS Business Connect mobile app as a Group Manager.

Follow the on-screen instructions to create your password. You may use your existing TELUS Business Connect password as your Group Manager password, if you wish. Select and answer one of the questions from the Security Question dropdown menu.

Launch the TELUS Business Connect mobile app, and log in with your TELUS Business Connect phone number, the Group extension number (rather than your User extension number), and your password. This will log you in as Group Manager.

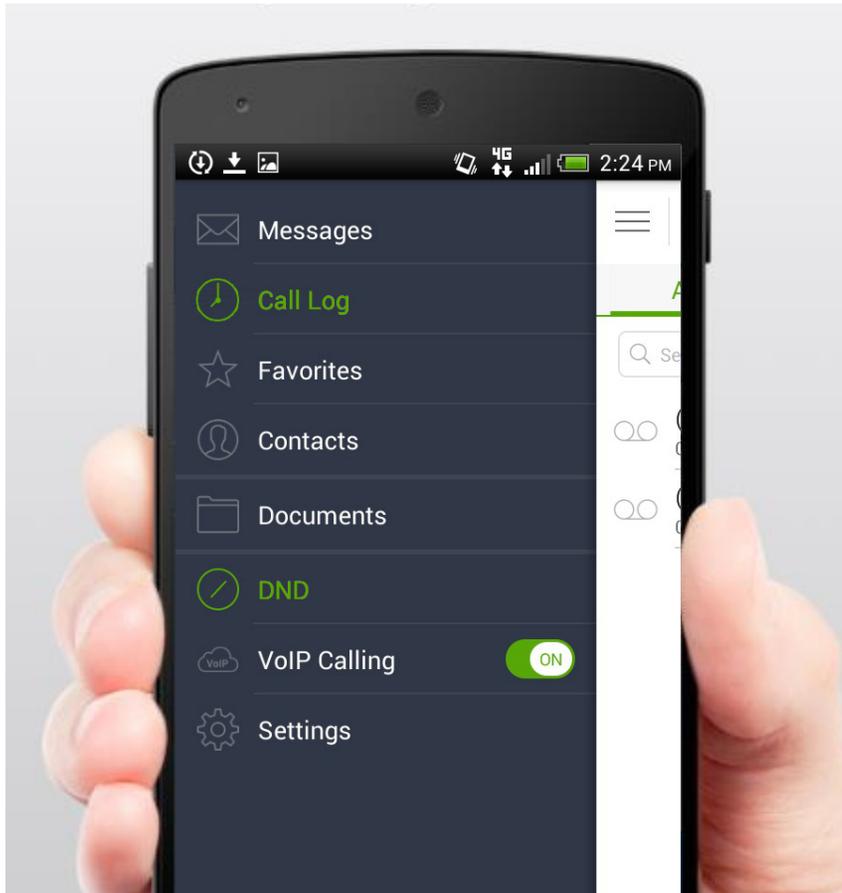
From the mobile app you can now set up your group details and add members or devices, as appropriate—see details for Call Queues and Paging Groups described elsewhere in this document.

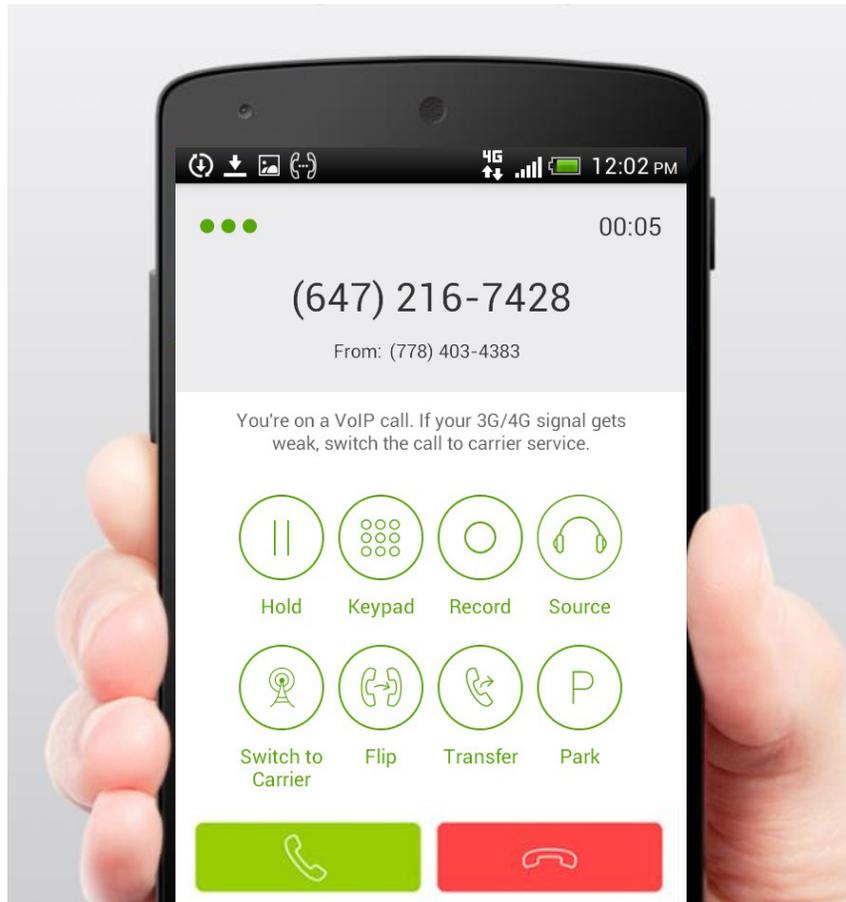
You can make changes and update the group info at any time from your TELUS Business Connect online account, or right from your smartphone app, by logging in as Group Manager.

**With the TELUS Business Connect Mobile App you can:**

- Receive business calls and faxes;
- Check your voicemail and received faxes;
- Monitor call logs that provide a detailed history of incoming, outgoing, and missed calls;
- Create custom business greetings for business and after hours;
- Set up business voicemail greetings;
- Manage your call-handling and call screening rules;
- Host or join an audio conference call with up to 1000 participants

All features and functions can be accessed and managed by logging into your Business Connect account. In addition, almost all of the Admin, User, and Group Manager features can be accessed and managed from the TELUS Business Connect Mobile App, as described in this document.





### Active Call Controls



**Transfer** lets you to transfer a call to other extensions or call queues on your TELUS Business Connect phone system.



**Record** activates On Demand Call Recording for your phone extension. Recordings are saved in your extension's online account.



**Hold** puts the other party on the line on hold until you tap it again to undo the action.



**Mute** turns off your microphone, eliminating background noise from your side of the call, and it may provide better incoming sound from the other party.



**Keypad** allows you to dial a number or press numeric inputs to access a certain department or queue.



**Source** gives you the option to use any of your audio sources. The most common audio sources for a mobile device are the headset and the internal speakers.



**Answer call button.**

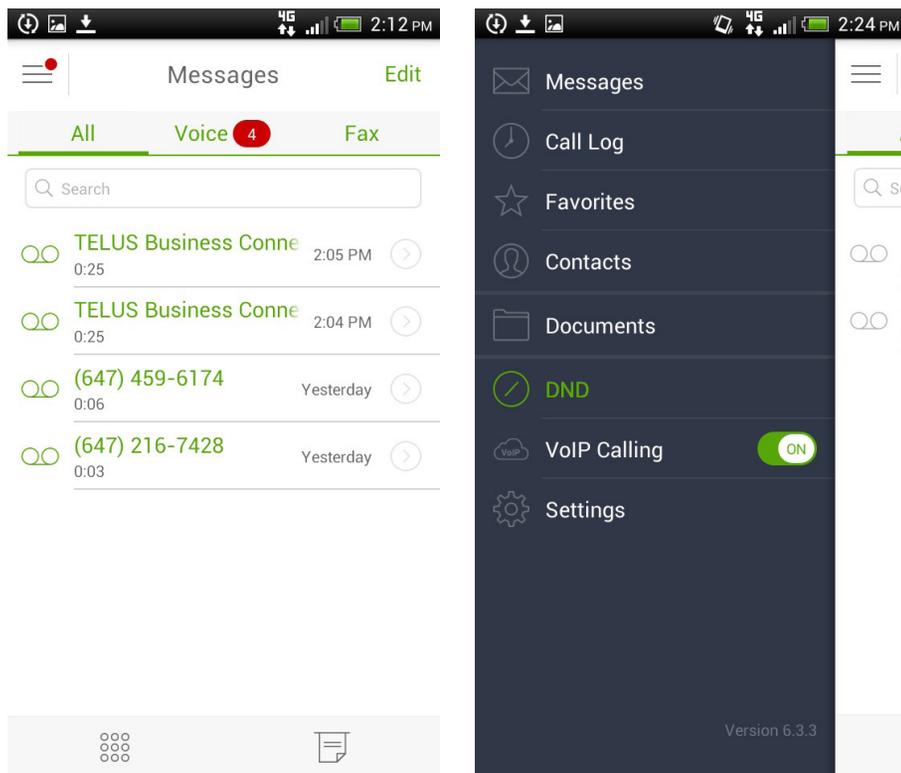


**End call button.**

## The Main Menu

On most of the App screens, click the three-line icon in the upper left of the screen to slide out the App menu. (See left-facing red arrow in figure below.)

This gives you access to most of the App features including Messages, Contacts, Documents, and Settings. You can also “swipe” left-to-right across most screens to reveal this menu.

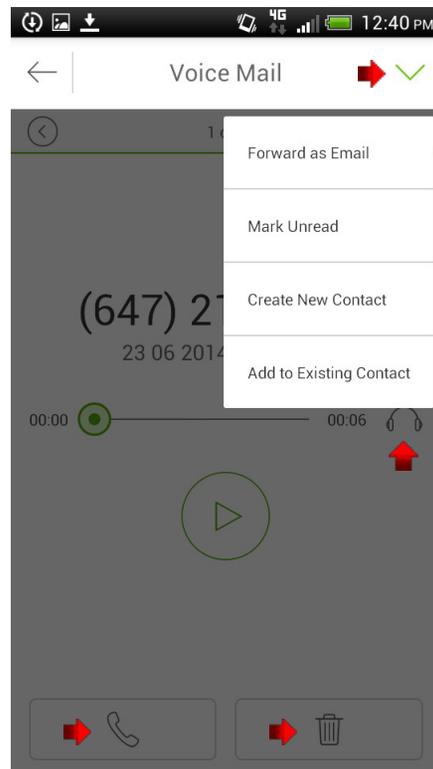
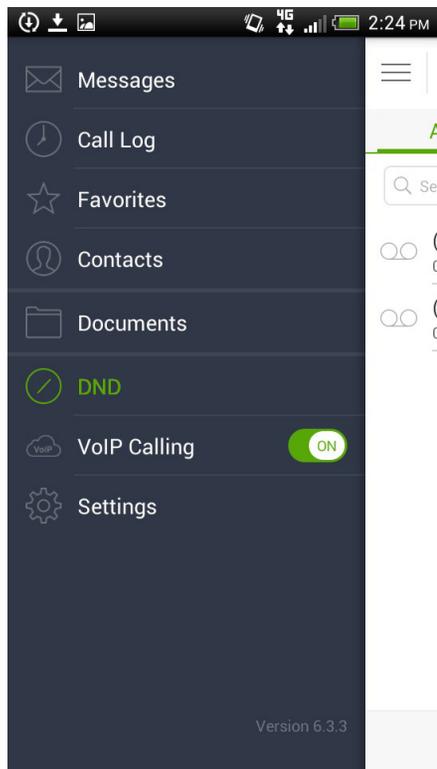


## Messages

To see your voicemail and fax messages, tap the **Menu** icon, then tap **Messages**. Tap the appropriate tab to see **All**, **Voice**, **Fax**, or **Text** messages. In the **Search** box, search for messages by sender name or number.

Tap a **message** to listen, view, or read it. Tap the circled **caret** to the right of the message to view information about it, and respond with:

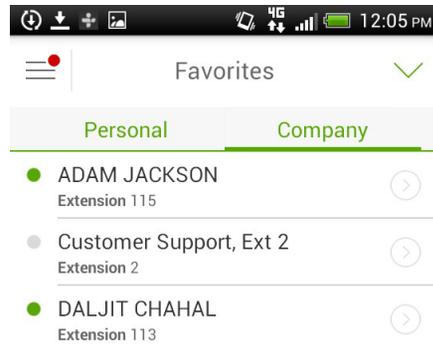
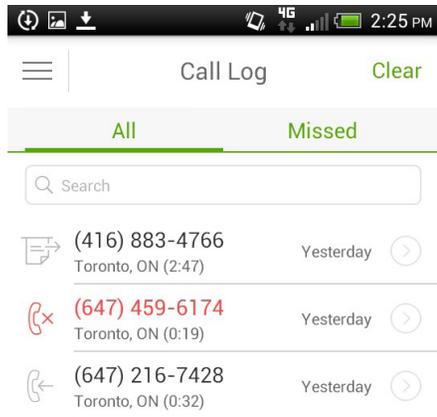
- call back
- send a text or a fax to the number
- create a new contact
- add the number to an existing contact, or
- block the number



After selecting a voicemail message, tap the **triangle** symbol at the top right of the screen to see the dropdown for various options, depending on the type of message, such as forwarding the voicemail or fax to an email address, editing a text message, viewing the contact information of the sender, or to mark the message Unopened.

To listen to your voicemail, choose **Headset**, or smartphone **Speaker**. Tap the **handset** button to return the call (you will need a Direct Number to be able to make outbound TELUS Business Connect calls from your smartphone).

Tap the **Trash** can icon to delete any message being viewed.



## Call Log

The Call Log maintains your call history, including calls you placed, received, and missed. Admins are able to view both company-wide call logs and his or her personal call log.

Dial numbers by tapping a number in your **Call Log**. (You must have a Direct Number to make outbound TELUS Business Connect calls from your smartphone.)

Tap the caret on the right side of an entry to see caller details, to call the number back or send a text or fax to the number, or to block the number.

## Favorites

Quickly find the people you contact frequently by adding them to your **Favorites**.

To add a contact to Favorites, from **Contacts** choose the **Personal** or the **Company** tab, tap a contact name, then tap the **Star** symbol to add this contact to your Favorites list.

To remove a contact from the Favorites list, click the caret next to the name to bring up the Contact Info. Tap the highlighted **Star** symbol to remove this contact in the Favorites.



## Contacts

Find the people you need, fast. The Contacts feature lets you view your personal contacts or to view the people listed in your company directory. To access your contacts, tap **Contacts** on the slide-out menu (accessed by tapping the three-line menu bar on the top left of most screens).

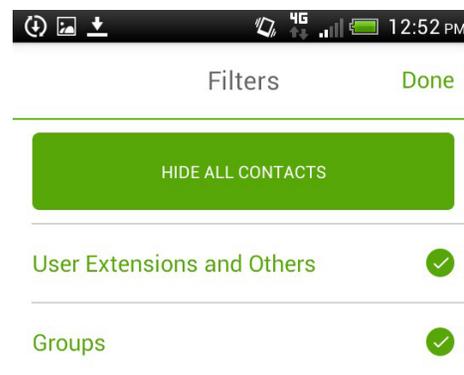
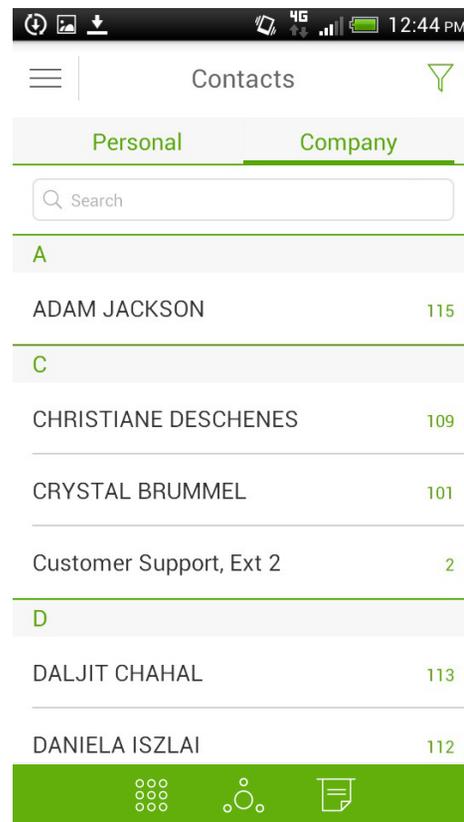
Tap **Personal** to view the contacts from your smartphone's contacts list. (You may get a message suggesting you change your smartphone Privacy settings to allow the mobile app to access this.)

Tap **Company** to see the contacts in your company directory.

Use the Search field at the top to find specific contacts by name.

To add a new contact to the Personal list, tap the **Personal** tab, then tap the caret in the upper right corner and select **Create New Contact**. Enter your new contact's details, then tap **Save**. (Company contacts come from the users in your TELUS Business Connect account and cannot be edited from the mobile app.)

Tap a contact name to view details including extensions, direct and mobile numbers, and email address.

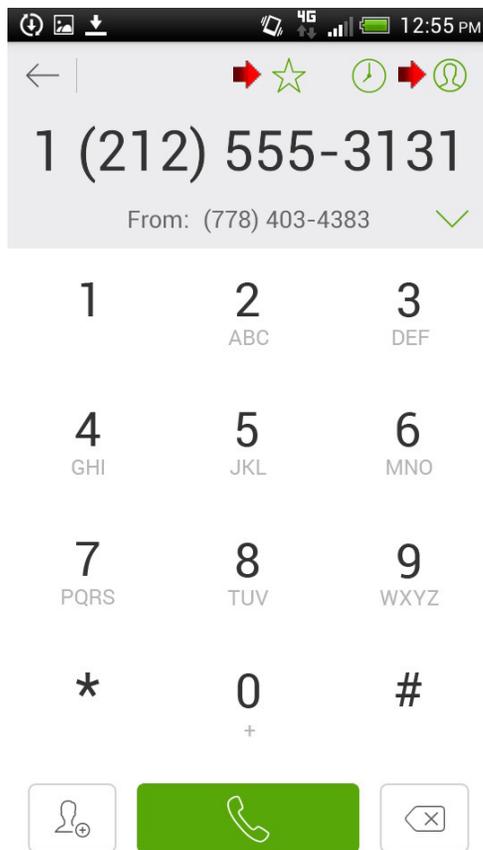


## Choose/Filter Groups in Contacts

On the Contacts page, with the Company tab selected, tap **Filter** in the upper right corner. Select **User Extensions and Others** to display all Company contacts; and/or choose **Set Filters** to display these on the Contact page. Or select **Hide All Contacts** to display no contact information on the Company page of your Contacts list.

Select the **Personal** tab, then tap the blue caret in the upper right and select **Choose Groups**. Select from among the displayed contact lists those you wish displayed on your Personal Contacts listing.

You will be able to choose contact folders/groups from any contact list with which your smartphone is synchronizing. Selected lists will display in your TELUS Business Connect Contacts under the Personal tab. Or select **Hide All Contacts** to display no contact information on the Personal page of your Contacts list.



## Making a Phone Call

To make phone calls, tap the green **Handset** icon at the bottom of most screens of the mobile app. Tap the keypad numbers, then tap the green **Call** button.

You can choose a number in your contact list by tapping the contacts icon  on the upper right and choosing the **Personal** or the **Company** list, or by tapping the star icon  at the top to access your **Favorites** lists. Tap one of their phone numbers displayed.

You can also dial directly from your **Contacts** list: Tap the three-line **Menu** icon  on the upper-left of most screens and on the slide-out menu that appears, tap **Contacts**. Or tap **Favorites** to display your most-called contacts.

Other areas, such as the **Call Log** and the **Messages** screen, display phone numbers which you can tap to call.

From the dial pad, tap the **caret** on the right of the **From** line to select your default Caller ID for outbound phone calls.

## RingOut

The RingOut feature lets you use your TELUS Business Connect business number to place outgoing calls from any phone you choose. The people you dial will see your business number on their caller ID instead of your personal name and number.

For example, if you're working from home, you can initiate TELUS Business Connect calls from your smartphone, then connect and complete the call from your home phone. The person you're calling will see your TELUS Business Connect number.

RingOut is accessed by tapping the green **Handset** icon on the bottom of most mobile app screens, such as the Message screen, the Contacts screen, and the Call Log screen.

Use the dial pad that appears to dial the number you want to call. Your mobile app will do the rest. (To specify your RingOut phone, see **RingOut Mode**, next.)

When you've entered the phone number on the dial pad, you can also click the  button to create a new Contact with this number, or to add the number to an existing Contact.

## RingOut Mode

To make outbound calls, the mobile app uses your cellphone's native calling system through your cellphone carrier. Use RingOut Mode to maintain your presentation on such calls, including such features as Caller ID and call logging. You keep your personal cellphone number private. RingOut calls use carrier voice minutes rather than your carrier data plan.

RingOut lets you use your TELUS Business Connect business number from any phone you choose, including your smartphone. To configure, from **Settings >My Mobile App Settings**, tap **RingOut Mode**.

Choose a TELUS Business Connect device to set as your RingOut Mode phone. Or tap **Another Phone** to add phone numbers, then tap one of them to be your RingOut device.

To avoid accidentally sending calls to your personal voicemail (if you don't pick up when your phone rings, or if you misdialed), turn on **Confirm Connection** so the mobile app will prompt you to press 1 before it dials the number and connects your call.

## VoIP Calls

The TELUS Business Connect mobile app can make and receive calls using VoIP (Voice over IP) which uses the Cloud (Internet) instead of your wireless carrier's 3G or 4G network. This can save carrier voice and data charges, especially when traveling internationally.

# Conferencing: Conference Calling

A single conference bridge phone number is provided for each account, shared by all users—no need for your users to keep track of multiple bridge lines.

Each user gets their own individual host and participant access code, so they can hold conference calls whenever they want, wherever they are.

Each user can host a conference with up to 1000 attendees, using their IP desk phone while in the office, or their Softphone on their desktop computer, or the Business Connect mobile app while on the go. Conferences are reservationless—you send an invite to participants, and the conference starts as soon as you join as host.

To start a conference, tap the **Conferencing** icon  at the bottom of most screens.

The **Conferencing** screen shows the dial-in number, **Host** and **Participant** access codes, and Invite buttons.

As host, the user can mute participants, get caller counts, record conferences, and more.

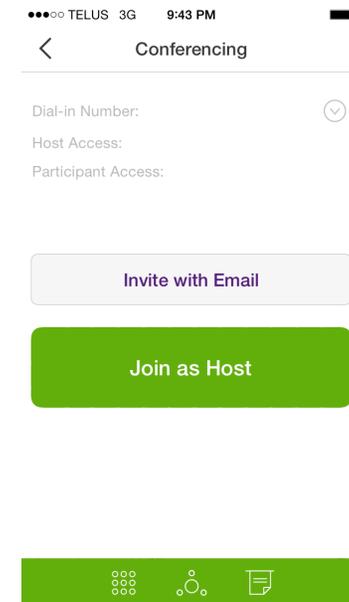
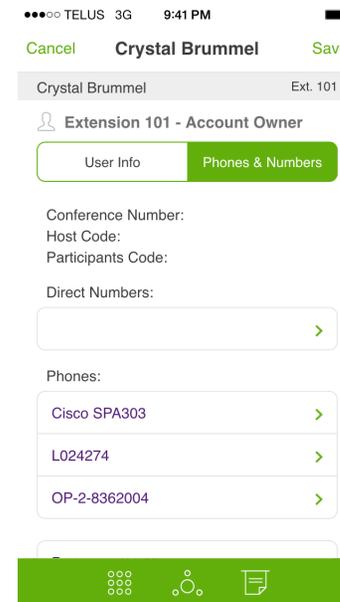
The main conferencing number is available in Canada. In addition, in-country dial-in numbers are available for use in over 40 countries.

Administrators can locate the unique conference calling information for a specific user by going to **Settings > Phone System > Users**; select a user and click the tab **Phones & Numbers**. You will see the conference number, host code, and participant access code for that user.

Tap **Invite with Email** to create a new email that says “Please join now, meeting in progress” and contains the conference number and the participant access code the attendee should use to join the meeting. Add a subject line and additional messaging, plus any attachments as needed, and tap **Send**.

**Note:** You can attach documents from your files to the Invitation Email.

Tap **JOIN AS HOST** to call and log in automatically and begin your audio conference.



**Tap to join** allows a participant to join a conference call without entering the Participant Access code. Both the host and the participant must have the Business Connect mobile app installed.

# Faxing

You can send, receive, and view faxes using the TELUS Business Connect mobile app. If you have an iPhone, you can use that device's AirPrint function to directly print any fax.

First, we'll cover viewing received faxes in the mobile app. Then we'll set up outbound faxing, and explain how to send faxes.

## Receiving and Viewing Faxes

Your TELUS Business Connect phone number by default receives both voice calls and faxes. (Optionally, you can set up specific extensions to receive only voice calls or only faxes.)

View the faxes you've received in the **Messages** section of the TELUS Business Connect mobile app. You can also arrange to receive faxes as PDF attachments in your email account.

### To access faxes on your smartphone:

1. Tap the **Menu** icon, then tap **Messages**.  **Messages**
2. For convenience, tap the **Fax** tab  to see just your faxes.
3. Tap the **Fax** icon  **Wendy Wang** 2 pages next to the fax message you want to view.
4. The fax will be displayed on screen.

## FaxOut from Mobile App

FaxOut is available to all users with the latest TELUS Business Connect mobile app. You can send or forward documents as fax messages to any contact anywhere from your iOS and Android-powered devices.

1. Launch the TELUS Business Connect mobile app from your mobile device. 
2. Tap the **Fax** tab. 
3. Enter recipient's name (with associated number) in the **To:** field.  
**Note:** You can also click the  icon to choose a contact from your phone.

|                  |                |   |
|------------------|----------------|---|
| ←                | Fax a Document | Send  |
| To:              |                |  |
| Cover Page:      | Contempo       |  |
| Documents to Fax |                |  |

4. Select your Cover Page (optional) and fill it in.
5. Tap  to attach a document.
6. Attach files from Dropbox, Box, Google Drive or your phone or tablet.
7. Authorize TELUS Business Connect to access your files (required only once).
8. Tap **Send**.

**Note:** Documents can be added to your **Documents** folder from email attachments. From your smartphone's email app, open an email and tap and hold the attachment name until the grey screen of app icons displays; tap the icon **Open**. The document will be added to the **Documents** folder, from which it can be selected for faxing.

## Choosing a Default Fax Cover Sheet

A cover sheet is attached to each fax you send through the TELUS Business Connect fax service. On the **Fax a Document** screen, tap  to select the default **Contempo** cover sheet. Tap  again to preview other available cover sheets. Select the cover page you want and click **Save**. The variable information on the cover page will be filled in during the fax-sending process.

**Select Cover Page**

- None
- Ancient
- Birthday
- Blank
- ClasMod
- Classic
- Confidential
- Contempo
- Elegant
- Express
- Formal
- Jazzy
- Modern
- Urgent

FAX

Date: { Date }

Pages including cover sheet: 1

|                   |                             |                   |                             |
|-------------------|-----------------------------|-------------------|-----------------------------|
| <b>To:</b>        | {Recipient Name}            | <b>From:</b>      | {Sender Name}               |
|                   | {Recipient Company}         |                   | {Sender Company}            |
|                   | {Recipient Street}          |                   | {Sender Address}            |
|                   | {Recipient City}            |                   | {Sender City}               |
|                   | {Recipient Sta {Recipient Z |                   | {Sender State} {Sender ZipC |
| <b>Phone</b>      | {Recipient Phone}           | <b>Phone</b>      | { Sender Phone }            |
| <b>Fax Number</b> | { Recipient Fax }           | <b>Fax Number</b> | { Sender Fax }              |

**NOTE:**

{ NOTE... }

Contempo fax cover sheet

## Email Addresses That Can Send Faxes

On the **Fax Settings** screen, under **Faxes Sent via Email**, under the line Email addresses permitted to send faxes add, one by one, the email addresses from which users can send faxes by email through your account with TELUS Business Connect. Click **Add** after each one; click **Save** when done. Email addresses might include alternate company accounts, personal accounts, or accounts for contractors. You can store up to five such email addresses.

When a fax is sent by email as described below, the system checks the email address of the sender, and sends the fax if it is on this approved list.

Omitting the Cover Sheet When Email Subject is Blank is in the same information block. When you send a fax by email, the subject line of the email is put on the cover page. Check **On** to omit the cover page by sending the fax without a subject line.

## To Send a Fax by Email

You can email documents to a special TELUS Business Connect email address that automatically converts the attachments into fax format and sends them to the fax number specified. You can send faxes by email in this way from any email address you have added to **Email addresses permitted to send faxes** described above.

1. Create an **email message**. **Attach** one or more documents you wish to fax.
2. The text in the **Subject Line** of the email will be added to the cover sheet. (If no subject line text is included, the cover sheet will be omitted if you set that feature as described above.)
3. Send the email **to the recipient's 10-digit fax number at the email address faxnumber@fax.telus.com**. For example, to send a document to the fax number 1-510-555-1212, you would use this email address: **18885551212@fax.telus.com**. You can send the fax to multiple recipients by adding fax number-addresses, separated by a comma, thus: 5105551212@, 5115551212@, 2105551212@.

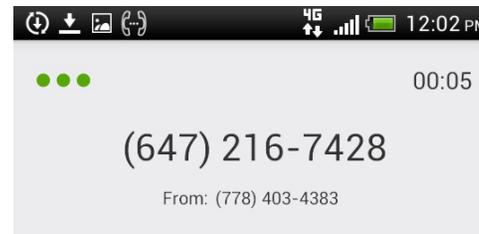
## Call Recording

### On-Demand Call Recording

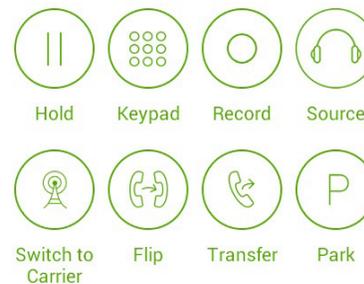
Once On-Demand Call Recording has been set up, users can activate call recording while taking a call on a Office IP phone, or anywhere using the TELUS Business Connect mobile app.

Press the **Record** button  on the Call Control screen to start recording a call, and once again to end the recording. The **Start** announcement will play when recording begins, and the **Stop** announcement will play when the recording ends.

Users can find their call recordings by clicking **Messages** in the menu bar, then **Recordings**. On-Demand Recordings are saved for 90 days. Download recordings to retain them longer.



You're on a VoIP call. If your 3G/4G signal gets weak, switch the call to carrier service.

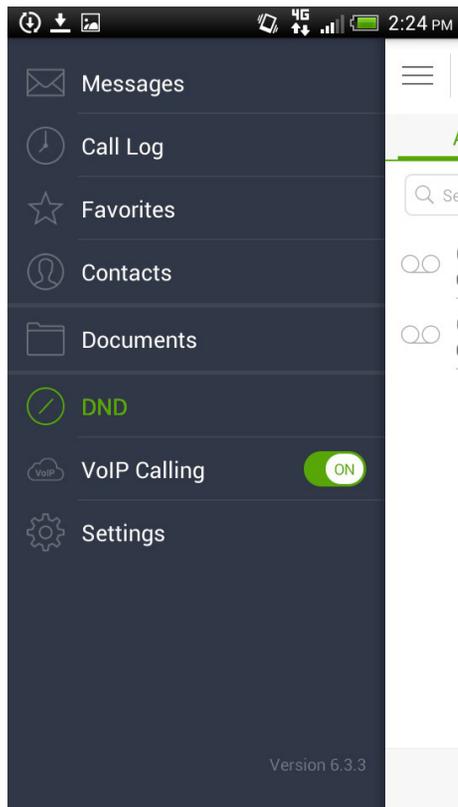


**NOTE:** The warning message does not play for outgoing calls; the user making the outgoing call **must** announce when the call is answered that the call is being recorded.

## Do Not Disturb (DND)

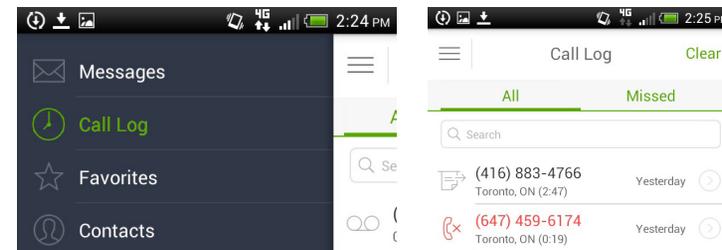
When you're busy and don't want to be interrupted, use Do Not Disturb to forward calls directly to voicemail.

To change settings for Do Not Disturb, tap  and select **DND** from the slide-out menu. Choose a setting from the options shown.



## Call Log

TELUS Business Connect gives you easy access to your call history, including calls you placed, received, and missed. To view your call history, tap . On the slide-out **Menu** tap **Call Log**. To see your entire call history tap the **All** tab.



To see only calls you've missed, tap **Missed**. To see more calls in your call log, scroll to the bottom and pull up, to load earlier records.

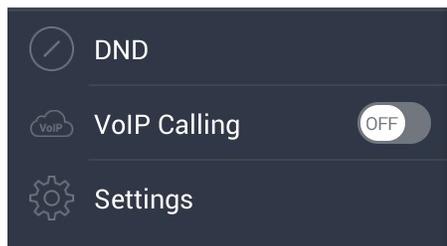
Dial numbers by tapping any number in your Call Log (You must have a Direct Number to make outbound calls from your smartphone.). Tap the **caret** on the right side of an entry to see caller details.

### Switch from Business Connect to Carrier call:

- End the phone call.
- Tap **Menu > VoIP Calling**.
- Turn VoIP Calling to **Off**.
- Try your phone call again.

Now your call will go over your carrier's connection, which may be a better connection if available, though it will consume carrier voice minutes.

You can turn VoIP Calling back to **On** later, when your Wi-Fi connection situation has improved.



## Presence

Presence is a feature by which you can see if another user is on the phone. Presence-enabled Business Connect Office IP phones use lights to indicate which specific user extensions are in use or on hold, with the user's permission.

Presence cannot be monitored from the mobile app, but the Admin can manage Presence settings for the users, and users can manage their own Presence settings, from their mobile apps.

### Administrator:

Admins can use their Smartphone App to set permission to share a user's presence status with colleagues by going to **Settings > Phone System > Users**, selecting a user, then **User Info**, tapping the **Phones & Numbers** tab, then tapping **Presence**. Admins can set their own Presence as a user by selecting their own name/extension.

### Tap Appearance.

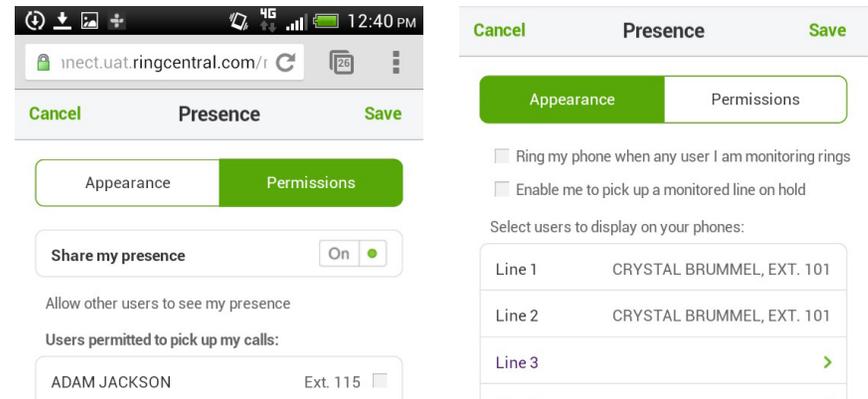
If the user has no Presence-enabled phones, you will see the message Currently none of the phones on your extension can show presence. Phones with the capability can be purchased from a TELUS Business Connect sales representative.

If the user does have a Presence-enabled Office IP phone, its Presence lights will be listed as shown on the right. The first two lights (Line 1 and Line 2) are dedicated to that user and cannot be changed. Tap on the other lights to choose colleagues whose presence you wish the user to monitor, from among those who have granted permission to show their presence status.

When you add extensions for this user to monitor with Presence, you can also check [Ring my phone when any user I am monitoring rings](#) so the user will know when the monitored user's phone is ringing; and/or check [Enable me to pick up a monitored line on hold](#) so this user can act as backup to the other user.

Now tap **Permissions**.

Tap **Share my presence**. When **On**, this allows other users to see this user's presence status—whether the user is on the line. Note that Presence detects calls to numbers/extensions. No matter which actual device the call is sent to, the system detects that the number/ extension is ringing, active, or on hold. You can also select other users who can pick up this user's phone calls. A user can thus answer a busy manager's calls, or a call to a user who is in a meeting or out at lunch.



### User:

Manage your Presence settings from the mobile app by tapping **Menu > Settings > My Extension Settings > User Info**. Tap the **Phones & Numbers** tab, then scroll down and tap **Presence**.

Under the **Appearance** tab, view and manage your Presence settings for that phone.

Or you may see the message “Currently none of the phones on your extension can show Presence. Phones with this capability can be purchased from a TELUS Business Connect sales representative.”

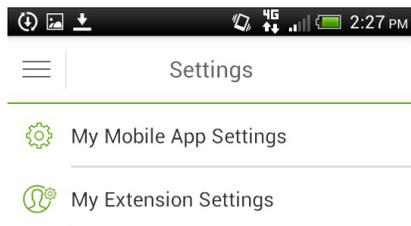
Under the tab **Permissions** you can check those colleagues who can monitor your phone's Presence. Then click **Save**.

# Managing Your User Settings

Most of the special customizable features of your TELUS Business Connect mobile app are found in the **Settings** area, particularly under **My Extension Settings**. This includes such items as User Info, Call Handling including Call Forwarding, Call Screening including Blocking, Messages that alert you to received faxes and voicemail, and VoIP settings for making outbound calls.

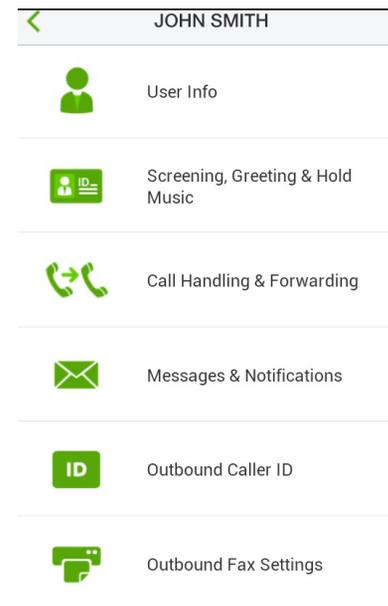
These features are the same for Users and for Administrators acting as Users.

From the **Menu**, tap the **Settings** icon. Now tap **My Extension Settings**.



## Extension Settings

This screen contains most of the functions you'll use to manage your own user settings.



### User Info

To manage your basic settings, greetings, call screening, call handling, direct numbers and desktop phones if you have them, security settings, notifications, and more, tap **User Info**.

Cancel    JOHN SMITH    Save

Extension 105

User Info    Phones & Numbers

|                  |                      |
|------------------|----------------------|
| Extension Number | 105                  |
| First Name       | JOHN                 |
| Last Name        | SMITH                |
| Record User Name | >                    |
| Contact Phone    |                      |
| Email            | JOHN.SMITH@telus.com |

User Hours    24 hours    >

Voice Manager Password    >

- **Extension Number:** When someone calls you on your company number, they can reach you by entering the this extension number. They can also reach you by dialing your Direct Number, if you have one.
- **First Name/Last Name:** You can edit your name here.
- **Record User Name:** TELUS Business Connect uses text- to-speech conversion to pronounce your name when answering your calls. If your name is mispronounced, you can tap this item to record the correct pronunciation (TELUS Business Connect will call you to capture the recording).

Or tap the Text-to-speech name field and type in a phonetic pronunciation. (You must log into your online account to hear the pronunciation being used by the system

- **Email:** This email address can be used for notifications.
- **Contact Phone:** This is an optional alternative phone number that might be used for call forwarding, if you wish.
- **Company Name:** Optional.
- **Address:** Optional.

## User Hours

Set your user business hours here. The default is 24 hours, seven days a week. If you set specific business hours here, you can then set call- handling rules that will apply during business hours and separate call handling rules for after hours.

Tap **User Hours**. Tap **24 hours** for incoming calls to be handled the same way all the time, including weekends. Tap **Specify hours** and specify the days and times you are available to take calls. Setting specific hours will allow you to set call-handling rules that apply during Business Hours and separate call-handling rules for After Hours. Also check the **Time Zone** setting at the bottom of this screen. When you're finished, tap **Save**.

You may also **Change User Password** from this User Info menu.

Cancel    Voice Manager Pas...    Save

Enter current password, make desired changes and select save.

**Change Password**  
Used to login to your Voice Manager clients

|                  |
|------------------|
| Current Password |
| New Password     |
| Confirm Password |

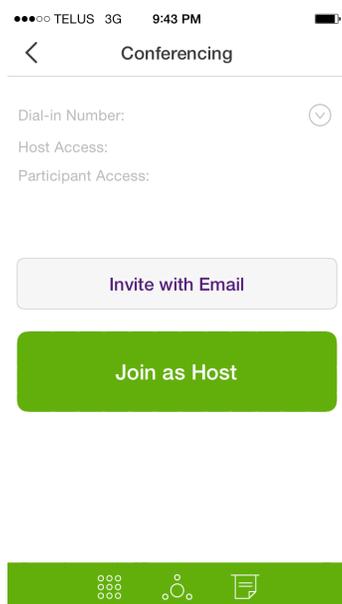
Your new password must be 8 - 32 characters, and must contain at least one letter, one number, one special character (!, @, #) / upper case letter, non-repeating, non-sequential.

**Change PIN**  
Used to access your Voice Manager account from a phone

|             |
|-------------|
| New PIN     |
| Confirm PIN |

# Phones & Numbers

At the top of the **User Info** screen, tap **Phones & Numbers**.



Here you will see the direct-dial numbers, if any, assigned to you.

- **Conference Number:** On this screen you will also see your company **Conference Number, Host Code, and Participant Code**. You can use this information to start or join a conference; or you can simply tap the slideout **Menu** and tap **Conference** to set up and manage your Conferences.
- **Direct Numbers** allow customers to contact you directly without having to go through the company receptionist or phone tree.

If you have direct numbers, you can tap each number to select the number type—voice and fax, voice only, or fax only—for each.

Tap **Add a Direct Number**—if you are not an Administrator, you will receive a message to contact your Administrator to request direct numbers.

If you do have Administrator privileges, you can add a Direct Number yourself. To add one or more numbers, tap **Add Number** and follow the screens to choose a Local, a Toll-Free, or a Vanity (custom) number. Additional charges for extra numbers will be provided on the Order Confirmation screen.

- **Add Phone:** This is an Administrator function and must be done through the RingCentral online account. Administrators can add, remove, or reassign phones.

## Presence

See “Presence” above for information on managing Presence settings.

## Call Screening, Greeting & Hold Music

From the **Menu** go to **Settings > My Extension Settings > Call Screening, Greeting & Hold Music**.

1. Tap the **User Hours** tab (if displayed).
2. Turn **On User Greeting**.

Cancel
Screening, Greeting ...
Save

User greeting:

User greeting

On

Set Greeting
Custom >

Example: "Thank you for calling John. Please wait while we connect you."

3. Tap **Set Greeting**.

4. On the **Set Greeting** screen, review the text of the default greeting. To hear it, tap **Play**. The Auto-Receptionist will read your name using text-to-speech technology. If you want to use the default greeting, tap **Save** (or **Cancel** if you have made no changes).
5. Or create a **Custom** greeting.
6. To record a Custom greeting:
  - a. Tap **Custom** and then tap **Record**.
  - b. Provide a phone number for the system to call, or have it call your forwarding number (select one under the **Forwarding Number** dropdown below).
  - c. Tap **Call Now**.
  - d. TELUS Business Connect will call you and prompt you to record your greeting.
  - e. On the **User Greeting** screen, a message will confirm that your custom message has been successfully received.
  - f. To listen to your custom greeting later, access your account on the Web.
  - g. Tap **Cancel** to return to the previous screen.

## Screening and Blocking Calls

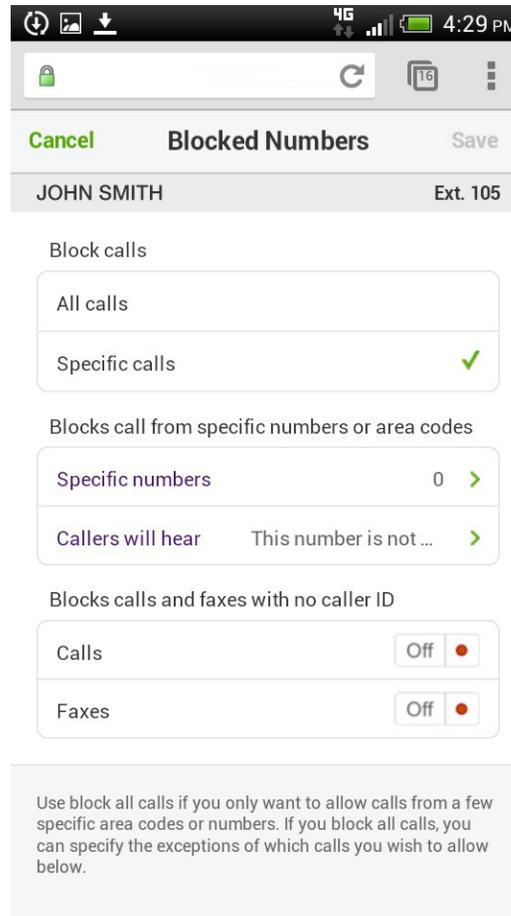
At the top of the **User Info** screen, tap **Phones & Numbers**.

1. Turn on **Call Screening** and choose to **ask callers to say their name before connecting**:
  - a. If Caller ID is not present,
  - b. If the caller is not in the user's Contact list, or
  - c. Always.
2. Turn on **Audio While Connecting**, and select the style of music to be played to the caller.
3. Turn on **Hold Music** and select the style of music to be played to the caller. Choose from a dozen and a half types of music— from easy listening to jazz, country, classical, corporate, Latin, or none. You can also choose a simple ringtone.
4. To listen to the music options, tap the **Play** button.

5. Tap Blocked Numbers and select from the options for blocking calls.
  - a. **All Calls**—If selected, you will not receive any calls or faxes made to this number, unless you select Allowed Numbers, below, and enter specific numbers or area codes.
  - b. **Specific calls** will block all calls and faxes from specific numbers or area codes you enter, or will block calls and faxes with no Caller ID.
  - c. You can also **Block calls from Pay Phones**.

Each choice also lets you set the message callers will hear, such as “This number is not available from your calling area” or “Mailbox Full.”

6. Tap **Save**.



The screenshot shows the 'Blocked Numbers' settings for 'JOHN SMITH' (Ext. 105). The screen has a 'Cancel' button on the left and a 'Save' button on the right. Under the heading 'Block calls', there are three options: 'All calls', 'Specific calls' (which is selected with a green checkmark), and 'Blocks call from specific numbers or area codes'. The 'Blocks call from specific numbers or area codes' section includes 'Specific numbers' (set to 0) and 'Callers will hear' (set to 'This number is not ...'). Below this, there is a section for 'Blocks calls and faxes with no caller ID' with toggle switches for 'Calls' and 'Faxes', both currently set to 'Off'.

Use block all calls if you only want to allow calls from a few specific area codes or numbers. If you block all calls, you can specify the exceptions of which calls you wish to allow below.

Repeat this process with the **After Hours** tab.

## After Hours Greeting

**NOTE:** If in Call Handling/After Hours you choose **Only Play Greeting and Disconnect**, you will now have the opportunity to choose a **Default** message or a **Custom** message.

If in Call Handling/After Hours you instead chose to **Unconditionally forward** after-hours calls, or to send after-hours callers **directly to voicemail**, your After-Hours greeting will not be played. You can still set **Blocked Numbers** handling.

## Call Handling & Forwarding

Go to **Settings > My Extension Settings > Call Handling & Forwarding**.

Review **Business Hours** and **After Hours** settings, and create **Advanced call-handling rules**.

### User Hours Call Handling & Forwarding

Choose from among the many options for determining which phones will ring, in what order, when calls come in during User business hours.

- Your TELUS Business Connect **Direct Numbers**, if you have any, are listed first. Tap **On** for the ones you want to ring your during business hours. If you have no direct numbers, but only extensions, no numbers will be displayed here.
- Tap **Ring my existing numbers** to add non-TELUS Business Connect numbers you may have, such as your home phone. Tap the space next to the label, such as **Home**, and type in a phone number, then tap **On** to activate it.
- To call outside numbers with extensions, put an asterisk between them, thus: **[number] \* [extension]**. The system will dial the number, pause, then dial the extension.
- Tap **Forward calls to other user's phone** to select other users on your-TELUS Business Connect account to add to your forwarding list.
- Tap **Change Ring Order** to decide in which order phones will ring when using **Ring Sequentially**. Tap **Back** when done.
- Tap **Edit Ring Groups** to check phones you want to be treated as a group. For example, if you use **Ring Sequentially**, then your Ring Order can include groups of numbers that will ring as a group (that is, simultaneously when it is their turn). Click **Back** when done.

- Tap **Number of Rings** to set how many times a given phone will ring before the call is forwarded to the next number, or sent to voicemail. (Keep in mind how many total rings callers will be subject to if the call is not answered.)
- Tap **Sequentially** or **Simultaneously** to have the phones to ring one after the other in the order given in Ring Order, or all at once.
- Tap **Smartphone and Softphone** to have your TELUS Business Connect Softphone call controller, if you have downloaded and installed it on your desktop computer, display incoming calls as soon as they come in. This gives you the opportunity to pick up the call on your Softphone, or send it to voicemail, or otherwise manage the call before other call-handling rules begin. Select the number of rings to **Wait before forwarding begins**.

### After-Hours Call Handling & Forwarding

Tap **After Hours**, then select:

- **Send callers to voicemail**—You will be able to create a custom voicemail message or accept the default message.
- **Play announcement and disconnect**—You will be able to create a custom announcement or accept the default message.
- **Forward Calls**—Turn On phones listed under Ring these phones during **after hours**.
- **Unconditional Forwarding** sends calls directly to a specified number without applying any call-handling or call-screening rules.

## Incoming Call Information

At the bottom of the User Call Handling screen, tap Incoming Call Information to set how inbound calls will be displayed to you on your device—helpful for distinguishing business calls from personal calls. (Settings for Incoming Call Information are the same for both Business Hours and After Hours screens, not separate.)

- **Incoming number displayed to me** – Typically you will see the Caller ID of an incoming call. You can tap **Caller's Phone Number Options**, just below, and choose, for callers whose Caller ID is blocked or unknown, to have displayed the **number being called**.

You can also have a numeric **prefix or suffix** added to the Caller ID being displayed, which can be useful for immediately identifying calls from your TELUS Business Connect system, to distinguish them from incoming personal calls.

Under **Display this call information** you can tap **On TELUS Business Connect phones only** or display the call information **on All Phones**.

Alternately, tap **Called Number** to have the number being called displayed instead of the Caller ID. Again, this is useful for recognizing business calls.

- **Play announcement before connecting.** When you receive a call from the TELUS Business Connect system, whether directly or by call forwarding, you will hear “You have a call; press 1 to accept.” This tells you the call is a business call, rather than a personal call. You can set this feature so that you **always** get such an announcement, never get such an announcement, or only get such an announcement when the call is coming in **to a non-TELUS Business Connect device**—such as when calls are forwarded to your home phone.
- **Include Mailbox Name in announcement.** The mailbox name being called is played as part of the incoming call information announcement—for example, “Mary, you have a call,” or “Sales, you have a call.”
- **Require my password to answer** protects your business calls when on the road or at home by requiring your TELUS Business Connect login password for any calls coming through TELUS Business Connect, even calls forwarded to your home phone, for example.

## Call Flip

TELUS Business Connect Call Flip lets you transfer live conversations from one device to another quickly and easily. For example, when you are on a call and arrive home after your commute, you can flip the call to your home phone. Simply dial two numbers and Flip.

To manage your Flip numbers, go to **Settings > My Extension Settings > Call Handling & Forwarding**. Towards the bottom of Call Handling, click the **Call Flip** bar. (You will find a Call Flip bar on both Business Hours and After Hours screens; settings are the same on both, not separate.)

You will see a list of numbers/devices assigned to you, including desk phones, smartphones, and the Softphone, as well as numbers and extensions from your Company Contact list. **The first eight positions are your Call Flip number positions**. Use the **up-and-down arrows** to move entries up and down until you have populated your eight Flip positions to your satisfaction.

## To use Call Flip

When you are on a phone call, press the **asterisk key (\*) and a number** corresponding to the device to which it is assigned, and the call is transferred immediately to that device. For example, if you have the number 2 assigned to your home phone, tapping **\*2** while you are on a call will instantly transfer the call to your home phone. Call Flip makes it easy and convenient to flip calls from device to device as you move about.

## To add numbers to your Call Flip list

Back on the main **Call Handling & Forwarding** screen, tap **Ring my existing phone numbers**, turn **on** other devices listed, and also to enter additional phone numbers such as your home phone, and tap them **On**.

Tap **Save**.

Tap **Call Flip**. You should see the phones you selected added to the Call Flip list. You can change the order (and thus the assigned Flip numbers) to suit. (If you don't see the numbers you added, go back to the previous step and remember to **Save** before moving on to Call Flip.) The numbered entries not being used are labeled "Unused".

## Call Handling – Advanced Rules

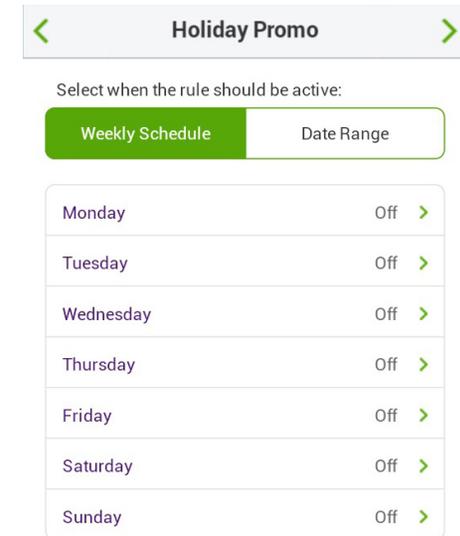
**Advanced Call Handling** lets you create specific additional rules for your number or extension based on date and/or time of call, or Caller ID, or the number being called. These rules override your regular call handling rules for that number.

### To create an Advanced Rule

1. Go to **Settings > My Extension Settings > Call Handling & Forwarding**, then tap **Advanced**.
2. Tap **Add Rule**.
3. Give your rule a **Name**, then select the conditions: **Date and/or Time** the call comes in; the **Caller ID** of the caller; and/or the **Called Number**. You can combine these selections.
4. Tap **Next**.
5. If you selected Date and/or Time as your rule condition, now select a **Weekly Schedule**, with specific times for each day if you wish. Or select a **Specific Date Range**.
6. If you selected **Caller ID** for this rule, enter one or more phone numbers, or choose names from your Contact List, or enter area codes or other partial numbers.
7. If you selected **Called Number**, choose the number(s) to which the rule will be applied. The choices will be the **Main Number**, or the **Auto-Receptionist** for the Group.

8. Tap **Next** and choose when to apply the rule: during **Business Hours**, **After Hours**, or **Always**.
9. Tap **Next**.
10. Select the action to take when incoming calls match this rule.
  - a. **Forward Calls:** Then set custom **Call Screening**, **Call Forwarding**, or **Messages handling** for these calls.
  - b. **Take Messages Only** to send callers to voicemail. You can choose to take messages or not, and can customize the voicemail greeting.
  - c. **Play Announcement Only and then end the call.**
  - d. **Unconditional Forwarding**, which immediately forwards the call to a number you then select, bypassing any other call handling, including greetings, call screening, voicemail, and Softphone.
  - e. You can also set **Group Greetings and Call Handling** for this rule, and under **Messages** choose a voicemail greeting and select the extension that will receive messages generated by use of this rule.

- f. Tap **Done**.



Select when the rule should be active:

**Weekly Schedule** | Date Range

|           |     |   |
|-----------|-----|---|
| Monday    | Off | > |
| Tuesday   | Off | > |
| Wednesday | Off | > |
| Thursday  | Off | > |
| Friday    | Off | > |
| Saturday  | Off | > |
| Sunday    | Off | > |

Because these Rules can be made quite complex and sophisticated, it is a good idea to test a new rule to make sure it operates the way you intend.

You can edit, changing details and conditions, turn the rule on and off, or delete any of these Rules by tapping **Advanced** from Call Handling, then tapping on the named Rule and making desired changes on the screens that follow.

## Messages & Notifications

The Messages & Notifications screen lets you manage your voicemail greetings, and receive notifications of received voicemails, faxes, or missed calls.

Tap the **Menu > Settings > My Extension Settings > Messages & Notifications**.

### Voicemail Greeting

The process for setting voicemail greetings are the same for Business Hours and for After Hours.

Tap **Take Messages** to **On** or **Off**.

When **On**, tap **Voicemail Greeting** to view the script of the default voicemail greeting. To hear it, tap **Play**. If you want to use the default voicemail greeting, tap **Cancel** to return to the previous screen. Or record a **Custom greeting**.

When **Take Messages** is turned **Off**, tap **Unavailable Greeting** to view the script of the default voicemail greeting saying you are unavailable. To hear it, tap **Play**. If you want to use the default greeting, tap **Cancel** to return to the previous screen.

Or record a **Custom** voicemail greeting. TELUS Business Connect will call you so you can record your greeting over the phone.

### To record a custom voicemail greeting:

1. Tap **Custom**, then **Record**.
2. Provide a phone number, then tap **Call Now**.
3. TELUS Business Connect will call the number. Follow the instructions to **record**, **review**, and **save** the message.
4. On the **Record over the Phone** screen, tap **Save**.

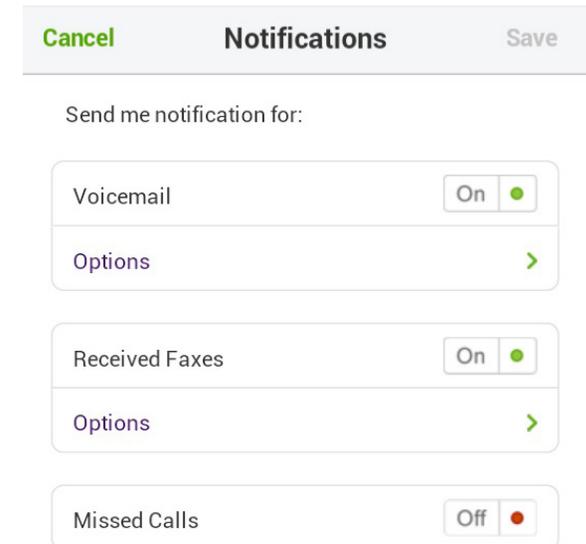
Repeat this process for the **After Hours** tab.

### Notifications

At the bottom of the **Messages & Notifications** screen, tap **Notifications**.

Here the Admin or the User can be notified, by email or text message (SMS), of various events such as received voicemail, received faxes, missed calls, and fax transmission result messages.

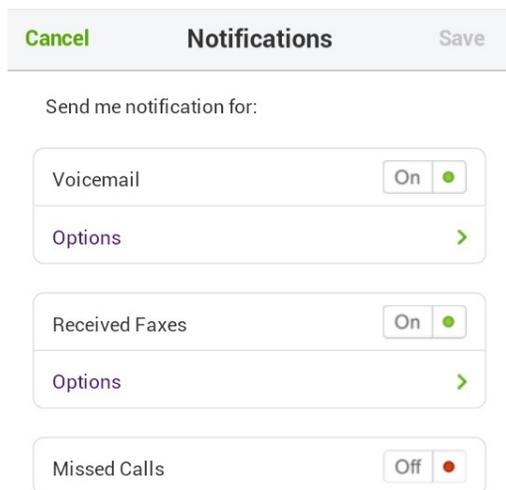
At the bottom of this screen is a toggle to switch between the **Basic** and **Advanced** screens.



The screenshot shows the 'Notifications' screen with a header bar containing 'Cancel', 'Notifications', and 'Save'. Below the header, there is a section titled 'Send me notification for:' with three rows of settings:

- Voicemail:** Toggled 'On' (green dot).
- Options:** Indicated by a green chevron arrow.
- Received Faxes:** Toggled 'On' (green dot).
- Options:** Indicated by a green chevron arrow.
- Missed Calls:** Toggled 'Off' (red dot).

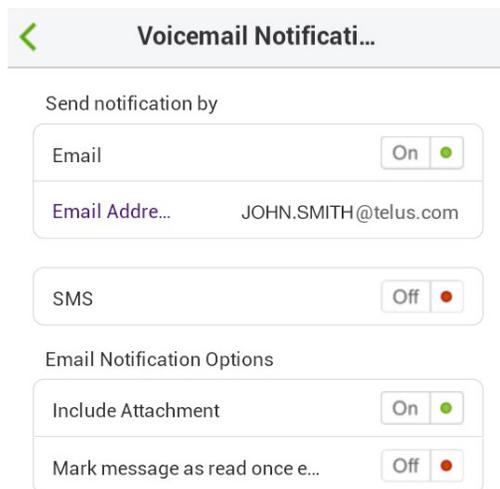
On the **Basic** screen, you have the choice of sending notification **by email** and/or **by SMS**. Tap a choice to turn it **On** or **Off**. Scroll to the bottom to enter the **Email** address to receive notifications. This could be the user, or the Admin, or a receptionist, for example.



The screenshot shows the 'Notifications' screen with a header bar containing 'Cancel', 'Notifications', and 'Save'. Below the header, there is a section titled 'Send me notification for:' with three rows of notification settings:

- Voicemail:** Set to 'On' (green dot).
- Options:** Indicated by a right-pointing chevron.
- Received Faxes:** Set to 'On' (green dot).
- Options:** Indicated by a right-pointing chevron.
- Missed Calls:** Set to 'Off' (red dot).

Also at the bottom of the screen, tap **Add Phone Number** and enter a phone number to receive the text messages; the phone number can be that of the user, or the Admin, or someone else; it need not be a TELUS Business Connect number. Select the **Carrier** for that phone number, to ensure that the text message is correctly sent through that carrier's texting system. You can enter more than one phone number to receive SMS notifications.



The screenshot shows the 'Voicemail Notification Options' screen with a back arrow and a title bar. Below the title bar, there is a section titled 'Send notification by' with three rows of notification settings:

- Email:** Set to 'On' (green dot). Below it, the 'Email Address' is displayed as 'JOHN.SMITH@telus.com'.
- SMS:** Set to 'Off' (red dot).

Below the 'Send notification by' section, there is a section titled 'Email Notification Options' with two rows of settings:

- Include Attachment:** Set to 'On' (green dot).
- Mark message as read once e...:** Set to 'Off' (red dot).

Tap **Save**.

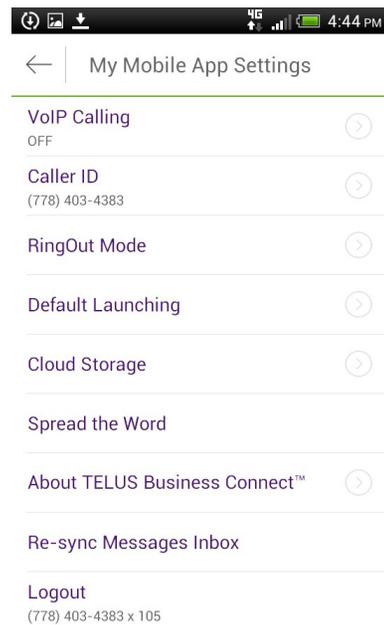
The email and phone number selected are now displayed at the bottom of the Notifications page.

At the bottom of the Notifications screen, tap **Advanced**. Now for each feature you turn **On** for notification, you can then tap **Options** to select an **email address** and a **phone number** for each feature individually. For email notifications, you can also **include any attachments**, and also mark the email message in your inbox as **Received**.

# My Mobile App Settings

The **My Mobile App Settings** menu for both users and administrators includes a number of specialty settings.

- VoIP Calling
- Caller ID
- RingOut Mode
- About TELUS Business Connect
- Re-sync Messages Inbox
- Logout

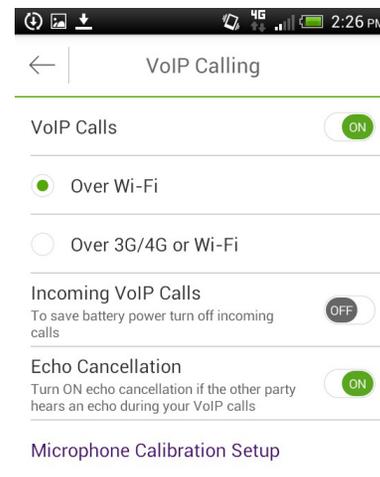


## VoIP Calling

Turn **VoIP Calls** to **On** to allow inbound and out-bound calls to use WiFi connections, if available.

Check **Over Wi-Fi** to have the system make calls only when connected to Wi-Fi. When you are overseas, this option allows you to avoid international voice roaming charges. (Data roaming charges may apply.)

**NOTE:** If Wi-Fi is not available, the system will use **RingOut** (see below).



Check **Over 3G/4G or Wi-Fi** to have the system use Wi-Fi; if Wi-Fi is not available, it will then use your carrier data plan over its 3G/4G network (possible charges and lower voice quality may result).

Turn **VoIP** to **Off** to only make calls using your carrier voice plan.

To enable RingOut (see below), turn **VoIP Calls** to **Off**.

Turn **Incoming VoIP Calls** to **On** to use VoIP for incoming calls, using Wi-Fi or 3G/4G depending on the VoIP Calls settings listed above. Incoming calls via VoIP over Wi-Fi avoid carrier voice-plan charges. To save battery power, turn Incoming VoIP Calls to **Off**; your incoming calls will then use your carrier voice plan.

On Android smartphones, turn **Echo Cancellation** to **On** to if the other party hears an echo during our VoIP calls. Tap **Microphone Calibration Setup** to perform a 30-second microphone calibration of your smartphone to ensure the best sound quality during VoIP calls. (These features are not needed for Android phones that have built-in echo cancellation and microphone calibration.)

Android screens shown. iOS screens look slightly different

## Caller ID

To set the number you want people to see when you place calls, **tap Caller ID**. Choose from among your TELUS Business Connect company phone numbers.

Calls you make from your TELUS Business Connect local numbers will have the Company ID included in the Caller ID displayed to the called party.

## RingOut Mode

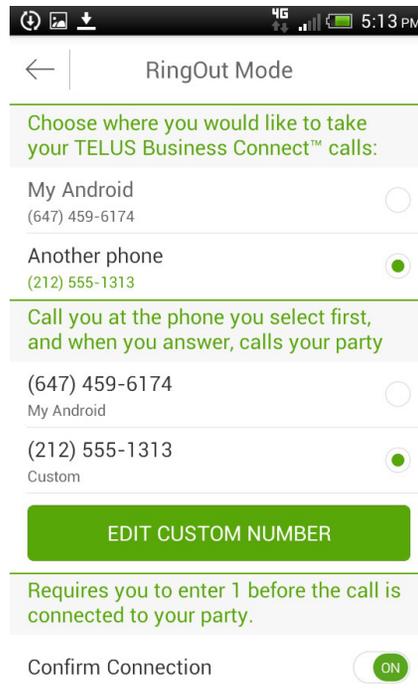
To make outbound calls, the TELUS Business Connect mobile app uses your cellphone's native calling system through your cellphone carrier. Use **RingOut Mode** to maintain your TELUS Business Connect identity on such calls, including such features as Caller ID and call logging.

You can keep your personal cellphone number private. RingOut calls use carrier voice minutes rather than your carrier data plan.

RingOut lets you use your TELUS Business Connect business number from any phone you choose, including your smartphone. To configure, from **Settings > My Mobile App Settings**, tap **RingOut Mode**.

Choose an TELUS Business Connect device to set it as your RingOut Mode phone. Or tap **Another Phone** to add phone numbers, then tap one of them to be your RingOut device.

To avoid accidentally sending calls to your personal voicemail (if you don't pick up when your phone rings), turn on **Confirm Connection** so TELUS Business Connect will prompt you to press 1 before it dials the number and connects your call.



## To make a RingOut call:

- Set **VoIP Calling** (above) to **Off**. With **VoIP Calling** set to **Off**, calls you make from TELUS Business Connect automatically use RingOut.
- If in the RingOut Mode screen you set **Your Phone** as the device to take TELUS Business Connect calls, you will make outbound calls in the usual way—use the dial pad or choose from your contact list.
- However, if in RingOut Mode you select **Another Phone**—for example, if you want to make TELUS Business Connect calls from your hotel phone—then, TELUS Business Connect will ring that phone first. When you pick up, TELUS Business Connect will then dial the outbound number and connect you.

(If you set **Confirm Connection**, you'll be prompted to press "1" first.)

### NOTES:

- RingOut calls use carrier voice-plan minutes.
- RingOut preserves your TELUS Business Connect calling identity, so those you call will see your selected TELUS Business Connect Caller ID.
- RingOut may save you from having to pay toll charges that would occur if you called directly from your smartphone. This is especially useful for international travelers.

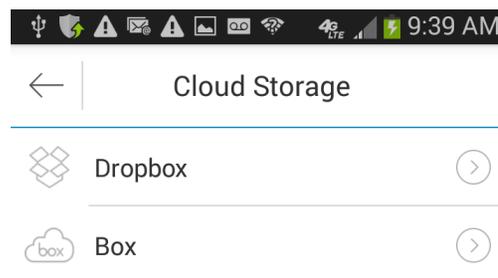
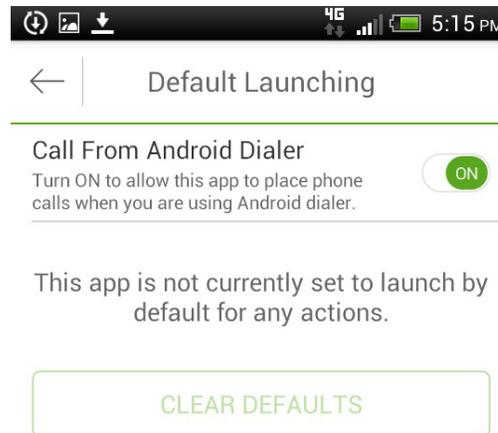
## Default Launching

Default Launching in **Settings > My Mobile App Settings** lets you turn off **Call from Android Dialer** and select Google Voice as your preferred dialer (if you are on an iOS platform).

## Cloud Storage

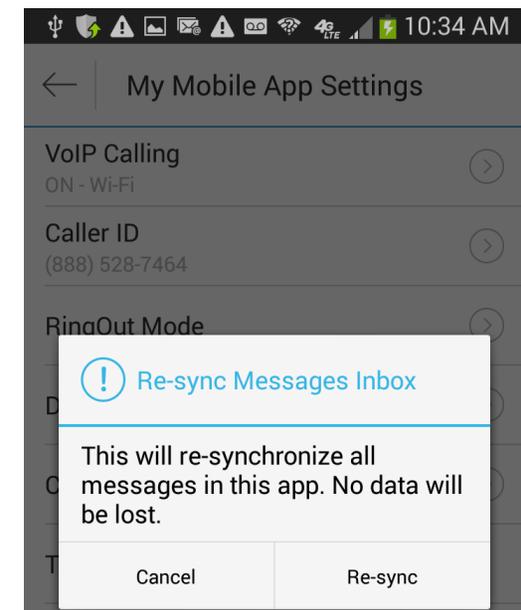
TELUS Business Connect can access documents stored in select cloud-storage apps, such as Dropbox, you have installed on your smartphone. Tap **Cloud Storage** in **Settings > My Mobile App Settings** to access the files you have stored in the cloud. You will now be able to fax documents directly from these cloud data apps.

If you don't see one of your supported cloud-storage services displayed, download and install that service's app to your smartphone. Once installed and activated, the app and its stored documents should show up on the TELUS Business Connect Cloud Storage listing.



## Re-sync Messages Inbox

Tap this button to re-synchronize all of your text, fax, and voicemail messages to the mobile app from your TELUS Business Connect account in the cloud. This would be useful if for example you feel your app is not receiving messages or voicemail that you expect. No data will be lost using this feature (since the data is all in the cloud).



## Logout

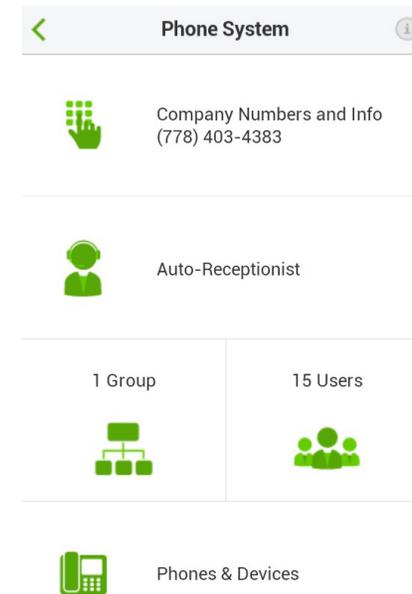
Log out from the phone number and extension displayed.

# Admin Phone System Settings

Express Setup helped you set up your phone system, numbers, Auto-Receptionist, users, and groups. You can change or update any of these settings at any time. In addition, as Administrator/Account Owner you can manage settings for your Company, Groups, and Users through the mobile app Phone System settings. These settings, along with the Billing settings, are only available to the administrators. (Users see only the two entries under **User: My Extension Settings and Application Settings**)

To access the TELUS Business Connect phone system settings on your smartphone, start the App and log in.

Tap **Settings > Phone System** to see the screen from which you can manage Company, Group, and User settings, as well as your TELUS Business Connect desk phones.



## Company Numbers and Info

Tap **Company Numbers and Info** to manage phone numbers. TELUS Business Connect includes a toll-free, a local, and a fax number. Each additional user receives their own local number and extension. You can tap each number, and the Company ID, to manage it.

Cancel
Company Numbers ...
Save

Company Caller ID
123 ACCOUNTING

This is the name that will appear as your caller ID when making calls. A maximum of 15 characters can be used. NOTE: Company Caller ID only appears when a local area code number is used.

Company Address
>

Company Numbers and Info i

|                   |                |   |
|-------------------|----------------|---|
| Local Number      | (778) 403-4383 | > |
| Auto-Receptionist | (587) 316-6637 | > |
| Auto-Receptionist | (587) 316-6638 | > |
| Auto-Receptionist | (450) 499-1504 | > |
| Auto-Receptionist | (587) 316-7424 | > |

Once you have obtained extra numbers, you can return to this Company Number screen and edit each number's type (voice, fax, or both) and its assigned extension/user.

- Click **Company Caller ID** and edit the name there (up to 15 characters). This is the company name you provided when you created your account. It will be added to the local phone number you use to make calls. (From toll-free numbers, only that toll-free number be displayed as the Caller ID.) Changes to this Caller ID can take a week or more to take full effect.
- View the **Company Toll-Free Number**; you cannot alter this number
- View the **Company Local Number**; you can delete this number if you wish.
- View the **Company Fax Number**; faxes are delivered by default to the extension you've listed as the operator; you can change this to another extension; or delete the number.

## Direct Extension Numbers

Scroll down Company Numbers to the Direct Extension Numbers listing. A direct extension is a full 10-digit phone number that can be called to reach a user directly. (Other company extensions are reached by calling the company number and entering the extension at the prompt.) You can tap a number to edit the following information for the direct extensions assigned to you and to your users:

- Whether this number accepts both voice and fax (the default), voice only, or fax only.
- Whether calls to this number connect to an extension (user or group) or to the Auto- Receptionist.
- Which extension is assigned to this number.
- You can also delete this number.

Cancel
Direct Extension Nu...
Save

Number
(604) 337-0631

Number Type
Voice and Fax >

Calls to this number will be connected to:

Auto-Receptionist

Extension
✓

Select extension:

ADAM JACKSON
Ext. 115

## Using an Existing Number (Porting and Forwarding)

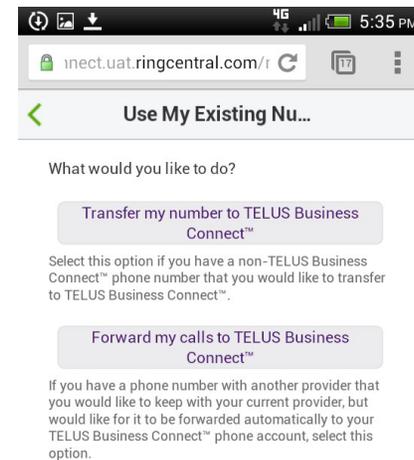
You can transfer (port) eligible existing phone numbers from your current provider to your TELUS Business Connect service, and you can forward calls to an existing number to your TELUS Business Connect number.

### To Transfer an Existing Number

To transfer a number or set of numbers to your TELUS Business Connect account, log into your account and go to **Settings > Phone System > Company Numbers and Info** and click on the **Use My Existing Number** button at the bottom of the center column, and follow the instructions.

### To Forward your Calls

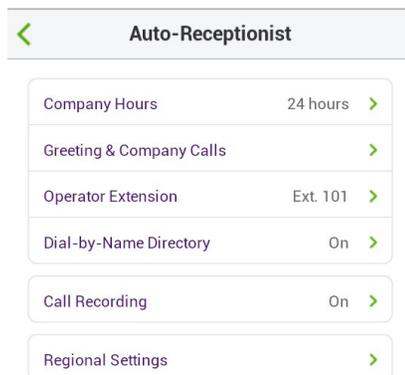
Forward calls to an existing number to your new TELUS Business Connect number. From **Settings > Phone System > Company Numbers and Info** scroll to the bottom and tap the **Use My Existing Number** button. Tap **Forward my calls to TELUS Business Connect**. Fill in the existing number you wish to transfer, and follow the detailed instructions.



## Auto-Receptionist Settings

The Auto-Receptionist settings determine how incoming calls are handled for your company.

Go to **Settings > Phone System > Auto-Receptionist**.



### Company Business Hours

On the Auto-Receptionist screen, tap **Company Hours**.

- Check **24 hours** to have incoming calls handled the same way all the time, including weekends.
- Check **Specify Hours** to have separate call handling for **Business Hours** and for **After Hours**. On the week display, choose business hours for each day, or Closed.
- Also choose your **Time Zone**.
- Tap **Save** when done.

### How to Handle Incoming Calls: Greetings & Company Calls

Tap **Greeting & Company Calls**. Here you decide how to greet callers and route incoming company calls during your company's business hours and after hours, as well as setting up advanced call-handling rules.

1. From the **Phone System** screen, click **Auto-Receptionist**.
2. Tap **Greeting & Company Calls**.
3. Select the **Company Hours** tab (if available).
4. Select **Play company greeting** if you'd like callers to hear a default or custom greeting. You can select to play the default greeting, or create a custom greeting on the next screen. (See instructions below.)
5. Or select **Connect directly to extension** to bypass the Auto- Receptionist and connect calls directly to a specific extension.
6. Under **If caller enters no action**, you can select **Connect to operator** (extension 0). Or select **Disconnect** to automatically disconnect callers after the greeting is played three times with no action by the caller.
7. Select the **After Hours** tab to set call handling for after hours. (If you have **Business Hours** set to **24 hour** you will get a pop-up message when you select the **After Hours** tab offering to let you change your business hours.)
8. Tap **Save** when done.

## Company Greeting

The Auto-Receptionist greets callers with a recorded message when they call your company. Your Auto-Receptionist is initially set to play a default greeting with your company name using text-to-speech technology (you can review the script of this default greeting from the Call Handling screen).

Follow these instructions to create a custom company greeting, using your phone or uploading a prerecorded greeting file from your computer.

### Recording your Company Greeting over the Phone

1. From the **Phone System** screen, select **Auto-Receptionist**.
2. Select **Greeting & Company Calls**.
3. Select the **Company Hours** or **After Hours** tab.
4. Tap **Greeting**.
5. Select **Default** or select **Custom**.
6. If you selected **Custom**, click the **Record** button.
7. In **Call me at**, select **Forwarding Number** and choose one from the dropdown.

8. Or select **Custom number**, tap the field, then type in a phone number.
9. TELUS Business Connect will call you and prompt you to record your greeting.
10. Repeat this process for the **After Hours** tab.
11. Tap **Done**.

### The Company Operator Extension

Choose an extension to receive calls intended for the operator (extension 0). When callers press 0 or don't enter an extension number, the system will connect the call to the designated employee.

1. From the **Settings** screen tap **Phone System**, then **Auto-Receptionist**.
2. Tap **Operator Extension**.
3. Choose a name/extension of the user who will receive operator calls.
4. Tap **Save**.

## Company Dial-by-Name Directory

The Dial-by-Name Directory allows callers to find user and group extensions by spelling out the name on their phone keypads. Follow these steps.

1. From the **Settings** screen tap **Phone System**, then **Auto-Receptionist**.
2. Tap **Dial-by-Name Directory**.
3. Tap **Dial-by-Name Directory** to **On**.
4. Select as the Directory Extension a number that is not already in use as an extension. This will become the number callers will tap to get to the dial-by-name directory.
5. Tap **Extensions in Directory**.
6. Deselect any extensions to be excluded from your company's Dial-by-Name Directory. This list includes both user extensions and group extensions.
7. Select to search by **First Name** or by **Last Name**.
8. Tap **Done**.

When Dial-by-Name Directory is On, callers will hear a recording that, in addition to telling them to dial an extension, also suggests they can dial the Directory Extension number in order to locate a user by name. When callers tap the Directory Extension, they are instructed to use their phone keypad to spell out the first three letters of the first name, or of the last name, of the person or group they wish to call. The system will connect them, or offer additional options if there is more than one choice.

# Groups

In the latest TELUS Business Connect release, **Departments** are now called **Groups**.

Groups support these new features:

1. **Call Queues**
2. **Paging**
3. **Messages-Only Extension**
4. **Announcement-Only Extension**

Groups enable you to designate a group of employees with similar activities or services.

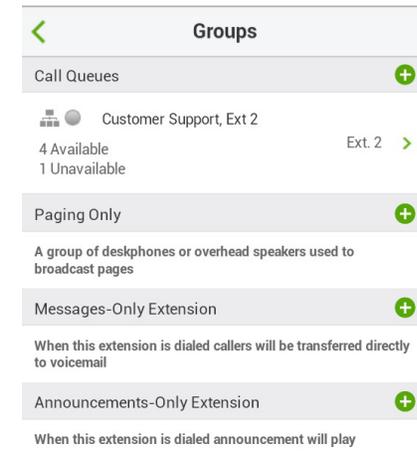
## Benefits

- Better communication by grouping related members with similar activities beyond group functions.
- Increase communication efficiency with the new **Paging** feature. Broadcast announcements and emergency alerts to the entire organization or selected peers at the same time.
- Reduce missing important calls by enabling a call to be answered from any phone with the **Shared Lines** feature.

## Call Queues

Create a call queue group when you want a specific group of users (such as Sales, Support, or Billing) to share incoming calls.

Each call queue can have an extension or direct (local or toll-free) number of its own. You can define specific business hours for each call queue and set up email or text message notifications of any missed calls or voicemails.



## Add a Call Queue Group

1. From the slideout Menu, tap **Settings > Phone System > Groups**.
2. Tap the **plus sign (+)** to the right of **Call Queues**.
3. Fill out the form: Give the new call queue an **Extension Number** and **Extension Name**, and add the **email** of the designated **Manager** of this Call Queue group.
4. Tap to **Select call queue members**.
5. Click **Save**.

## Call Queue Info

From the Groups menu, tap the name of a Call Queue group, then tap **Call Queue Info**, where you can edit or add information, as needed:

- or modify the pronunciation of the **Call Queue Name**.
- Enter a **Contact Phone** for the group.
- View **Member Availability** (according to how the members have set their Business Hours and After Hours).
- Enter an **Address** for the group.
- Set the Call Queue group's business **Hours**; incoming calls can be handled differently for Business Hours and for After Hours.
- Enter **Regional Settings**.
- **Re-send the Welcome Email** that is sent to the Group Manager and the Group Members if they haven't yet responded to their original invitation. This option goes away when this group's manager and members have all responded.
- You can also **Delete the Call Queue**.

| Cancel                  | Call Queue Info         | Save           |
|-------------------------|-------------------------|----------------|
| Customer Support, Ext 2 |                         | Ext. 2         |
| Extension 2             |                         |                |
| Call Queue Info         |                         | Direct Numbers |
| Extension Number        | 2                       |                |
| Extension Name          | Customer Support, Ext 2 |                |
| Record Call Queue Name  | ➤                       |                |
| Contact Phone           |                         |                |
| Email                   | JOHN.SMITH@TELUS.COM    |                |

## Call Queue Group Members Availability

| Members Availability      |           |
|---------------------------|-----------|
| Ext.101 - CRYSTAL BRUMMEL | Available |
| Ext.108 - GRACIE MUSNGI   | Available |
| Ext.110 - KIM DEANS       | Available |
| Ext.102 - LINDA MCLATCHIE | Available |
| Ext.105 - SUSAN ELRICK    | Available |

[Refresh](#)

Tap **Settings > Phone System > Groups**. Under each Call Queue group name there is a count of **Available** and of **Unavailable** members of that group.

**Available** members can take phone calls. **Unavailable** members are on the phone, or are outside their set business hours.

Tap on a specific Call Queue and on that group's **Call Queue Info** screen, scroll down and tap

**Members Availability** to see the names of the group members who are **Available** or **Unavailable**.

## Call Queue Group Member Availability and Wait Time Settings

[Cancel](#) **Members Availability** [Save](#)

Time to wait for memb... 1 min ▼  
 Maximum time to wait for a call queue member before trying the next member

Post-call wrap-up time 15 sec ▼  
 Minimum post-call wrap up time before agent's status is automatically set available

Maximum hold time 3 min ▼  
 Maximum hold time to wait for an available call queue member

Max. callers waiting 10 ▼

Go to **Settings > Phone System > Groups**, tap a specific Call Queue Group, and tap **Call Handling**.

Scroll down to the bottom and tap **Member availability and wait times**.

Options on this menu determine how inbound calls to the Group are handled, depending on the availability of the Group members, and how long it takes to connect to a given member.

## Options are:

- Maximum **time to wait for a Group member to answer a call** before trying the next member in the Group rotation order, in minutes.
- Minimum **post-call wrap-up time** before agent's status is automatically set to available, in seconds. You can give the Group member some time to handle the results of the call, such as making notes.
- **Maximum hold time** to wait for an available Group member, in minutes, before transferring the on-hold call to the next member.
- **Maximum Callers Waiting**—If the number of callers waiting exceeds (number), you can either **send the next callers directly to voicemail**, or **disconnect** after telling new callers of the **heavy call volume**.

## Call Queue Business Hours

Your Call Queue's business hours determine when calls will be routed to Group members and when after-hours rules will apply.

On the **Group Info** screen, tap **Group Hours** to access your current settings. Select **24 hours** for Groups that handle all incoming calls the same at all times. Tap **Specify hours** to set the specific days and times the Group will be available to take calls. When you're finished, tap **Save**.

## Call Queue Greeting

The Auto-Receptionist greets callers when they call a Group in your company. Your phone system is initially set to play a default greeting in which the Auto-Receptionist automatically reads the name of the Group (using text-to-speech technology) connecting the caller with a Group member. When **Off**, callers will just connect directly to the Group member according to Company call-handling rules.

| Cancel  | Greeting                | Save                                   |
|---|-------------------------|--|
|   | Customer Support, Ext 2 | Ext. 2                                 |
| Call Queue Greeting   |                         |  |
| Call Queue Greeting   |                         | On <input checked="" type="checkbox"/> |
| Set Greeting  |                         | Custom >                               |
| <p>When ON, callers will hear a call queue greeting before connecting to a call queue member</p> <p>Example: "Thank you for calling sales. Please wait while we connect you to the next available agent."</p> |                         |  |
| Blocked Numbers   |                         | >                                      |

**NOTE:** If you choose **unconditional forwarding** for **After Hours calls**, or send After Hours Group callers **directly to voicemail**, your After Hours Group greeting will not be played even if it is set to On.

**NOTE:** If you have specified Group Hours, then you will be able to set Greeting for business hours and separately for After Hours. If you have not specified Group Hours but have set this Group's to "24 hours", then there will be only one Greeting, which will play at all times.

Go to **Setup > Phone System > Groups**, select a Call Queue group, then tap **Greeting**.

Turn **Call Queue Greeting** to **On**. Tap **Set Greeting**, then **Play** to listen to the **Default** greeting. You can use this Default greeting (simply select **Cancel** to back out), or create a **Custom** greeting.

### To record a Custom greeting:

1. Tap **Set Greeting**, then tap **Custom** and then **Record**.
2. Provide a phone number for the system to call, or have it call your forwarding number (select one under the **Forwarding Number** dropdown below).
3. Tap **Call Now**.
4. TELUS Business Connect will call you and prompt you to record your greeting.
5. On the **User Greeting** screen, a message will confirm that your custom message has been successfully received.
6. To listen to your custom greeting later, access your account on the Web.
7. Tap **Cancel** to return to the previous screen.

From this screen you can also tap **Blocked Numbers**. Select from the options.

- You can block **All calls**.
- You can tap **Specific calls** and select
  - Specific numbers;
  - Calls and/or faxes **from callers with no Caller ID**;
  - **Calls from Pay Phones**.

In each case you can choose what message the blocked callers will hear.

When done, tap **Save**.

Tap **Cancel** to exit from Greetings.

## Group Call Handling

Group call handling includes deciding the order in which calls are transferring to Group members; the music that is played while connecting the call; and Group member availability and wait times.

To access and edit these settings, tap **Settings > Phone System > Groups** and select a Group.

Tap **Call Handling**.

### Group Call Handling during Business Hours

To manage the order in which calls are answered by Group members, tap **Group Hours** at the top of the **Call Handling** screen.

- Tap **Rotating** to set calls to rotate among available Group members.
- Tap **Simultaneously** to set calls to ring all available Group extensions at the same time.
- Tap **In fixed order**, then tap **Specify fixed order** and decide the order by tapping the up and down arrows to move Group member names up and down the list.
- Tap **Back**.

- Tap **Audio While Connecting** to **On** to select the music that will keep Group callers entertained while connecting. You can choose from among more than a dozen types of music. Tap the type of music you want, then tap **Save**.

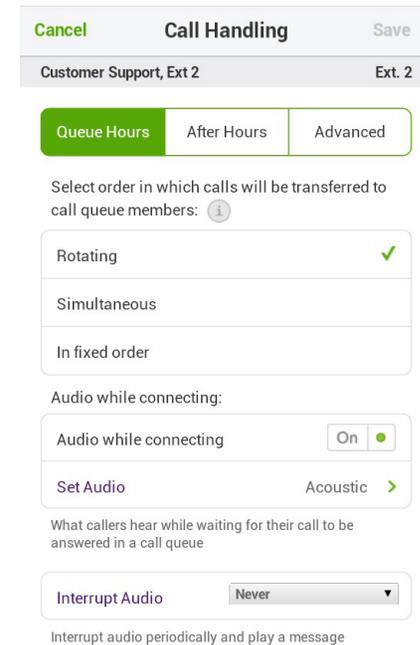
### Group Call Handling After Hours

Now tap **After Hours** tab at the top of the **Call Handling** screen. Choose from the following settings for how to handle calls during your defined after-hours times, when no one is available to take calls:

- Play a greeting and disconnect
- Send callers to Group voicemail
- Unconditional call forwarding

If you select **Unconditional call forwarding**, you will be prompted to enter a phone number. Unconditional call forwarding will forward all calls to the number you specify and override all After Hours settings, such as voicemail and greetings.

**NOTE:** The After Hours setting becomes available only after you change Group business hours from the default 24 hours setting.



**Cancel**      **Call Handling**      **Save**

**Customer Support, Ext 2**      **Ext. 2**

**Queue Hours**    **After Hours**    **Advanced**

Select order in which calls will be transferred to call queue members: ⓘ

Rotating ✓

Simultaneous

In fixed order

Audio while connecting:

Audio while connecting    **On** ●

**Set Audio**      Acoustic >

What callers hear while waiting for their call to be answered in a call queue

**Interrupt Audio**    **Never** ▾

Interrupt audio periodically and play a message

## Advanced Call Handling for Groups: Rules

Advanced Call Handling lets you create specific additional rules for that Group extension based on date and/or time of call, or Caller ID, or the number called. These rules override your regular call-handling rules for that extension. These rules can be useful for special situations such as promotions and events: Customers can call a contest number and get a special message or leave a message, for example; and the rule can be modified or turned off when the contest finishes.

To create a **Rule** for a specific Group, go to **Settings > Phone System**, tap **Group**, then tap a specific Group.

The screenshot shows the 'Call Handling' screen for 'Customer Support, Ext 2'. At the top, there are 'Cancel', 'Call Handling', and 'Save' buttons. Below that, the extension 'Ext. 2' is displayed. There are three tabs: 'Queue Hours', 'After Hours', and 'Advanced' (which is highlighted in green). Below the tabs, there is a paragraph of text: 'Multi-condition advanced call handling rules offer powerful call management capabilities using conditions based on time of day, date range, incoming caller ID and called number. Please carefully test the call flows based on the rules set to ensure that the calls are being handled as expected'. At the bottom, there is an 'Add Rule' button.

Tap **Call Handling**, then tap the **Advanced** tab.

Tap **Add Rule**.

The screenshot shows the 'Custom Rule' screen. At the top, there are back and forward navigation arrows and the title 'Custom Rule'. Below that, there is a 'Name Rule' field with the text 'Holiday Promo'. Underneath, there is a prompt: 'Enter a descriptive name for your rule and select a condition you want the rule to be based on.' Below this, there is a section titled 'Base custom rule on the following condition:'. There are three options: 'Date and/or Time' (checked with a green checkmark), 'Caller ID' (unchecked), and 'Called Number' (unchecked).

On this **Custom Rule** screen, give your Rule a **Name**, then select the **conditions: Date and/ or Time** the call comes in; the **Caller ID** of the caller; and/or the **Called Number**. You can combine these selections.

Tap **Next**.

If you selected **Date and/or Time** as your Rule condition, now select a **Weekly Schedule** and specific times for each day if you wish. Or select a **Specific Date Range**. Then tap **Back**, view your Conditions Summary, and tap **Next**.

If you selected **Caller ID** for this rule, you can enter one or more phone numbers, or choose names from your Contact list, or enter area codes or other partial numbers. Tap **Next**.

If you selected **Called Number**, choose the number(s) to which the Rule will be applied. The choices will be the **Main Number**, or the Group **Auto-Receptionist**.

The screenshot shows the 'Holiday Promo' screen. At the top, there are back and forward navigation arrows and the title 'Holiday Promo'. Below that, there is a prompt: 'Select when the rule should be active:'. There are two options: 'Weekly Schedule' (highlighted in green) and 'Date Range'. Below this, there is a list of days from Monday to Sunday, each with a time range of '9:00 AM to 6:00 PM' and a right-pointing arrow.

Tap **Next** and choose when to apply the Rule: during **Business Hours**, **After Hours**, or **Always**.

Now select the action to take when incoming calls match this rule:

- **Forward Calls:** Then set custom Call Screening, Call Forwarding, or Messages handling for these calls.
- **Take Messages Only** to send callers to voicemail. You can choose to take messages or not, and can customize the voicemail greeting.
- **Play Announcement Only** and then end the call.
- **Unconditional Forwarding**, which immediately forwards the call to a number you then select, bypassing any other call handling, including greetings, call screening, voicemail, and Softphone.

You can also set Group Greetings and Call Handling for this Rule, and under Messages choose a voicemail greeting and select the extension that will receive messages generated by use of this Rule. As you can see, there are rich programmatic possibilities with this Advance Rule feature.

Tap **Done**.

You can go back to edit the Rule, turn the rule on and off, change details and conditions, add more Rules, or delete a Rule.

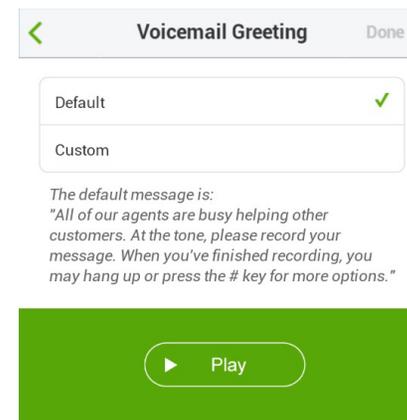
## Group Messages/Voicemail Greetings

This setting is for the **Group voicemail greeting**, which callers to the group extension hear when they are sent to voicemail.

From **Settings > Phone System > Group >** tap a **Call Queue** group name. Scroll down and tap **Messages & Notifications**.

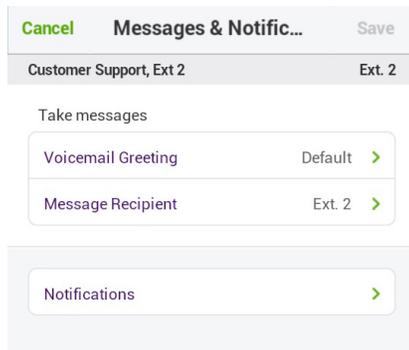
Tap **Queue Hours** or **After Hours**, if offered.

Tap **Voicemail Greetings**. Read or **Play** the script for the default greeting, or record a custom greeting.



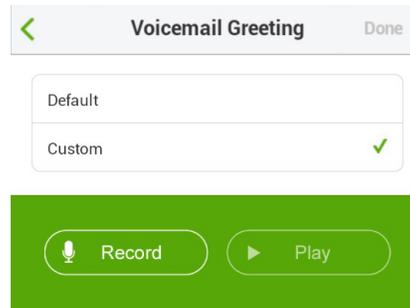
## To record a custom Group voicemail greeting

1. Tap **Custom** and then tap **Record**.
2. Provide a phone number for the system to call, or have it call your forwarding number (select one under the **Forwarding Number** drop-down).
3. Tap **Call Now**.
4. TELUS Business Connect will call you and prompt you to record your greeting.



The screenshot shows the 'Messages & Notifications' screen. At the top, there are 'Cancel' and 'Save' buttons. Below that, the current extension is 'Customer Support, Ext 2'. Under the 'Take messages' section, there are two rows: 'Voicemail Greeting' set to 'Default' and 'Message Recipient' set to 'Ext. 2'. At the bottom, there is a 'Notifications' section with a right-pointing arrow.

You can designate a Group member to receive voicemail messages. By default, TELUS Business Connect saves voicemail messages to a Group voicemail box.



The screenshot shows the 'Voicemail Greeting' selection screen. At the top, there are back and 'Done' buttons. Below that, there are two options: 'Default' and 'Custom'. The 'Custom' option is selected, indicated by a green checkmark. At the bottom, there are two buttons: 'Record' (with a microphone icon) and 'Play' (with a play icon).

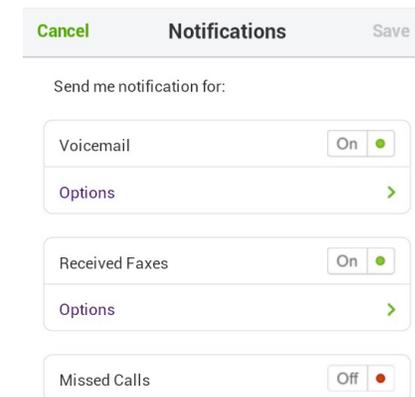
To designate a specific employee as the message recipient, tap **Message Recipient** and then tap the name of the employee. When you're finished, tap **Save**.

**NOTE:** If you designate a Group member as the message recipient, Group messages will no longer be saved to the Group voicemail box.

## Call Queue Notifications

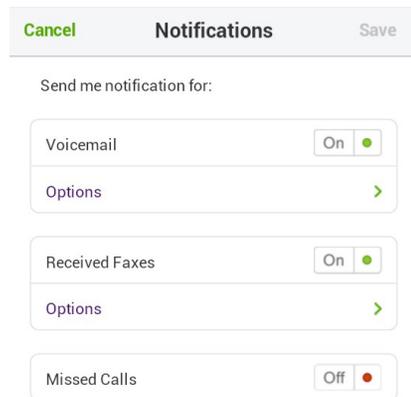
Back at the **Messages & Notifications** screen, tap **Notifications**. Here the Administrator or the User can be notified, by email or text message (SMS), of various events such as received voicemail, received faxes, missed calls, and fax transmission result messages.

At the bottom of this screen is a toggle to switch between the **Basic** and **Advanced** screens.



The screenshot shows the 'Notifications' screen. At the top, there are 'Cancel', 'Notifications', and 'Save' buttons. Below that, there is a section titled 'Send me notification for:'. There are three rows: 'Voicemail' with a toggle set to 'On', 'Options' with a right-pointing arrow, 'Received Faxes' with a toggle set to 'On', and another 'Options' with a right-pointing arrow. At the bottom, there is a row for 'Missed Calls' with a toggle set to 'Off'.

On the **Basic** screen, you have the choice of sending notification **by email** and/or by **SMS**. Tap a choice to turn it **On** or **Off**. Scroll to the bottom to enter the **Email** address to receive notifications. This could be the user, or the Admin, or a receptionist, for example.



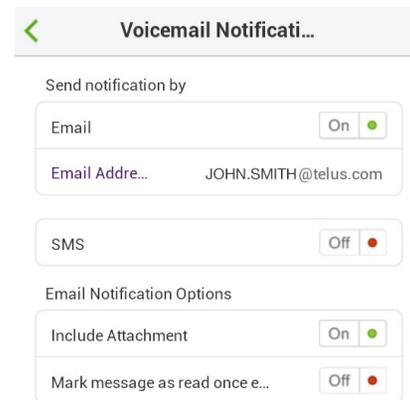
The screenshot shows a 'Notifications' screen with a 'Cancel' button on the left and a 'Save' button on the right. Under the heading 'Send me notification for:', there are three sections:
 

- Voicemail**: Set to 'On' (green dot), with an 'Options' link and a right-pointing arrow.
- Received Faxes**: Set to 'On' (green dot), with an 'Options' link and a right-pointing arrow.
- Missed Calls**: Set to 'Off' (red dot).

Also at the bottom of the screen, tap **Add Phone Number** and enter a phone number to receive the text messages; the phone number can be that of the user, or the Administrator, or someone else; it need not be a TELUS Business Connect number. Select the **Carrier** for that phone number, to ensure that the text message is correctly sent through that carrier's texting system. You can enter more than one phone number to receive SMS notifications.

Tap **Save**.

The email and phone number selected are now displayed at the bottom of the Notifications page.



The screenshot shows a 'Voicemail Notificati...' screen with a back arrow on the left. It contains the following settings:
 

- Send notification by**:
  - Email**: Set to 'On' (green dot). Below it, the 'Email Address' is displayed as 'JOHN.SMITH@telus.com'.
  - SMS**: Set to 'Off' (red dot).
- Email Notification Options**:
  - Include Attachment**: Set to 'On' (green dot).
  - Mark message as read once e...**: Set to 'Off' (red dot).

Tap **Advanced** at the bottom of the Notifications screen for an alternative set of options for notifications. Now for each feature you turn **On** for notification, you can then tap **Options** to select an **email address** and a **phone number** for each feature individually. For email notifications, you can also **include any attachments**, and also mark the email message in your inbox as **Received**.

## Paging Only Groups

Paging is a commonly required function in many locations such as warehouse/shipping centers, retail stores, schools, hospitals, etc.

Business Connect Paging supports broadcasting through multiple desk phones (groups) and through overhead paging devices.

Your mobile devices cannot receive pages; the Paging feature is available only on desk phones and supported paging devices.

## How to Page from a Mobile App Device

Mobile app users with paging permission can page a known paging group by dialing \*84 followed by # and the number of the paging group, then # again.

Note: The user must first enable VoIP calling on the mobile app device.

# Other Administrator Settings

There are some special settings for Administrators in **Phone System**.

Phone System gives the Administrator access to all settings for the company phone system. See Admin Phone System Settings for details.

## Some settings unique to the Administrator:

- Only Administrators can set and change Company settings.
- Administrators can create new Groups and edit any existing Group settings. (Group Managers can edit settings for their own Groups.)
- Administrators can make another user into an Administrator.
- Only Administrators can review, manage, and assign company desktop phones.
- Administrators can turn on On-Demand Call Recording.

