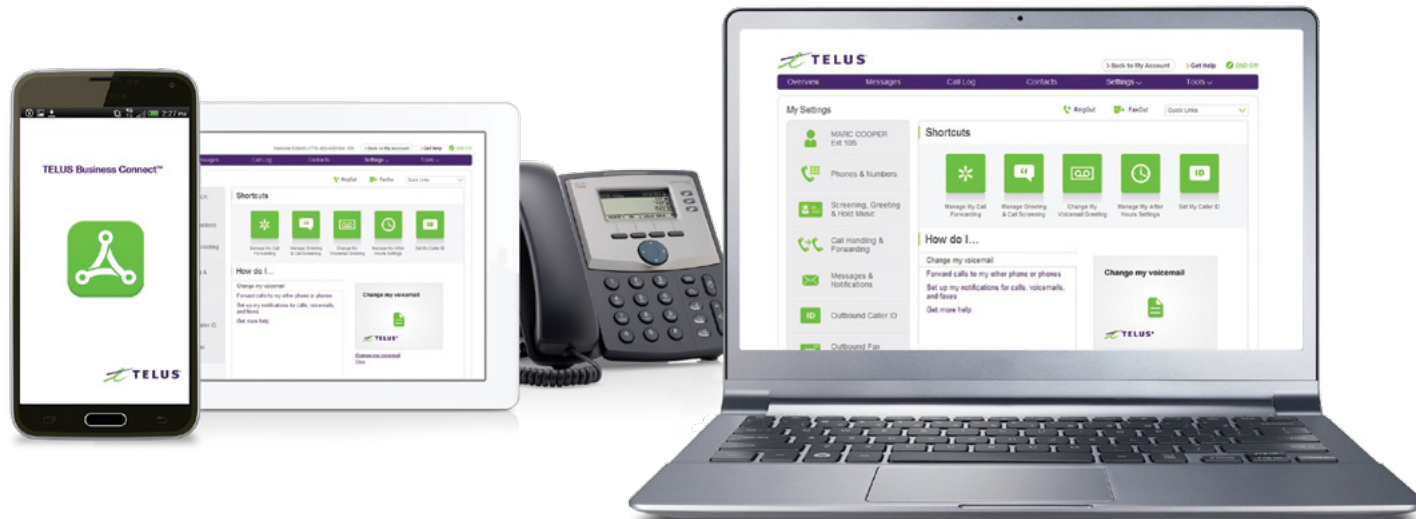


# TELUS Business Connect™

## Admin Guide



# Table of Contents

## Part 1 – Getting Started

---

4	Introduction
5	Admin homepage
5	Main Functions
5	Admin Portal
5	My Extension
6	Do Not Disturb
7	Conference
8	Conference Commands
9	RingOut
10	FaxOut

## Part 2 – Admin Portal

---

12	Phone System
13	Company Numbers and Info
14	Company Caller ID
15	Company Numbers
16	Direct Extensions
17	Auto-Receptionist Settings
18	Company Business Hours
19	Company Call Handling
19	Set Auto-Receptionist to Connect to a Direct Extension
20	Company Greeting and Menu
20	Set a Company Greeting
21	On-demand Call Recording
21	Enable On-demand Call Recording
22	Set an On-demand Call Recording Announcement
23	Automatic Call Recording*
23	Enable Automatic Call Recording
24	Set a Call Recording Announcement
25	Multi-Level Auto-Receptionist
25	Layout Your Multi-level IVR Plan
25	Single-Location IVR Use Case
25	Multiple-Locations IVR Use Case
26	Switch to Multi-level IVR Mode
27	Groups
28	Call Queues
28	Add a Call Queue Group
29	Configure Call Queues
29	Call Queue Info
30	Call Queue Greetings
30	Set a Call Queue Greeting
31	Call Handling
32	Messages & Notifications
32	Set a Voicemail Greeting
33	Message Recipient
34	Voicemail Preview*
35	Notifications
36	Paging Only
36	Add a Paging Only Group
37	Configure a Paging Only Group
38	Call Monitoring Group*
39	Add a Call Monitoring Group*
40	Configure a Call Monitoring Group
41	Set up Presence for Users that can be monitored by others
42	Set up Presence for Users that can monitor others
43	IVR Menus*
43	Add an IVR Menu Group
44	Configure an IVR Menu
44	Extension Info
45	Select Prompt Mode: Audio
46	Select Prompt Mode: Text-to-Speech
47	Call Handling

\*Not available for all users. Please see page for more details.

# Table of Contents

	Groups (cont.)				
48	Park Locations	61	Users	78	Reports
48	Add a Park Location	62	User Info	80	Call Log
49	Configure a Park Location	62	Super Admin	81	International Calling
49	Info	63	Phones & Numbers	82	Tools
50	Users	63	Screening, Greeting & Hold Music	83	Appearance
51	Set up Presence for Park Locations	64	Call Handling & Forwarding	84	IVR Tool*
52	Message-Only Extensions	64	Messages & Notifications	85	Visual IVR Editor
52	Add a Message-Only Extension	65	Outbound Caller ID	86	Create a new IVR Menu with the Visual IVR Editor
53	Configure a Message-Only Extension	65	Outbound Fax Settings	91	Edit an Existing IVR Menu with the Visual IVR Editor
53	Extension Info	66	Admin Only User Settings	92	Prompts
54	Messages & Notifications	66	Edit Permissions for all Users	93	Record a Prompt over the Phone
54	Set a Voicemail Greeting	66	International Calling	94	Record a Prompt Using Your Computer Microphone
55	Message Recipient	67	Administrator Permission	95	XML
56	Voicemail Preview*	68	Phones & Devices	96	Templates
57	Notifications	68	User Phones, Devices, Unassigned	96	Create a Template for User Settings
58	Announcements-Only Extensions	68	Add Your Own Device	100	Appendix A - Multi-Account Access
58	Add an Announcements-Only Extension	69	Managing Hot Desking	101	Account Management Portal
59	Extension Info	69	Common Phone Setup	102	Manage Linked Accounts
60	Set an Announcement	69	Convert an Unassigned Phone to a Common Phone	102	Access Accounts
		70	Unassign a Common Phone	103	View Service Status
		70	Log out a Common Phone		
		71	Set the Hot Desking Session Timeout		
		72	Manage Roles and Permissions		
		72	Predefined Roles		
		72	Custom Roles*		
		73	Assign Users to a Role		
		74	Modify a User's Role		
		75	Create a New Role*		

\*Not available for all users. Please see page for more details.

Part 1

# Getting Started



# Introduction

TELUS Business Connect is a simple powerful communication solution allowing businesses to answer the call, grow the business and make the sale.

TELUS Business Connect is an integrated, fully featured mobile and office communication system that enables businesses to be more accessible, productive and professional.

This guide will help the system administrator and end-users set up and access the following TELUS Business Connect features:

- Auto-Receptionist
- Company numbers
- Call flip
- Call groups
- Presence
- Messaging
- Call queues
- Call monitoring
- Call handling and forwarding
- Call recording on-demand
- Intercom
- Faxing via email
- Audio conferencing
- Templates
- Reports

## Admin homepage

When you log in as an administrator, you will be taken to the Admin Portal which allows you access to admin-only tools and configure account-wide phone system settings. You can access your individual account overview and settings from the My Extension page. At the top of the screen, hover over Admin Portal and click My Extension to switch to your individual user homepage.

### Main Functions

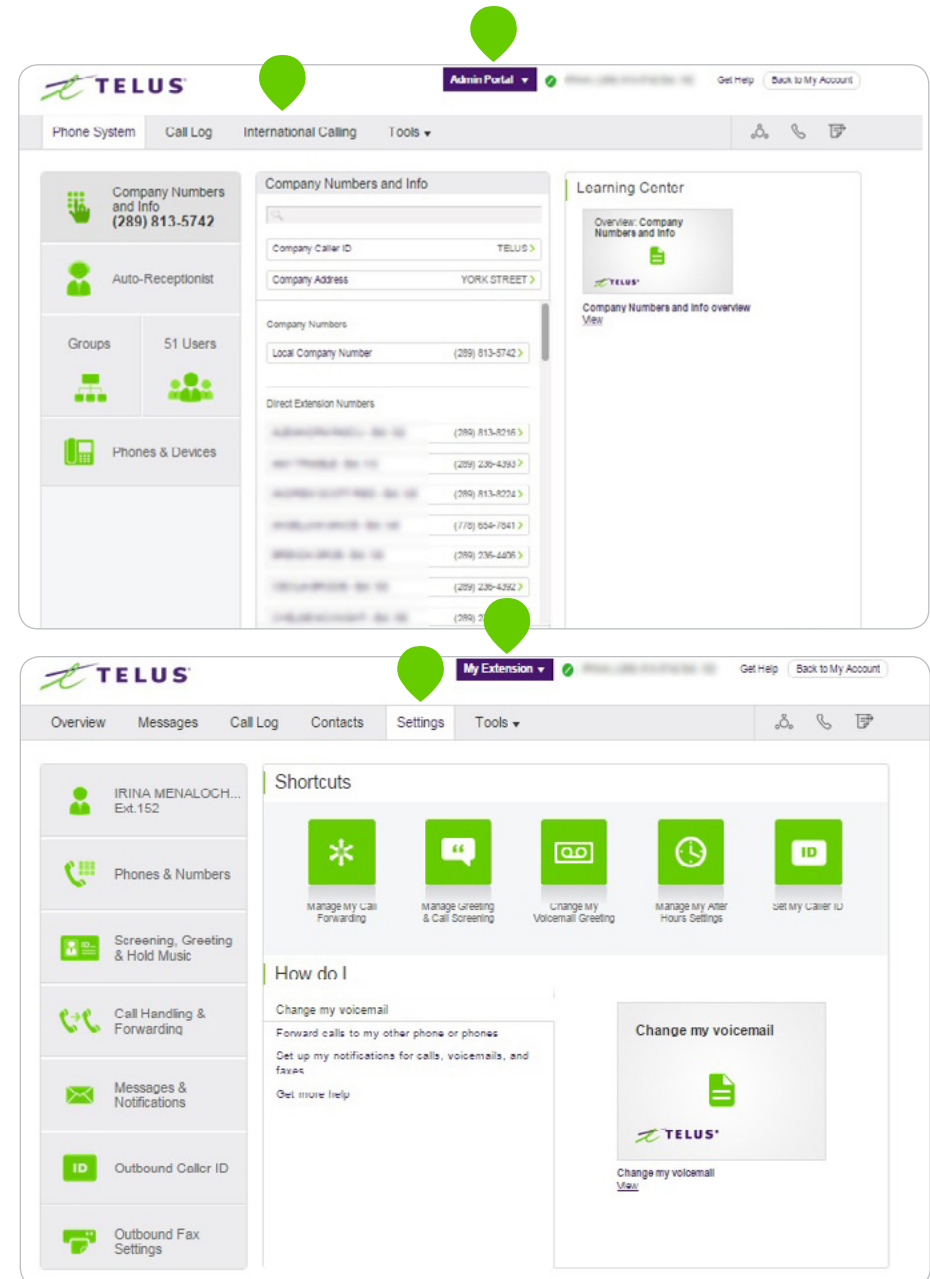
There are a few main functions that administrators can access from any online page. These functions are Edit Company Business Hours, Change Company Greeting and Set Company Caller ID.

### Admin Portal

From the Admin Portal, admins see admin-only tools. The Phone System tab is the main tab and landing page that houses all of the main settings for the entire phone system. Here, you have Company Numbers and Info, Auto-Receptionist, Groups, Users, and Phones and Devices. The Call Log, and International Calling tab display information about your phone system. The Tools tab has the setup option named Appearance.

### My Extension

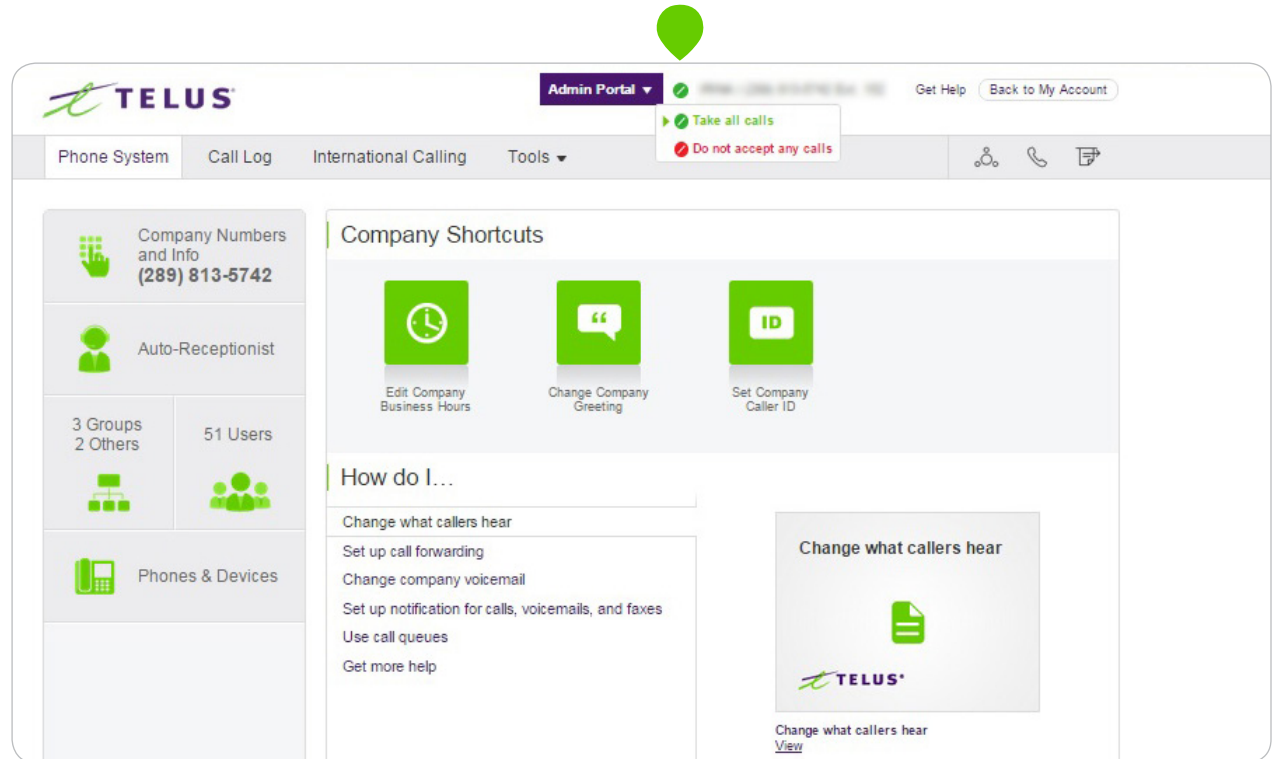
When you switch to the My Extension page, you will see the standard user settings view of Overview, Messages, Call Log, Contacts, Settings, and Tools. Click on Settings to access your individual settings. The My Extension tab houses the same settings as a regular user has.



## Do Not Disturb

In the upper right of every page of your online account is a small coloured icon next to your name. This icon displays your Do Not Disturb status. Click the icon to toggle between statuses:

- **“Do Not Disturb Off – Green** means that you are available to take incoming calls.
- **“Do Not Disturb On – Red** means “Do not accept any calls.” All callers are sent to voicemail.



## Conference

TELUS Business Connect customers can setup, host, and join conference calls anytime, anywhere. Click the Conference icon in the upper right corner of your online account to get started.

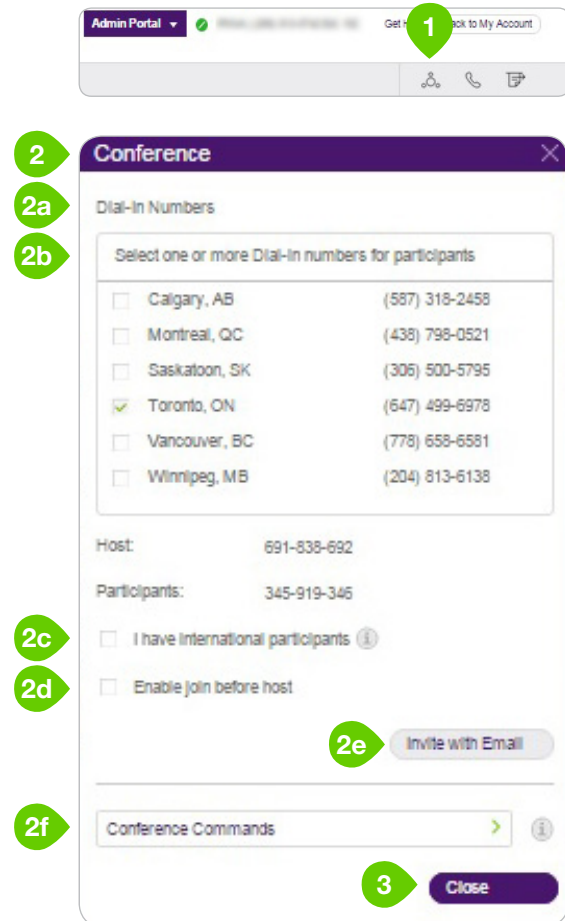
Each customer receives a unique conference bridge number, and each user on the phone system gets his or her own host and participant access code so that you and your team can hold independent conferences whenever you want.

You also have the option to add the international dial-in number in the invitation. Check the “I have international participants” option and select the needed countries in the list.

Each conference call can include up to 1000 attendees, enabling you to hold large meetings and broadcasts.

### Launch the Conferencing Application

1. Click the **Conference** icon.
2. A pop-up will appear with conference numbers and settings.
  - a. View Dial-in numbers.
  - b. View **Host** and **Participant** codes.
  - c. If you have international participants, check the checkbox next to **I have international participants**. Select international dial-in numbers at the bottom of the pop-up.
  - d. Check the checkbox next to **Enable join before host** to start a conference call without a host.
  - e. Click **Invite with Email** to open an email with prep-populated conference details – simply enter participant emails and send.
  - f. Click **Conference Commands** to view Conference Commands\*.
3. Click **Close**.



The screenshot shows the TELUS Business Connect Admin Portal interface. At the top, there's a navigation bar with 'Admin Portal', a user profile icon, and a 'Get Help' link. A green circle with the number '1' points to the 'Conference' icon in the top right corner. Below this, a 'Conference' pop-up window is displayed. The window has a title bar with a close button. Inside, there's a section titled 'Dial-In Numbers' with a sub-header 'Select one or more Dial-in numbers for participants'. It lists several Canadian cities with their respective area codes and phone numbers: Calgary, AB (587) 318-2458; Montreal, QC (438) 798-0521; Saskatoon, SK (306) 500-5795; Toronto, ON (647) 499-6978 (checked); Vancouver, BC (778) 658-6581; and Winnipeg, MB (204) 813-6138. Below this, there are fields for 'Host' (691-838-692) and 'Participants' (345-919-345). There are two checkboxes: 'I have international participants' (unchecked) and 'Enable join before host' (unchecked). A green circle with the number '2' points to the 'Invite with Email' button. Below that, there's a 'Conference Commands' section with a text input field and a green circle with the number '2f' pointing to it. At the bottom right, there's a green circle with the number '3' pointing to the 'Close' button.

\*See Conference Commands on the next page.

# Conference Commands

For the Conferencing feature, the host and participants have the same conference bridge number to dial into, but their call control depends on the access codes that they will use.

The Host has the full call control and can access the conference commands in the table to the right.

Participants, on the other hand, have limited control of the conference commands. The commands are displayed with the conferencing dial-in information.

The commands are displayed with the conferencing dial-in information.

Conference

Dial-In Numbers

Select one or more Dial-In numbers for participants

☐ Calgary, AB

(587) 318-2458

☐ Montreal, QC

(438) 798-0521

☐ Saskatoon, SK

(306) 500-5795

☒ Toronto, ON

(647) 499-6978

☐ Vancouver, BC

(778) 658-6581

☐ Winnipeg, MB

(204) 613-6138

Host:

691-838-692

Participants:

345-919-346

☐ I have international participants

☐ Enable join before host

Invite with Email

Conference Commands

Use this command...

To do this...

\* # 2

Caller Count: Keep track of how many people are on the call

\* # 3

Leave Conference: Lets the host hang up and end the call

\* # 4

Menu: Listen to the list of touchtone commands

\* # 5

Set Listening Modes

Press 1x: Mute callers - Callers can unmute with \* # 6

Press 2x: Mute callers - Listen only. No unmuting option

Press 3x: Unmute callers - Opens the line again

\* # 6

Mute Host Line

Press once to MUTE

Press again to UNMUTE

\* # 7

Secure the Call

Press once to BLOCK all callers

Press again to OPEN the call

\* # 8

Hear sound when people Enter or Exit call

Press 1x: Turns OFF sound

Press 2x: Entertone is ON Exit tone is OFF

Press 3x: Entertone is OFF Exit tone is ON

Press 4x: Turns ON sound

\* 9

Record your conference

Press once to START recording

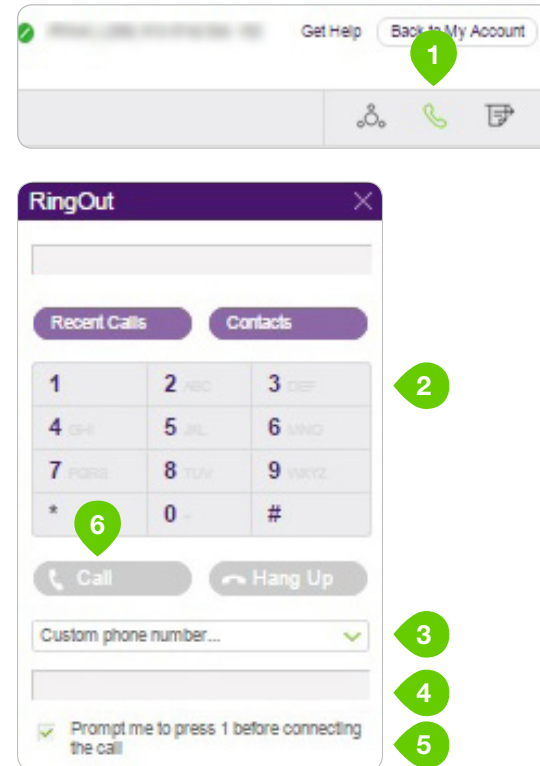
Press again to STOP recording

Close

## RingOut

RingOut enables one-touch calling from any phone or Internet-enabled computer, allowing you to make calls using your business caller ID from any location, such as a hotel room. The RingOut icon appears near the top of every online account page.

1. Click on the **RingOut** icon on any account page to open this menu pop-up.
2. In the number field, enter or select the number you wish to call. You can also choose from among recent calls, or from your contact list.
3. Current Location should list your TELUS Business Connect number. Or you can choose **Custom phone number** from the drop-down menu and enter the desired number in the Custom Number field below.
4. Enter the Custom Number to call here.
5. **Prompt me to press 1 before connecting the call** is pre-checked:  
When the system calls you, you will hear “Please press 1 to connect.” This protects you in case you mistyped your own number, or if your voicemail picks up too quickly.
6. Now click **Call**. The system first calls you. When you answer (and press 1 as instructed), it then calls the other number and connects you.



The image shows the RingOut interface. At the top, there is a header bar with a green checkmark, a phone number, and links for 'Get Help' and 'Back to My Account'. Below this is a navigation bar with icons for a network, a phone, and a document. The main content area is titled 'RingOut' and contains a search bar, two tabs for 'Recent Calls' and 'Contacts', and a numeric keypad. The keypad has buttons for digits 1-9, \*, 0, and #. Below the keypad are 'Call' and 'Hang Up' buttons. At the bottom, there is a dropdown menu for 'Custom phone number...' and a checkbox labeled 'Prompt me to press 1 before connecting the call' which is checked. Numbered callouts are placed over the interface: 1 points to the 'Back to My Account' link, 2 points to the numeric keypad, 3 points to the 'Custom phone number...' dropdown, 4 points to the 'Call' button, 5 points to the 'Prompt me to press 1...' checkbox, and 6 points to the '\*' button on the keypad.

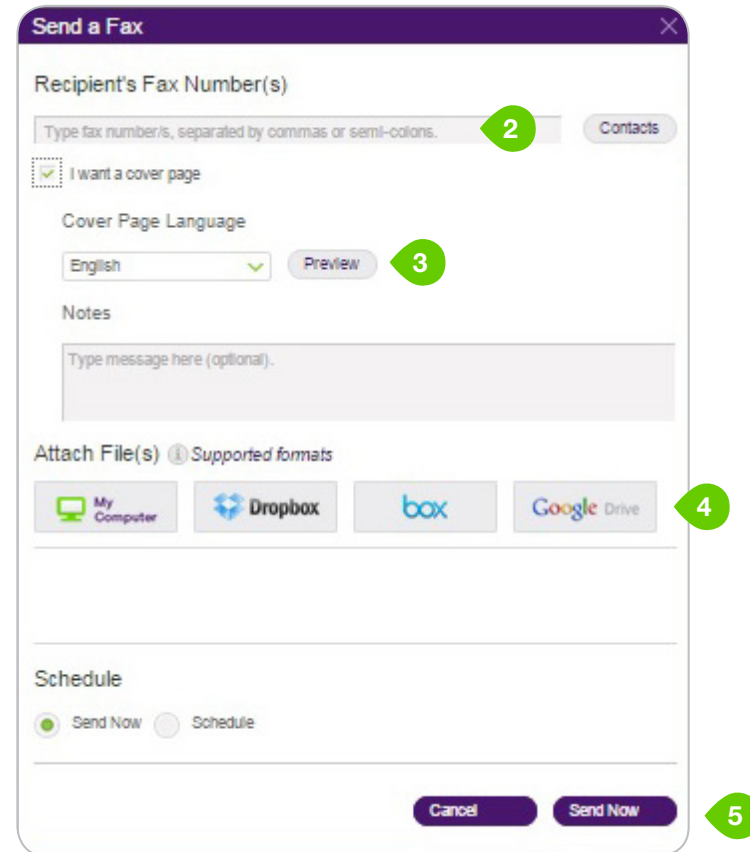
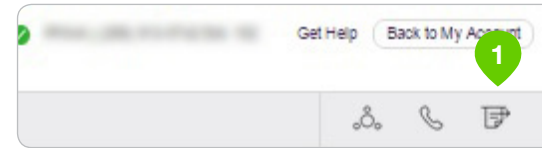
## FaxOut

To quickly send a fax from your online account, click the FaxOut icon located in the upper right corner. Fill in the form with recipient's fax number and cover page information, and attach or scan a document, which will automatically be converted into a fax.

A wide variety of standard document types, including word processing and spreadsheet and PDF documents, are recognized by FaxOut.

Send files from Dropbox, Box or Google Drive with just a few clicks.

1. Click the **FaxOut** icon in the upper right corner.
2. Enter up to 50 recipients.
3. Select your cover page and add a message.
4. Attach files from Dropbox, Box, Google Drive or your computer and authorize TELUS Business Connect to access your files (you have to do this only once).
5. Click **Send Now** and your fax is on its way.



The 'Send a Fax' dialog box contains the following elements:

- Step 2:** A text input field for 'Recipient's Fax Number(s)' with a placeholder 'Type fax number/s, separated by commas or semi-colons.' and a 'Contacts' button.
- Step 3:** A checkbox labeled 'I want a cover page' (checked), a 'Cover Page Language' dropdown menu set to 'English', and a 'Preview' button.
- Notes:** A text area with the placeholder 'Type message here (optional)'.
- Step 4:** An 'Attach File(s)' section with a help icon and the text 'Supported formats'. Below are four buttons: 'My Computer', 'Dropbox', 'box', and 'Google Drive'.
- Schedule:** Two radio buttons, 'Send Now' (selected) and 'Schedule'.
- Step 5:** 'Cancel' and 'Send Now' buttons at the bottom right.

Part 2

# Admin Portal



## Phone System

The Phone System tab is the main tab of the Admin Portal. It houses all of the main settings for your entire phone system. Here you will find settings for:

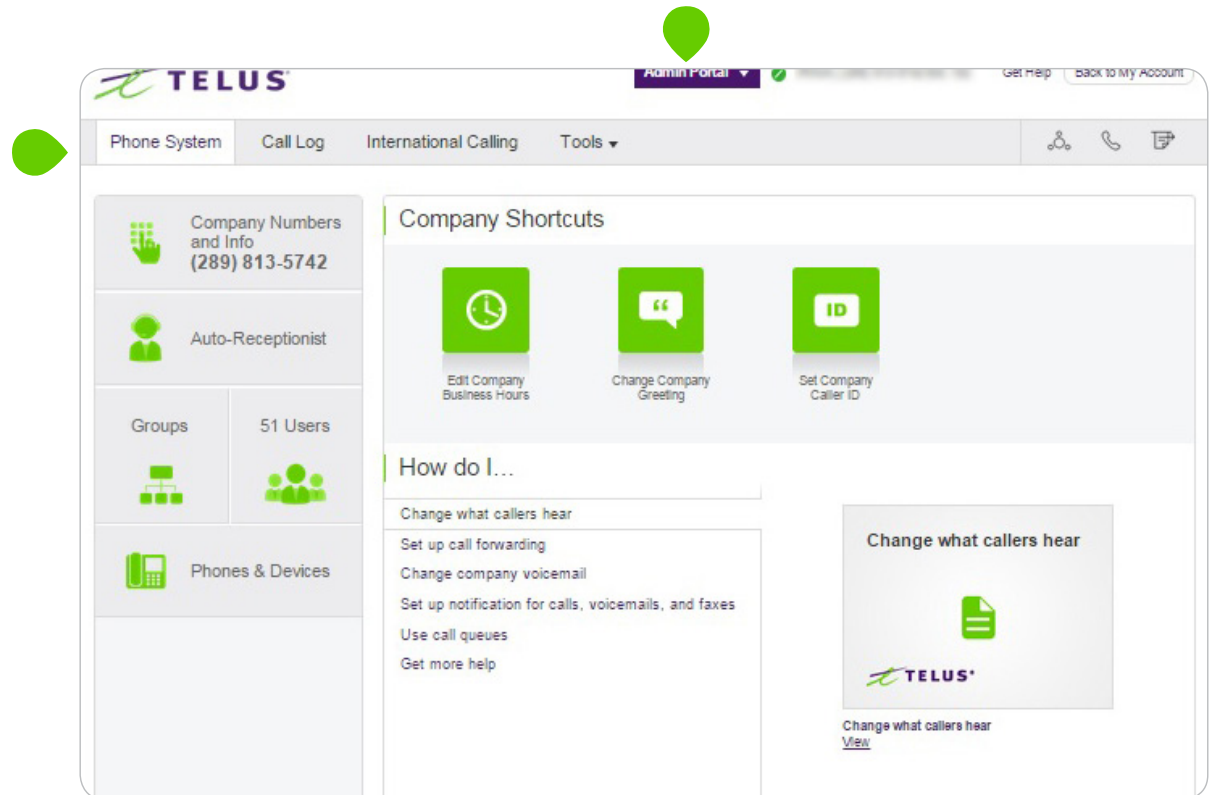
- Company Numbers and Info
- Auto-Receptionist Settings
- Auto-Receptionist
- Groups
- Users
- Phones & Devices

On your Phone System page, you have Shortcuts that allow you to quickly access commonly used functions such as:

- Edit Company Business Hours
- Change Company Greeting
- Set Company Caller ID

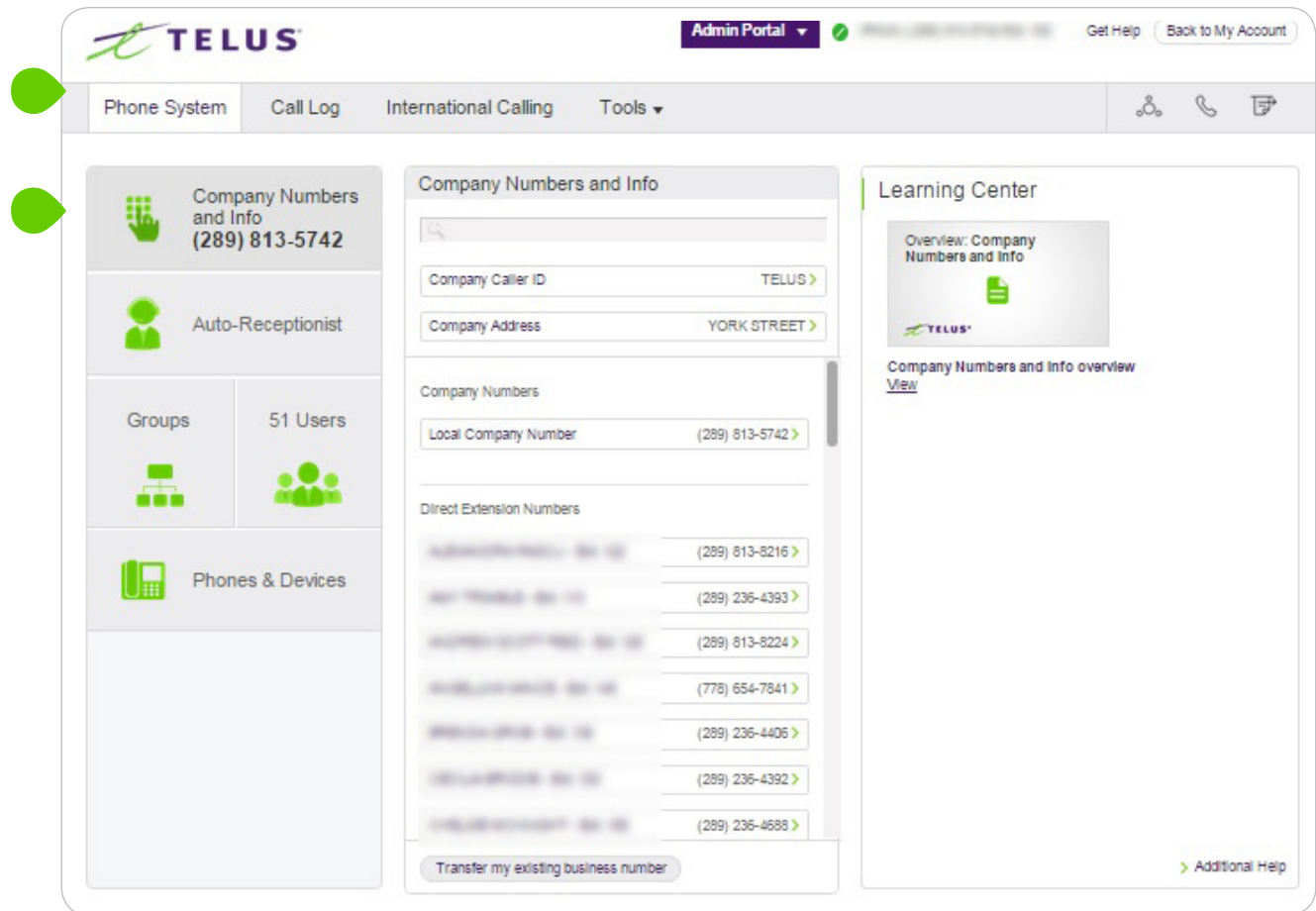
### How do I...

If you need help setting up your phone system, check out the How do I... section for helpful articles.



## Company Numbers and Info

The Company Numbers and Info settings include Company Caller ID, Company Numbers, Direct Extension Numbers, and the option to add additional numbers.



**TELUS** Admin Portal

Phone System | Call Log | International Calling | Tools

**Company Numbers and Info**  
(289) 813-5742

Auto-Receptionist

Groups | 51 Users

Phones & Devices

**Company Numbers and Info**

Company Caller ID: TELUS

Company Address: YORK STREET

**Company Numbers**

Local Company Number: (289) 813-5742

**Direct Extension Numbers**

Extension 8216	(289) 813-8216
Extension 4393	(289) 236-4393
Extension 8224	(289) 813-8224
Extension 7841	(778) 654-7841
Extension 4406	(289) 236-4406
Extension 4392	(289) 236-4392
Extension 4688	(289) 236-4688

Transfer my existing business number

**Learning Center**

Overview: Company Numbers and Info

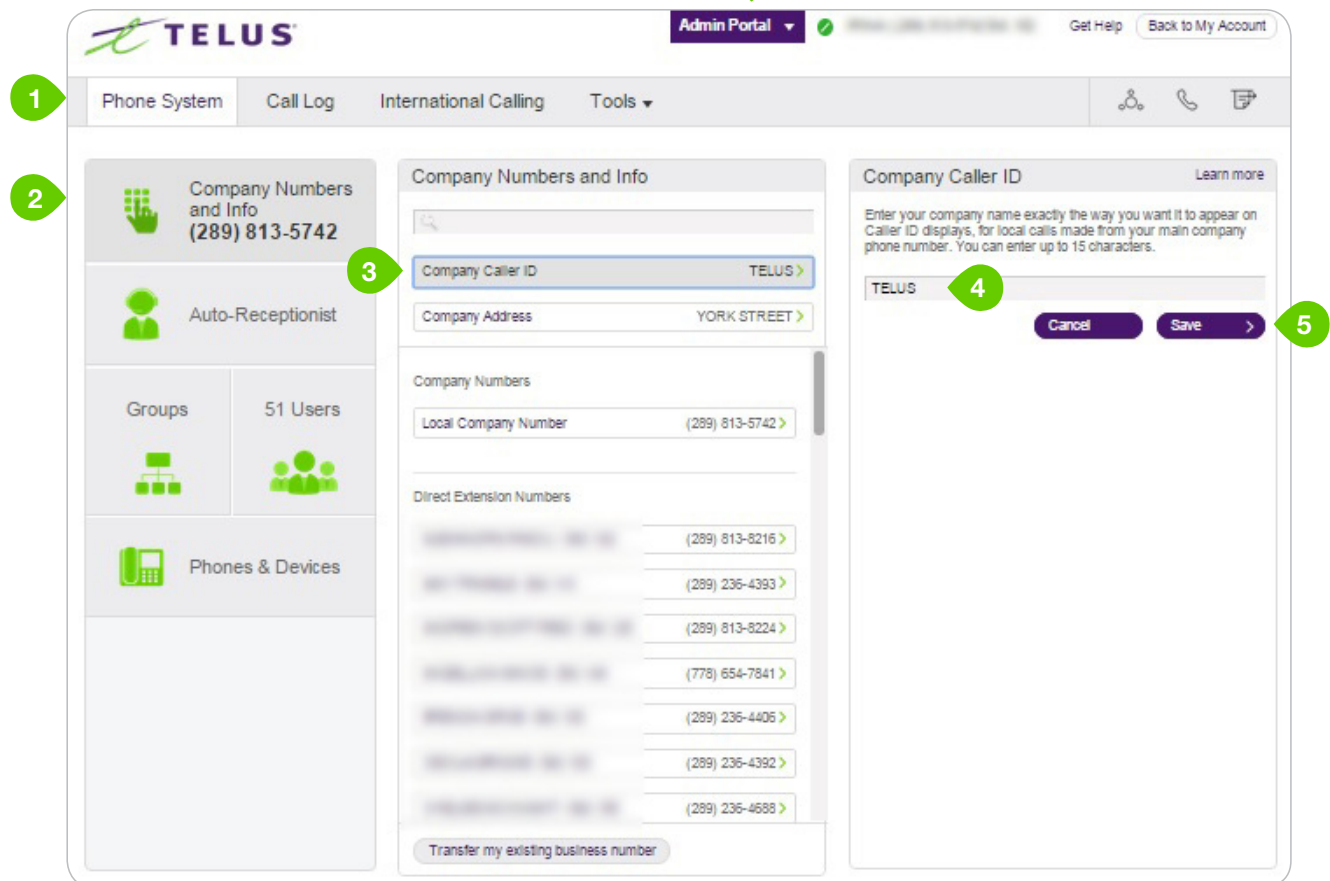
Company Numbers and Info overview [View](#)

Additional Help

## Company Caller ID

Set your Company Caller ID to your company's name so that your customers will know who is calling when you call them.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Numbers and Info**.
3. Click **Company Caller ID**.
4. Enter your company name exactly the way you want it to appear on Caller ID displays, for local calls made from your main company phone number. You can enter up to 15 characters.
5. Click **Save**.

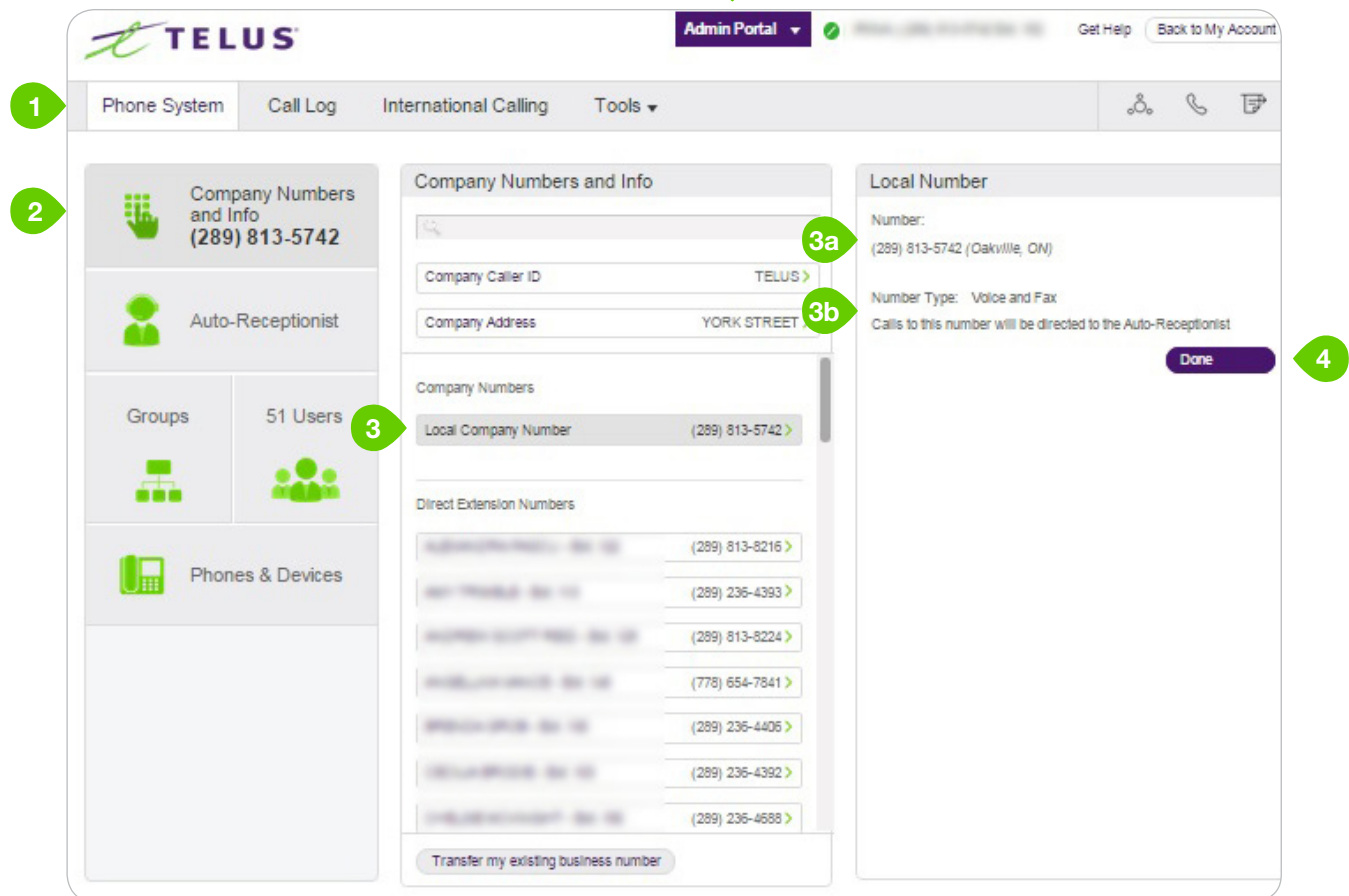


The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, an 'Admin Portal' dropdown menu, a status indicator, and links for 'Get Help' and 'Back to My Account'. Below the navigation bar are tabs for 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is active. On the left sidebar, there are icons and labels for 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', 'Groups' (51 Users), and 'Phones & Devices'. The main content area is divided into two sections. The left section, 'Company Numbers and Info', contains a search bar, a 'Company Caller ID' field with a dropdown arrow (labeled with a green circle 3), a 'Company Address' field with a dropdown arrow, and a list of 'Company Numbers' and 'Direct Extension Numbers'. The right section, 'Company Caller ID', contains a text input field with the value 'TELUS' (labeled with a green circle 4), a 'Cancel' button, and a 'Save' button (labeled with a green circle 5). A green circle 1 points to the 'Phone System' tab, and a green circle 2 points to the 'Company Numbers and Info' icon in the sidebar.

## Company Numbers

Under Company Numbers, you will see the Main Number for your company as well as other numbers such as Auto-Receptionist numbers.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Numbers and Info**.
3. Click a number under **Company Numbers** to see more details.
  - a. **Number** – View your number and additional information.
  - b. **Number Type** – View your number type.
4. Click **Done**.

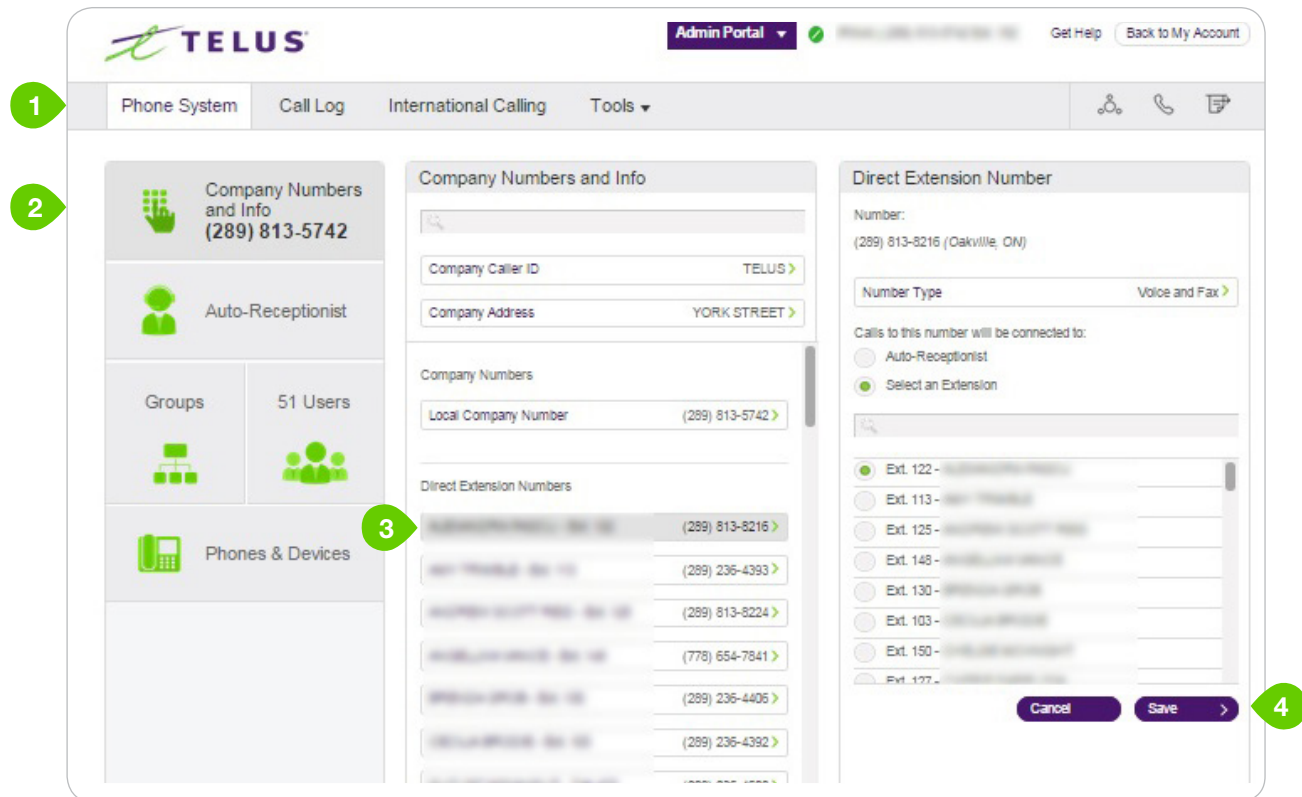


The screenshot displays the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, 'Admin Portal' dropdown, and 'Get Help' and 'Back to My Account' links. The left sidebar features tabs for 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The main content area is divided into several sections: 'Company Numbers and Info' (containing fields for 'Company Caller ID' (TELUS), 'Company Address' (YORK STREET), and a list of 'Company Numbers' with a 'Local Company Number' (289) 813-5742); 'Auto-Receptionist'; 'Groups' (showing 51 Users); and 'Phones & Devices'. A right sidebar shows 'Local Number' details, including the number (289) 813-5742 (Oakville, ON) and its type (Voice and Fax). A 'Done' button is located at the bottom right of the right sidebar. Green callout numbers 1 through 4 indicate the steps: 1 points to the 'Phone System' tab, 2 points to the 'Company Numbers and Info' section, 3 points to the 'Local Number' section, and 4 points to the 'Done' button.

## Direct Extensions

Under Direct Extensions, you will see all of the Direct Extension Numbers that have been set for your phone system.

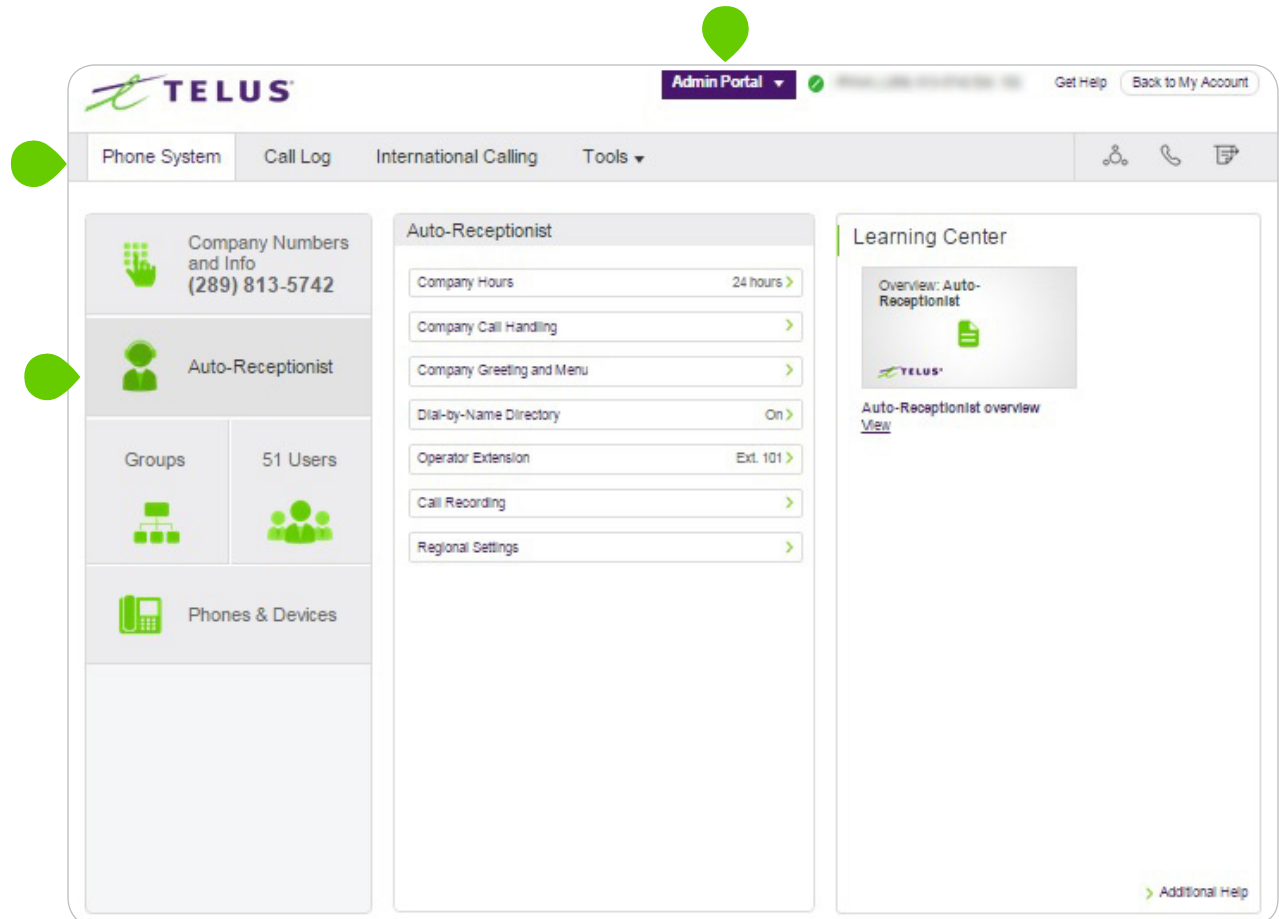
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Numbers and Info**.
3. Click a number under **Direct Extension Numbers** to see more details.
  - a. **Users without phones** – View the Number, edit Number Type (Voice and Fax, Voice only, Fax only), and edit whether Calls to this number will be connected to: either Auto- Receptionist or Select an Extension. If you have made any changes, click Save.
  - b. **Users with physical desk phones** – View the Number, edit Number Type (Voice and Fax, Voice only, Fax only), and click Phone to edit the phone details by navigating to the Phones & Devices view.
4. Click **Save**.



The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, 'Admin Portal' dropdown, a status indicator, 'Get Help', and 'Back to My Account'. The main navigation tabs are 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The left sidebar contains icons for 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', 'Groups' (51 Users), and 'Phones & Devices'. The main content area is titled 'Company Numbers and Info' and includes fields for 'Company Caller ID' (TELUS), 'Company Address' (YORK STREET), and a list of 'Direct Extension Numbers'. One number, (289) 813-8216, is selected. The right sidebar shows the details for this number, including 'Number Type' (Voice and Fax) and 'Calls to this number will be connected to' (Auto-Receptionist). A 'Save' button is visible at the bottom right of the sidebar.

## Auto-Receptionist Settings

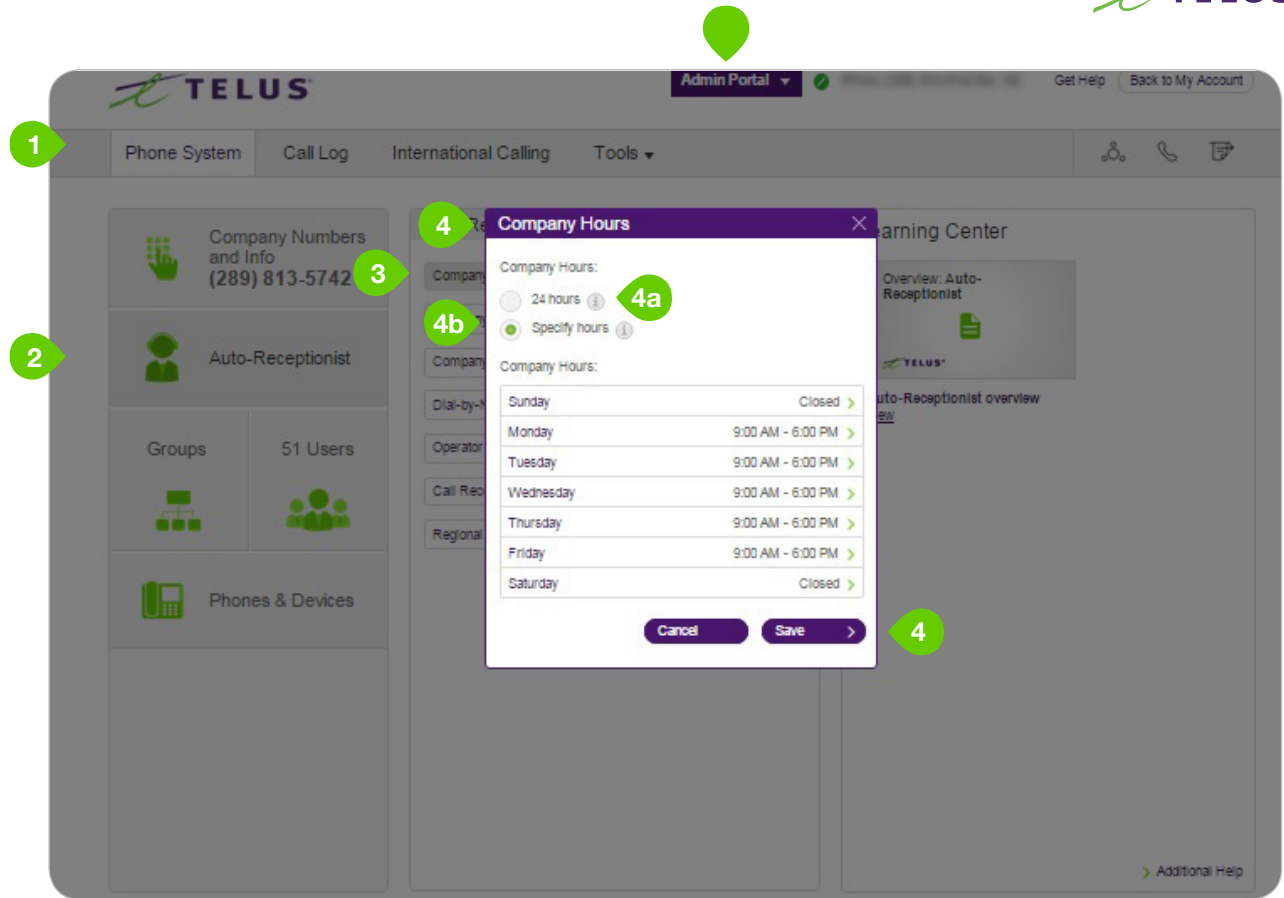
Create your own auto-receptionist for your phone system. Customize your options for effective call management. Choose your company hours, set your company greeting, define rules for call handling and more.



## Company Business Hours

Customize your company's business hours. You can specify the opening and closing time for each day of the week or select 24 hours. This establishes the settings for the Business Hours and After Hours tabs in other settings areas (such as call queue settings and user settings).

1. From the Admin Portal, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Hours**.
4. Set your Company Hours to:
  - a. **24 hours** to have incoming calls handled the same way all the time.
  - b. **Specify hours** for each day of the week. This lets you set separate call-handling rules and greetings for Business Hours and After Hours.
5. Click **Save**.





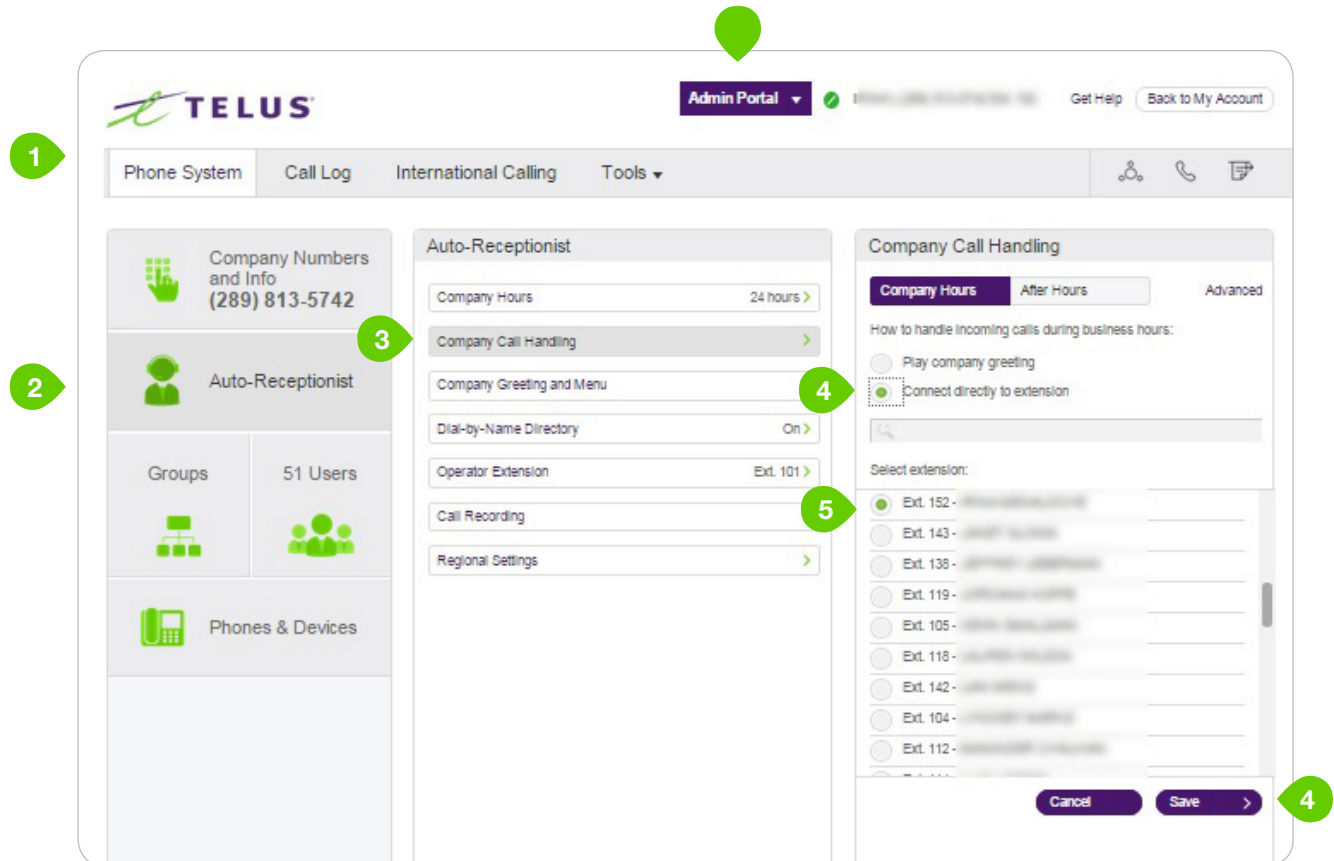
## Company Call Handling

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 set a custom greeting by recording through your phone or computer or by uploading a sound file. Alternatively, the Auto-Receptionist can connect calls directly to an extension of your choice.

### Set Auto-Receptionist to Connect to a Direct Extension

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Call Handling**.
4. Select the radio button next to **Connect directly to extension**.
5. Select an extension to receive all calls.
6. Click **Save**.

NOTE: If you have set custom Company Hours, follow these steps for both the Company Hours and After Hours tabs.



The screenshot illustrates the TELUS Admin Portal interface for configuring the Auto-Receptionist. The top navigation bar includes the 'Admin Portal' link. The left sidebar contains the 'Phone System' tab, which is selected. The main content area displays the 'Auto-Receptionist' configuration page. The 'Company Call Handling' section is highlighted, showing the 'Company Hours' tab. The 'Connect directly to extension' radio button is selected, and 'Ext. 152' is chosen from the extension list. The 'Save' button is visible at the bottom right.



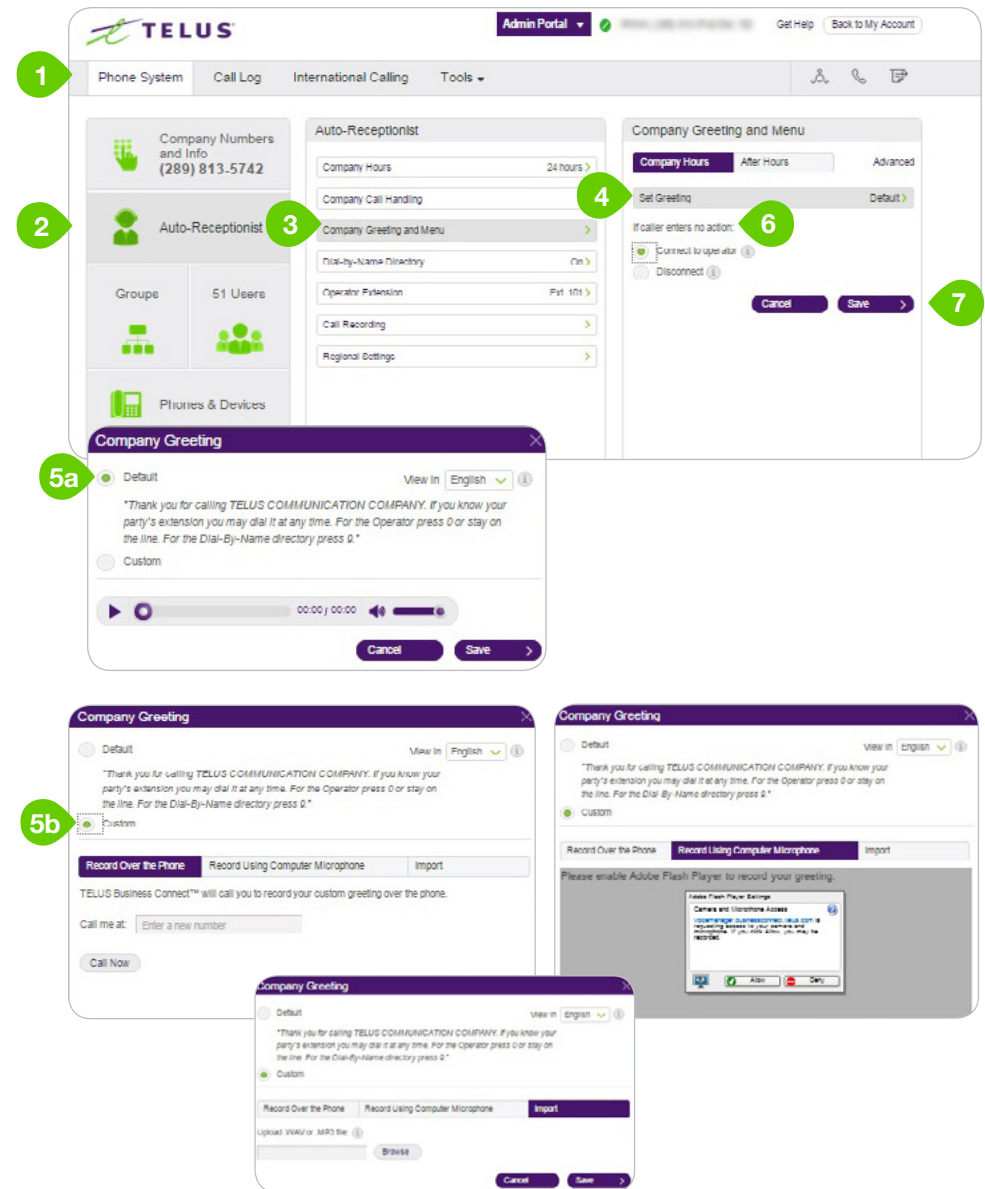
## Company Greeting and Menu

The Company Greeting and Menu bar provides additional call handling options, including hearing the Default greeting and recording a Custom greeting.

### Set a Company Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Greeting and Menu**.
4. A pop-up will appear with the current greeting.
5. Choose your preferred type of greeting.
  - a. **Default** – Select the radio button next to Default.
  - b. **Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to Call me at, choose a phone number from the dropdown menu if you have saved numbers or type a phone number in the text field. Click the Call Now button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**  
Click **Allow** on the Adobe Flash Player Settings pop-up. Click **Allow** if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
    - **Import**  
Browse for a WAV or MP3 file you want to use. Click **Attach**. Click the play button to listen to your greeting. If you've set a custom greeting, click the record button to set a different company greeting.
6. Under **If caller enters no action**, choose whether you'd like the use to **Connect to an operator** or **Disconnect**.
7. Click **Save**.

NOTE: If you have set custom Company Hours, follow these steps for both the Company Hours and After Hours tabs.



## On-demand Call Recording

On-demand Call Recording makes it easy for TELUS Business Connect users to record calls they make or receive. After On-demand Call Recording is enabled, users can activate on-demand call recording at any time by pressing \*9 on their phone's dial pad.

NOTE: Provincial and federal laws require that your callers hear a call-recording notification before and after a call is recorded. As an administrator, you need to make sure your company's call recording procedures comply with federal and provincial laws; TELUS Business Connect is not responsible for your company's compliance.

### Enable On-demand Call Recording

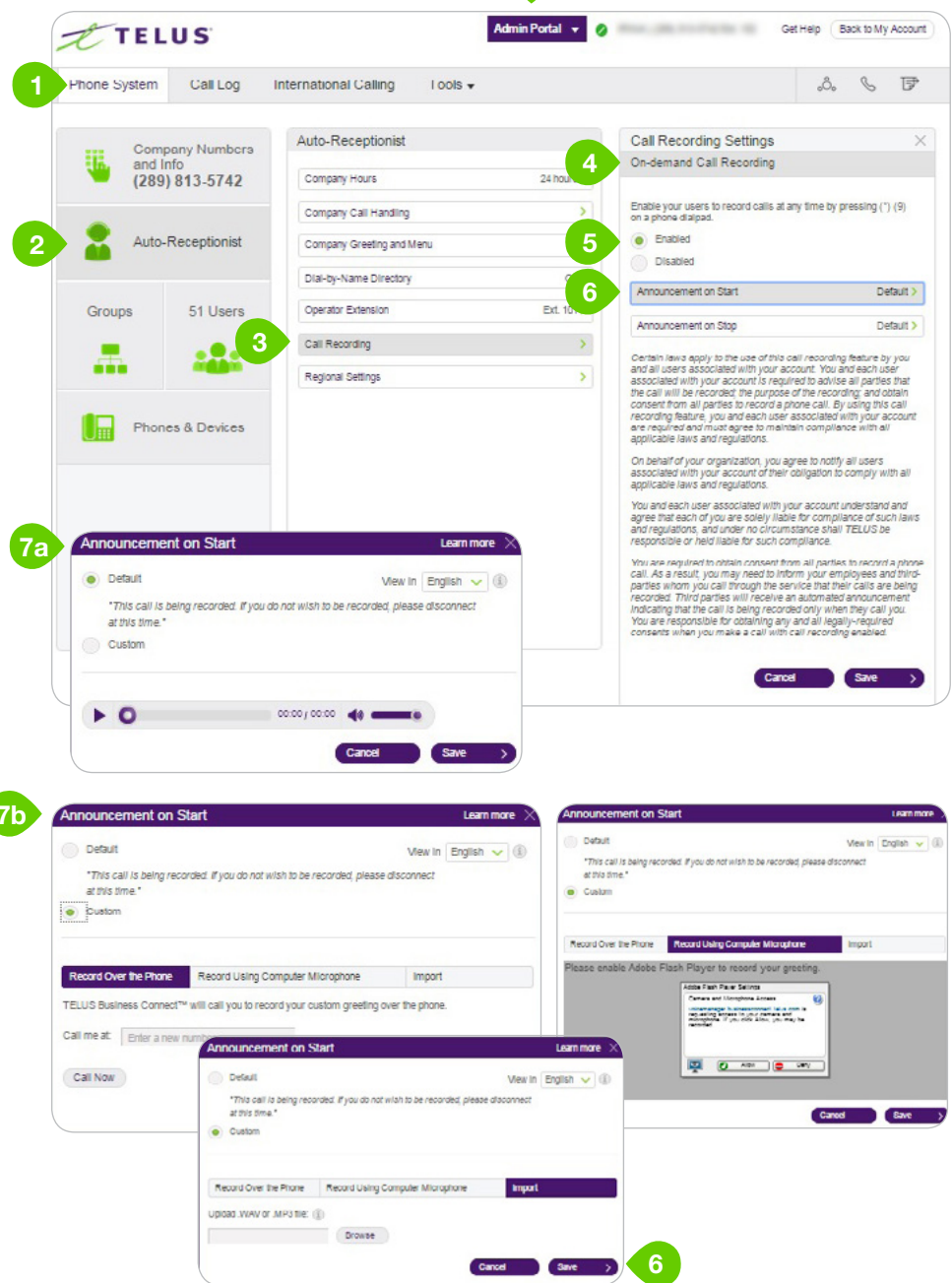
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Click **On-demand Call Recording**.
5. Select the radio button next to **Enabled**.
6. Click **Save**.

The screenshot displays the TELUS Admin Portal interface. At the top, the 'Admin Portal' header is visible. The left sidebar shows the 'Phone System' tab selected. The main content area is divided into sections: 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', 'Groups' (51 Users), and 'Phones & Devices'. The 'Auto-Receptionist' section is expanded, showing various settings. The 'Call Recording' option is highlighted with a green circle 3. The 'Call Recording Settings' panel on the right shows 'On-demand Call Recording' enabled, indicated by a green circle 5. The 'Save' button at the bottom right is highlighted with a green circle 6.

## Set an On-demand Call Recording Announcement

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Click **On-demand Call Recording**.
5. Select the radio button next to **Enabled**.
6. Click **Announcement on Start**.
7. A pop-up will appear displaying the current announcement. Choose your preferred type of announcement.
  - a. **Default** – Select the radio button next to Default.
  - b. **Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to Call me at, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**  
Click **Allow** on the Adobe Flash Player Settings pop-up. Click **Allow** if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your company announcement through your computer microphone. Stop the recording and listen to the playback.
    - **Import**  
Browse for a .WAV or .MP3 file you want to use. Click **Attach**.
8. Click **Save**.

NOTE: Repeat these steps with Announcement on Stop in step 5 to listen to and set the announcement for Announcement on Stop.



The screenshot illustrates the TELUS Admin Portal interface for configuring call recording. It shows the 'Phone System' tab selected, leading to the 'Auto-Receptionist' settings. The 'Call Recording' section is highlighted, and the 'On-demand Call Recording' settings are shown. The 'Announcement on Start' pop-up is displayed, showing the 'Default' and 'Custom' options. The 'Custom' option is selected, and the 'Record Using Computer Microphone' tab is active. An Adobe Flash Player Settings pop-up is shown, asking to allow the application to use the microphone. The 'Announcement on Start' pop-up is shown again, displaying the recorded announcement.

## Automatic Call Recording\*

Automatic Call Recording allows you to record incoming and outgoing calls automatically. You can also play back the recordings or download the Recorded call logs for sales and support training, compliance, etc.

NOTE: State and federal laws require that your callers hear a call-recording notification before and after a call is recorded. As an administrator, you need to make sure your company's call recording procedures comply with federal and state laws; TELUS Business Connect is not responsible for your company's compliance.

### Enable Automatic Call Recording

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Click **Automatic Call Recording**.
5. Under **Automatically record calls**, select the radio button next to **Enabled**.
6. Click **OK** on the agreement pop-up.
7. Click **Users & Groups to Record**.
8. A pop-up will appear with a list of Users & Groups to Record.
9. Check the check box for the user extension you want to have their calls recorded and the type of call where the recording will take place (inbound or outbound).
10. Click **Save**. Users you selected will be informed by email that their calls will be automatically recorded, and how to access their recorded calls.

The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes 'Admin Portal', user information 'JOHN | (778) 403-4391 Ext. 101', and a 'Get Help' link. The main menu on the left has 'Phone System' selected. The 'Auto-Receptionist' section is active, showing options like 'Company Numbers and Info', 'Auto-Receptionist', '3 Groups 4 Others', '2 Users', and 'Phones & Devices'. The 'Call Recording' option is highlighted. The 'Call Recording Settings' dialog is open, showing 'On-demand Call Recording' and 'Automatic Call Recording' sections. The 'Automatic Call Recording' section has 'Automatically record calls' set to 'Enabled'. The 'Users & Groups to Record' section shows a list of users and groups with checkboxes for recording. The 'Call Recording Announcement' is set to 'Default'.

The screenshot shows two pop-up windows. The first is 'Enable Call Recording', which contains legal disclaimers and an 'OK' button. The second is 'Users & Groups to Record', which contains a table for selecting users and groups to record. The table has columns for 'Users', 'Ext.', 'Incoming', and 'Outgoing'. The 'Incoming' column has checkboxes for each user and group, and the 'Outgoing' column has checkboxes for each user and group. The 'Incoming' column has a '9' callout. The 'Outgoing' column has a '10' callout. The 'Save' button is at the bottom right.

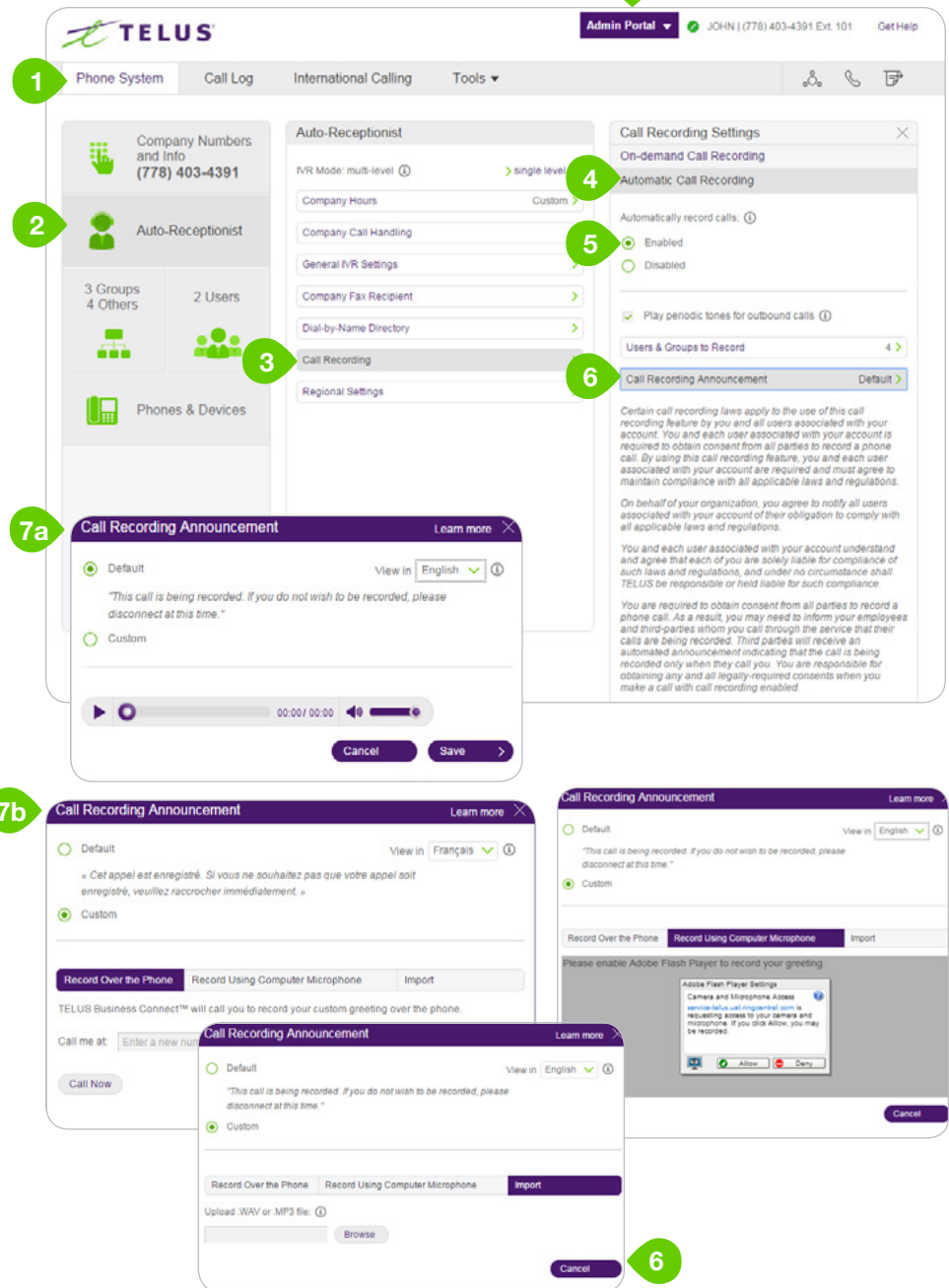
Users	Ext.	Incoming	Outgoing
JOHN SMITH	Ext. 101	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OFFICE SEAT	Ext. 102	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Call Queues	Ext.	Incoming	Outgoing
sales	Ext. 1111	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Paging Only	Ext.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
warehouse	Ext. 2222	<input checked="" type="checkbox"/>	<input type="checkbox"/>

\*This option is available for Premium and Premium Plus only.



## Set a Call Recording Announcement

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Click **Automatic Call Recording**.
5. Under **Automatically record calls**, select the radio button next to **Enabled**.
6. Click **Call Recording Announcement**.
7. A pop-up will appear displaying the current **Call Recording Announcement**. Choose your preferred type of announcement.
  - a. **Default** – Select the radio button next to Default.
  - b. **Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to Call me at, choose a phone number from the dropdown menu if you have saved numbers or type a phone number in the text field. Click the Call Now button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**  
Click Allow on the Adobe Flash Player Settings pop up. Click Allow if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your announcement through your computer microphone. Stop the recording and listen to the playback.
    - **Import**  
Browse for a .WAV or .MP3 file you want to use. Click Attach.
8. Click **Save**.



## Multi-Level Auto-Receptionist

The Multi-level IVR is an additional option to the Auto-Receptionist. It extends the Auto-Receptionist menu with more powerful and efficient call handling.

### Layout Your Multi-level IVR Plan

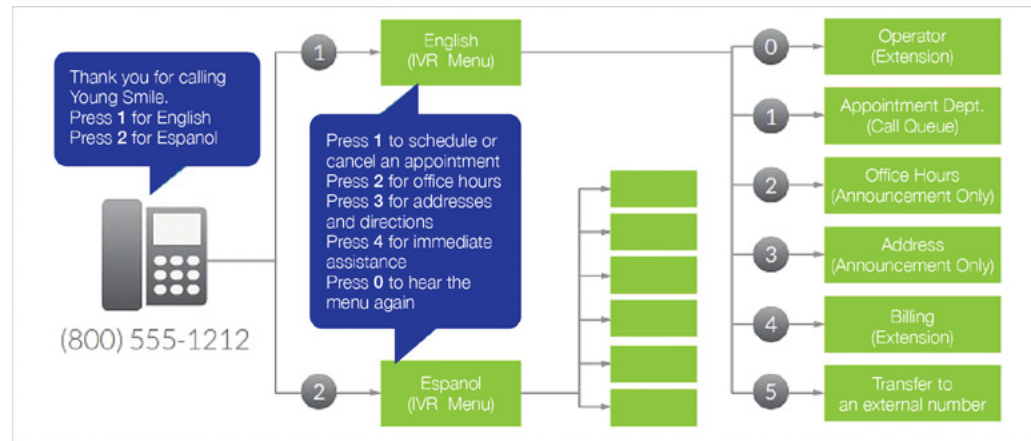
The TELUS Business Connect Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar to the examples shown on this page.

#### Single-Location IVR Use Case

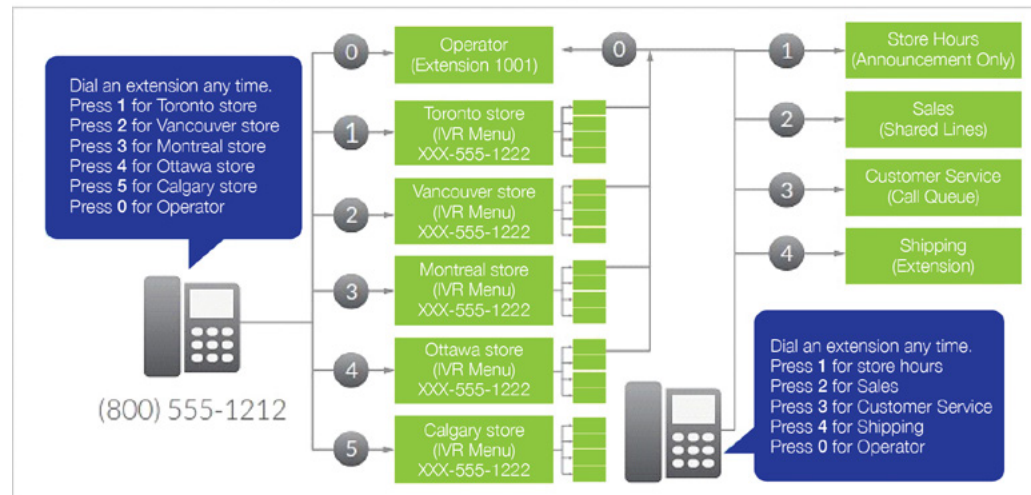
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

#### Multiple-Locations IVR Use Case

A nationwide furniture retailer has 5 stores located in Toronto, Vancouver, Montreal, Ottawa and Calgary. The IT Manager sets up a toll-free number for the automated attendant system that can route incoming calls to the proper stores in the entire retail chain.



Multi-Level IVR, single location use case: bilingual dentist office

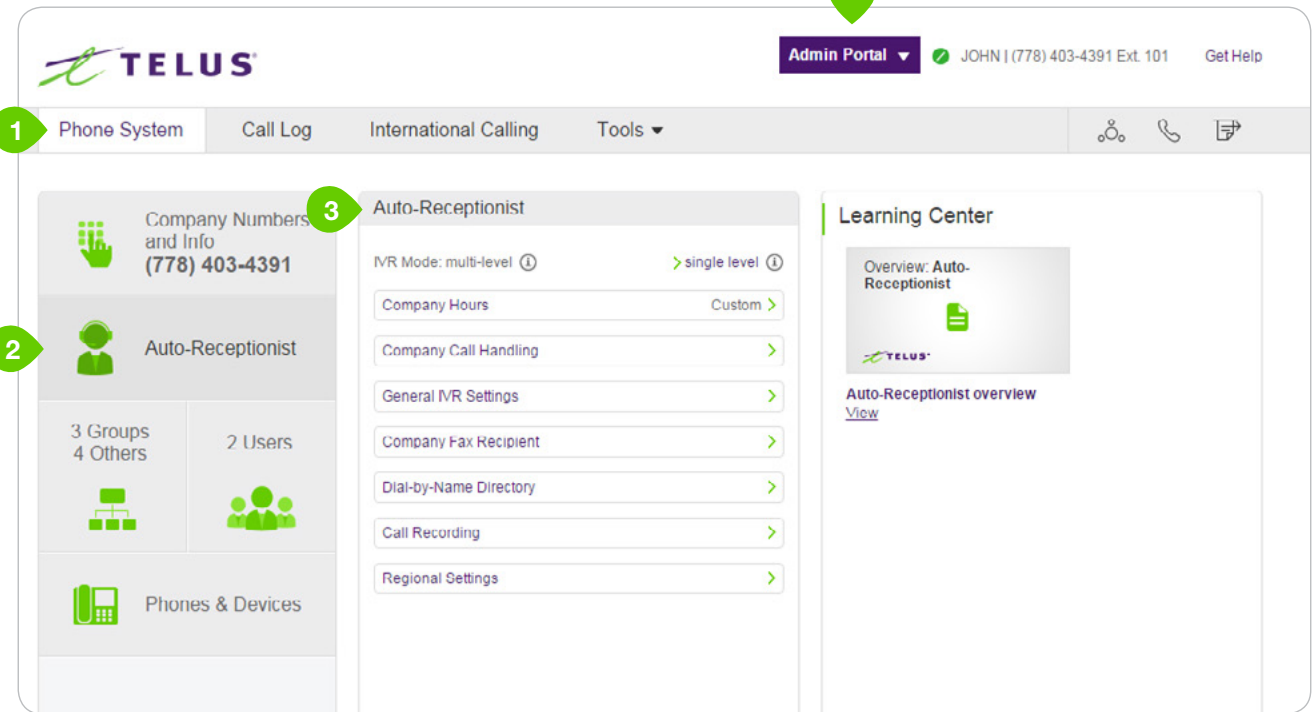


Multi-Level IVR, multiple location use case: nationwide furniture retailer

## Switch to Multi-level IVR Mode

As an option, you can change your Auto-Receptionist from a single-level to a multi-level IVR to serve users at multiple locations or to provide callers with multi-lingual menus.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. On the Auto-Receptionist panel, click > **multi-level**.
4. A pop-up will appear with a warning message. By switching to multi-level IVR mode, all of your company call handling settings will be discarded. Please confirm that you wish to proceed.
5. Click **OK** to confirm switching to multi-level IVR.
6. Select a pre-configured IVR menu.
7. Click **Save**.



NOTE: You will need to reset your call handling settings.

NOTE: Your IT department should validate and test the IVR configuration to ensure the routing and prompts in a root menu work well before connecting them to the Auto-Receptionist.

## Groups

TELUS Business Connect offers different types of groups for your phone system needs.

**Call Queues** are different from extensions. Call queues increase the efficiency of your company by directing the calls to the right employees. Call queues can support up to 25 calls waiting in a call queue.

**Paging Only\*** groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices.

**Park Locations** are private locations for your employees to park and pick up calls. Create up to 100 park locations for different groups of users in your phone system.

**Call Monitoring\*\*** allows you to set of permissions that allow specific users to monitor the calls of other users.

**Message-Only Extensions** allow you to create a dedicated extension specifically for receiving voice messages. All calls routed to this extension will be automatically directed to the extension's voicemail box.

**Announcements-Only Extensions** allow you to create a dedicated extension specifically for playing an announcement. All callers routed to this extension will only hear a recorded announcement/greeting.

\*Not available for one-line accounts.

\*\*Available for Premium and Premium Plus users only.

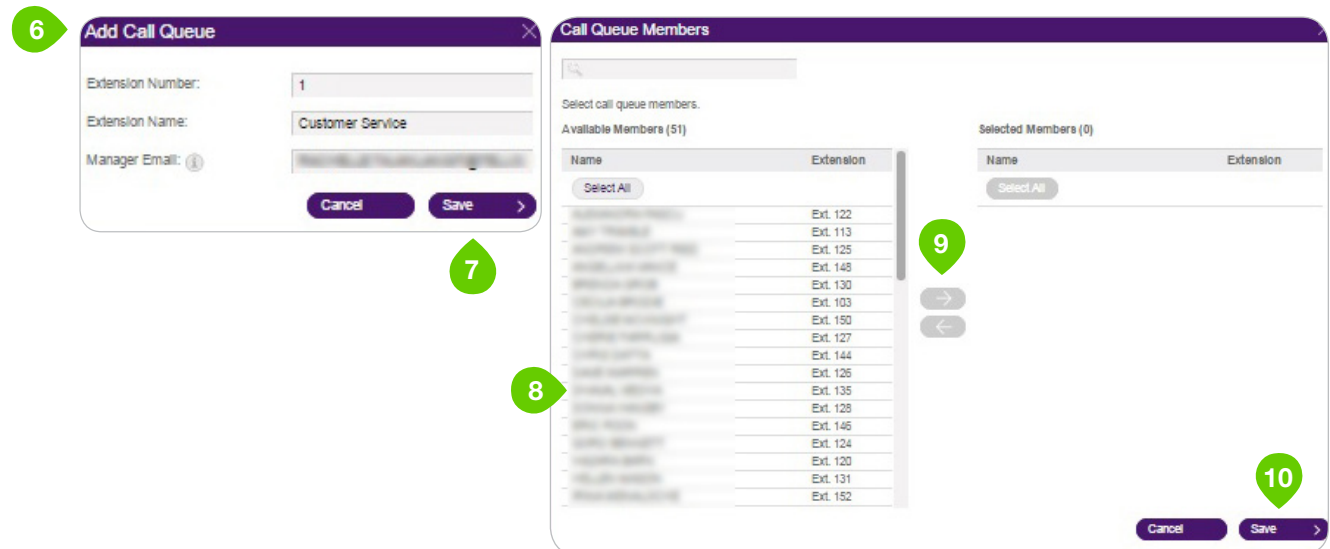
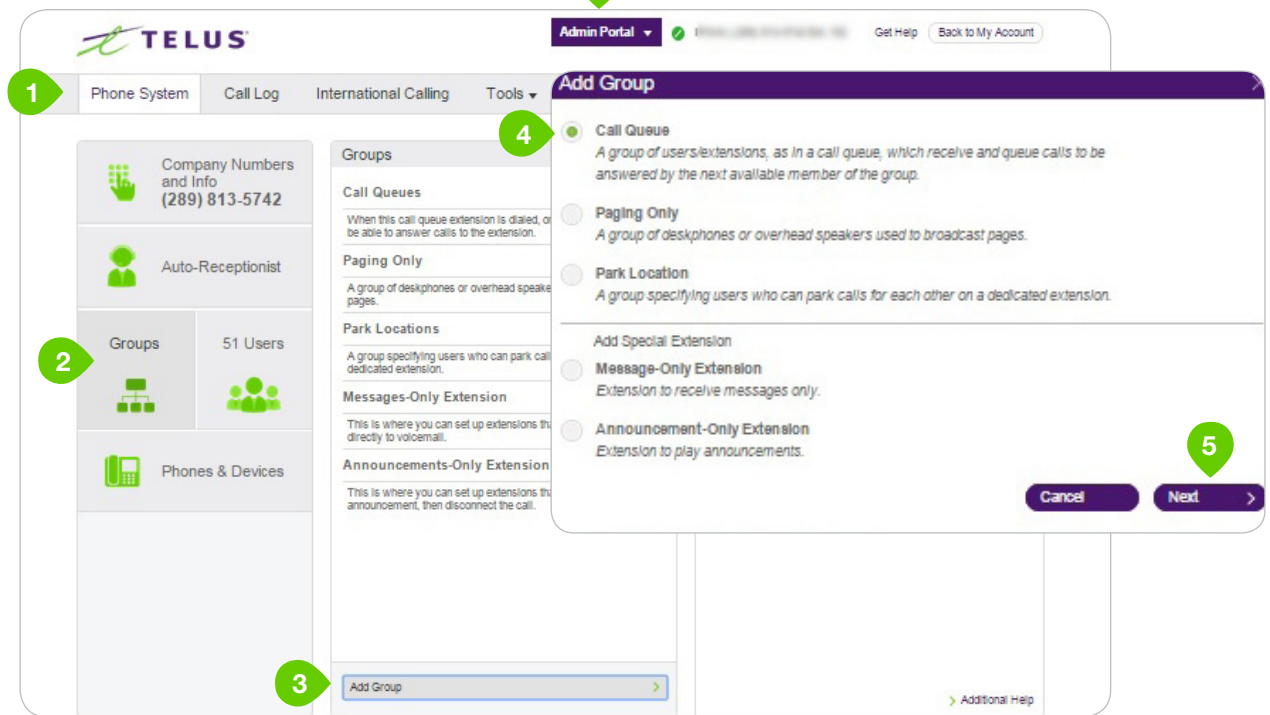


## Call Queues

Create a call queue when you want a specific group of users (such as Sales or Support) 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 notifications of any missed calls or voicemails.

### Add a Call Queue Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group** at the bottom of the Groups panel.
4. Select the radio button next to **Call Queues**.
5. Click **Next**.
6. Enter an **Extension Number**, **Extension Name**, and **Manager Email**.
7. Click **Save**.
8. Select the users you'd like to add to the group.
9. Use the arrows to move them into the group.
10. Click **Save**.



## Configure Call Queues

After you have created a Call Queue, you can configure the Call Queue Info, Direct Numbers, Greeting, Call Handling, and Messages & Notifications.

### Call Queue Info

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Call Queue** (Customer Support in this example). If you don't have any existing Call Queues, go to the previous page to learn how to create one.
4. Click **Call Queue Info** to edit your call queue settings.
5. Edit your settings:
  - a. **Extension Number**
  - b. **Group Name**
  - c. **Record Call Queue Name**
  - d. **Company Name**
  - e. **Contact Phone**
  - f. **Manager Email**
  - g. **Address**
  - h. **Call Queue Hours**
  - i. **Call Queue Members**
  - j. **Regional Settings**
  - k. **Delete Call Queue**
6. Click **Save**.

The screenshot illustrates the TELUS Admin Portal interface for configuring a Call Queue. The top navigation bar includes the 'Admin Portal' dropdown and links for 'Get Help' and 'Back to My Account'. The 'Phone System' tab is selected in the top navigation. The left sidebar shows the 'Groups' section, which is highlighted with a green circle. The 'Groups' section displays '1 Group' and '51 Users'. The 'Call Queue Info' modal is open, showing the 'Customer Service, Ext.1' queue. The modal includes fields for 'Extension Number' (1), 'Group Name' (Customer Service), 'Record Call Queue Name', 'Company Name', 'Contact Phone', 'Manager Email', 'Address', 'Call Queue Hours' (24 hours), 'Call Queue Members' (1), 'Voice Manager Password', and 'Regional Settings'. A 'Delete Call Queue' button is located at the bottom of the modal. A 'Save' button is at the bottom right of the modal. The 'Call Queue Info' modal is also highlighted with a green circle.

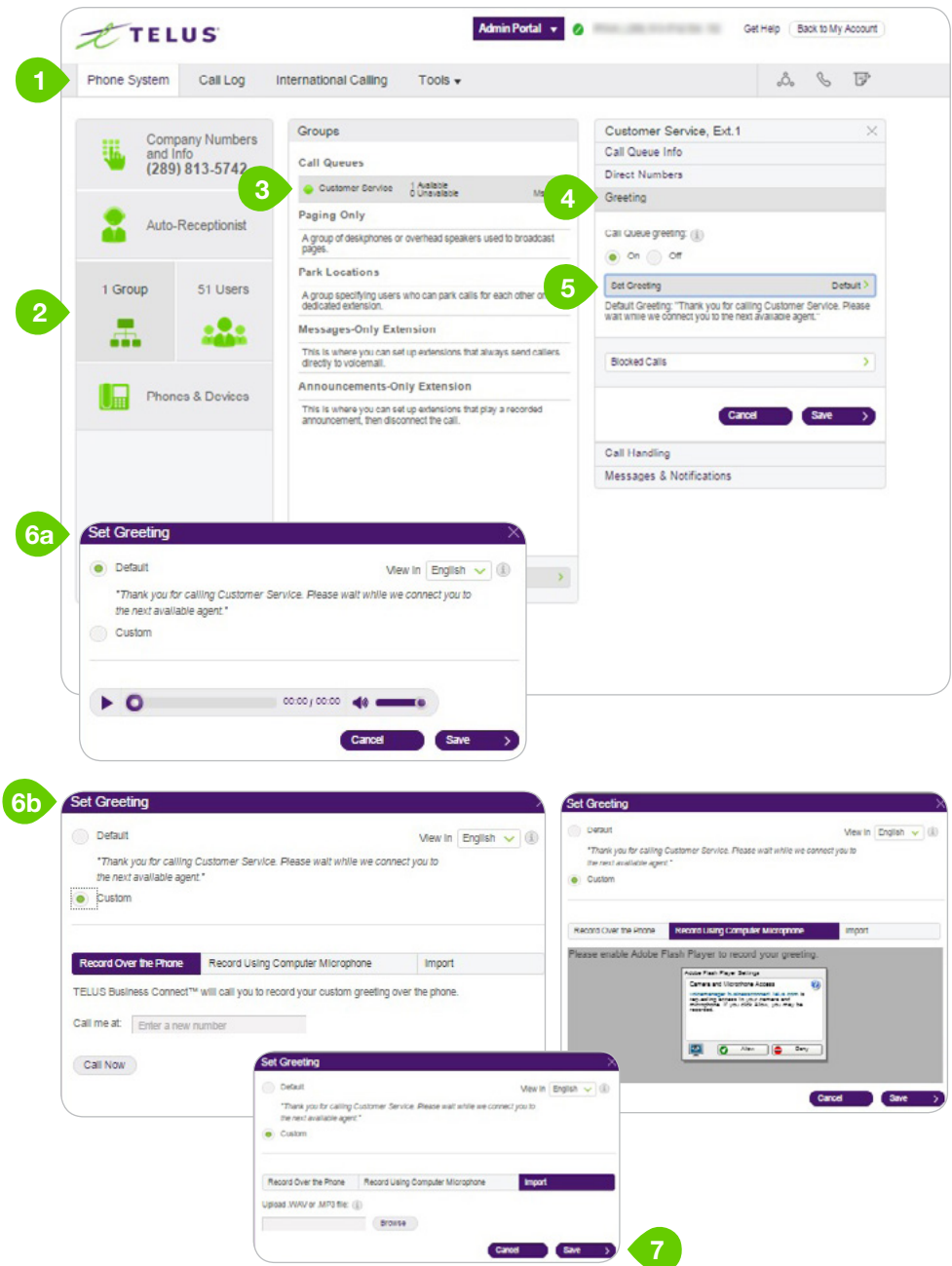
## Call Queue Greetings

If you would like your callers to hear a recorded greeting before being connected to a call group, turn on the Call Queue greeting.

### Set a Call Queue Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Call Queue** (Customer Support in this example).
4. Click **Greeting**.
5. Click **Set Greeting**.
6. A pop-up window will appear displaying the current **Greeting**. Choose your preferred type of greeting.
  - Default** – Select the radio button next to Default.
  - Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to Call me at, choose a phone number from the dropdown menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**  
Click **Allow** on the Adobe Flash Player Settings pop-up. Click **Allow** if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your greeting through your computer microphone. Stop the recording and listen to the playback.
    - **Import**  
Browse for a .WAV or .MP3 file you want to use. Click **Attach**.
7. Click **Save**.

NOTE: If you have set custom Call Queue Hours, follow these steps for both the Call Queue Hours and After Hours tabs.

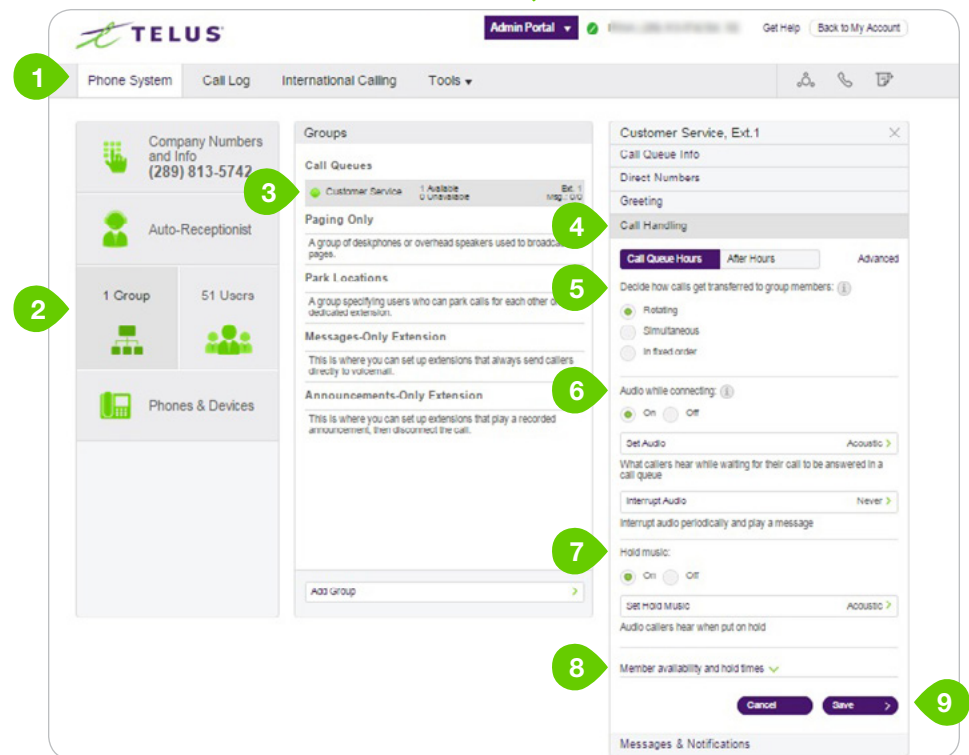


## Call Handling

Choose how you'd like each call queue to handle incoming calls. Set the order in which the calls will be transferred to the members of the call queue, choose the audio while connecting, hold music, and hold time here.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the name of the **Call Queue** you'd like to configure (Customer Support in this example).
4. Select **Call Handling** to edit your call handling settings.
5. Select the order in which calls will be transferred to department members:
  - a. **Rotating** – in order by extension number
  - b. **Simultaneous** – on all department extensions
  - c. **In fixed order** – choose order
6. Under **Audio while connecting**, click **Set Audio** to select the audio callers will hear during business hours while waiting for a connection. Click **Interrupt Audio** to choose how often the audio will be interrupted by a prompt. If you choose an interrupt time, you can then choose a standard Interrupt Prompt, such as “Thank you for holding. Please continue to stay on the line,” or record or upload your own custom prompt.
7. Under **Hold Music**, click **Set Hold Music** to choose the audio callers will hear while on hold.
8. You can also choose how to handle callers who are on hold in the **Member availability and hold times** menu.
9. Click **Save**.

NOTE: If you have set custom Call Queue Hours, follow these steps for both the Call Queue Hours and After Hours tabs.





## Messages & Notifications

In this section, set your message recipient, voicemail greeting, and notifications. TELUS Business Connect allows each Call Queue to have separate voicemails to greet unanswered calls, as well as allows you to set a recipient for these voicemails.

### Set a Voicemail Greeting

- From the **Admin Portal**, select the **Phone System** tab.
- Click **Groups**.
- Select a **Call Queue** (Customer Support in this example).
- Click **Messages and Notifications**.
- Click Voicemail Greeting.
- A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
  - Default** – Select the radio button next to Default.
  - Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to Call me at, choose a phone number from the dropdown menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**  
Click **Allow** on the Adobe Flash Player Settings pop-up. Click **Allow** if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your greeting through your computer microphone. Stop the recording and listen to the playback.
    - **Import**  
Browse for a .WAV or .MP3 file you want to use. Click **Attach**.
- Click **Save**.

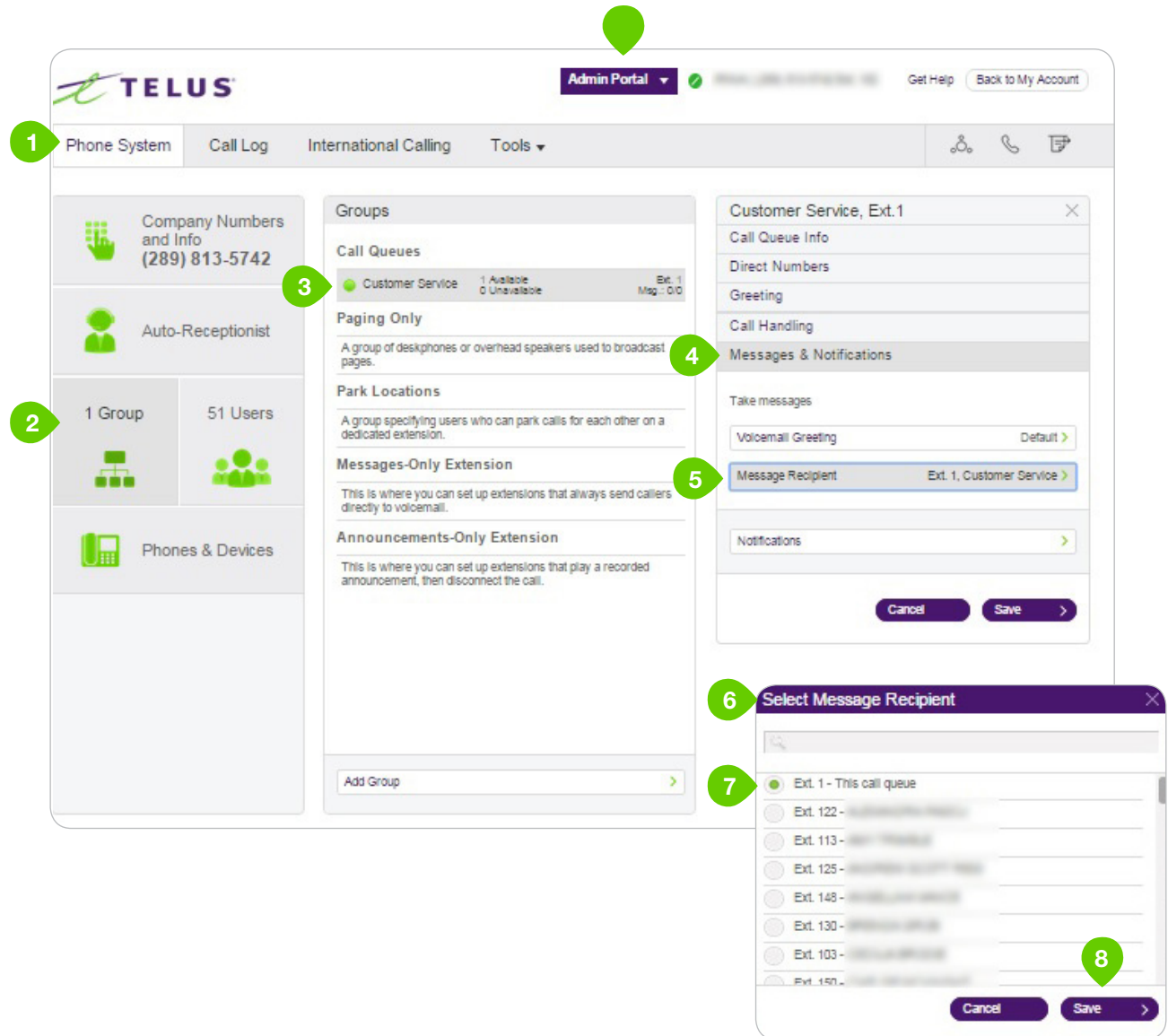
NOTE: If you have set custom Company Hours, follow these steps for both the Company Hours and After Hours tabs.

The screenshot illustrates the process of setting a voicemail greeting in the TELUS Admin Portal. It shows the navigation from the Admin Portal to the Phone System tab, then to Groups, and finally to the Messages & Notifications section. The 'Voicemail Greeting' settings are displayed, and a pop-up window allows the user to choose between Default, Custom, Record Over the Phone, Record Using Computer Microphone, and Import. The 'Record Over the Phone' option is selected, and a 'Call Now' button is visible. The 'Record Using Computer Microphone' option is also shown, with a 'Call Now' button. The 'Import' option is shown with a 'Browse' button. The 'Save' button is visible at the bottom of the pop-up.

## Message Recipient

After you have set your Voicemail Greeting, you can set which users or call queues are to receive the messages.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select a **Call Queue** (Customer Support in this example).
4. Click **Messages and Notifications**.
5. Click **Message Recipient**.
6. A pop-up will appear with a list of members to receive messages left for this Call Queue.
7. Select the radio button next to the recipient.
8. Click **Save**.



The screenshot illustrates the TELUS Admin Portal interface with numbered steps 1 through 8. Step 1 points to the 'Phone System' tab in the top navigation bar. Step 2 points to the 'Groups' section in the left sidebar. Step 3 points to the 'Customer Service' call queue under the 'Groups' section. Step 4 points to the 'Messages & Notifications' tab within the 'Customer Service' call queue settings. Step 5 points to the 'Message Recipient' option under 'Take messages'. Step 6 points to the 'Select Message Recipient' pop-up window. Step 7 points to the radio button next to 'Ext. 1 - This call queue' in the pop-up. Step 8 points to the 'Save' button at the bottom of the pop-up.

## Voicemail Preview\*

The voicemail preview provides a text version of your voicemail that allows you to get the gist of the message. It delivers a text version of your voicemail to your TELUS Business Connect mobile or desktop application or via e-mail.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Call Queue** (Customer Service in this example).
4. Click **Messages and Notifications**.
5. Click **Voicemail Preview**.
6. A pop-up will appear with the option to turn Voicemail Preview on or off.
7. Select the button next to **On** or **Off**.
8. Click **Save**.

The screenshot illustrates the TELUS Admin Portal interface with numbered callouts (1-8) indicating the steps to enable Voicemail Preview:

1. Select the **Phone System** tab in the top navigation bar.
2. Click on the **Groups** link in the left sidebar.
3. Select an existing **Call Queue** (e.g., 'agent 1') in the 'Call Queues' section.
4. Click on the **Messages & Notifications** link in the right sidebar for the selected queue.
5. Click on the **Voicemail Preview** link in the 'Messages & Notifications' section.
6. A pop-up window titled 'Voicemail Preview' appears.
7. Select the **On** radio button to enable the feature.
8. Click the **Save** button to apply the changes.

\*Available for Premium Plus users only.

## Notifications

As an administrator, you can set up notifications to be sent to your phone or email when voicemails, faxes and missed calls are received for each call queue.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select a **Call Queue** (Customer Support in this example).
4. Click **Messages and Notifications**.
5. Click **Notifications**.
6. A pop-up will appear with options for email notifications to a recipient of your choice when voicemail messages or faxes are received, or calls missed. Set your notification settings by checking the checkboxes and filling in email and phone numbers.
  - a. Click **Advanced Notification Options** to see more detailed notification settings.
  - b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
  - c. Click **Switch to Basic Notification Settings**.
7. Click **Save**.

The screenshot illustrates the TELUS Admin Portal interface for configuring notifications. The top navigation bar includes the 'Admin Portal' link and a 'Get Help' button. The main content area features tabs for 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is selected, displaying a sidebar with 'Company Numbers and Info', 'Auto-Receptionist', 'Groups', and 'Phones & Devices'. The 'Groups' section is expanded, showing 'Call Queues' with 'Customer Service' selected. The 'Messages & Notifications' section is also expanded, showing 'Take messages' and 'Notifications'. A 'Notifications' pop-up is shown in the foreground, with 'Advanced Notification Options' selected. The pop-up has sections for 'Voicemail Messages', 'Received Faxes', and 'Missed Calls', each with 'Notify me by' (Email, SMS) and 'Send notifications to' (Email, Phone number) options. The 'Advanced Notification Options' section is expanded, showing more detailed settings for each notification type. The 'Switch to Basic Notification Settings' button is visible at the bottom right of the pop-up.



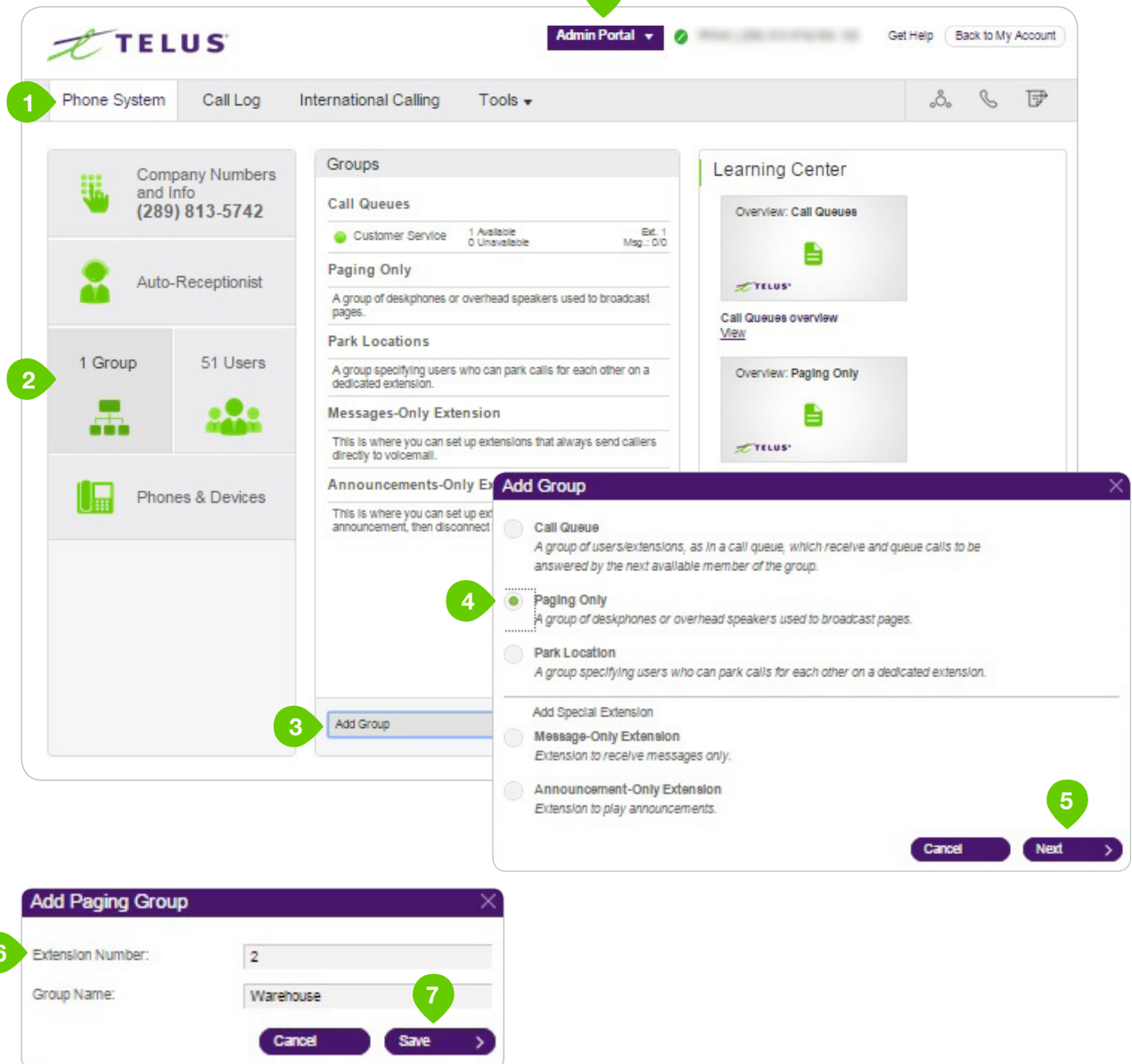
## Paging Only

Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools and hospitals, among others.

You can page using a special phone with a paging soft-key, or by dialing \*84 from your digital desk phone or from your VoIP calling enabled mobile phone. In each case you need to set up the Group number prior to the page.

### Add a Paging Only Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **Paging Only**.
5. Click Next.
6. Enter the **Extension Number** and **Group Name**.
7. Click **Save**.



The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, an 'Admin Portal' dropdown, a status indicator, and links for 'Get Help' and 'Back to My Account'. The main content area has a sidebar with tabs: 'Phone System' (highlighted with a green circle 1), 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is active, showing a 'Groups' section with '1 Group' and '51 Users'. A green circle 2 points to the 'Groups' section. Below this, there are sections for 'Company Numbers and Info', 'Auto-Receptionist', and 'Phones & Devices'. A green circle 3 points to the 'Add Group' button. The 'Add Group' modal is open, showing options for 'Call Queue', 'Paging Only' (selected with a green circle 4), 'Park Location', 'Message-Only Extension', and 'Announcement-Only Extension'. A green circle 5 points to the 'Next' button. Below the modal, the 'Add Paging Group' form is shown with fields for 'Extension Number' (value: 2, green circle 6) and 'Group Name' (value: Warehouse, green circle 7). The 'Save' button is highlighted with a green circle 7.

## Configure a Paging Only Group

After the paging group is set up, select the devices to receive pages from the list of paging devices and user phones capable of doing so.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select a Paging Only group (Warehouse in this example).
4. Click **Info**.
  - a. Edit your group's name and extension, apply a template, or disable the extension and click save.
5. Click **Paging**.
6. Click **Devices to receive page**.
  - a. Select the users who are to receive pages.
  - b. Use the arrows to move users to allow or access to receive pages.
  - c. Click **Save**.
7. Click **Users allowed to page this group**.
  - a. Select the users who are to be allowed to page.
  - b. Use the arrows to move users to allow or revoke access to page.
  - c. Click **Save**.
8. Click **Done**.

The screenshot illustrates the configuration steps for a Paging Only Group in the TELUS Admin Portal. The interface is divided into a top navigation bar, a main content area with tabs, and a sidebar. The 'Phone System' tab is selected, and the 'Groups' section is expanded. The 'Paging Only' group is selected, and the 'Info' modal is open. The 'Info' modal has fields for 'Extension Number' (2), 'Group Name' (Warehouse), 'Status' (Enabled), and 'Paging' (checked). The 'Paging' modal is also open, showing 'Devices to receive page' and 'Users allowed to page this group' sections. The 'Devices to receive page' modal shows a list of available devices and a selected device (BYOC - Cisco SPA303). The 'Users allowed to page this group' modal shows a list of available users and a selected user (120).

### Call Monitoring Group\*

Call monitoring groups all authorized users to access calls made by other users in real time. These functions provide training, coaching, and QA tools for supervisors or other levels of the management team. They can also help improve teams' performance and productivity. The following actions are available for authorized users in a call monitoring group: Monitor, Whisper, Barge, and Take Over.

In order to set up call monitoring, you'll need to create a call monitoring group first. Next, select the users who will have permission to monitor, and lastly, select the users who can be monitored.

After creating a call monitoring group, users who have the permission to monitor others' calls will use the touch tones on their phones to access the call monitoring features. These users will select a current call in progress on their phones then press the touch tone for the action they'd like to take. You must have a supported device with presence capabilities to use this feature.

#### Supported Devices:

- Polycom VVX 310
- Polycom VVX 410
- Polycom VVX 500
- Cisco SPA 303
- Cisco SPA 508G
- Cisco SPA 514G
- Cisco SPA 525G2

ACTION	DESCRIPTION	EXAMPLE	TOUCH TONE
Monitor	Silently listen in on a call.	Supervisors/QA to monitor performance.	*80
Whisper	Speak only to the employee without the caller on the other end hearing.	Provide support to users to help them handle a call.	*81
Barge	Join the call so all parties can communicate with each other.	Help facilitate discussion between all parties.	*82
Take Over	Take over the call entirely and release the employee from the call.	Allow the supervisor to handle a call and allow the employee to continue other tasks.	*83

\*Available for Premium and Premium Plus users only.

### Add a Call Monitoring Group\*

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to Call Monitoring.
5. Click **Next**.
6. Enter a **Group Name**.
7. Click **Next**.
8. Select the users that can monitor this group.
9. Click the blue arrow in the middle of the screen.
10. Click **Next**.
11. Select the users that can be monitored by this group.
12. Click the blue arrow in the middle of the screen.
13. Click **Save** You will be taken back to the Groups screen.

The screenshot shows the TELUS Admin Portal interface. The 'Phone System' tab is selected, and the 'Groups' section is active. The 'Add Group' button is highlighted. A modal titled 'Define Name of Monitoring Group' is open, showing the 'Group Name' field with the text 'Call Monitoring Group 2'. The 'Next' button is visible.

NOTE: The users who will be doing the monitoring (e.g. supervisors) can add the users who will be getting monitored (e.g. agents) in his or her desk phone Presence appearance. The desk phone may need to be rebooted after these settings have been changed.

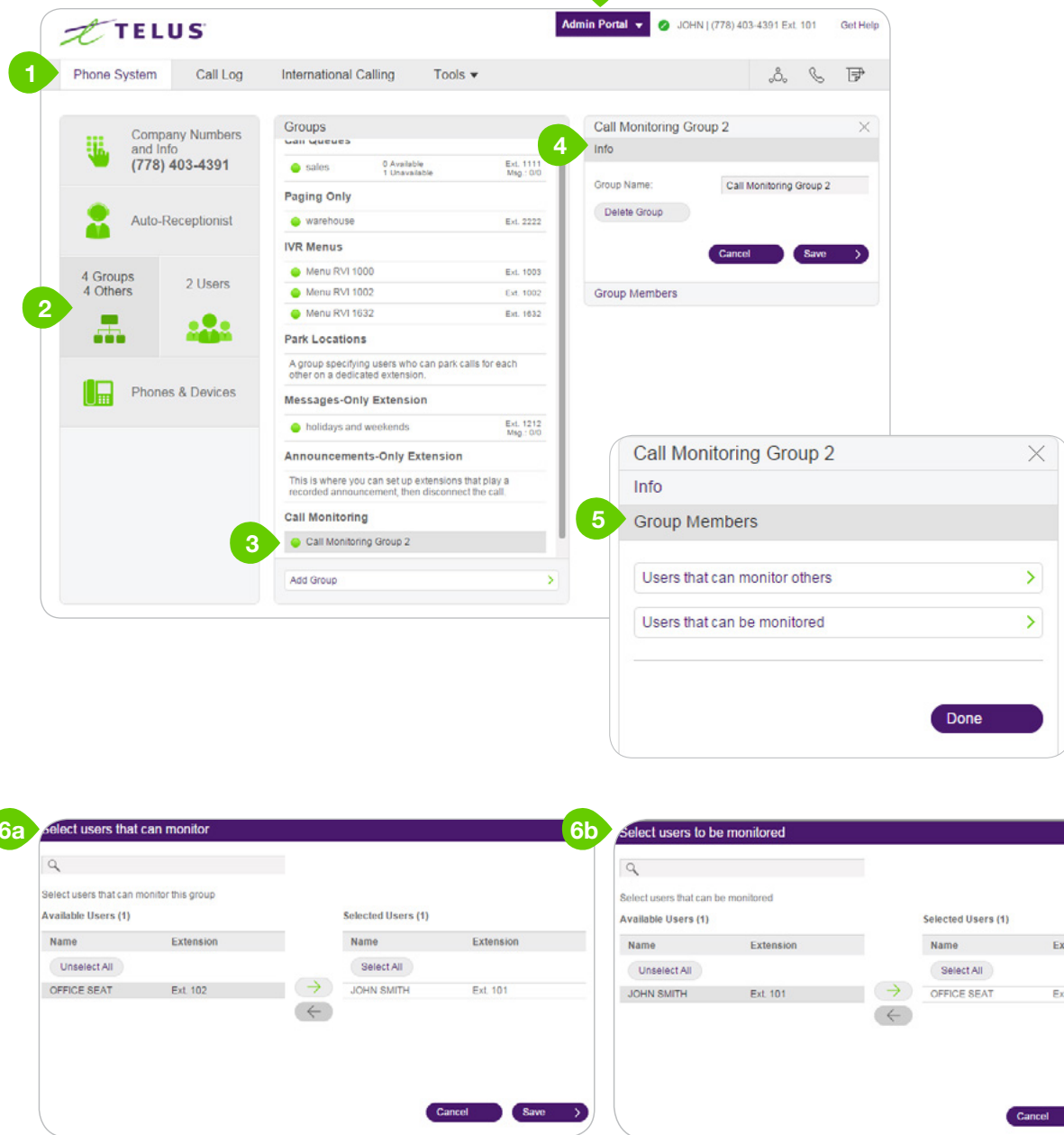
The two screenshots show the user selection process. The first screenshot, titled 'Select users that can monitor', shows a list of 'Available Users (2)' with 'JOHN SMITH' (Ext. 101) and 'OFFICE SEAT' (Ext. 102) selected. The second screenshot, titled 'Select users to be monitored', shows the same list of 'Available Users (2)' with 'JOHN SMITH' (Ext. 101) and 'OFFICE SEAT' (Ext. 102) selected. Both screenshots show the 'Next' button.

\*Available for Premium and Premium Plus users only.

## Configure a Call Monitoring Group

After you create your Call Monitoring Group, you can edit the group members and set up Presence for members of the group.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select a **Call Monitoring group** (Customer Service Monitoring in this example).
4. Click **Info** to edit the **Group Name** or **Delete** the group.
5. Click **Group Members**.
  - a. Click **Users that can monitor others**.  
Select the users you want to add and click the blue arrow in the middle of the screen. Click **Save**.
  - b. Click **Users that can be monitored**. Select the users you want to add and click the blue arrow in the middle of the screen. Click **Save**.



The screenshots illustrate the process of configuring a Call Monitoring Group in the TELUS Admin Portal. The main interface shows the 'Phone System' tab with a sidebar containing 'Groups', 'Auto-Receptionist', '4 Groups 4 Others', '2 Users', and 'Phones & Devices'. The 'Groups' section lists various groups, including 'Call Monitoring Group 2'. A callout box highlights the 'Info' tab for 'Call Monitoring Group 2', showing options to edit the group name or delete it. Another callout box highlights the 'Group Members' tab, which allows selecting users that can monitor others and users that can be monitored. Two additional screenshots, labeled 6a and 6b, show the selection process for these users. Screenshot 6a shows 'Available Users' and 'Selected Users' for 'Users that can monitor this group', with 'JOHN SMITH' selected. Screenshot 6b shows 'Available Users' and 'Selected Users' for 'Users that can be monitored', with 'OFFICE SEAT' selected.

**6a** Select users that can monitor

Available Users (1)		Selected Users (1)	
Name	Extension	Name	Extension
OFFICE SEAT	Ext. 102	JOHN SMITH	Ext. 101

**6b** Select users to be monitored

Available Users (1)		Selected Users (1)	
Name	Extension	Name	Extension
JOHN SMITH	Ext. 101	OFFICE SEAT	Ext. 102

## Set up Presence for Users that can be monitored by others

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Users**.
3. Select a user that is going to be monitored.
4. Click **Phones & Numbers**.
5. Click **Presence**.
6. Click **Permissions**.
7. Select the radio button next to **Allow other users to see my Presence status**.
8. Select users permitted to answer my calls.
9. Click the blue arrow in the middle of the screen.
10. Click **Save**.

The screenshot displays the TELUS Admin Portal interface with the following elements and numbered callouts:

- 1**: Points to the **Phone System** tab in the top navigation bar.
- 2**: Points to the **Users** icon in the left sidebar.
- 3**: Points to the user **JOHN SMITH (Super Admin)** in the **Users** list.
- 4**: Points to the **Phones & Numbers** tab in the user's profile.
- 5**: Points to the **Presence** option in the **Phones & Numbers** section.
- 6**: Points to the **Permissions** tab in the **Presence** modal.
- 7**: Points to the **Allow other users to see my Presence status** radio button, which is currently set to **On**.
- 8**: Points to the **Available Users (1)** table, which lists users permitted to answer calls.
- 9**: Points to the blue arrow button at the bottom of the **Available Users** table.
- 10**: Points to the **Save** button at the bottom right of the **Presence** modal.

**Available Users (1)** Table:

Name	Extension
OFFICE SEAT	Ext. 102



## Set up Presence for Users that can monitor others

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Users**.
3. Select a user that is going to be monitoring other users.
4. Click **Phones & Numbers**.
5. Click **Presence**.
6. Click Select to add the users that this user will be monitoring to the list under the **Appearance** tab.
7. Select the radio button next to the user you'd like to add.
8. Click **Done**.
9. Make sure the checkbox next to **Enable me to pick up a monitored line on hold** is checked in order to use all call monitoring features on the Presence screen.
10. Click **Save**.
11. A pop-up will appear notifying you that your phone will restart to reflect these changes.
12. Click **OK**. The affected phone will restart. The user will now be able to use easy to access buttons on his or her phone for call monitoring.

The screenshot illustrates the TELUS Admin Portal interface with numbered callouts (1-12) indicating the steps to set up Presence for a user.

- 1:** The **Phone System** tab is selected in the top navigation bar.
- 2:** The **Users** section is clicked in the left sidebar.
- 3:** A user, **OFFICE SEAT (778) 403 4402**, is selected from the **Users** list.
- 4:** The **Phones & Numbers** section is clicked in the left sidebar.
- 5:** The **Presence** tab is selected in the right-hand panel.
- 6:** The **Appearance** tab is selected in the **Presence** sub-panel.
- 7:** A user, **Ext101 - JOHN SMITH**, is selected from the **Select a User** pop-up.
- 8:** The **Done** button is clicked in the **Select a User** pop-up.
- 9:** The checkbox **Enable me to pick up a monitored line on hold** is checked in the **Appearance** tab.
- 10:** The **Save** button is clicked at the bottom of the **Appearance** tab.
- 11:** An **Attention** pop-up appears, stating: "Your phones will now be rebooted to reflect the changes you made. If a call is in progress the phone will restart after it completes."
- 12:** The **OK** button is clicked in the **Attention** pop-up.



## IVR Menus\*

TELUS Business Connect offers various tools to help manage and create IVR menus. Administrators can add a new IVR menu as shown on this page, use the Visual IVR Editor, or import and XML file.

### Add an IVR Menu Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **IVR Menu**.
5. Click **Next**.
6. Enter an **Extension Number** and **Extension Name**.
7. Click **Save**.

**TELUS** Admin Portal | JOHN | (778) 403-4391 Ext. 101 | Get Help

**1** Phone System | Call Log | International Calling | Tools

**2** Groups

Company Numbers and Info (778) 403-4391

Auto-Receptionist

4 Groups 4 Others | 2 Users

Phones & Devices

**3** Add Group

**4** Add Group

**5** Add Group

**6** Add IVR Menu

**7** Add IVR Menu

Extension Number: 1633

Extension Name: IVR Menu 1633

Cancel Save

\*Available for Premium and Premium Plus users only.

## Configure an IVR Menu

After you have created an IVR Menu, you can configure it from the Groups menu. Configuration options include Extension Info, Direct Numbers, Prompt, and Call Handling.

### Extension Info

After you select an existing IVR Menu, edit your extension number, name, and delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **IVR Menu** (Main Menu in this example). If you don't have any existing IVR Menus, go to the previous page to learn how to create one.
4. Click **Extension Info**.
5. Edit the **Extension Number** and **Extension Name**.
6. If you'd like to delete this menu, click **Delete Menu**.
7. Click **Save**.

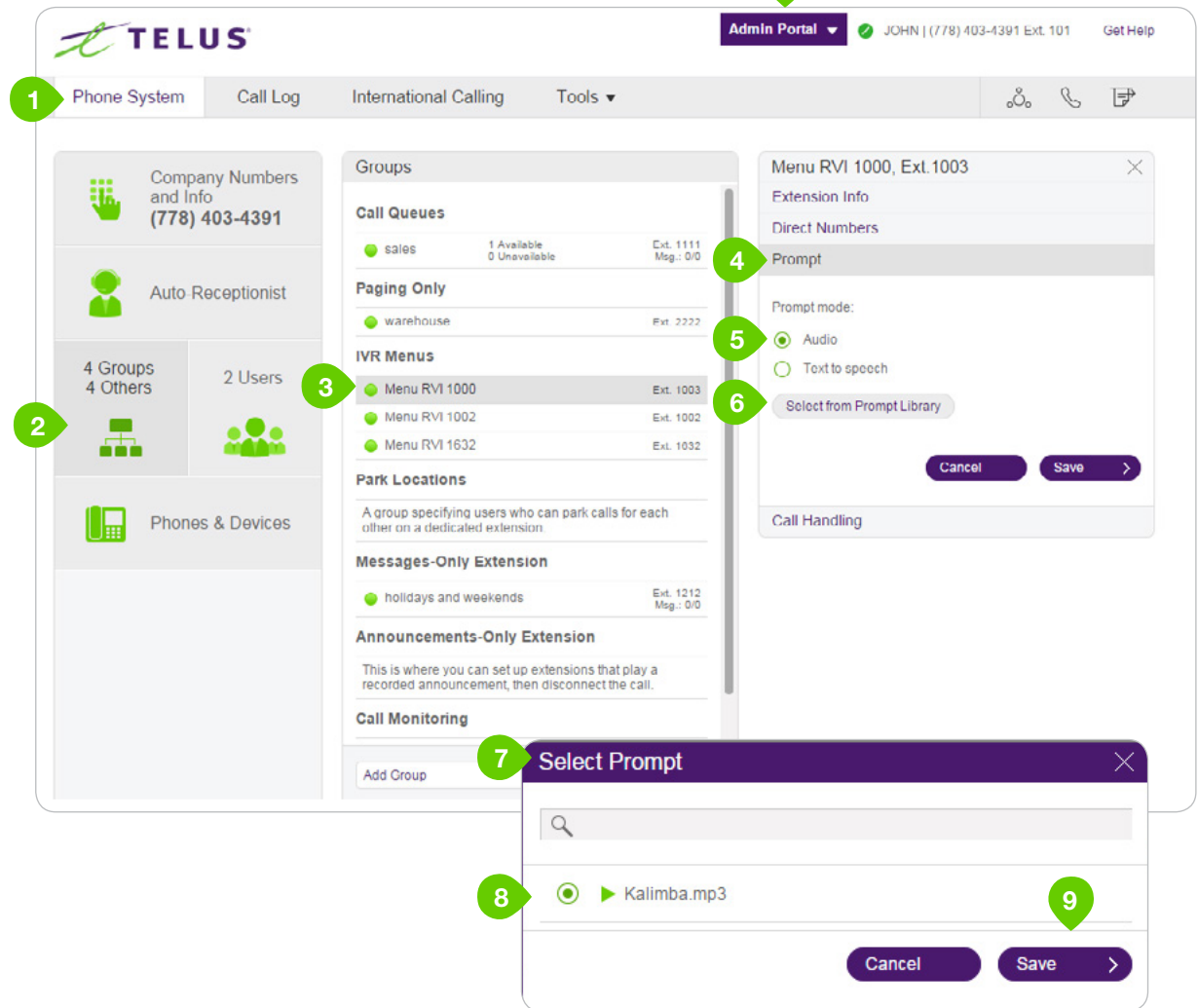
The screenshot displays the TELUS Admin Portal interface. At the top, the 'Admin Portal' tab is selected, showing the user 'JOHN | (778) 403-4391 Ext. 101'. The left sidebar has the 'Phone System' tab highlighted. The main content area shows the 'Groups' section, which includes a list of 'IVR Menus'. The 'Menu RVI 1000, Ext. 1003' is selected, and its configuration modal is open. The modal shows the 'Extension Info' tab, where the 'Extension Number' is 1003, the 'Extension Name' is 'Menu RVI 1000', and the 'Language' is 'Français (Canada)'. There is a 'Delete Menu' button and 'Cancel'/'Save' buttons at the bottom of the modal. Numbered callouts 1 through 7 indicate the steps for configuring the IVR Menu.

### Select Prompt Mode: Audio

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **IVR Menu** (Main Menu in this example).
4. Click **Prompt**.
5. Under **Prompt mode**, select the radio button next to **Audio**.
6. Click **Select from Prompt Library**.
7. A pop-up will appear with a list of pre-uploaded prompts.
8. Select the radio button next to the prompt you'd like to set.
9. Click **Save**.

NOTE: The prompt recordings have to pre-uploaded and saved to the Prompt Library first, which is available at the IVR Tool.

NOTE: An IVR menu can function independently from the Auto-Receptionist, so it does not have to be set up for Auto-Receptionist greeting.



The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, an 'Admin Portal' dropdown, a user profile 'JOHN | (778) 403-4391 Ext. 101', and a 'Get Help' link. The main navigation tabs are 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is active, showing a sidebar with 'Company Numbers and Info (778) 403-4391', 'Auto Receptionist', '4 Groups 4 Others', '2 Users', and 'Phones & Devices'. The main content area displays 'Groups' with sections for 'Call Queues', 'Paging Only', 'IVR Menus', 'Park Locations', 'Messages-Only Extension', 'Announcements-Only Extension', and 'Call Monitoring'. The 'IVR Menus' section lists three menus: 'Menu RVI 1000' (Ext. 1003), 'Menu RVI 1002' (Ext. 1002), and 'Menu RVI 1632' (Ext. 1032). A 'Select Prompt' pop-up is open, showing a search bar and a list of prompts. The 'Audio' radio button is selected under 'Prompt mode', and the 'Select from Prompt Library' button is clicked. The 'Select Prompt' pop-up shows a list of prompts, with 'Kalimba.mp3' selected. The 'Save' button is highlighted.

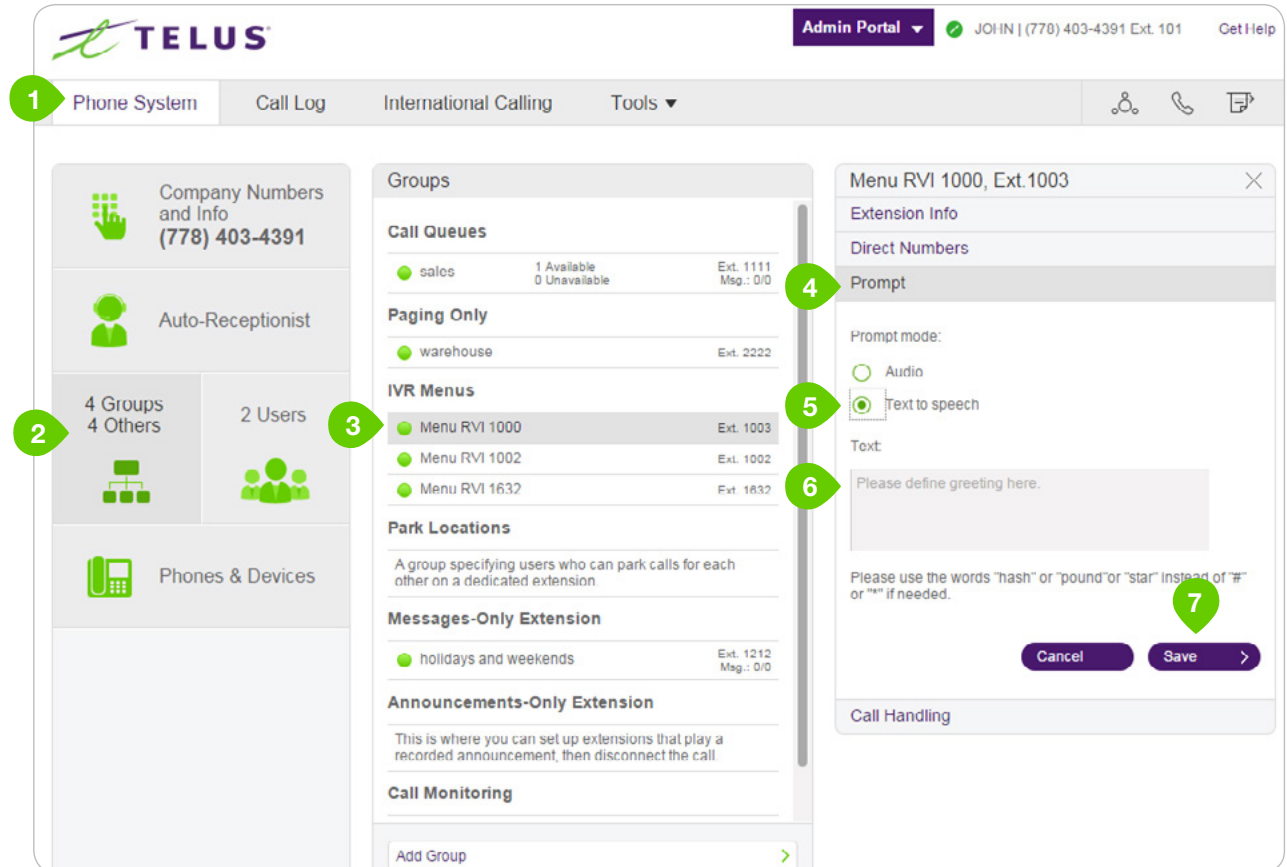
## Select Prompt Mode: Text-to-Speech

To set up a text-to-speech prompt for an IVR menu:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **IVR Menu** (Main Menu in this example).
4. Click **Prompt**.
5. Under **Prompt mode**, select the radio button next to **Text to speech**.
6. In the box for **Text**: type in your desired greeting and connection instructions for your callers. TELUS Business Connect's text-to-speech utility will convert the text greeting you typed into a voice file.

NOTE: The text must contain only letters, digits, space, commas and periods. No special symbols. Use the words "hash" or "pound" or "star" instead of "#" or "\*" if needed.

7. Click **Save**. You can hear your new prompt by dialing into the extension and re-recording it until satisfied.



The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, 'Admin Portal' dropdown, user information 'JOHN | (770) 403-4391 Ext. 101', and a 'Get Help' link. The main navigation tabs are 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is active, showing a sidebar with 'Company Numbers and Info (778) 403-4391', 'Auto-Receptionist', '4 Groups 4 Others', '2 Users', and 'Phones & Devices'. The main content area lists various IVR features: 'Groups' (with 'Call Queues' and 'Paging Only'), 'IVR Menus' (with a list of menus including 'Menu RVI 1000'), 'Park Locations', 'Messages-Only Extension', 'Announcements-Only Extension', and 'Call Monitoring'. A modal window titled 'Menu RVI 1000, Ext. 1003' is open, showing 'Extension Info', 'Direct Numbers', and 'Prompt' settings. In the 'Prompt' section, 'Text to speech' is selected under 'Prompt mode'. The 'Text' field contains the placeholder 'Please define greeting here.' Below this is a note: 'Please use the words "hash" or "pound" or "star" instead of "#" or "\*" if needed.' At the bottom of the modal are 'Cancel' and 'Save' buttons. Numbered callouts 1 through 7 are overlaid on the image to guide the user through the steps.

## Call Handling

To set up touch pad keys to handle incoming calls for an IVR menu:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **IVR Menu**.
4. Click **Call Handling**.
5. Click the **Add Key** button.
6. A pop-up will appear with **Key press assignment** options.
7. At the **Key press** drop-down select a number (from 0 through 9) to link to the desired **Action** in the next step.
8. Select your desired Action. Options include:
  - **Connect to Dial-by-name directory** – Your TELUS Business Connect online account allows you to enable or disable the Dial-by-Name directory. You can change how the extensions are searched, either by first name or last name. You can also configure the list of extensions included and change extension number of the directory.
  - **Connect** to an extension, user, group, or IVR menu.
  - **Transfer** to voicemail of an extension user, group, or IVR menu.
  - **External Transfer** to an outside number.
9. Select the radio button next to the extension you'd like to connect to.
10. Click Save.
11. Under **Generic Key Presses**, choose if you'd like to use default settings or specify your own.

You can also use the Visual IVR Editor to configure call handling settings.

The screenshot illustrates the TELUS Admin Portal interface with numbered callouts (1-11) indicating the steps to configure call handling for an IVR menu.

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Groups** section is expanded in the left sidebar.
- Step 3:** An existing IVR menu, **Menu RVI 1000**, is selected from the **IVR Menus** list.
- Step 4:** The **Call Handling** tab is selected within the **Menu RVI 1000** configuration panel.
- Step 5:** The **Add Key** button is clicked.
- Step 6:** A **Key press assignment** pop-up window is displayed.
- Step 7:** The **Key press** dropdown is set to **1**.
- Step 8:** The **Action** dropdown is set to **Connect to**.
- Step 9:** The radio button for **holidays and weekends** (Ext. 1212) is selected.
- Step 10:** The **Save** button is clicked.
- Step 11:** Under **Generic Key Presses**, the **Specify** option is selected, and the **Press #** is set to **Repeat menu greeting**.



## Park Locations

Use Park Location groups to create a private location in which specific users can park and pick up calls. Once users have been added to the group, the park location can be added to the user's Presence on a desk phone or HUD on the TELUS Business Connect for Desktop application. You can have up to 100 park locations in your phone system.

### Add a Park Location

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **Park Location**.
5. Click **Next**.
6. Enter an **Extension Number** and **Group Name**.
7. Click **Save**.

NOTE: Only one call can be parked in each location at a time.

The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes 'Admin Portal', 'Get Help', and 'Back to My Account'. The main content area is divided into several sections: 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' section is active, showing 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', '2 Groups', '51 Users', and 'Phones & Devices'. The 'Groups' section is expanded, showing 'Call Queues', 'Paging Only', 'Park Locations', 'Messages-Only Extension', and 'Announcements-Only Extension'. The 'Add Group' dialog is open, showing the 'Park Location' option selected. The 'Add Park Location' dialog is also open, showing the 'Extension Number' field with the value '10001' and the 'Group Name' field with the value 'Park Location 10001'. The 'Save' button is highlighted.

1. From the **Admin Portal** tab, select **Phone System**.

2. Click **Groups**.

3. Click **Add Group**.

4. Select the radio button next to **Park Location**.

5. Click **Next**.

6. Enter an **Extension Number** and **Group Name**.

7. Click **Save**.



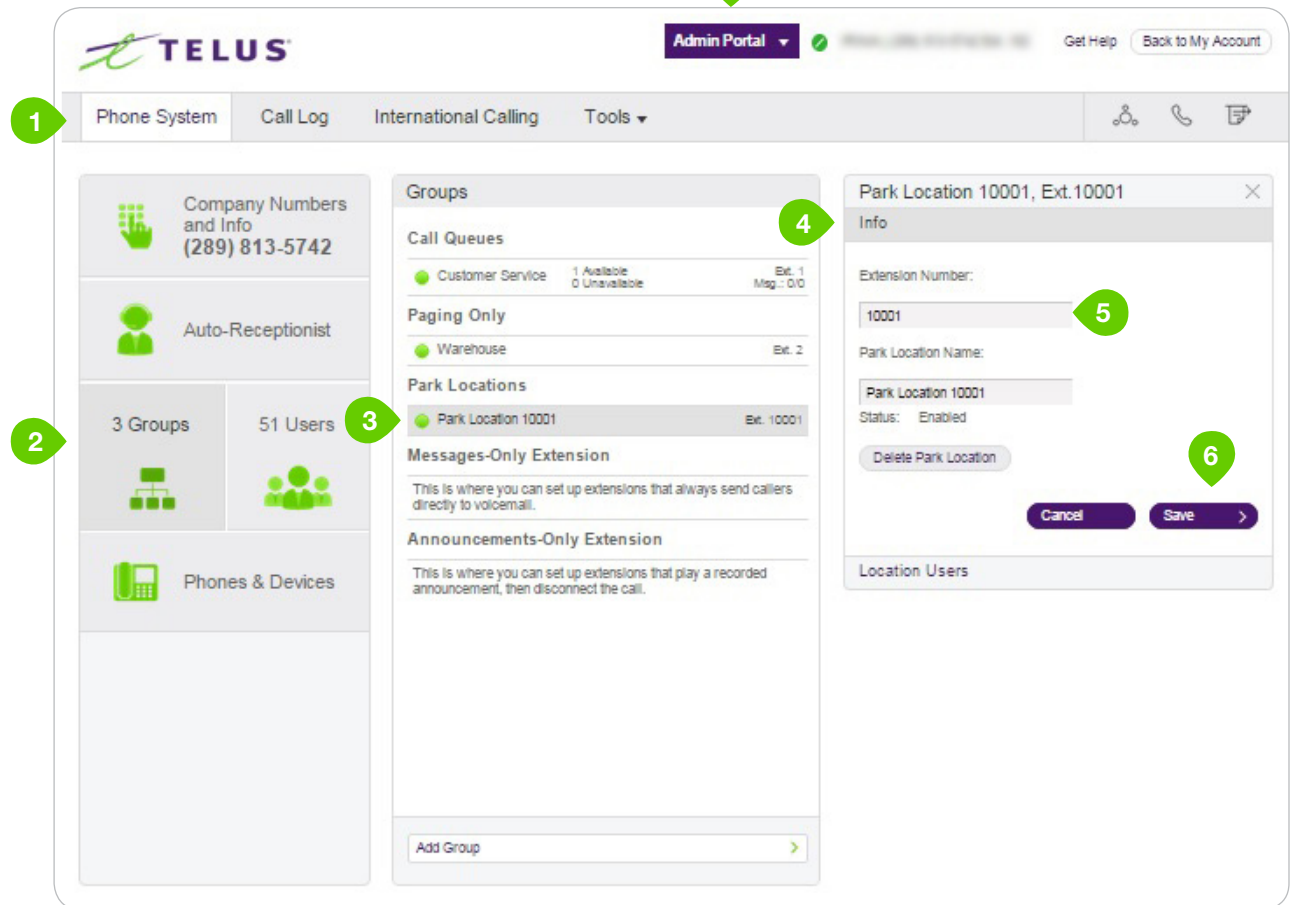
## Configure a Park Location

After you have created a Park Location, you can edit its information and the users in the group.

### Info

To edit your Park Location Extension Number and Name:

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Select an existing **Park Location** (Park Location 1001 in this example).
4. Click **Info**.
5. Edit the **Extension Number** and **Park Location**.
6. Click **Save**.



## Users

To add or remove users from a Park Location:

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Select an existing **Park Location** (Park Location 1001 in this example).
4. Click **Location Users**.
5. Click **Users** of this park location.
6. Select users you'd like to add to the group from the right column.
7. Click the blue arrow in the middle of the pop-up to move the selected users to the right column. You can also select users from the right column and move to the left column to remove them from the group.
8. Click **Save**.

The screenshot illustrates the TELUS Admin Portal interface for managing users. The top navigation bar includes the 'Admin Portal' tab and a 'Get Help' link. The left sidebar contains 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The main content area displays 'Groups' with sections for 'Call Queues', 'Paging Only', 'Park Locations', 'Messages-Only Extension', and 'Announcements-Only Extension'. A 'Park Location 10001, Ext. 10001' pop-up is open, showing 'Location Users' and 'Users of this park location'. A 'Users of this park location' modal is also open, showing a list of 'Available Users (51)' and 'Allowed Users (0)'. Numbered callouts 1 through 8 indicate the sequence of steps for adding or removing users from a Park Location.

## Set up Presence for Park Locations

Use Presence to configure your Park Location on your desk phone and your HUD on the TELUS Business Connect for Desktop application.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Users**.
3. Select a user that is going to be monitoring other users.
4. Click **Phones & Numbers**.
5. Click **Presence**.
6. Select the **Appearance** tab.
7. Click Select to add a **Park Location**.
8. Select the radio button next to the **Park Location** you'd like to add.
9. Click **Done**.
10. Click **Save**.
11. A pop-up will appear notifying you that your phone will restart to reflect these changes.
12. Click **OK**. The affected phone will restart.

The screenshot illustrates the TELUS Admin Portal interface with numbered callouts (1-12) indicating the steps to set up Presence for Park Locations. The interface includes a top navigation bar with 'Admin Portal', 'Get Help', and 'Back to My Account'. A left sidebar contains 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The main content area shows 'Company Numbers and Info', 'Auto-Receptionist', '3 Groups', '51 Users', and 'Phones & Devices'. A 'Users' list is displayed with columns for name, extension, and status. A 'Phones & Numbers' panel for 'IRINA MENALOCHE, Ext. 152' shows 'Direct Numbers', 'Phones', and 'Presence' settings. A 'Presence' pop-up shows a table with columns 'Line', 'User', and 'Delete'. A 'Select a User' pop-up shows a list of users. An 'Attention' pop-up shows a message about phone rebooting.

## Message-Only Extensions

Create an extension dedicated to receiving messages. All calls routed to this extension will automatically be directed to the extension's voicemail box.

### Add a Message-Only Extension

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **Message-Only Extension**.
5. Click **Next**.
6. Enter an **Extension Number**, **Extension Name**, and **Email**.
7. Click **Save**.

The screenshot illustrates the process of adding a Message-Only Extension in the TELUS Admin Portal. The interface includes a top navigation bar with the TELUS logo, 'Admin Portal' dropdown, and links for 'Get Help' and 'Back to My Account'. A main navigation bar contains tabs for 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is active, showing a sidebar with 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', '3 Groups', '51 Users', and 'Phones & Devices'. The 'Groups' section is expanded, displaying 'Call Queues', 'Paging Only', 'Park Locations', 'Messages-Only Extension', and 'Announcements-Only Extension'. The 'Messages-Only Extension' section is highlighted with a green circle 3. A modal window titled 'Add Group' is open, showing radio buttons for 'Call Queue', 'Paging Only', 'Park Location', 'Add Special Extension', 'Message-Only Extension' (selected with a green circle 4), and 'Announcement-Only Extension'. The 'Message-Only Extension' option is described as 'Extension to receive messages only.' A 'Next' button is visible at the bottom right of the modal. A second modal window titled 'Add Messages-Only Extension' is open, showing input fields for 'Extension Number' (3), 'Extension Name' (VoiceMail), and 'Email' (with a help icon). 'Cancel' and 'Save' buttons are at the bottom, with a 'Next' button at the bottom right. Green circles 1 through 7 are overlaid on the image to indicate the sequence of steps.

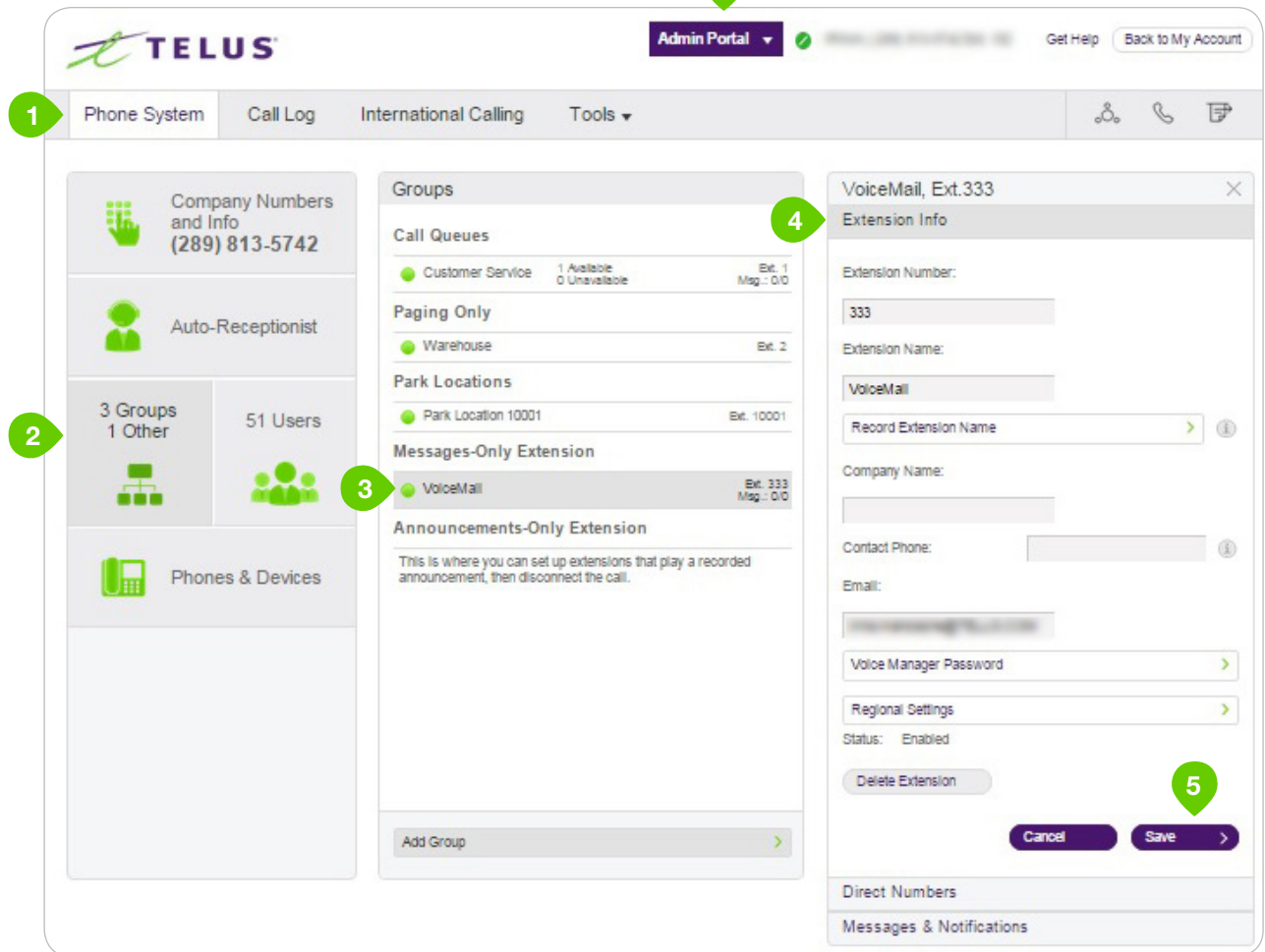
## Configure a Message-Only Extension

After you've created a Message-Only Extension configure the Extension Info, Direct Numbers, and Messages & Notifications.

### Extension Info

Edit your extension number, name, and delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Message-Only Extension** (Voicemail in this example).
4. Click **Extension Info** to edit the following:
  - a. **Extension Number**
  - b. **Extension Name**
  - c. **Company Name**
  - d. **Contact Phone**
  - e. **Email**
  - f. **Regional Settings**
  - g. **Apply Template**
  - h. **Resend Welcome Email**
  - i. **Delete Extension**
5. Click **Save**.



The screenshot shows the TELUS Admin Portal interface with the following elements and numbered callouts:

- 1**: Points to the **Phone System** tab in the top navigation bar.
- 2**: Points to the **Groups** section in the left sidebar.
- 3**: Points to the **VoiceMail** extension under the **Messages-Only Extension** category.
- 4**: Points to the **Extension Info** sub-tab within the VoiceMail extension configuration.
- 5**: Points to the **Save** button at the bottom right of the configuration panel.

The interface includes a top navigation bar with the TELUS logo, an **Admin Portal** dropdown, and links for **Get Help** and **Back to My Account**. The main content area is divided into a left sidebar with icons for **Company Numbers and Info**, **Auto-Receptionist**, **3 Groups 1 Other**, **51 Users**, and **Phones & Devices**. The central panel shows configuration options for **Call Queues**, **Paging Only**, **Park Locations**, **Messages-Only Extension** (with a **VoiceMail** entry), and **Announcements-Only Extension**. The right panel displays the **Extension Info** form for the selected extension, including fields for **Extension Number** (333), **Extension Name** (VoiceMail), **Record Extension Name**, **Company Name**, **Contact Phone**, **Email**, **Voice Manager Password**, **Regional Settings**, and **Status** (Enabled). It also includes a **Delete Extension** button and **Cancel** and **Save** buttons.



## Messages & Notifications

Set the voicemail greeting you would like to use for your Message-Only Extension.

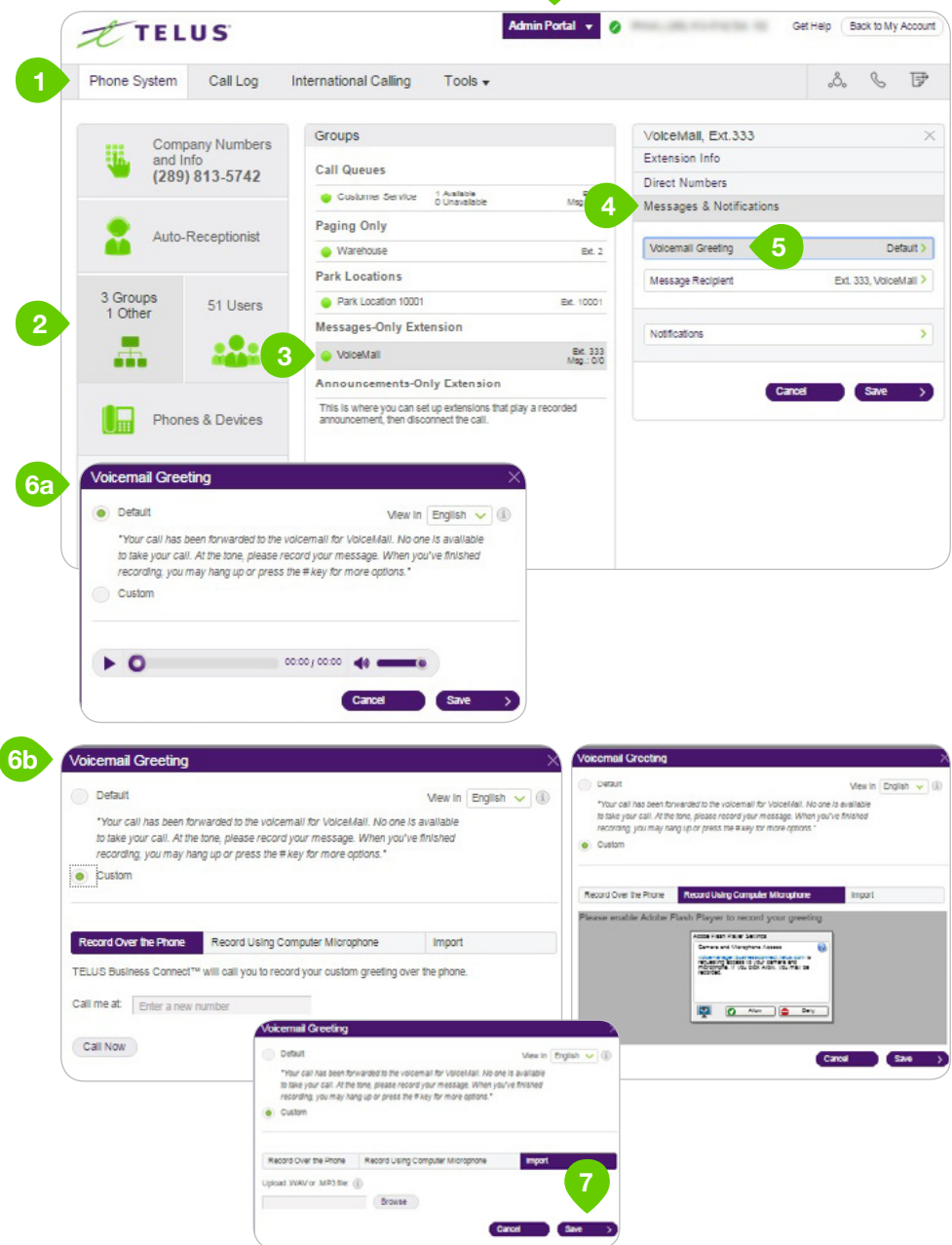
## Set a Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Message-Only Extension** (Voicemail in this example).
4. Click **Messages & Notifications**.
5. Click **Voicemail Greeting**.
6. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
  - a. **Default** – Select the radio button next to Default.
  - b. **Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**

Next to Call me at, choose a phone number from the dropdown menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**

Click **Allow** on the Adobe Flash Player Settings pop-up. Click **Allow** if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
    - **Import**

Browse for a .WAV or .MP3 file you want to use. Click **Attach**.
7. Click **Save**.





## Message Recipient

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Message-Only Extension** (Voicemail in this example).
4. Click **Messages & Notifications**.
5. Click **Message Recipient**.
6. A pop-up will appear with a list of recipients.
7. Select the radio button next to the extension you'd like to set as the recipient.
8. Click **Save**.

The screenshot displays the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, an 'Admin Portal' dropdown, and links for 'Get Help' and 'Back to My Account'. The main navigation tabs are 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The left sidebar contains icons and labels for 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', '3 Groups 1 Other' (with a tree icon), '51 Users' (with a group icon), and 'Phones & Devices' (with a phone icon). The central content area is titled 'Groups' and lists several categories: 'Call Queues' (with 'Customer Service' showing 1 Available and 0 Unavailable), 'Paging Only' (with 'Warehouse'), 'Park Locations' (with 'Park Location 10001'), 'Messages-Only Extension' (with 'VoiceMail' selected, Ext. 333, Msg.: 0/0), and 'Announcements-Only Extension'. A green circle with the number 1 points to the 'Phone System' tab, 2 to the 'Groups' section, 3 to the 'VoiceMail' extension, 4 to the 'Messages & Notifications' sub-section, and 5 to the 'Message Recipient' option. A pop-up window titled 'Select Message Recipient' is shown in the bottom right, with a green circle 6 pointing to its title bar, 7 to the list of extensions (where 'Ext. 333 - This extension' is selected), and 8 to the 'Save' button. The pop-up also includes a search bar and a list of other extensions like Ext. 122, Ext. 113, Ext. 125, Ext. 148, Ext. 130, Ext. 103, and Ext. 150.

### Voicemail Preview\*

The voicemail preview provides a text version of your voicemail that allows you to get the gist of the message. It delivers a text version of your voicemail to your TELUS Business Connect mobile or desktop application or via e-mail.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Message-Only Extension** (Holiday Message in this example).
4. Click **Messages and Notifications**.
5. Click **Voicemail Preview**.
6. A pop-up will appear with the option to turn Voicemail Preview on or off.
7. Select the button next to **On** or **Off**.
8. Click **Save**.

The screenshot illustrates the TELUS Admin Portal interface with numbered callouts indicating the steps to enable Voicemail Preview:

- 1**: Select the **Phone System** tab in the top navigation bar.
- 2**: Click on the **Groups** icon in the left sidebar.
- 3**: Select an existing **Message-Only Extension** (e.g., 'Test Messages-Only Ext Group') in the 'Groups' list.
- 4**: Click on the **Messages & Notifications** section in the extension details.
- 5**: Click on the **Voicemail Preview** option.
- 6**: A pop-up window titled **Voicemail Preview** appears.
- 7**: Select the **On** radio button to enable the feature.
- 8**: Click the **Save** button to confirm the changes.

## Notifications

Choose who will receive notifications for voicemail messages and how they will receive them.

- From the **Admin Portal**, select the **Phone System** tab.
- Click **Groups**.
- Select an existing **Message-Only Extension** (Voicemail in this example).
- Click **Messages & Notifications**.
- Click **Notifications**.
- A pop-up will appear with notification options. Set your notification settings by checking the checkboxes and filling in email and phone numbers.
  - Click **Advanced Notification Options** to see more detailed notification settings.
  - Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
  - Click **Switch to Basic Notification Settings**.
- Click **Save**.

The screenshot illustrates the process of configuring voicemail notifications in the TELUS Admin Portal. The interface is divided into a top navigation bar, a main content area, and a sidebar. The 'Phone System' tab is selected, and the 'Groups' section is expanded. The 'Messages-Only Extension' section is chosen, and the 'VoiceMail, Ext.333' extension is selected. The 'Messages & Notifications' section is expanded, and the 'Notifications' section is highlighted. A pop-up window titled 'Notifications' is shown, with the 'Basic Notification Settings' tab active. The pop-up contains options for 'Notify me by' (Email, SMS), 'Send notifications to' (Email, Phone number), and 'Mark message as read once emailed'. The 'Advanced Notification Options' tab is also shown, with options for 'Notify me by', 'Send notifications to', and 'Mark message as read once emailed'. The 'Switch to Basic Notification Settings' button is visible at the bottom of the pop-up.

## Announcements-Only Extensions

Create an extension that is dedicated to only play an announcement for your callers. All callers routed to this extension will hear a recorded announcement such as a holiday closure announcement.

### Add an Announcements-Only Extension

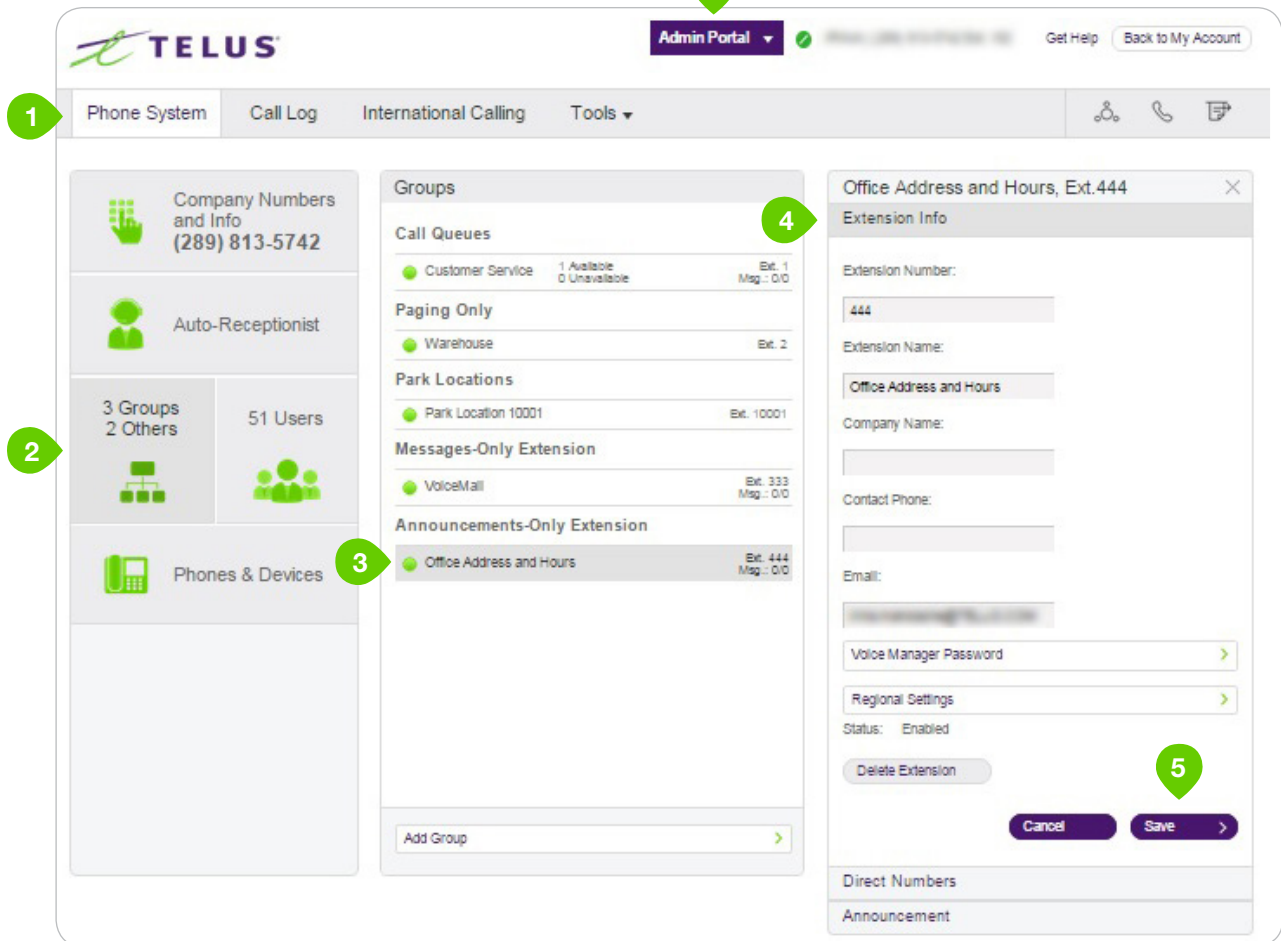
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **Announcement-Only Extension**.
5. Click **Next**.
6. Enter an **Extension Number**, **Extension Name**, and **Email**.
7. Click **Save**.

The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, 'Admin Portal' dropdown, 'Get Help', and 'Back to My Account'. The main navigation tabs are 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Phone System' tab is selected, showing a sidebar with 'Company Numbers and Info (289) 813-5742', 'Auto-Receptionist', '3 Groups 1 Other', '51 Users', and 'Phones & Devices'. The main content area displays 'Groups' with sections for 'Call Queues', 'Paging Only', 'Park Locations', 'Messages-Only Extension', and 'Announcements-Only Extension'. The 'Announcements-Only Extension' section has a description: 'This is where you can set up extensions that play a recorded announcement, then disconnect the call.' A green circle with the number 1 points to the 'Phone System' tab. A green circle with the number 2 points to the 'Groups' section. A green circle with the number 3 points to the 'Add Group' button. A modal window titled 'Add Group' is open, showing options: 'Call Queue', 'Paging Only', 'Park Location', 'Add Special Extension', 'Message-Only Extension', and 'Announcement-Only Extension'. The 'Announcement-Only Extension' option is selected, indicated by a green circle with the number 4. A green circle with the number 5 points to the 'Next' button. Below the modal, another modal titled 'Add Announcements-Only Extension' is shown. It has fields for 'Extension Number' (444), 'Extension Name' (Office Address and Hours), and 'Email' (info@telus.com). A green circle with the number 6 points to the 'Extension Number' field. A green circle with the number 7 points to the 'Save' button.

## Extension Info

Edit your extension number, name, and delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Announcements-Only Extension** (Office Address and Hours in this example).
4. Click **Extension Info** to edit the following:
  - a. **Extension Number**
  - b. **Extension Name**
  - c. **Company Name**
  - d. **Contact Phone**
  - e. **Email**
  - f. **Regional Settings**
  - g. **Apply Template**
  - h. **Resend Welcome Email**
  - i. **Delete Extension**
5. Click **Save**.

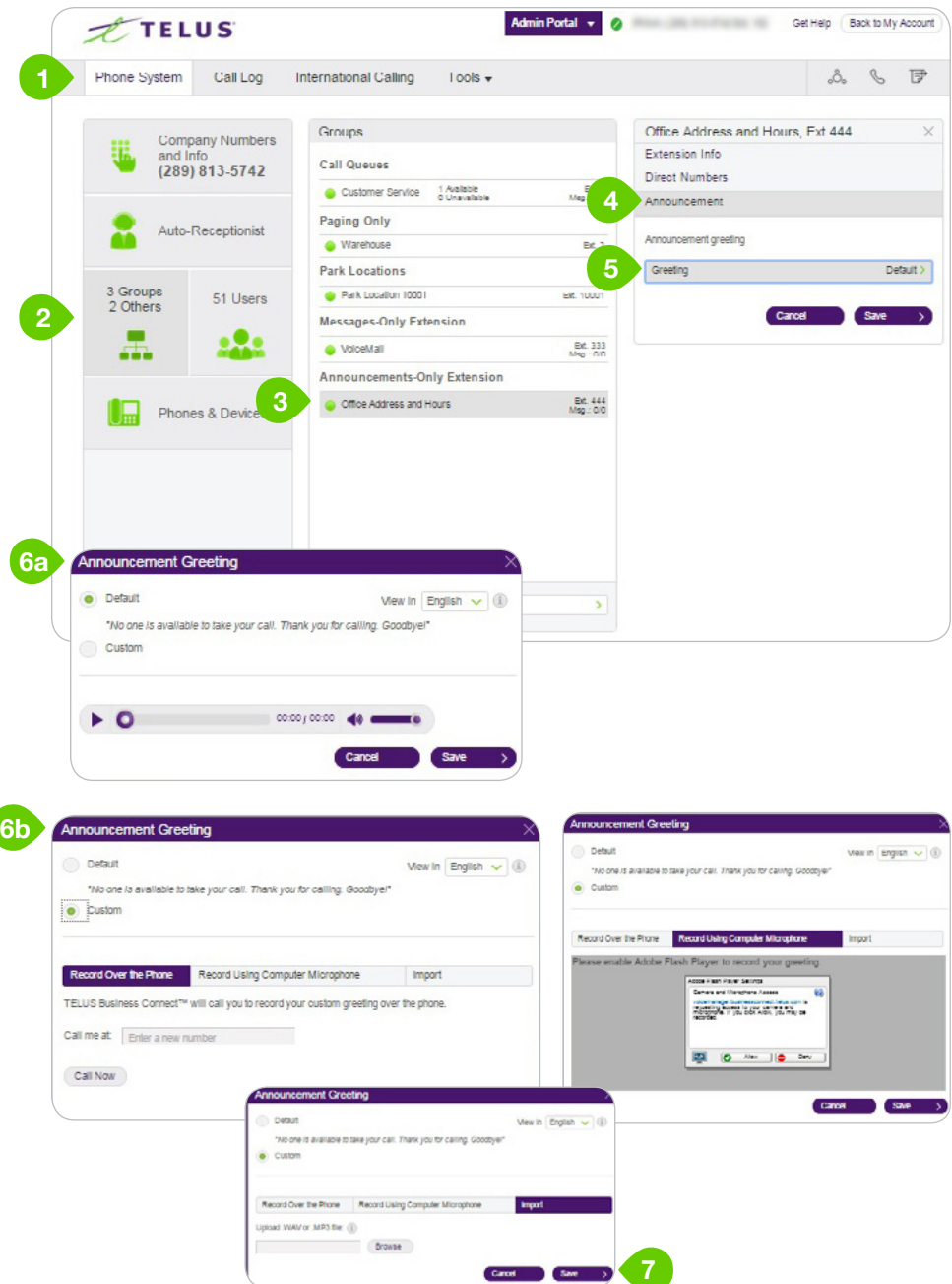


The screenshot shows the TELUS Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. The 'Phone System' tab is selected. In the left sidebar, the 'Groups' section is highlighted. The main content area shows a list of groups, with 'Office Address and Hours' (Ext. 444) selected. A pop-up window titled 'Office Address and Hours, Ext.444' is open, showing the 'Extension Info' tab. The fields to be edited are: Extension Number (444), Extension Name, Office Address and Hours, Company Name, Contact Phone, Email, Voice Manager Password, and Regional Settings. The 'Delete Extension' button is also visible. The 'Save' button is at the bottom right of the pop-up.



## Set an Announcement

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Announcements-Only Extension** (Office Address and Hours in this example).
4. Click **Announcement**.
5. Click **Greeting**.
6. A pop-up will appear displaying the current Announcement Greeting. Choose your preferred type of greeting.
  - a. **Default** – Select the radio button next to Default.
  - b. **Custom** – Select the radio button next to Custom and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to Call me at, choose a phone number from the dropdown menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and TELUS Business Connect will call you to record your message.
    - **Record Using Computer Microphone**  
Click **Allow** on the Adobe Flash Player Settings pop-up. Click **Allow** if TELUS Business Connect asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your announcement through your computer microphone. Stop the recording and listen to the playback.
    - **Import**  
Browse for a .WAV or .MP3 file you want to use. Click **Attach**.
7. Click **Save**.





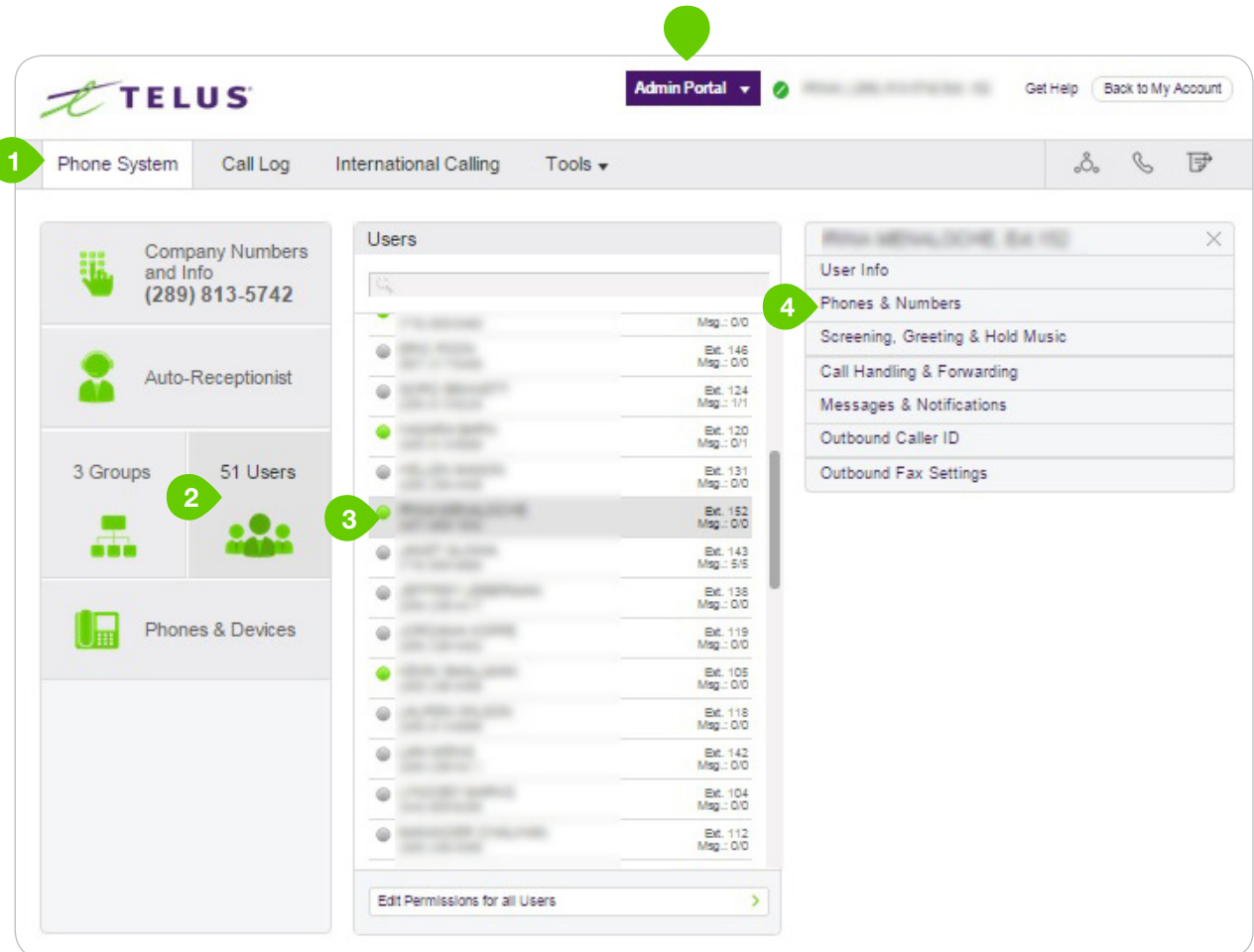
## Users

Admins have the ability to edit the following user settings:

- User Information
- Phones & Numbers
- Screening, Greeting, & Hold Music
- Call Handling & Forwarding
- Messages & Notifications
- Outbound Caller ID
- Outbound Fax Settings

Administrators will use the Users panel to access and edit these settings.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Users**.
3. Select a user.
4. Click the category you'd like to edit.



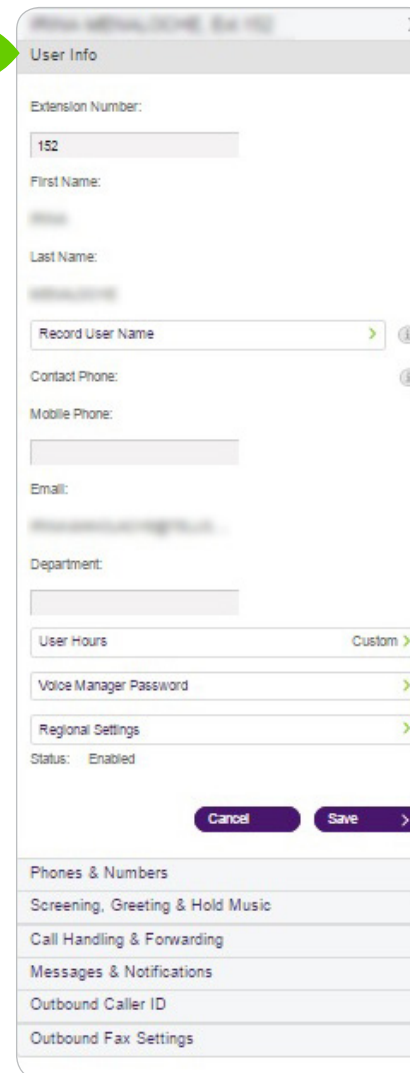
The screenshot displays the TELUS Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. The left sidebar contains the 'Phone System' tab, which is highlighted with a green circle and the number 1. Below the sidebar, the 'Users' panel is selected, indicated by a green circle and the number 2. The main content area shows a list of users, with one user selected, indicated by a green circle and the number 3. The selected user's settings are displayed on the right, with a green circle and the number 4 highlighting the 'Phones & Numbers' category.

## User Info

Click on User Info to view and edit the selected user's information. From this menu, you can edit a user's extension, name, recording, phone numbers, email address, department, hours, password, and regional settings.

## Super Admin

One user on your account will be labeled as the Super Admin. By default, this role is assigned to Extension 101, the person who initially set up the account. You can assign this extension to any user on your account, but it is recommended that you assign it to the user who is primarily responsible for this account. Though you can assign administrator permissions to other users on your account, the Super Admin serves as the main account administrator and cannot be deleted. The administrator permissions also cannot be removed from this user.



**User Info**

Extension Number:  
152

First Name:  
[Redacted]

Last Name:  
[Redacted]

Record User Name >

Contact Phone: ⓘ

Mobile Phone:  
[Redacted]

Email:  
[Redacted]

Department:  
[Redacted]

User Hours Custom >

Voice Manager Password >

Regional Settings >

Status: Enabled

Cancel Save >

Phones & Numbers  
Screening, Greeting & Hold Music  
Call Handling & Forwarding  
Messages & Notifications  
Outbound Caller ID  
Outbound Fax Settings



**User Info (Super Admin)**

Super Admin >

Super Admin is the built-in Administrator for your account. This user cannot be deleted and Administrator permissions cannot be removed. You can use this extension for any user in your account, but it's recommended that you assign this extension to the user who is primarily responsible for this account.

Extension Number:  
101

First Name:  
[Redacted]

Last Name:  
[Redacted]

Record User Name ⓘ >

Contact Phone: +1 (416) 323-8944 ⓘ

Mobile Phone:  
+1 (416) 323-8944

Email:  
[Redacted]

Department:  
[Redacted]

User Hours 24 hours >

Voice Manager Password >

Regional Settings >

Status: Enabled

Cancel Save >

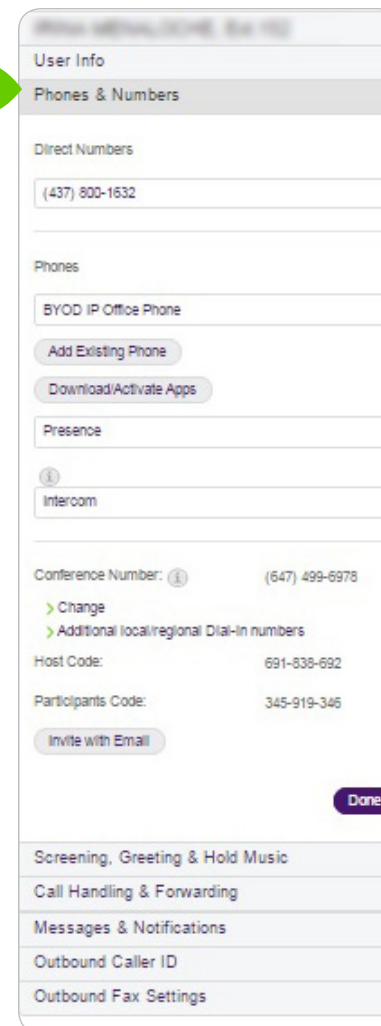
Phones & Numbers  
Screening, Greeting & Hold Music  
Call Handling & Forwarding  
Messages & Notifications  
Outbound Caller ID  
Outbound Fax Settings

## Phones & Numbers

Click Phones & Numbers to view and edit the selected user's phone numbers and phone settings. You can download/activate apps, change presence and intercom settings, and view and edit conference settings.

## Screening, Greeting & Hold Music

Click Screening, Greeting & Hold Music to view and edit the selected user's greeting, call screening options, connecting message, audio while connecting, hold music, and blocked call settings.



**IRINA MENALOCHE** Edit

User Info

**Phones & Numbers**

Direct Numbers

(437) 800-1632

Phones

BYOD IP Office Phone

Add Existing Phone

Download/Activate Apps

Presence

Intercom

Conference Number: (647) 499-6978

> Change

> Additional local/regional Dial-In numbers

Host Code: 691-838-692

Participants Code: 345-919-346

Invite with Email

Done

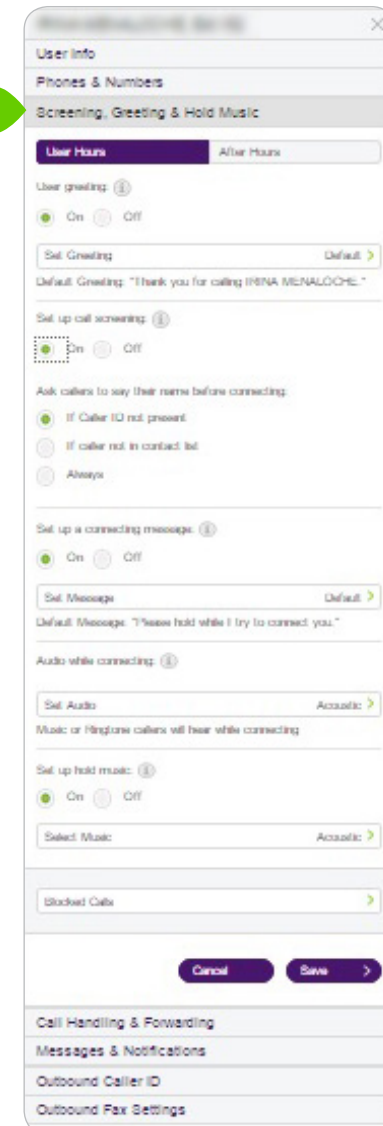
Screening, Greeting & Hold Music

Call Handling & Forwarding

Messages & Notifications

Outbound Caller ID

Outbound Fax Settings



**IRINA MENALOCHE** Edit

User Info

**Phones & Numbers**

**Screening, Greeting & Hold Music**

User Hours

User greeting

On Off

Set Greeting Default

Default Greeting: "Thank you for calling IRINA MENALOCHE."

Set up call screening

On Off

Ask callers to say their name before connecting

If Caller ID not present

If caller not in contact list

Always

Set up a connecting message

On Off

Set Message Default

Default Message: "Please hold while I try to connect you."

Audio while connecting

Set Audio Acoustic

Music or Ringtone callers will hear while connecting

Set up hold music

On Off

Select Music Acoustic

Blocked Calls

Cancel Save

Call Handling & Forwarding

Messages & Notifications

Outbound Caller ID

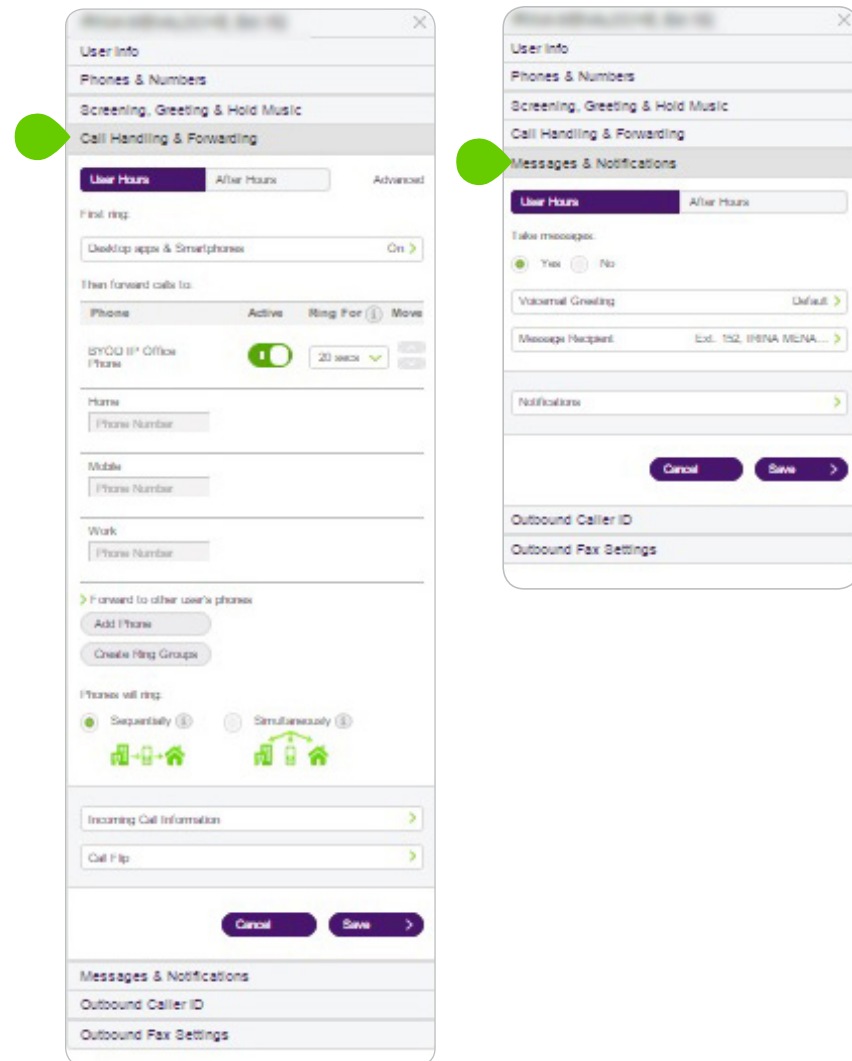
Outbound Fax Settings

## Call Handling & Forwarding

Click Call Handling & Forwarding to view and edit the selected user's call handling, call forwarding, ring group, additional phones, ring pattern, incoming call, and call flip settings.

## Messages & Notifications

Click Messages & Notifications to view and edit the selected user's voicemail settings, voicemail greeting, message recipient, messages, and notification settings.



The image displays two side-by-side screenshots of the Admin Portal interface, showing the settings for a selected user. The left screenshot shows the 'Call Handling & Forwarding' settings, and the right screenshot shows the 'Messages & Notifications' settings. Both screenshots have a green circle highlighting the respective menu item in the left-hand navigation bar.

**Call Handling & Forwarding Screenshot:**

- User Info**
- Phones & Numbers**
- Screening, Greeting & Hold Music**
- Call Handling & Forwarding** (highlighted)
- User Hours** (selected), After Hours, Advanced
- First ring:** Desktop apps & Smartphones On >
- Then forward calls to:**
  - Phone:** Active Ring For 1 Move
  - SYOU IP Office iPhone (toggle on) 20 sec
  - Home:** Phone Number
  - Mobile:** Phone Number
  - Work:** Phone Number
- > Forward to other user's phones:**
  - Add iPhone
  - Create Ring Groups
- Phones will ring:**
  - Sequentially (selected)
  - Simultaneously
- Incoming Call Information** >
- Call Flip** >
- Cancel** **Save** >

**Messages & Notifications Screenshot:**

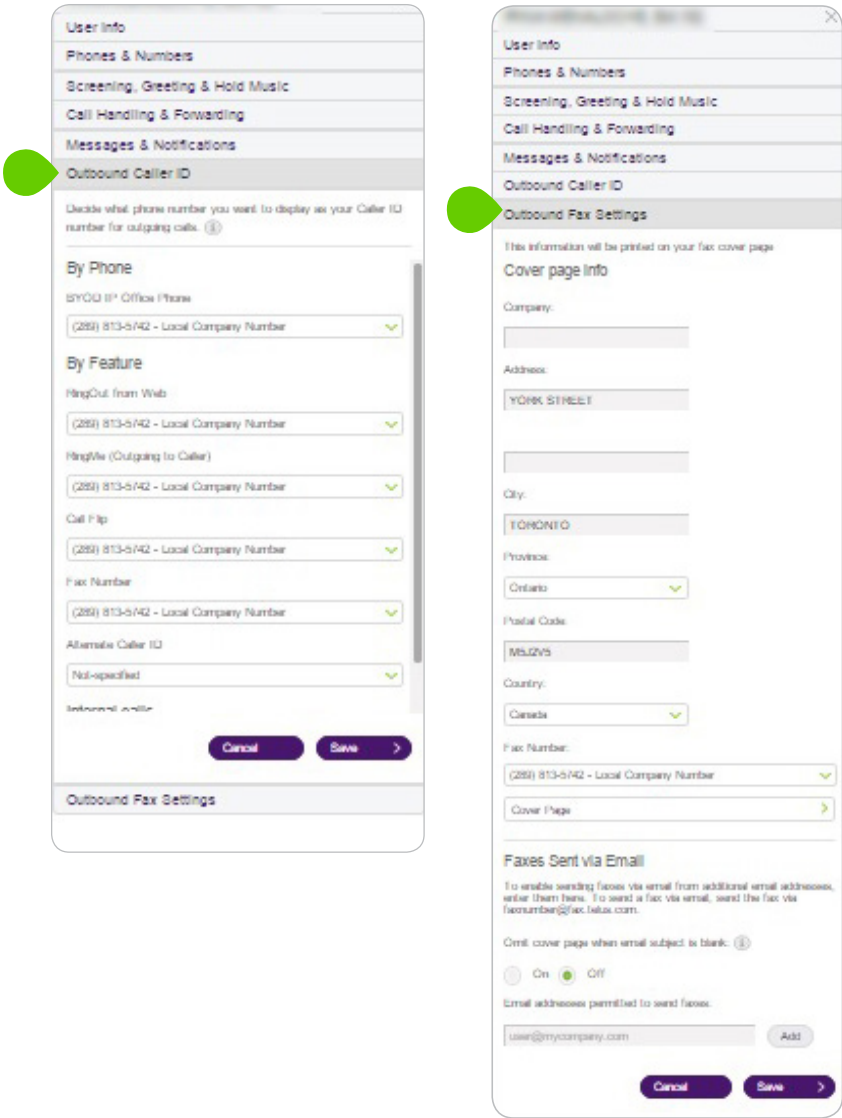
- User Info**
- Phones & Numbers**
- Screening, Greeting & Hold Music**
- Call Handling & Forwarding**
- Messages & Notifications** (highlighted)
- User Hours** (selected), After Hours
- Take messages:** Yes (selected) No
- Vicemail Greeting:** Default >
- Message Recipient:** Ext. 152, IRINA MENA... >
- Notifications** >
- Cancel** **Save** >
- Outbound Caller ID**
- Outbound Fax Settings**

### Outbound Caller ID

Click Outbound Caller ID to view and edit the selected user's outbound caller ID numbers.

### Outbound Fax Settings

Click Outbound Fax Settings to view and edit the selected user's fax cover page settings and fax via email settings.



## Admin Only User Settings

There are some actions that only admins can perform in this section.

These admin only user settings are described in this section.


### Edit Permissions for all Users

There are two sets of permissions that administrators can edit for all users at once: International Calling and Administrator Permission.

### International Calling

Administrators can create a list of users who are allowed to call internationally and add and remove users from this list at any time. To set your international calling settings:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **User(s)**.
3. Click **Edit Permissions for all Users**.
4. A pop-up will appear displaying administrator options.
5. Click the **International Calling** tab.
6. Select the users who you'd like to allow international calling for.
7. Click the arrow to move the selected members to the column on the right. This column is for users who are allowed to use international calling. You can select users and use the arrows to add or remove them from this column.
8. Click **Save**.



The screenshot shows the TELUS Admin Portal interface. The 'Phone System' tab is selected, indicated by a green circle with the number 1. The 'Users' section is visible, showing a list of users with their extensions and messages. A green circle with the number 2 points to the 'Users' link. A green circle with the number 3 points to the 'Edit Permissions for all Users' button. A green circle with the number 4 points to the 'International Calling' tab in the pop-up. A green circle with the number 5 points to the 'Available Users (0)' table. A green circle with the number 6 points to the 'Selected Users (51)' table. A green circle with the number 7 points to the right arrow button. A green circle with the number 8 points to the 'Save' button.

**Phone System** | Call Log | International Calling | Tools

**Company Numbers and Info** (289) 813-5742

**Auto-Receptionist**

**3 Groups** | **51 Users**

**Phones & Devices**

**Users**

**Users**

**Learning Center**

**Overview: Users**

**Users overview** [View](#)

**Edit Permissions for all Users**

**International Calling** | Administrator

Currently International Calling is disabled for your account. Click here to enable.

Give International Calling permission to:

Available Users (0)

Name	Extension
Select All	

Selected Users (51)

Name	Extension
Select All	
Ext. 122	Ext. 122
Ext. 113	Ext. 113
Ext. 125	Ext. 125
Ext. 148	Ext. 148
Ext. 130	Ext. 130
Ext. 103	Ext. 103
Ext. 150	Ext. 150
Ext. 127	Ext. 127
Ext. 144	Ext. 144
Ext. 126	Ext. 126
Ext. 135	Ext. 135
Ext. 128	Ext. 128
Ext. 146	Ext. 146
Ext. 124	Ext. 124
Ext. 121	Ext. 121
Ext. 111	Ext. 111
Ext. 152	Ext. 152

**Cancel** **Save**



## Administrator Permission

You can give and revoke administrator permissions to users on your account.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **User(s)**.
3. Click **Edit Permissions for all Users**.
4. A pop-up will appear displaying administrator options.
5. Click the **Administrator** tab.
6. Select the users who you'd like to give administrator permission to.
7. Click the arrow to move the selected members to the column on the right. This column is for users who have administrator permissions. You can select users and use the arrows to add or remove them from this column.
8. Click **Save**.

NOTE: You cannot revoke administrator permissions from the Super Admin. There is only one Super Admin for each account, set to extension 101 by default, which should be the main administrator of your account.

The screenshot illustrates the steps to assign administrator permissions in the TELUS Admin Portal. The interface shows the 'Phone System' tab selected, with the 'Users' section highlighted. The 'Edit Permissions for all Users' pop-up is open, showing the 'Administrator' tab. The 'Available Users' list contains 48 users, and the 'Selected Users' list contains 3 users: Ext. 152, Ext. 143, and Ext. 101. The 'Save' button is visible at the bottom right of the pop-up.

## Phones & Devices

This section provides you a view of all phones that are associated with your TELUS Business Connect account. You can add phones and devices from this section as well.

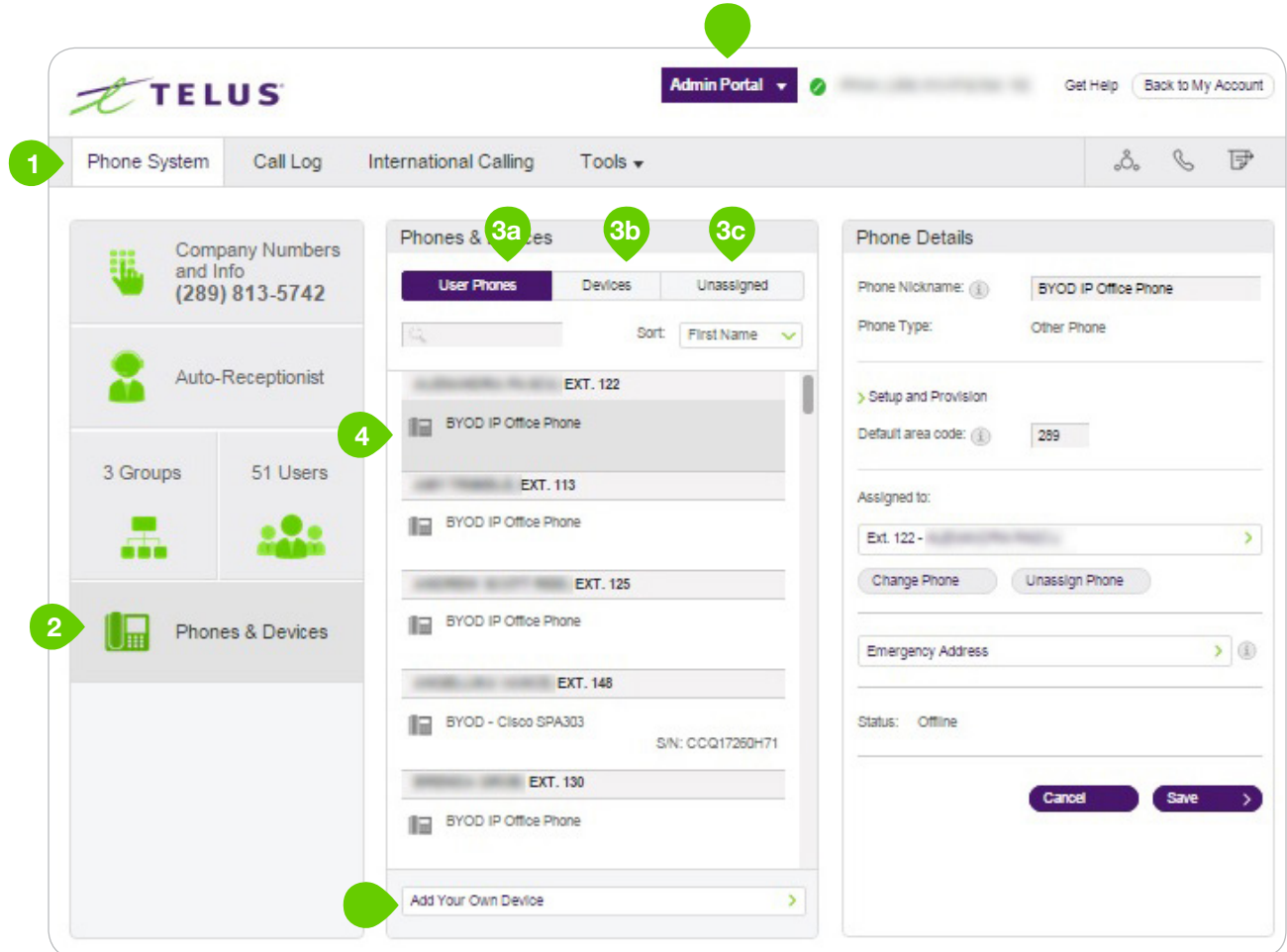
### User Phones, Devices, Unassigned

To view and edit devices on your account:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click on the tabs at the top of the middle panel to see:
  - a. **User Phones**
  - b. **Devices**
  - c. **Unassigned**
4. Click on a device to view and edit details.

### Add Your Own Device

You can add a desktop phone, conference phone, or paging device by clicking **Add your own device** at the bottom of the middle panel.



## Managing Hot Desking

Hot desking\* enables any employee to log in to a shared phone that adopts the user's phone settings. Employees who travel from different offices can share the same common phone and desk while keeping their own extension profiles and voicemail access. The admin can view and manage the common phones for hot desking from the **Devices** tab.

Hot desking is only available for extensions with digital lines. Host phones will not support any inbound or outbound calling without a guest user logged in (except emergency calls).

### Common Phone Setup

Hot desking is required to be set up on a common phone. You can either purchase a new common phone, or convert an existing unassigned Polycom VVX 310, VVX 410, or VVX 500 phone to a common phone. See these sections:

- Add a Common Phone
- Convert an Unassigned Phone to a Common Phone

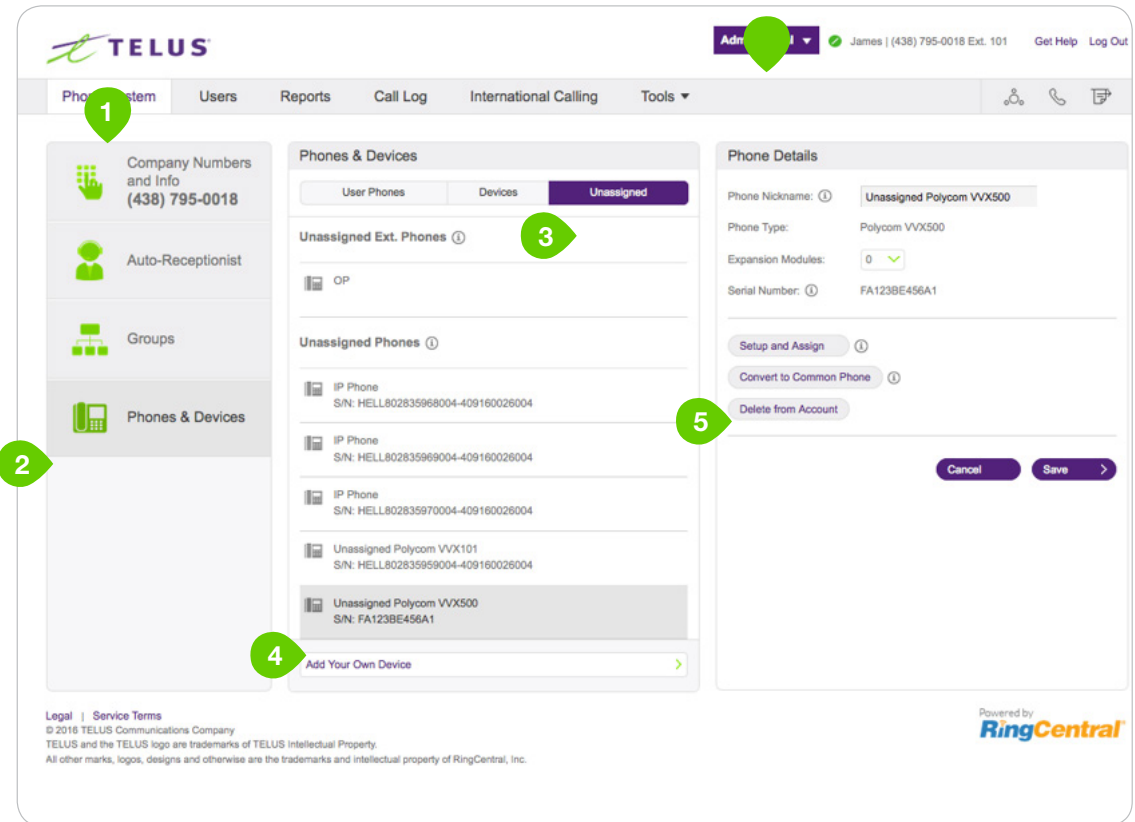
### Convert an Unassigned Phone to a Common Phone

Converting an unassigned phone to a common phone makes that phone only available for use in hot desking. No minutes are included for any type of calls.

To convert an unassigned phone to a common phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Unassigned** tab.
4. Select an unassigned phone.
5. Under Phone Details, select **Convert to Common Phone**.
6. Follow the instructions to complete the conversion.

\*Available for Premium and Premium Plus users only.



## Unassign a Common Phone

You can unassign a common phone to remove it from hot desking use, and return it to the list of unassigned devices.

To unassign a common phone:

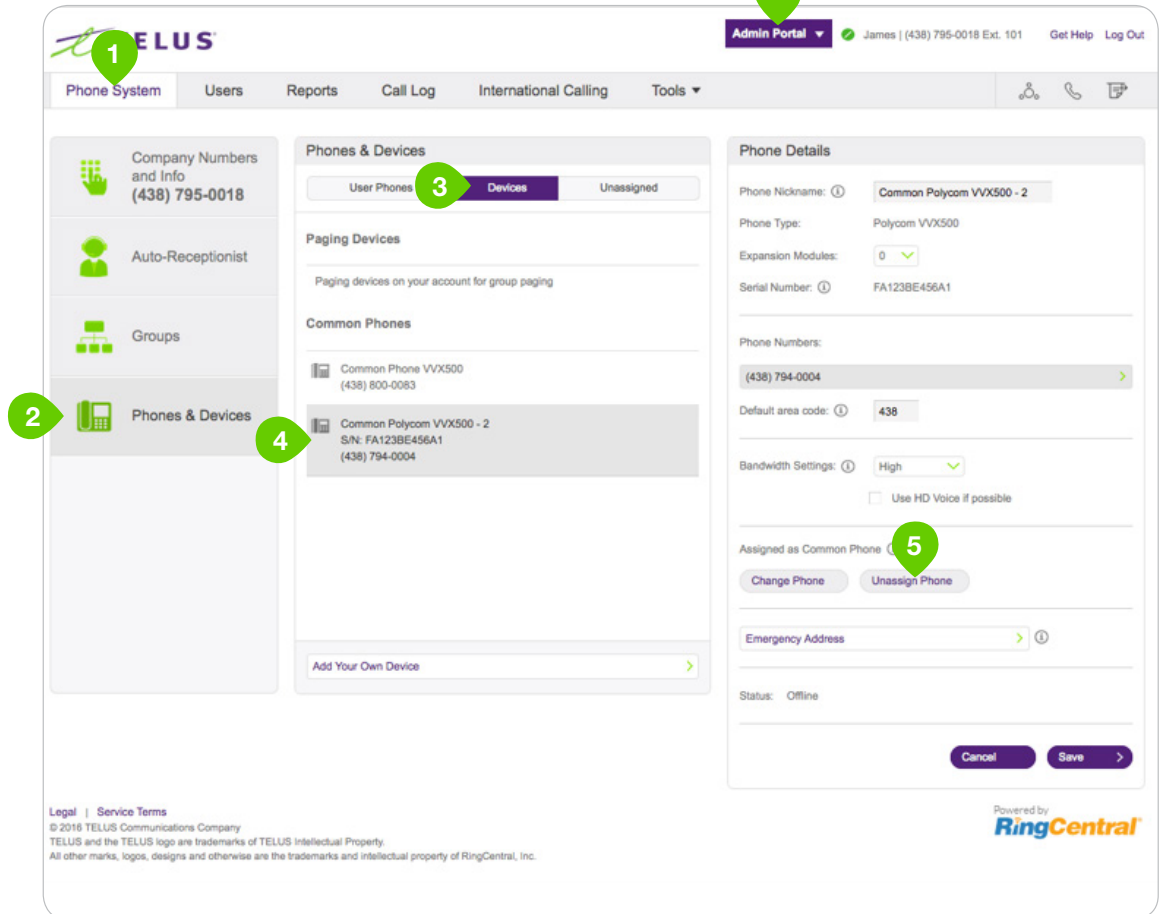
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Devices** tab.
4. Select a common phone.
5. Under Phone Details, select **Unassign Phone**.

## Log out a Common Phone

You can log out the currently logged in user from the common phone.

To log out a common phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Devices** tab.
4. Select a common phone.
5. Under Phone Details, select **Logout**.



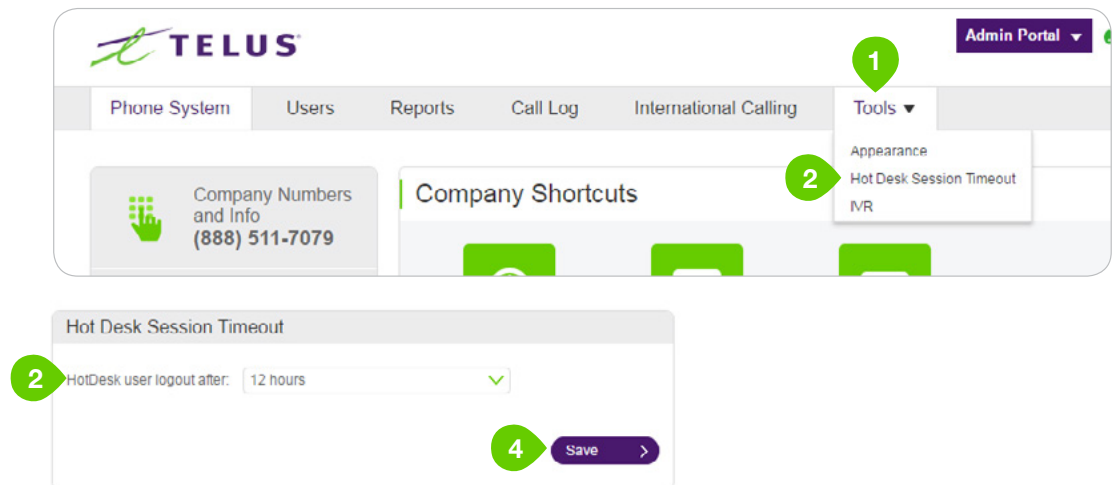
The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes the TELUS logo, 'Admin Portal' dropdown, user name 'James | (438) 795-0018 Ext. 101', and links for 'Get Help' and 'Log Out'. The left sidebar has a 'Phone System' tab selected, with other options like 'Users', 'Reports', 'Call Log', 'International Calling', and 'Tools'. The main content area is divided into two sections: 'Phones & Devices' and 'Phone Details'. The 'Phones & Devices' section has three tabs: 'User Phones', 'Devices' (selected), and 'Unassigned'. Below the tabs, there are sections for 'Paging Devices' and 'Common Phones'. The 'Common Phones' section lists two devices: 'Common Phone VVX500 (438) 800-0083' and 'Common Polycom VVX500 - 2 S/N: FA123BE456A1 (438) 794-0004'. The 'Phone Details' section on the right shows the details for the selected device, including 'Phone Nickname', 'Phone Type', 'Expansion Modules', 'Serial Number', 'Phone Numbers', 'Default area code', 'Bandwidth Settings', and 'Assigned as Common Phone'. The 'Assigned as Common Phone' section has two buttons: 'Change Phone' and 'Unassign Phone'.

## Setting the Hot Desking Session Timeout

The hot desking session timeout specifies the time period when guest users will be logged out from phone endpoints. The default session timeout is 12 hours.

To set session time out for all common phones:

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Hot Desk Session Timeout**.
3. Set the session timeout from the menu.
4. Click **Save**.



# Manage Roles and Permissions

Roles and permissions allow you to enforce your company security policy by providing a flexible, role-based access control in your TELUS Business Connect phone system.

You can delegate access to certain areas without giving full admin access, or by retaining control over certain areas. You can use templates and bulk upload options to efficiently apply roles among users across an organization.

## Predefined Roles

You can grant access privileges by assigning users one of the seven predefined roles:

- Super Admin: Complete system administrator level access
- Phone System Admin: Phone System settings access plus full access to user level settings
- Billing Admin: Full access to billing functions, user level settings, international dialing, plus analytics features
- User Admin: Full access to user administration (self and others), international dialing, and system features/apps
- Manager: Provide users with all capabilities of Standard (International) along with access to key functions such as Reports and Company Call Log
- Standard (International): Full access to user level settings, access to features plus international dialing
- Standard: Full access to user level settings, access to features and no international dialing

Predefined roles cannot be modified.

## Custom Roles\*

You can create custom roles to meet your business needs. When creating a custom role you select an existing role as a starting point, and select permissions to be assigned to the role.

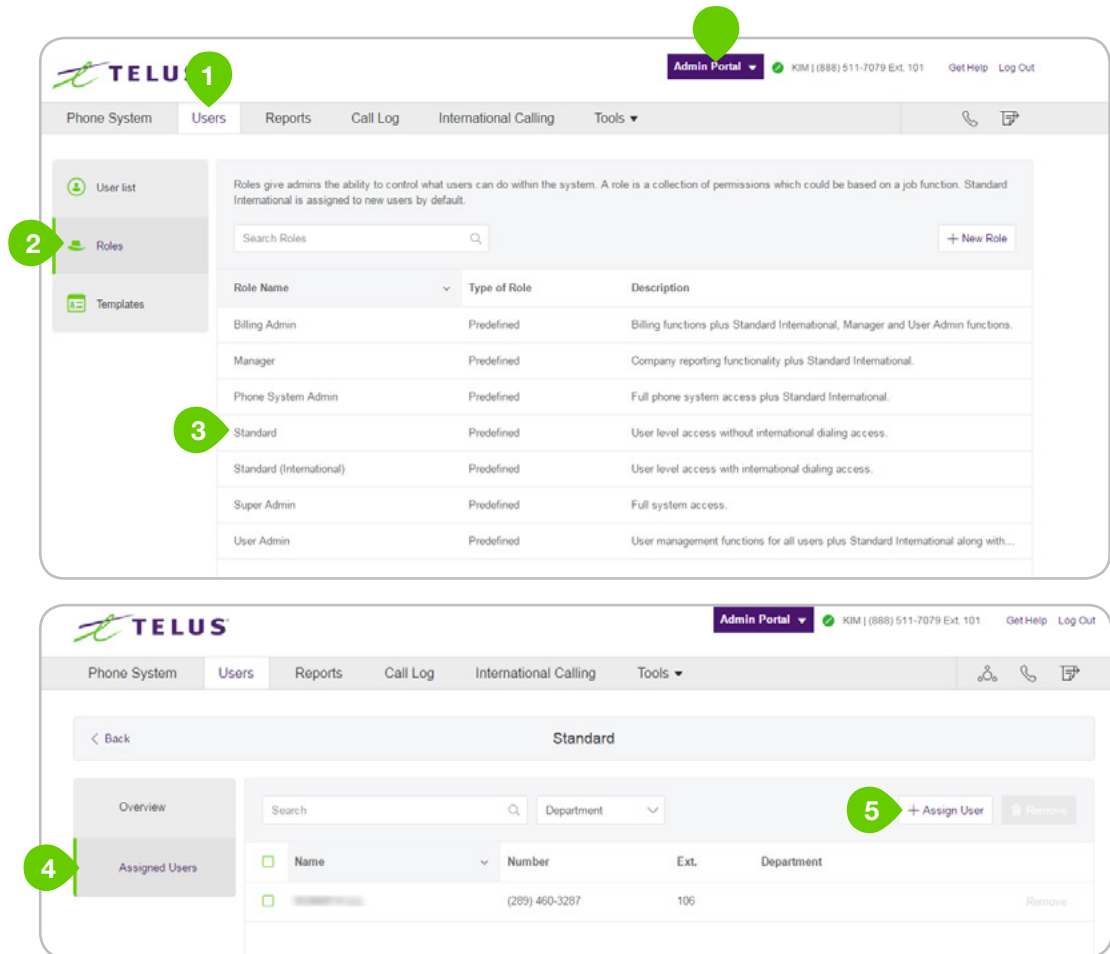
\*This feature is available for Premium and Premium Plus only.



## Assign Users to a Role

To assign users to a role:

1. From the **Admin Portal**, select the **Users** tab.
2. Click **Roles**.
3. Select one of the roles to assign users to.
4. Click the Assign Users tab to view the users currently assigned to the role.
5. Click **Assign User**.
6. A list of users and their currently assigned roles is displayed.
7. Select the users to assign to the role.
8. Click **Assign**.
9. The users' roles are assigned and the new role assignments are displayed in the **User list**.



**Roles**

Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function. Standard International is assigned to new users by default.

Search Roles  [+ New Role](#)

Role Name	Type of Role	Description
Billing Admin	Predefined	Billing functions plus Standard International, Manager and User Admin functions.
Manager	Predefined	Company reporting functionality plus Standard International.
Phone System Admin	Predefined	Full phone system access plus Standard International.
Standard	Predefined	User level access without international dialing access.
Standard (International)	Predefined	User level access with international dialing access.
Super Admin	Predefined	Full system access.
User Admin	Predefined	User management functions for all users plus Standard International along with...

**Standard**

[Back](#)

Overview **Assigned Users**

Search  Department  [+ Assign User](#) [Remove](#)

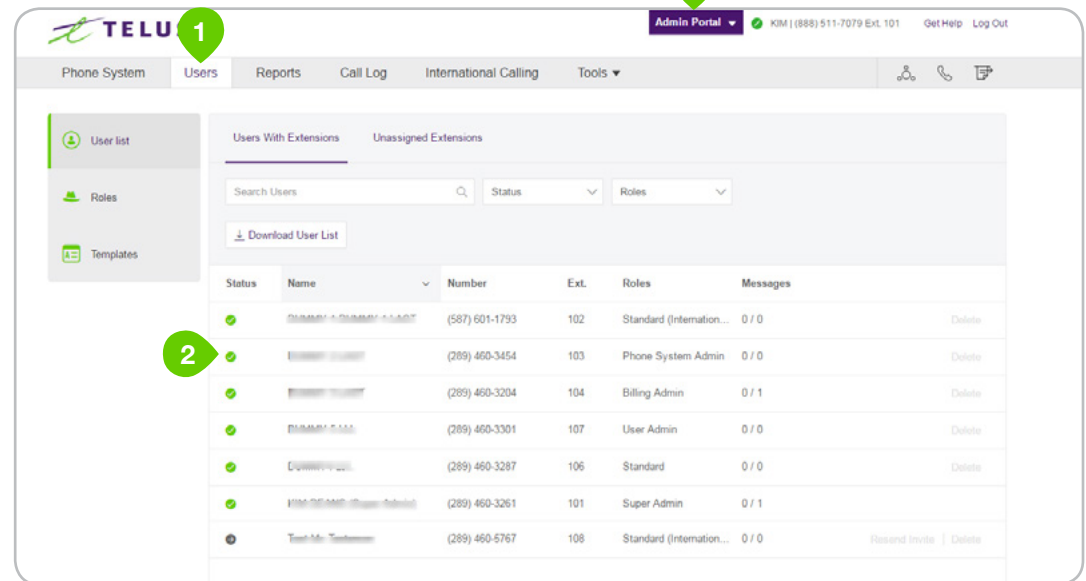
Name	Number	Ext.	Department
<input type="checkbox"/>	(289) 460-3287	106	<a href="#">Remove</a>

Note: the New Role option is available for Premium and Premium Plus users only.

## Modify a User's Role

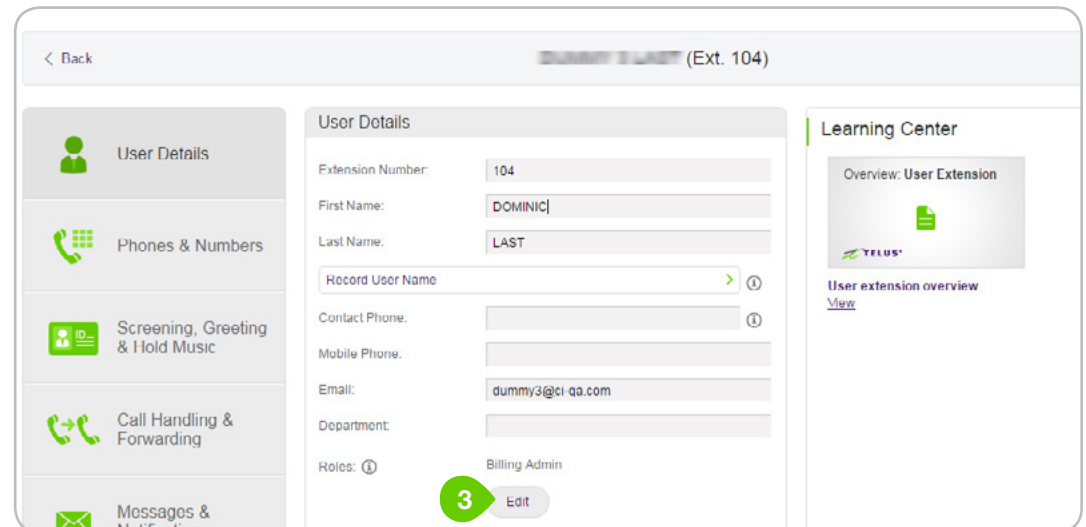
You can modify a user's role by editing the user's page.

1. From the **Admin Portal**, select the **Users** tab.
2. Click the user whose role you will modify.
3. Click the **Edit** button next to **Role**.
4. Select the role.
5. Click **Save**.



The screenshot shows the TELUS Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'International Calling', and 'Tools'. The 'Users' tab is selected. On the left sidebar, there are links for 'User list', 'Roles', and 'Templates'. The main content area is titled 'Users With Extensions' and 'Unassigned Extensions'. It features a search bar, status and role filters, and a 'Download User List' button. Below this is a table of users with columns for Status, Name, Number, Ext., Roles, and Messages. A green circle with the number 2 points to the first user in the table.

Status	Name	Number	Ext.	Roles	Messages
✓	Dominic + Dominic + LAST	(587) 601-1793	102	Standard (Internation...	0 / 0
✓	Dummy User	(289) 460-3454	103	Phone System Admin	0 / 0
✓	Dummy User	(289) 460-3204	104	Billing Admin	0 / 1
✓	Dummy User	(289) 460-3301	107	User Admin	0 / 0
✓	Dummy User	(289) 460-3287	106	Standard	0 / 0
✓	Dummy User (Phone System)	(289) 460-3261	101	Super Admin	0 / 1
✗	Test Mr. Testerson	(289) 460-5767	108	Standard (Internation...	0 / 0



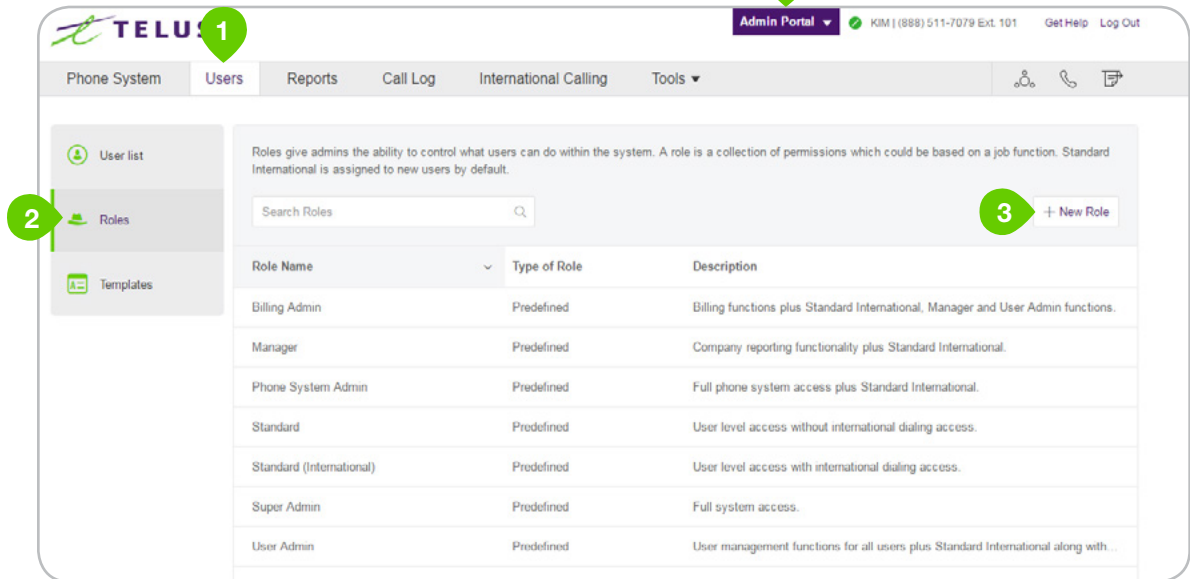
The screenshot shows the 'User Details' page for user 'DUMMY 104' (Ext. 104). The left sidebar contains links for 'User Details', 'Phones & Numbers', 'Screening, Greeting & Hold Music', 'Call Handling & Forwarding', and 'Messages & Notifications'. The main content area is titled 'User Details' and contains fields for Extension Number, First Name, Last Name, Record User Name, Contact Phone, Mobile Phone, Email, Department, and Roles. A green circle with the number 3 points to the 'Edit' button next to the 'Roles' field.

Field	Value
Extension Number	104
First Name	DOMINIC
Last Name	LAST
Record User Name	[icon]
Contact Phone	[icon]
Mobile Phone	[icon]
Email	dummy3@ci-qa.com
Department	[icon]
Roles	Billing Admin

## Create a New Role\*

To create a new, custom role:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Roles** panel.
3. Click **New Role**.



1 Admin Portal

2 Roles

3 + New Role

Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function. Standard International is assigned to new users by default.

Search Roles

Role Name	Type of Role	Description
Billing Admin	Predefined	Billing functions plus Standard International, Manager and User Admin functions.
Manager	Predefined	Company reporting functionality plus Standard International.
Phone System Admin	Predefined	Full phone system access plus Standard International.
Standard	Predefined	User level access without international dialing access.
Standard (International)	Predefined	User level access with international dialing access.
Super Admin	Predefined	Full system access.
User Admin	Predefined	User management functions for all users plus Standard International along with ...

\*This option is available for Premium and Premium Plus only.

**Step 1: Select Role**

Select a role to use as a starting point. The permissions included in the starting role are displayed.

**Step 2: Describe Role**

Enter a **Name** for the role and a **Description** of the permissions of the role.

Create New Role

1 Select Role

2 Describe Role

3 Permissions

Select a role to use as a starting point

☐ Super Admin

☐ Phone System Admin

☐ Standard (International)

☒ Billing Admin

☐ User Admin

☐ Standard

☐ Manager

Description

Billing functions plus Standard International, Manager and User Admin functions.

Permissions

General

Overview, Messages, Contacts, Standard User Tools

User Settings

Call Handling & Forwarding

Messages & Notifications

Outbound Caller ID

Outbound Fax Settings

Phones & Numbers

Screening, Greeting & Hold Music

User Info

Billing

Create New Role

✓ Select Role

2 Describe Role

3 Permissions

Name

Billing and Phone System Admin

Description

Provides access to billing settings and limited phone system settings.

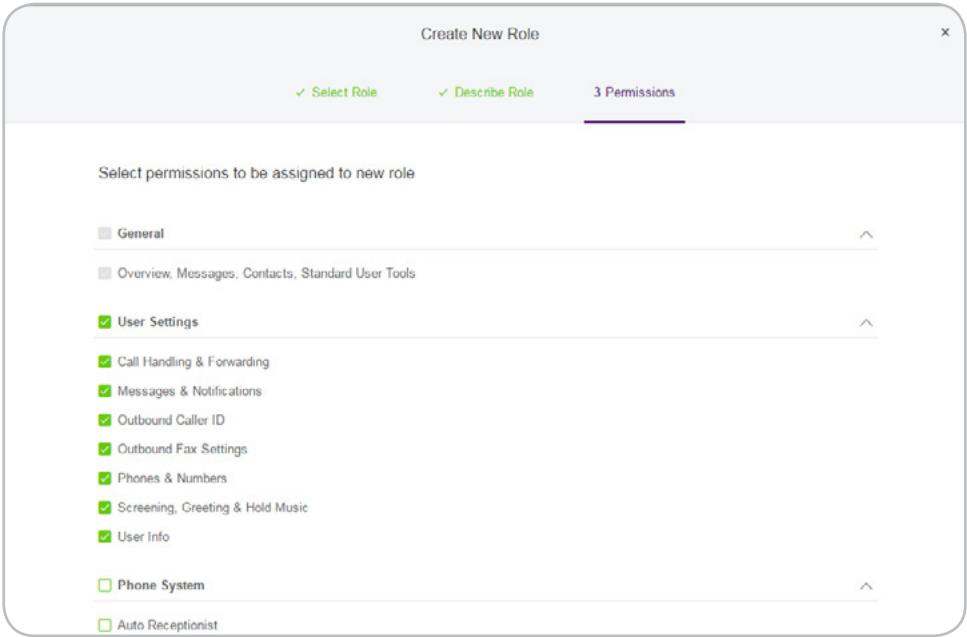
Back

Next

**Step 3: Permissions**

Select permissions for the role by adding to or removing permissions as required.

The role is created and appears in the list on the Roles panel. To assign users to the role, see “Assign Users to a Role” on page 73.



## Reports

TELUS Business Connect Reports helps admins optimize the phone system by presenting usage analysis and trending metrics in an easy-to-read graphical format. With five separate views and many filtering options, you can target your report to reveal metrics to increase your business performance. The **Queue Activity**, **User Activity**, and **Phone Number** reports are visible to Account Administrators and Call Queue Managers.

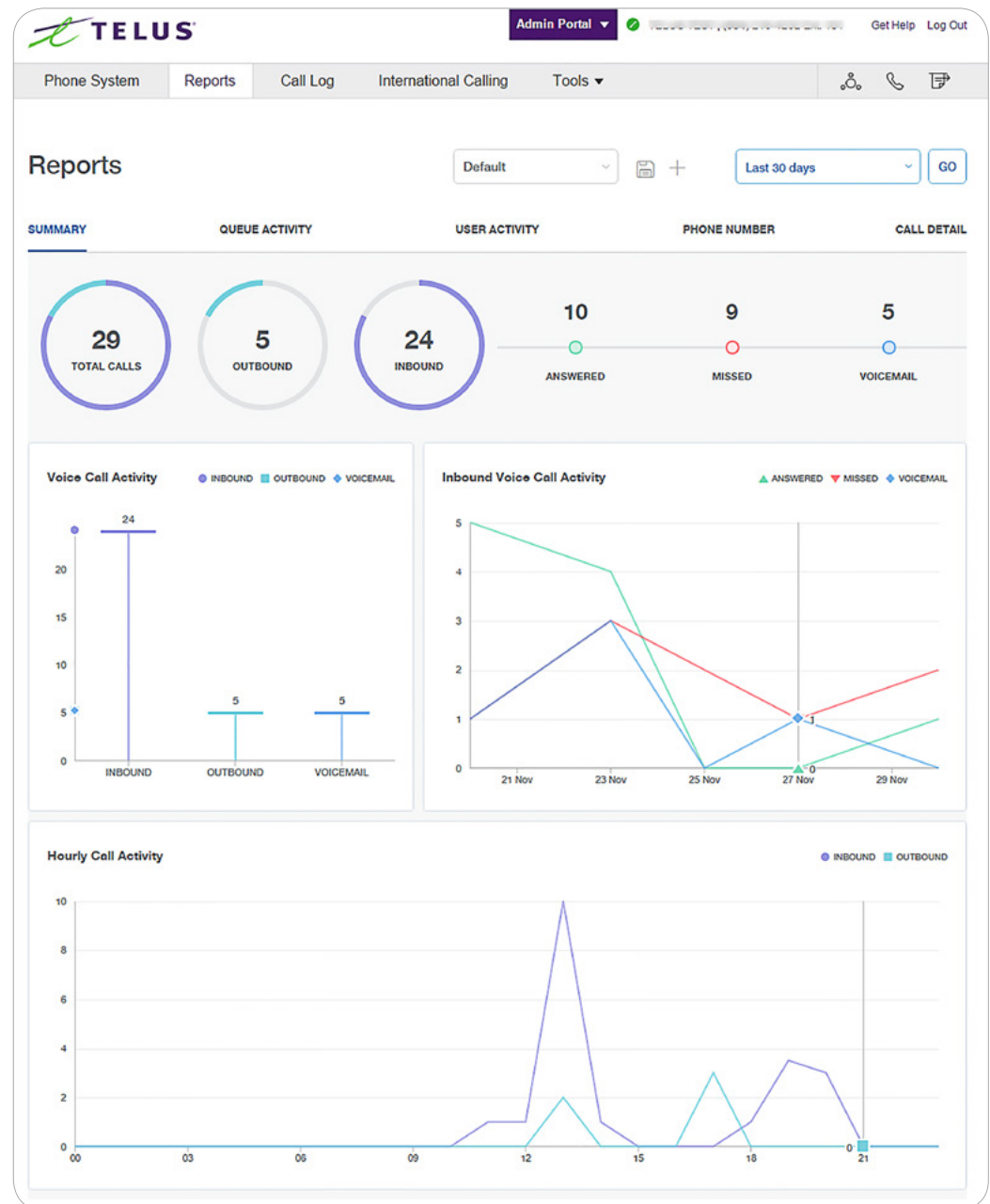
The **Summary** report provides an overview of all call activity - Total, Outbound, Inbound, Answered, Missed, Voicemail, and Call Activity during a selected date range. The **Queue Activity** report presents a summary of Total Call Volume, Total Talk Time, Average Call Duration, Missed Calls, and Time to Answer for each call queue selected during a date range.

The **User Activity** report provides Total Call Volume, Average Number of Calls per User, Number of Inbound and Outbound Calls, Number of Call Per hour and Day, and Average Call Time for each selected user over a selected date range.

The **Phone Number** report provides Total Call Count, Average Calls per Day, and Average Inbound Call Duration for individual phone number over a selected date range. The **Call Detail** report (not available on mobile) provides details regarding calls made to a particular extension—call direction, extension name, queue name, dialed number and so on.

Reports can be saved as a custom report, or exported for later analysis as an Excel file with tabs separating groups of related metrics. To export a report, select the data to be included in the report from the filter, and click **Export**. To learn more, [click here](#).

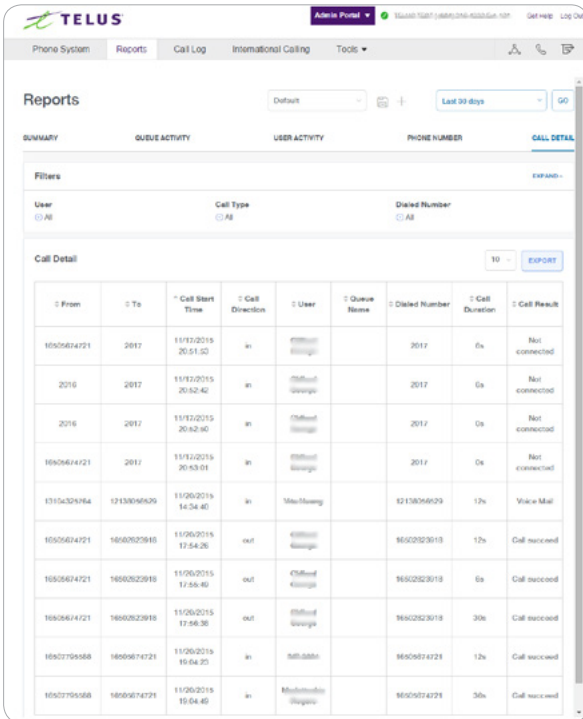
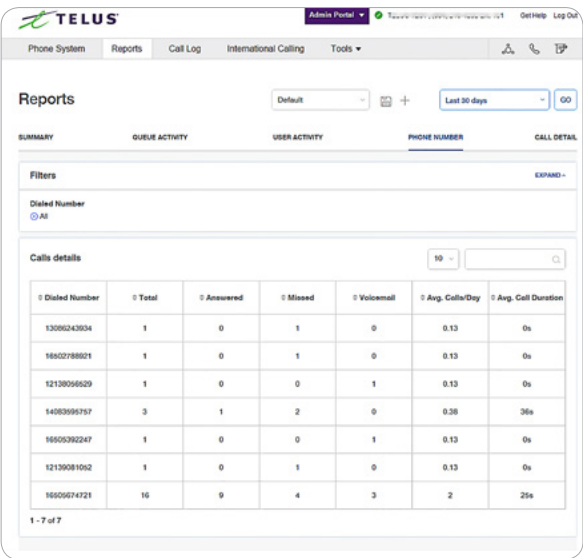
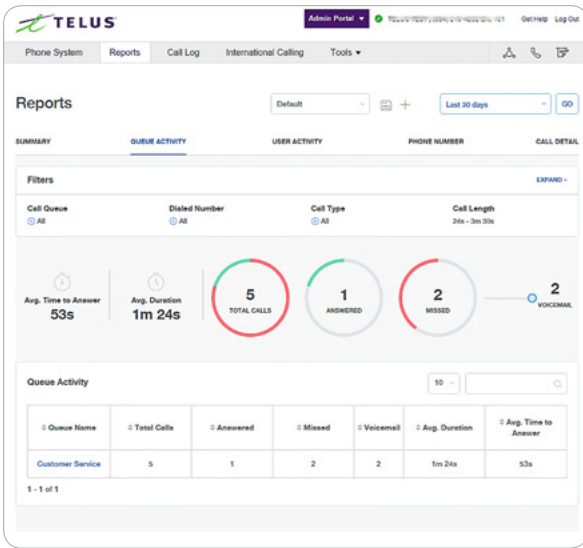
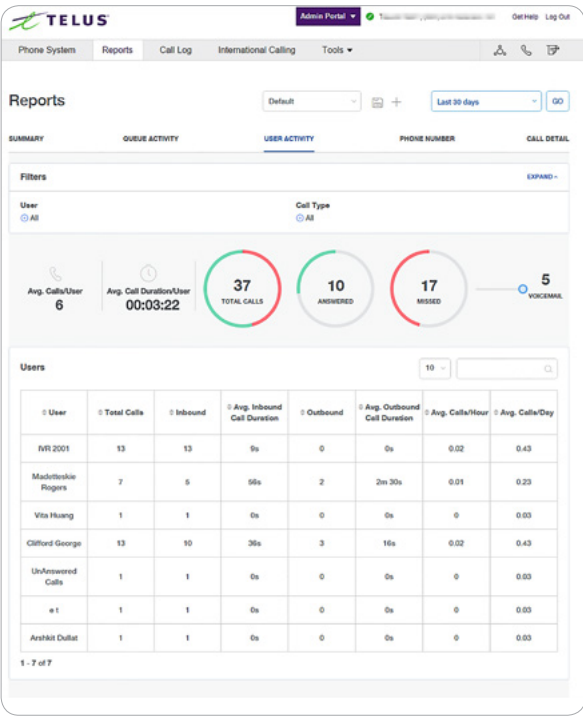
(More reports on the following page)







Reports for User Activity, Queue Activity, Phone Number, and Call Detail



# Call Log

The Call Log provides reports on inbound and outbound calls and faxes for the company number and specified extensions. Select the time period, type of call (inbound or outbound), blocked calls, or recorded calls. You can have the call log delivered to an email address daily, weekly, or monthly on specified day.


In the Type column you will see icons for the following types of calls:

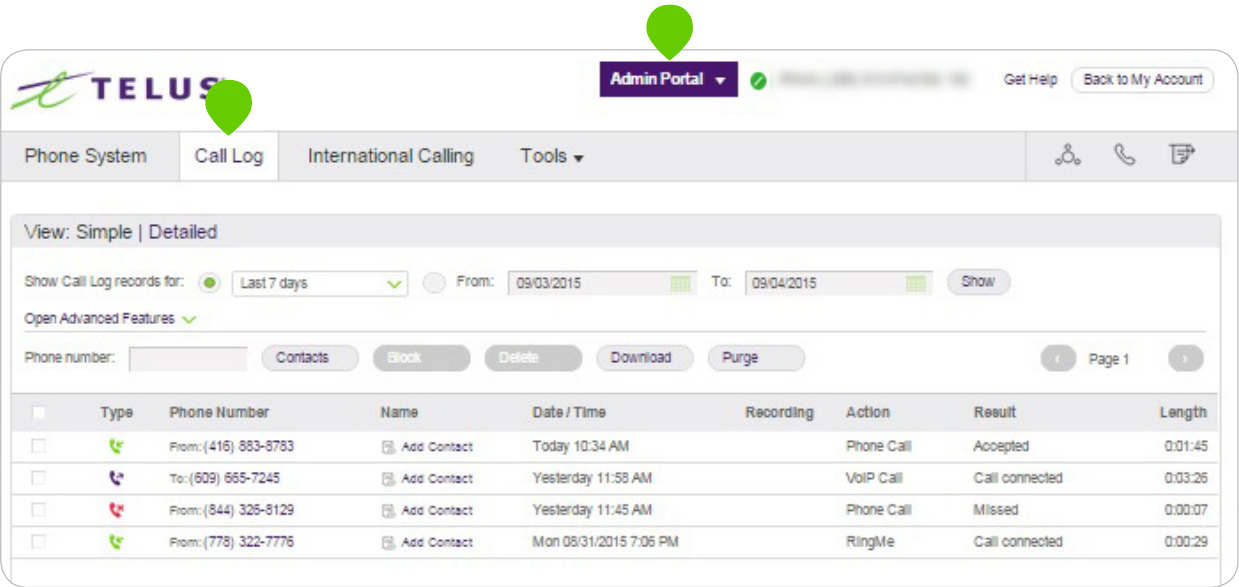
 Inbound Call

 Outbound Call

 Missed Call

In the **Recording** column, you will see an icon if the call has been recorded. Hover over the icon to listen to the recording.

 Listen to a call recording



## International Calling

To enable, disable, and view international calling rates:

1. From the **Admin Portal**, select the **International Calling** tab.
2. Options under **International Calling** are the following:
  - a. If International Calling is not enabled, click **Enable International Calling** to enable it.
  - b. If International Calling is enabled, you can disable international calling completely by clicking **Disable International Calling**.
3. View the countries international calling is available to and the price for each country.
  - a. Use the alphabet at the top of the screen to jump to a list of countries that start with a specific letter.
  - b. Sort by Countries that are enabled or disabled by using the drop-down menu.
4. Turn calling to a specific country on or off by clicking the switch to the right of that country. You will see a white, vertical line with a navy blue background when the switch is in the “on” position as shown in the image on the right.

The screenshots illustrate the steps to manage international calling in the TELUS Admin Portal. The top screenshot shows the 'International Calling' tab with a table of countries and a toggle switch for each. A green circle '1' points to the 'Admin Portal' dropdown. A green circle '2a' points to the 'Enable International Calling' button. The bottom screenshot shows the same page with a green circle '3a' pointing to the alphabet jump list, a green circle '2b' pointing to the 'Disable International Calling' button, and a green circle '3b' pointing to the 'Filter by' dropdown. A green circle '1' points to the toggle switch for American Samoa.

Country	Type	Destination Country Code	Toggle
Hawaii	Regular/Mobile	1	On
Alaska	Regular/Mobile	1	On

Jump to letter: A B C D E F G H I J K L M N O P Q R S T U V W Y Z

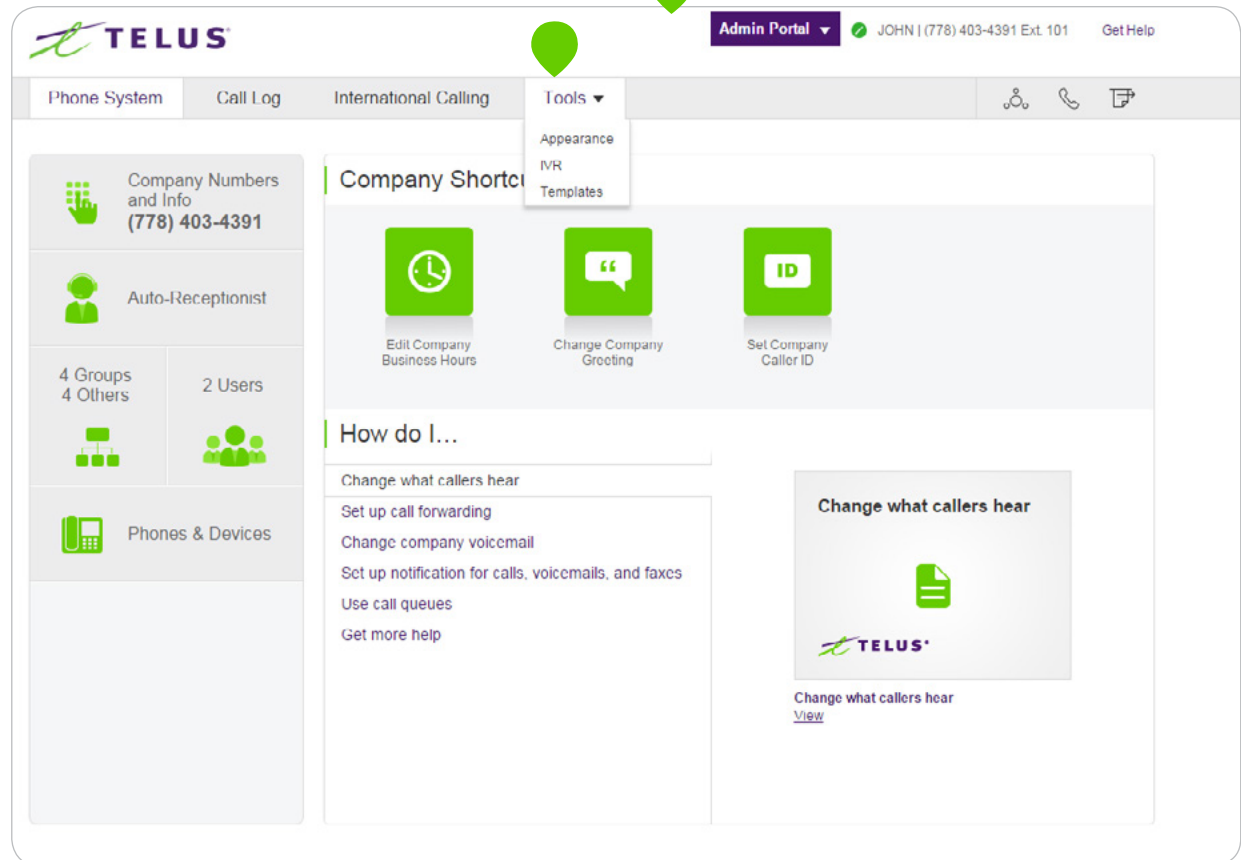
Filter by: All

Country	Type	Destination Country Code	Toggle
Afghanistan	Mobile 937		Off
	Regular 93		Off
Albania	Mobile 35567		Off
	Regular 355		Off
American Samoa	Regular 1684		On
Andorra	Mobile 3763, 3764, 3766		On
	Regular 376		On
Anguilla	Mobile 1264773, 1264724, 1264584, 1264583, 1264582, 1264581, 1264235, 1264469, 1264476, 1264537, 1264538, 1264539, 1264543, 1264729, 1264772		On
	Regular 1264		On
Antarctica	Regular 577		On

## Tools

In the Admin Portal, the Tools tab houses many important features for your company's phone system. When you click on the Tools tab, a menu will appear with the following items:

- Appearance
- IVR Tool
- Templates



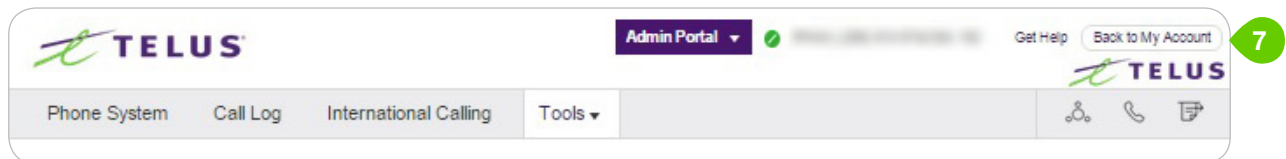
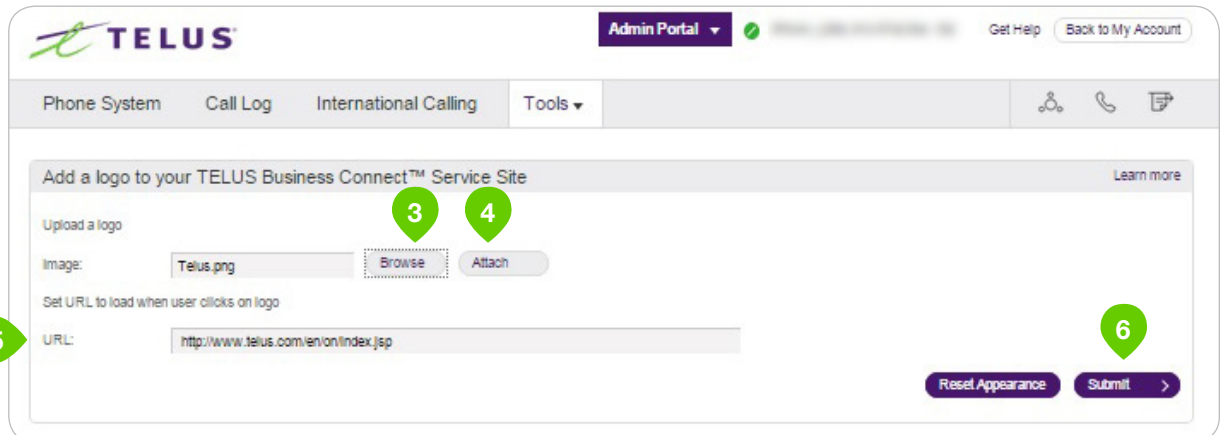
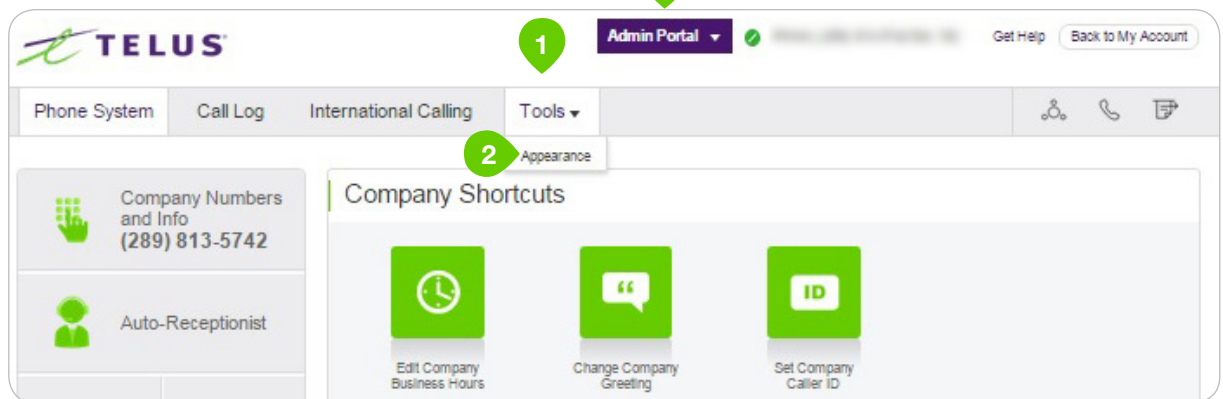
The screenshot shows the TELUS Admin Portal interface. At the top, the TELUS logo is on the left, and the 'Admin Portal' dropdown menu is on the right, showing the user 'JOHN | (778) 403-4391 Ext. 101' and a 'Get Help' link. Below the header is a navigation bar with tabs: 'Phone System', 'Call Log', 'International Calling', and 'Tools'. The 'Tools' tab is selected, and a dropdown menu is open, showing 'Appearance', 'IVR', and 'Templates'. The main content area is divided into two columns. The left column contains a sidebar with icons and labels: 'Company Numbers and Info (778) 403-4391', 'Auto-Receptionist', '4 Groups 4 Others', '2 Users', and 'Phones & Devices'. The right column has a 'Company Shortcuts' section with three green icons: 'Edit Company Business Hours', 'Change Company Greeting', and 'Set Company Caller ID'. Below this is a 'How do I...' section with a search bar and a list of links: 'Change what callers hear', 'Set up call forwarding', 'Change company voicemail', 'Set up notification for calls, voicemails, and faxes', 'Use call queues', and 'Get more help'. On the right side of this section is a card titled 'Change what callers hear' with a green document icon and a 'View' link.

## Appearance

Add your company logo to your TELUS Business Connect online account for a custom look. Take one step further and link your company logo to your company's website for easy navigation.

### To upload and link an image:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Appearance**.
3. Click **Browse** to browse your computer for an image to upload and select the file you want to use.
4. Click **Attach**.
5. Enter the URL that will be opened when a user clicks on your image.
6. Click **Submit**.
7. View your logo in the upper right corner of your online account and test the URL by clicking on the image.



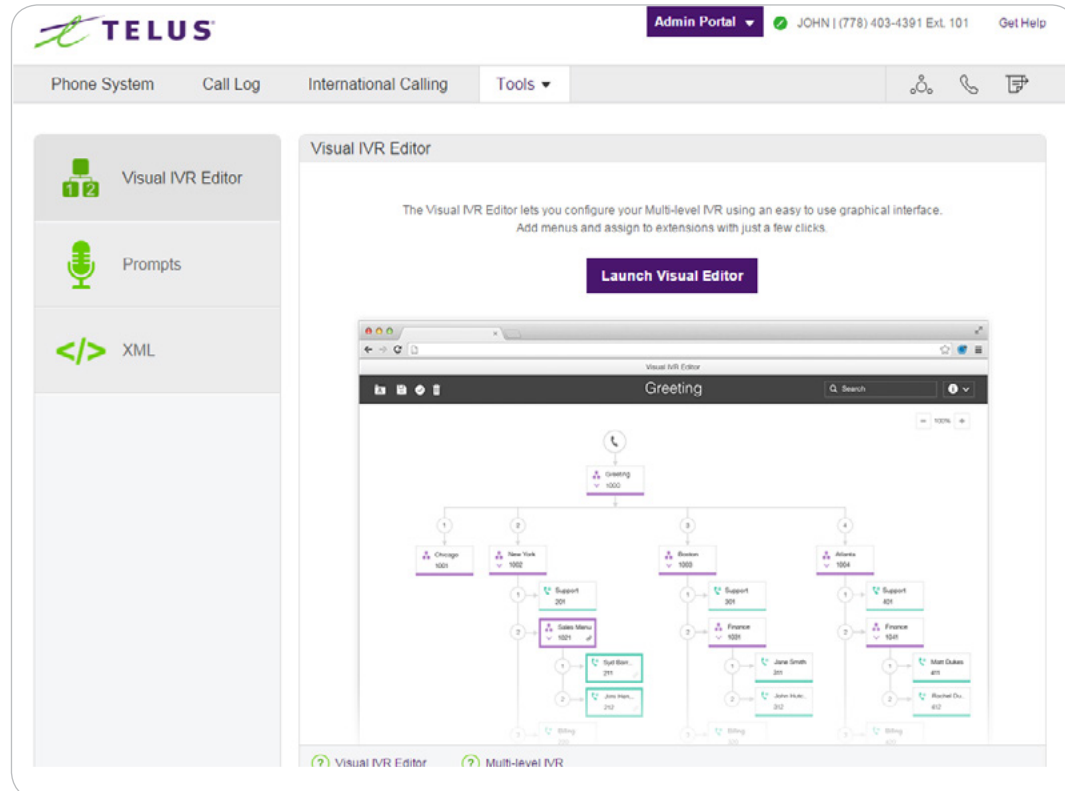
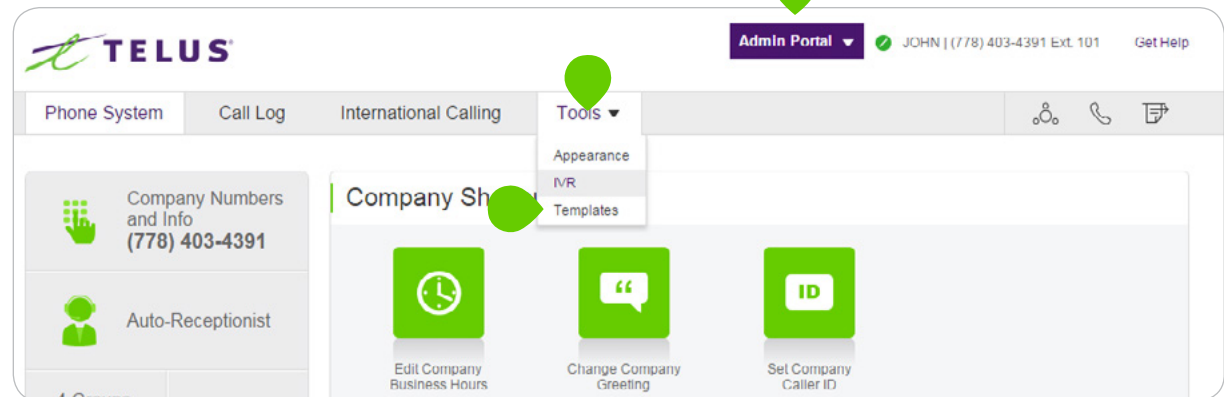
## IVR Tool\*

TELUS Business Connect provides additional IVR tools to help you create and manage your IVR Menus. The IVR tool consists of three parts which help you configure your IVR: the Visual IVR Editor, the Prompts section, and the XML section.

### Use the IVR tool to:

- Configure IVR menus with the Visual IVR Editor
- Import prompt recordings
- Record prompts
- Import and export XML files

NOTE: Any change on the IVR menu will overwrite the imported XML file. It is suggested that you export and save a new XML file after making changes.

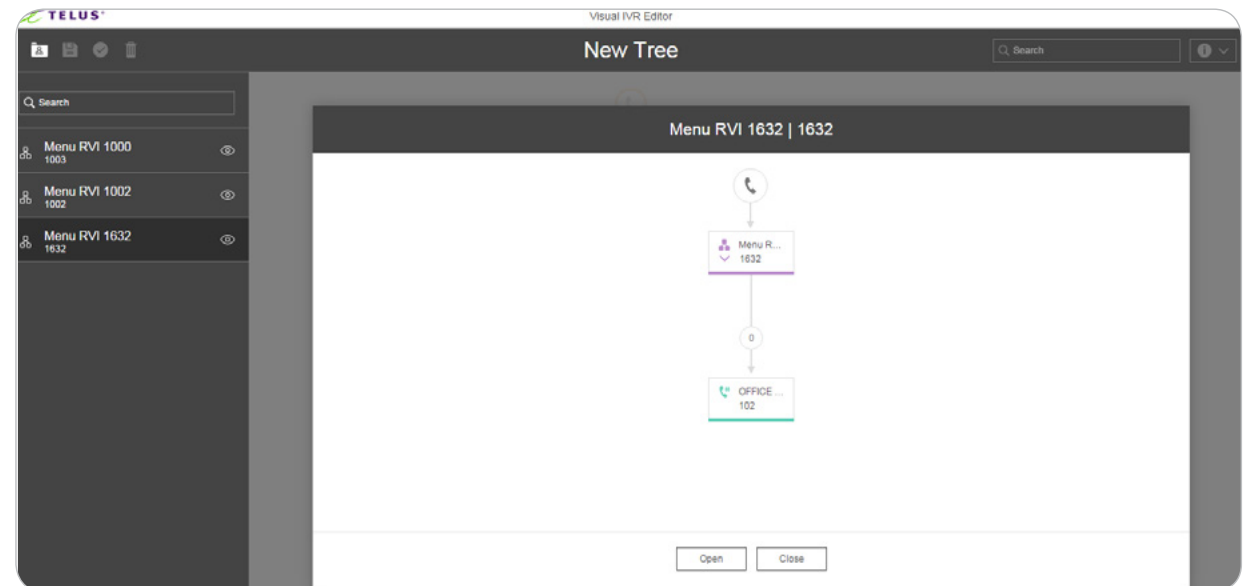
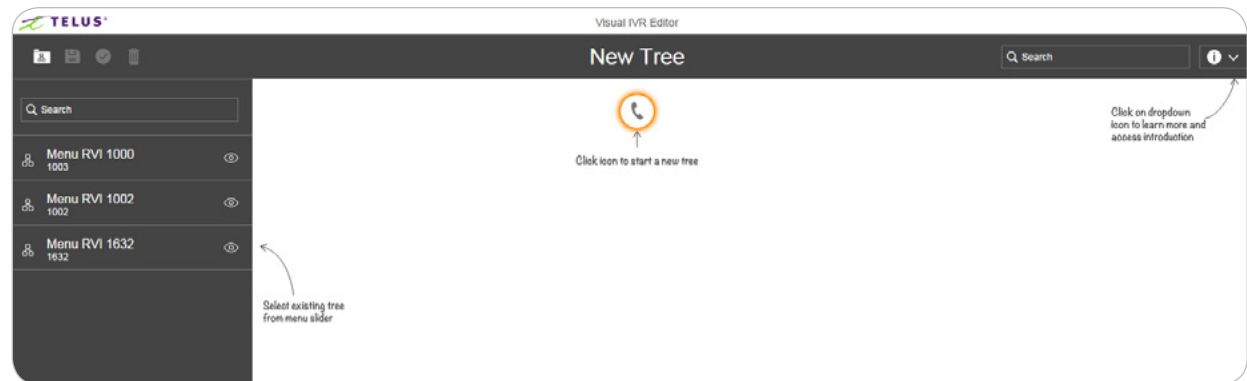


\*Available for Premium and Premium Plus users only.



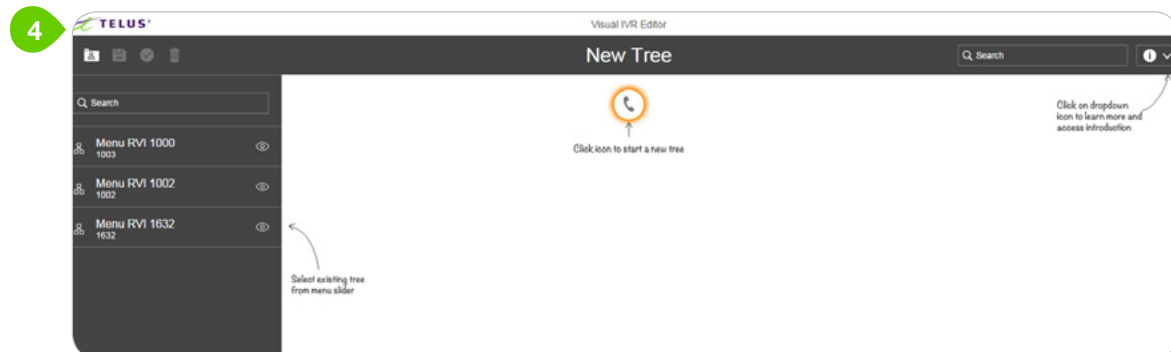
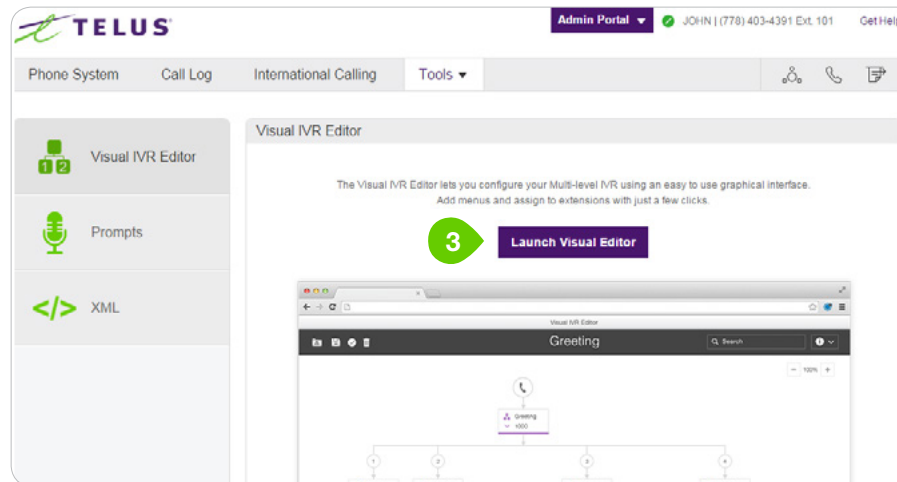
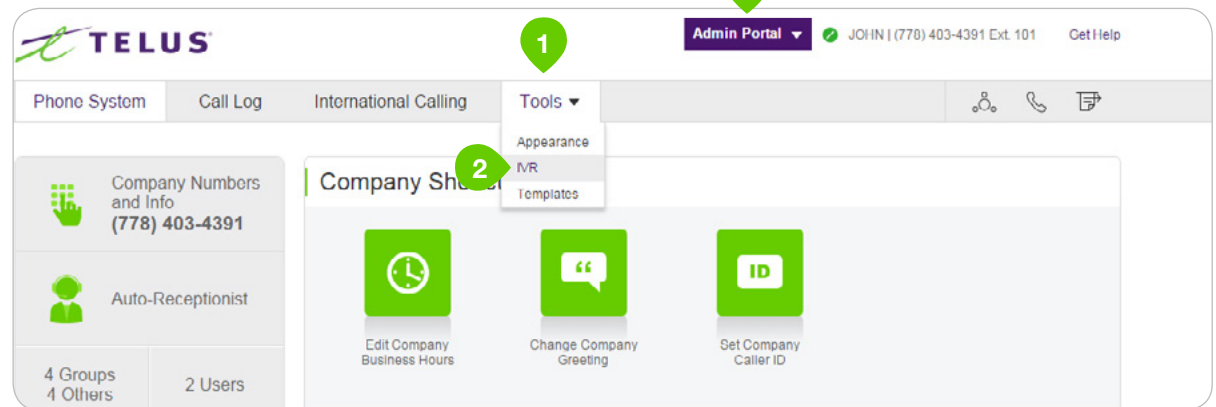
## Visual IVR Editor

The Visual IVR Editor lets you configure your Multi-level IVR using an easy to use graphical interface. Add menus and assign to extensions with just a few clicks.

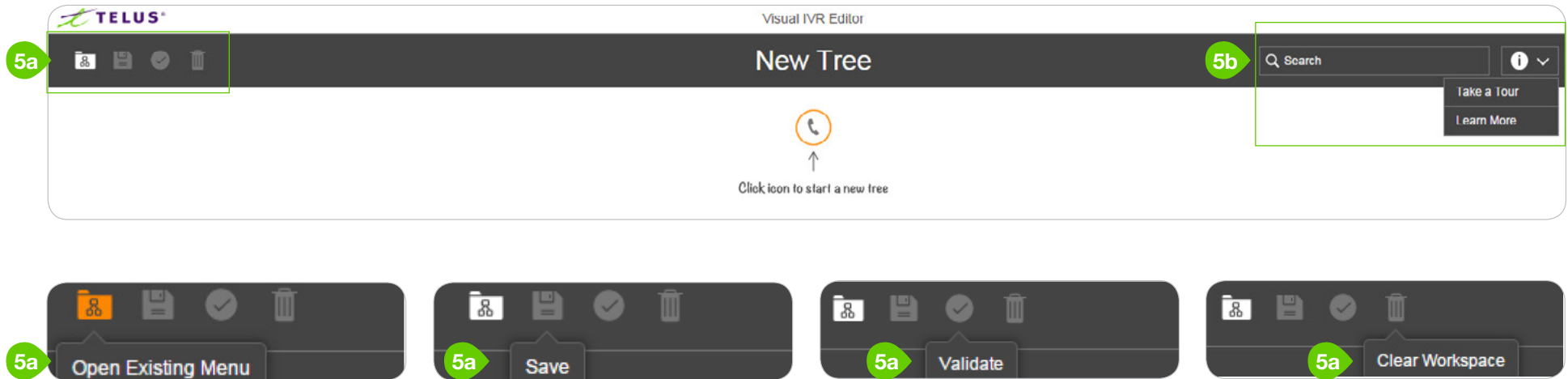


### Create a new IVR Menu with the Visual IVR Editor

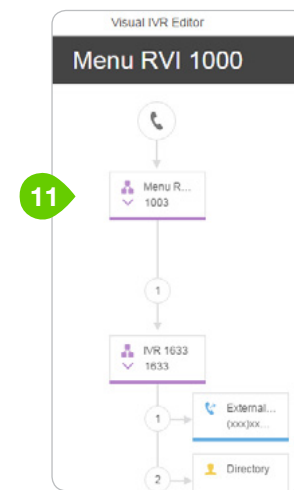
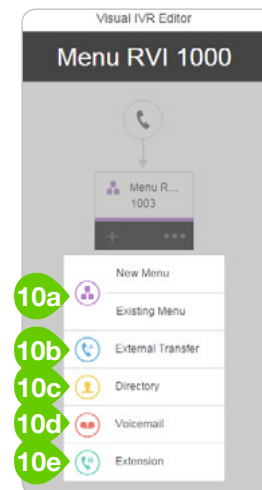
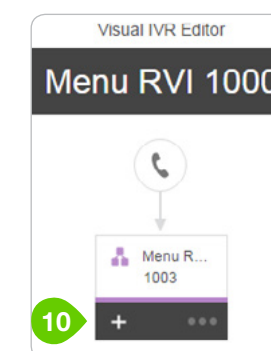
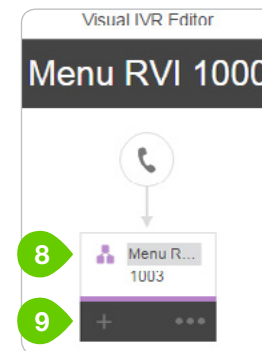
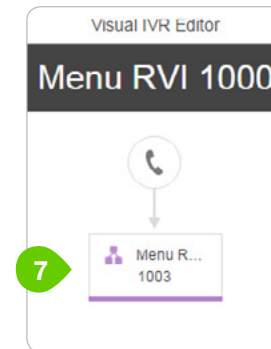
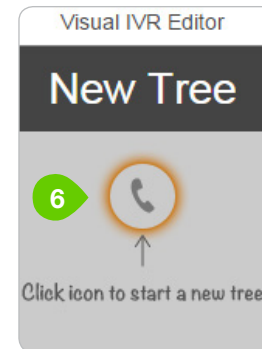
1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Launch Visual Editor**.
4. The **Visual IVR Editor** will open in a new tab.



5. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the **Visual IVR Editor**.
- a. In the upper left corner of the screen you have icons for **Open Existing Menu**, **Save**, **Validate**, and **Clear Workspace**.
- b. In the upper right corner you have a **search bar**, an **information drop-down menu** with options for **Take a Tour** and **Learn More**, and when you are viewing an IVR menu, you will see zoom in and out buttons.



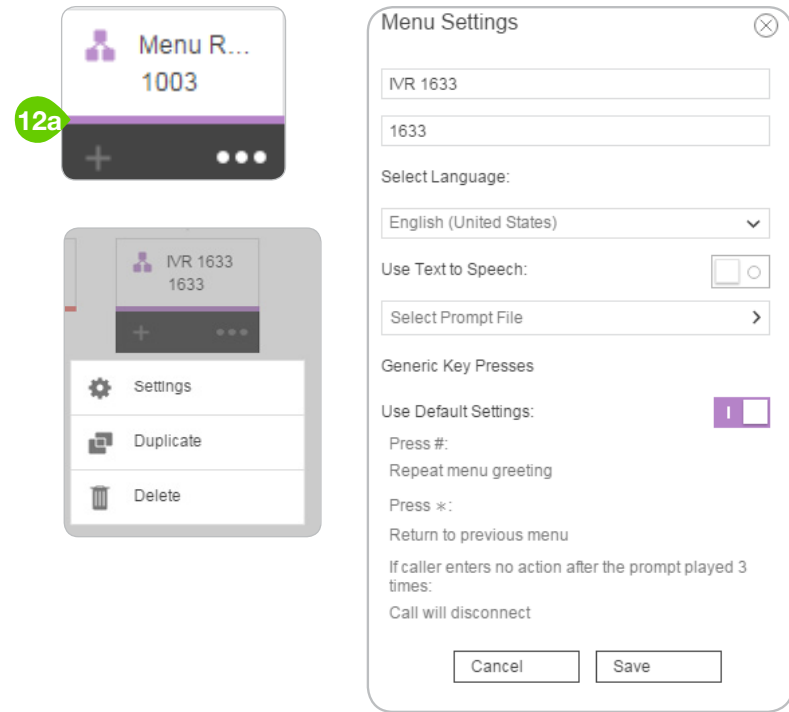
6. Click the **Phone** icon to start a new tree.
7. Your new tree will be automatically assigned a name and extension number.
8. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
9. Hover over your new IVR menu to see more options.
10. Click “+” to add sub-items to your tree. Sub-items include:
  - a. **New Menu** – Create a new IVR menu as an option within your tree.
  - b. **Existing Menu** – Choose an existing IVR menu from a different IVR tree.
  - c. **External Transfer** – Include an external number in your tree.
  - d. **Directory** – Attach your company’s dial-by-name directory to your tree.
  - e. **Voicemail** – Give the option to leave a voicemail.
  - f. **Extension** – Add a specific extension to your tree.
11. As you add sub-items to your tree, they will appear in the Visual IVR Editor.



12. Once you have added your items to your menu, hover over an item to edit it and see more options. For some items you will see a “+” and “...” and other items will only have the trashcan icon.

a. **IVR Menus**

- Click the IVR name and extension text fields to edit them.
- Click the “+” to add sub-items to your tree.
- Click “...” to open the menu for **Settings**, **Duplicate**, and **Delete**.
- Click **Settings** to edit your IVR Menu settings just as you would edit them in the IVR Group settings.
- Click **Duplicate** to duplicate the menu then drag and drop under an existing IVR menu within your tree.
- Click **Delete** to delete this item.



12.

**b. External Transfer**

- Click the phone number text field to enter the external transfer number of your choice.
- Click the trashcan icon to delete this item.

**c. Directory**

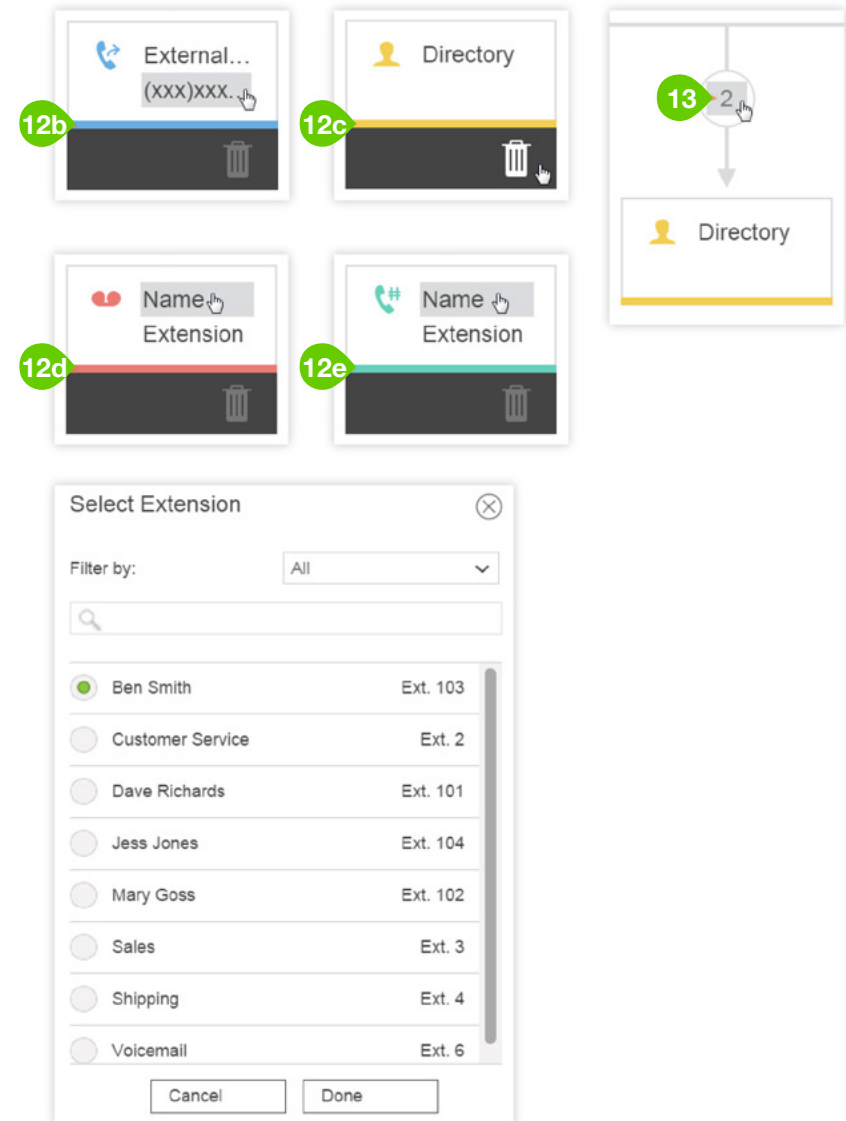
- No further configuration is needed.
- Click the trashcan icon to delete this item.

**d. Voicemail**

- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trashcan icon to delete this item.

**e. Extension**

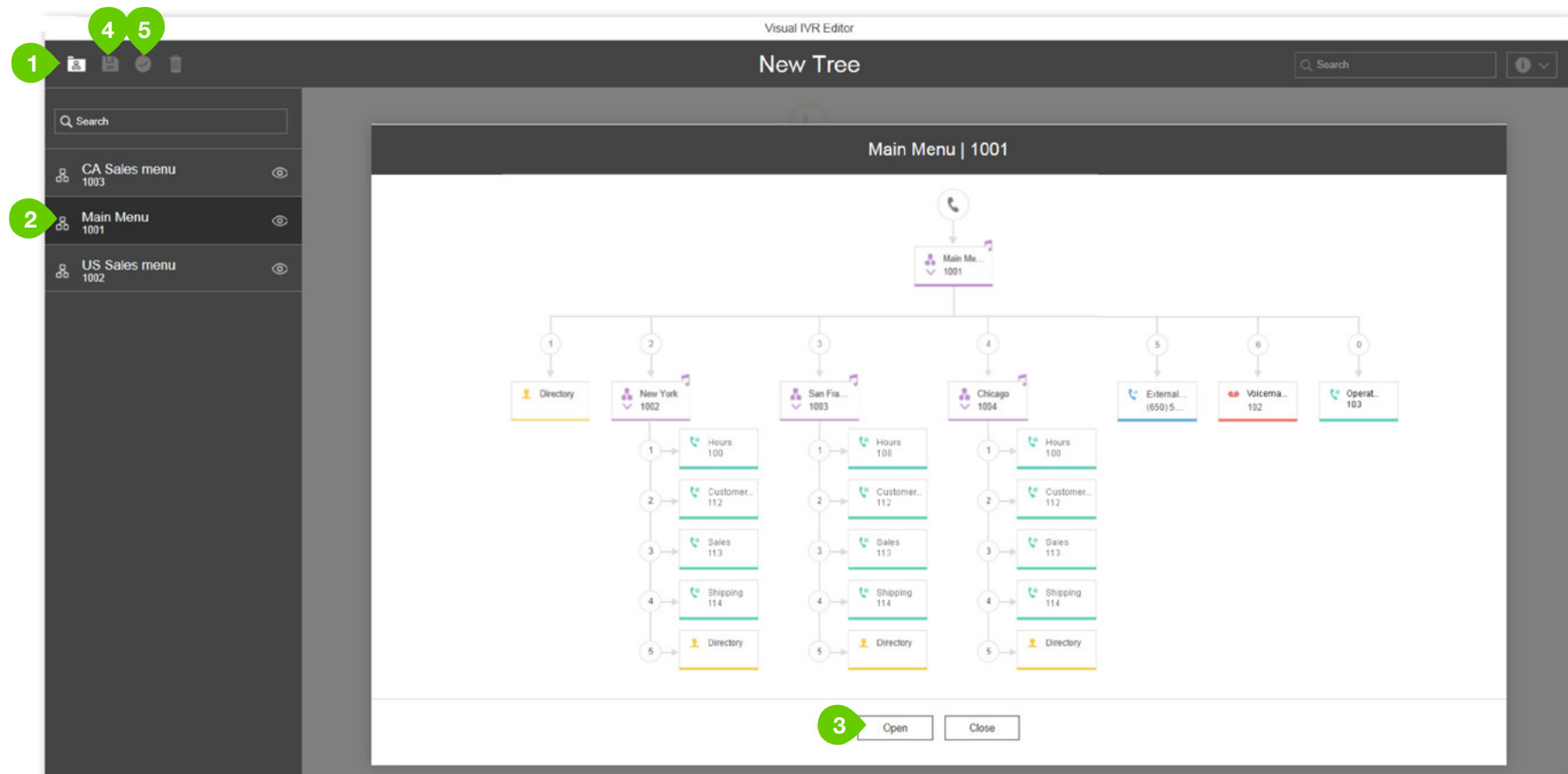
- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trashcan icon to delete this item.
- You can also change the order and key press of an item by click on the existing number and typing a new number. Click out to save.





### Edit an existing IVR Menu with the Visual IVR Editor

1. Click the **Open Existing Menu** icon.
2. Click on an existing menu to see a preview of the menu.
3. Click **Open** to be able to edit the menu in the **Visual IVR Editor**.
4. After editing your menu, click the **Validate** icon to check your IVR menu.
5. Click the **Save** icon once you are done editing to save your IVR

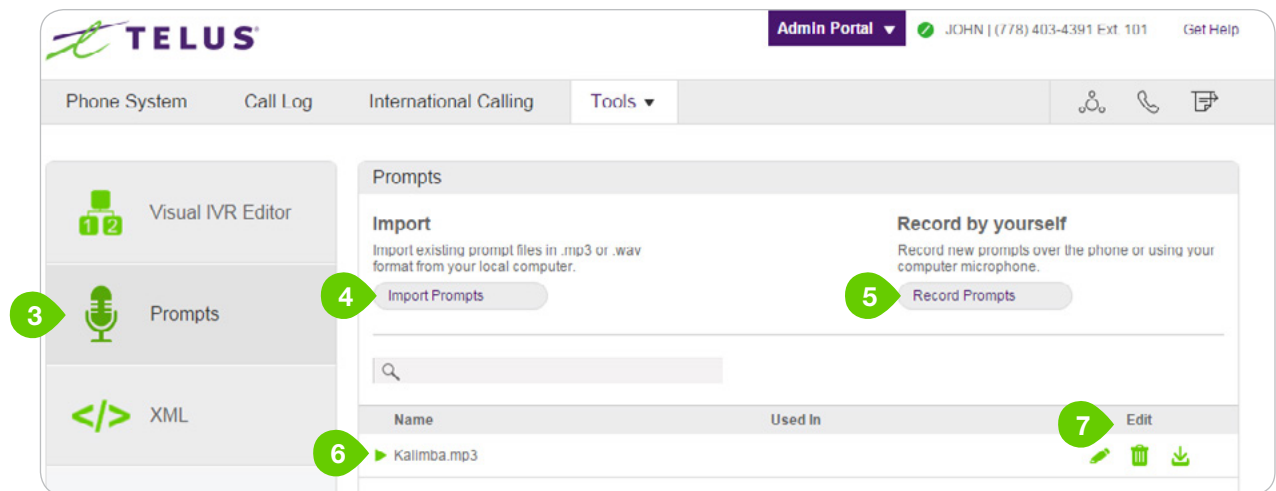
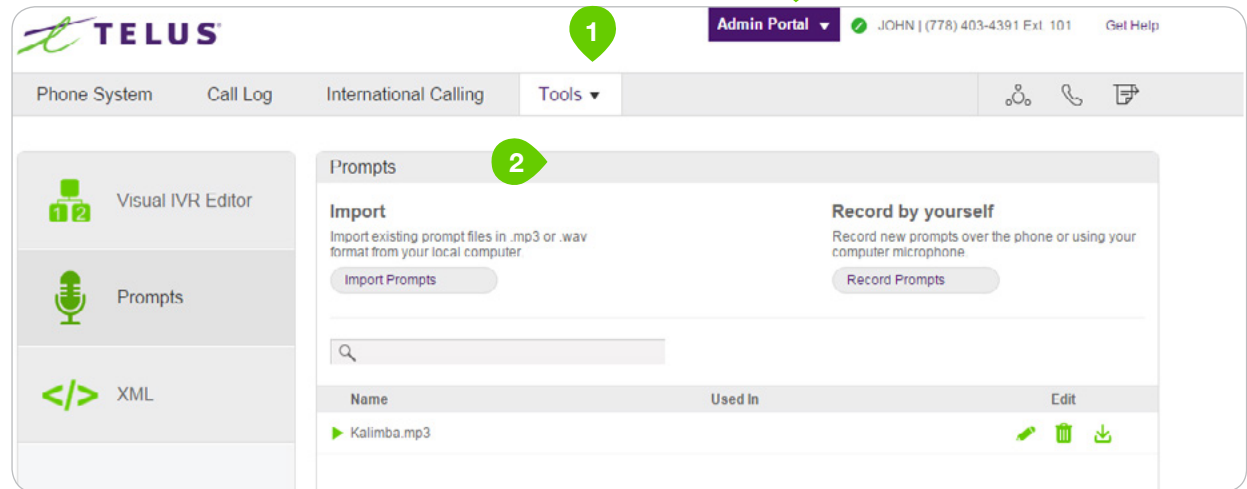


## Prompts

In the **Prompts** section, you can import or record your IVR prompts and edit prompts that have already been imported.

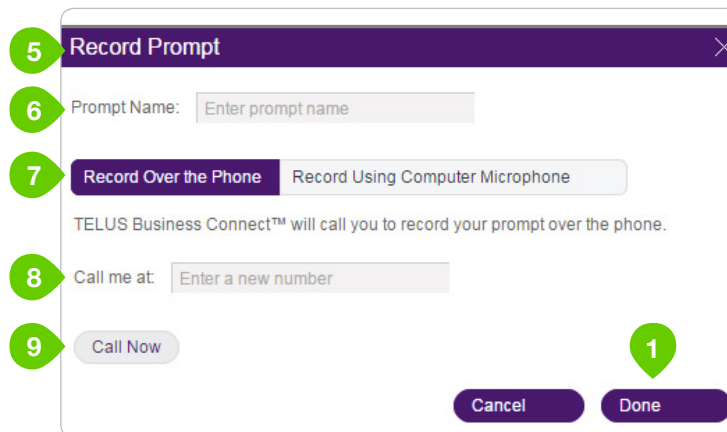
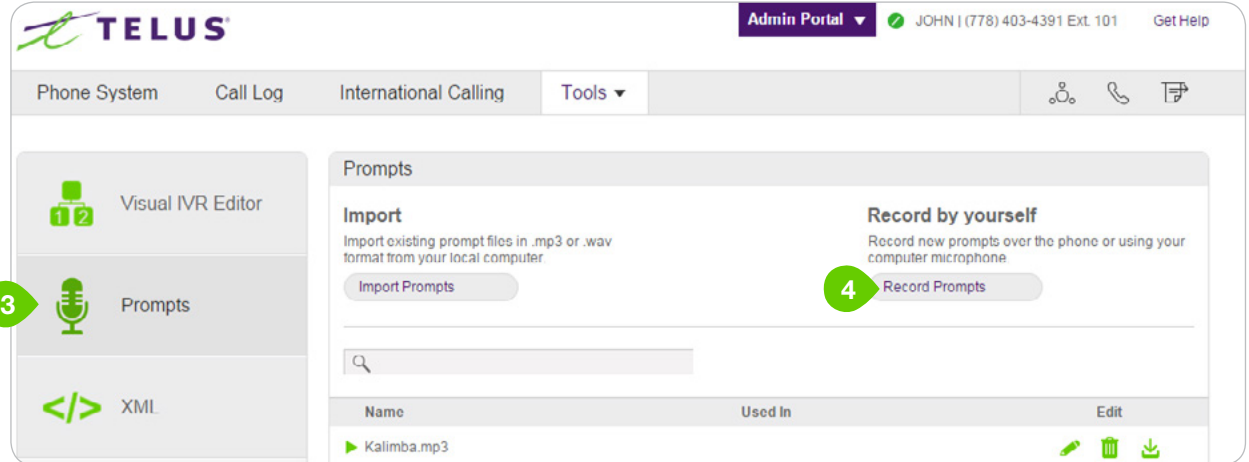
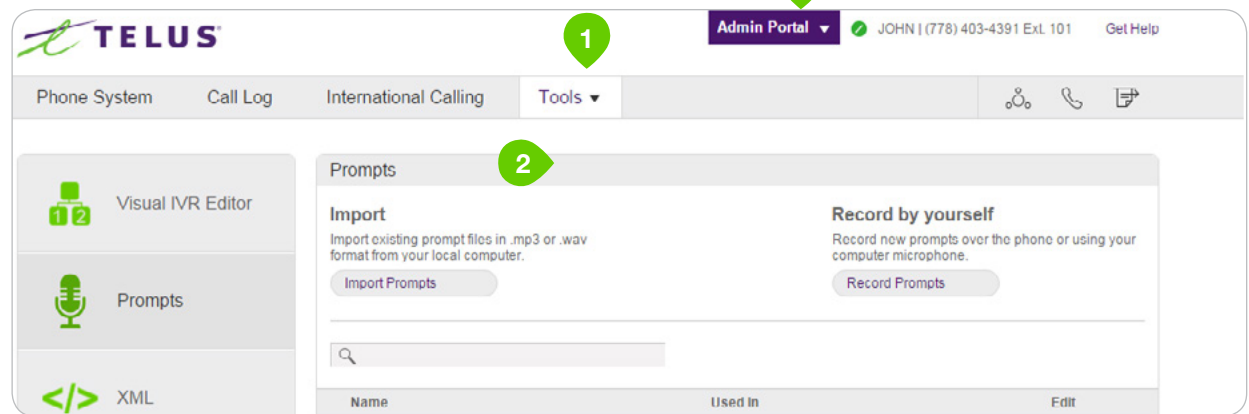
### To import a file for your IVR prompt:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Prompts**.
4. Click **Import Prompts** to import a .wav or .mp3 file to set as your IVR prompt.
5. Click **Record Prompts** to record an IVR prompt. Learn more about recording your own prompt on the next pages.
6. Click the **play** button next to an existing prompt to listen to it.
7. Under **Edit**, click the **pencil** icon to edit the name of an existing prompt, click the **trash can** icon to delete the existing prompt, and click the **download** icon to download the prompt.



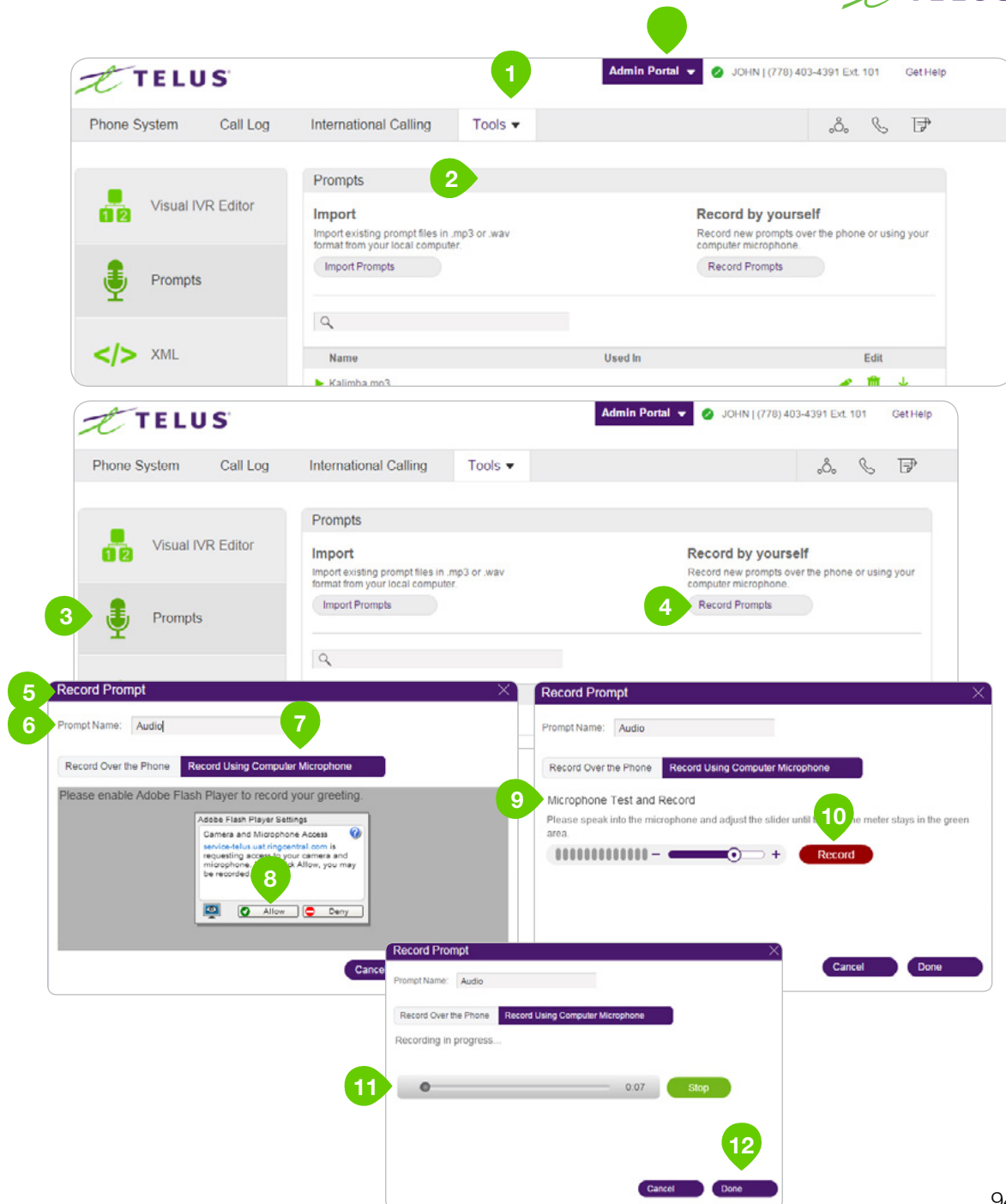
## Record a Prompt over the phone

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Prompts**.
4. Click **Record Prompts**.
5. A pop-up will appear.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Record Over the Phone**.
8. Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field.
9. Click the **Call Now** button, and TELUS Business Connect will call you to record your message. Record your IVR prompt over your phone when prompted.
10. Click **Done**.



## Record a Prompt using your computer microphone

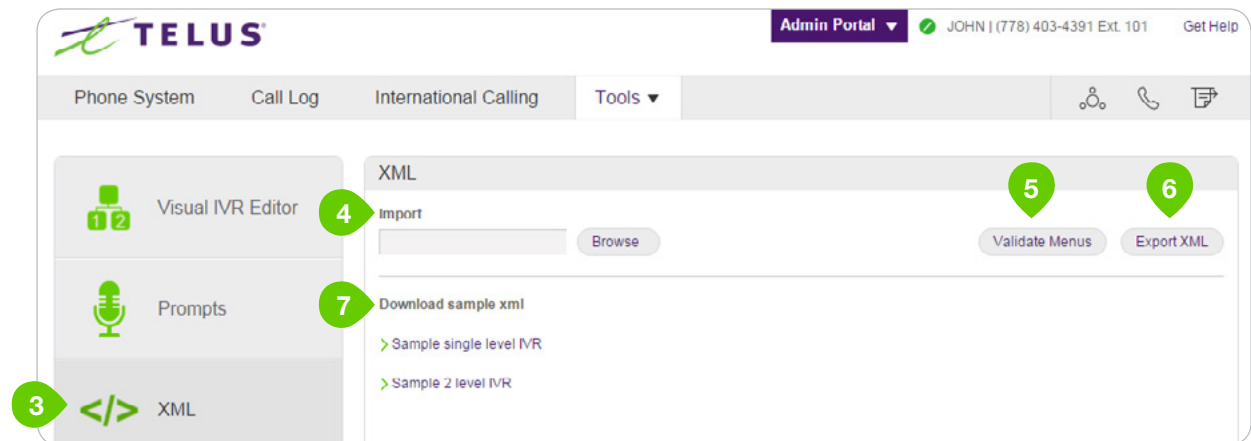
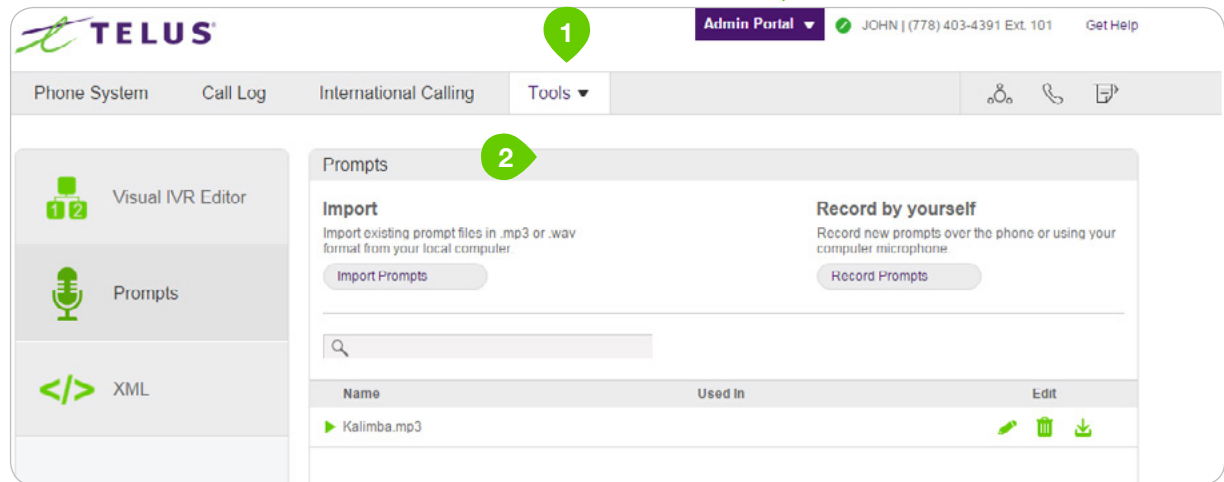
1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Prompts**.
4. Click **Record Prompts**.
5. A pop-up will appear.
6. Enter a name for your prompt.
7. Click **Record Using Computer Microphone**.
8. Click **Allow** on the **Adobe Flash Player Settings** pop-up. (Also, click **Allow** if TELUS Business Connect asks to record through your computer.)
9. The **Microphone Test** and **Record** settings will appear.
10. When ready, click the red **Record** button to record your IVR prompt through your computer microphone.
11. Click the **play** button to listen to your prompt and click the **record** button to re-record your IVR prompt.
12. Click **Done**.



## XML

In the XML section, you can import and export XML files for your IVR. You can also validate your IVR Menus once you have imported an XML file.

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **</> XML**.
4. Under **Import**, click **Browse** to find an XML file then click **Import**.
5. Click **Validate Menus** to check the configuration of your IVR menus.
6. If you have existing IVR menus, click **Export XML** to download them in XML.
7. Under **Download sample xml**, click a file name to download a sample XML file.

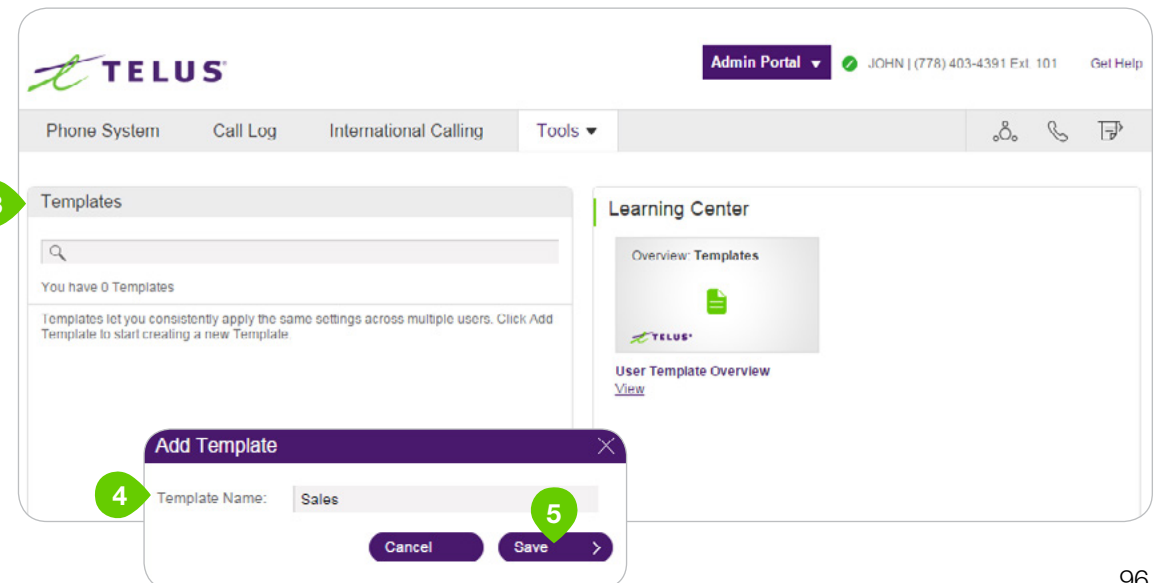
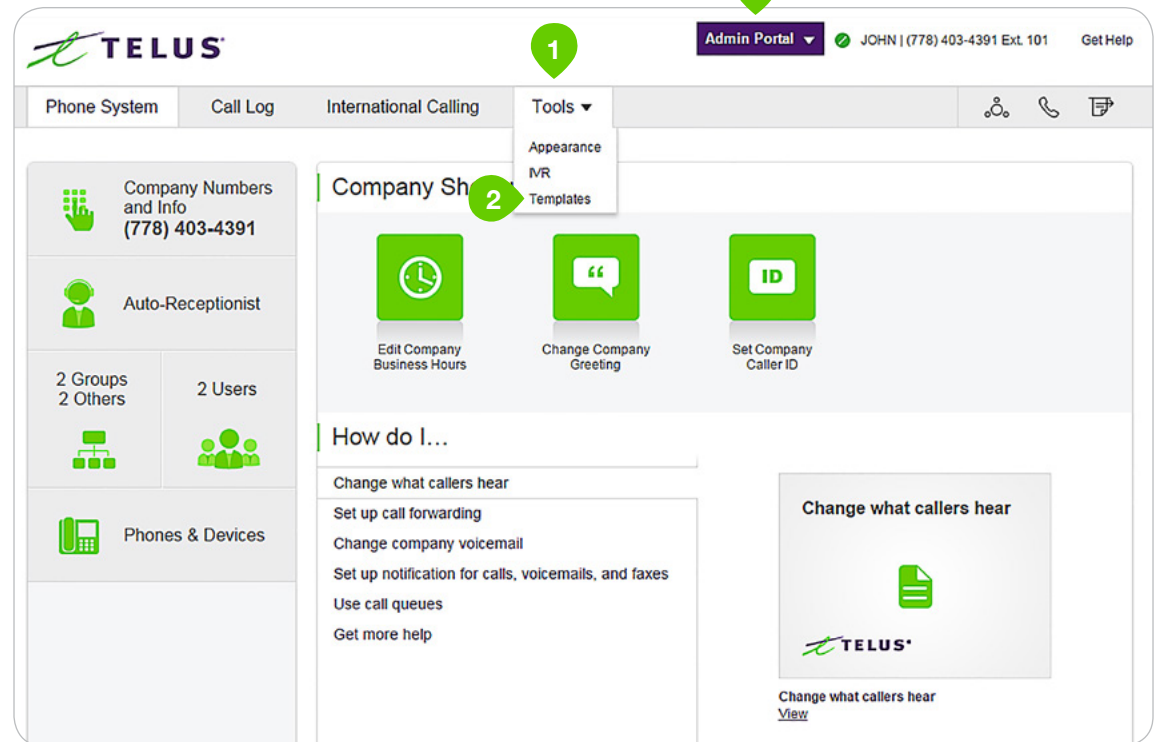


## Templates\*

TELUS Business Connect Templates will save you time and repetitive manual effort by streamlining your administrative routine. Create a template for all settings for a user and apply it to users as you need.

### Create a Template for User Settings

1. From the Admin Portal, click the **Tools** tab.
2. Click **Templates**. You'll see a list of existing templates, or none until you create your first one.
3. Click **Add Template**.
4. Enter a **Template Name**.
5. Click **Save**.



Not available for one line accounts. If you would like to activate this feature, please call the dedicated toll-free TELUS Business Connect support number at 1-844-626-6638, enter your TELUS Business Connect phone number, then press 1 or 2.



**Create a Template for User Settings (cont.)**

6. Click the name of a template.
  7. You will see the options you can set for this template in the right panel (Sales in this example). For each setting, you have the ability to allow the template settings to override each user's settings. Slide the tab to the right to allow the override. The icon will be blue with a white vertical line when the override is allowed.
- a. **Template Info** – Edit the name of your template and see the last time it was modified and when it was created
  - b. **E911 Address** – Provide a physical address for First Responders.
  - c. **User Hours** – Set user hours to 24 hours or Specify hours.
  - d. **Connecting Message** – Set the default message or create a custom message for callers to hear while the call is being connected.

**6** Templates

You have 1 Template

Template Name	Last Modified
Sales	22/10/2015

**Sales**

Template Info

Setting	Value
Emergency Address	Off
User Hours	Off
Connecting Message	Off
Audio While Connecting	Off
Hold Music	Off
Messages	Off
Outbound Caller ID	Off
International Calling Permission	Off
Notifications	Off
Bandwidth Settings	Off

**7a** Template Info

Template Name: Sales

Last Modified: 22/10/2015 at 12:10 pm by TELUS Business C...

Created: 22/10/2015 at 12:18 pm by JOHN SMITH

**7b** Emergency Address

Override User Settings: ☒

**Emergency Address Registered Location**

Enter the physical location where you will be using this phone. Emergency ad dispatchers will send emergency first responders to this exact location. **Important:** Be sure to update this address every time you move your phone to different location to make sure you can be found during an emergency.

Street Address:

Apartment / Suite #:

City:

Province:

Postal Code:

Country:

**7c** User Hours

Override User Settings: ☒

User Hours: ☒ 24 hours ☐ Specify hours

☐ Sunday

Day	From	To
Monday	9:00 AM	6:00 PM
Tuesday	9:00 AM	6:00 PM
Wednesday	9:00 AM	6:00 PM
Thursday	9:00 AM	6:00 PM
Friday	9:00 AM	6:00 PM

**7d** Connecting Message

Override User Settings: ☒

Set up a connecting message: ☒ On ☐ Off

Set Message:

Default Message: "Please hold while I try to connect you."

## Create a Template for User Settings (cont.)

7. e. **Audio While Connecting** – Select the music or ringtone callers will hear while connecting.
- f. **Hold Music** – Turn hold music on or off and choose from 16 musical styles.
- g. **Messages** – Allow or deny users to take voicemail messages; then select the default or create a custom voicemail greeting.
- h. **Outbound Caller ID** – Choose the phone number to display as your outbound caller ID for each type of outgoing call.
- i. **International Calling Permission\*** – Allow users to make international calls.
- j. **Notifications** – Choose how you want to be notified about voicemail messages missed calls, fax transmission results and received text messages.
- k. **Bandwidth Settings** – Select High or Low bandwidth settings.

**7e Audio While Connecting** On

Override User Settings: ☒

Audio while connecting: ⓘ

Set audio Acoustic >

Music or Ringtone callers will hear while connecting

**7f Hold Music** On

Override User Settings: ☒

Set up hold music: ⓘ

☒ On ☐ Off

Select Music Acoustic >

**7g Messages** On

Override User Settings: ☒

Take messages:

☒ On ☐ Off

VoiceMail Greeting Default >

**7h Outbound Caller ID** On

Override User Settings: ☒

Decide what phone number you want to display as your Caller ID number for outgoing calls. ⓘ

**By Phone**

(778) 403-4391 - Main Number ✓

**By Feature**

RingOut from Web: (778) 403-4391 - Main Number ✓

RingMe (Outgoing to Caller): (778) 403-4391 - Main Number ✓

Call Flip: (778) 403-4391 - Main Number ✓

Fax Number: (778) 403-4391 - Main Number ✓

**Internal calls**

☒ Display my extension number for internal calls. ⓘ

**7i International Calling Permission** On

Override User Settings: ☐

Give User International Calling Permission: ⓘ

☒ Yes ☐ No

**7j Notifications** On

Override User Settings: ☒

**VoiceMail Messages**

☒ Notify by Email

☐ Include attachment with email

☐ Mark message as read once emailed

**Received Faxes**

☒ Notify by Email

☐ Include attachment with email

☐ Mark message as read once emailed

**Missed Calls**

☐ Notify by Email

**Fax Transmission Results**

☒ Notify by Email

**7k Bandwidth Settings** On

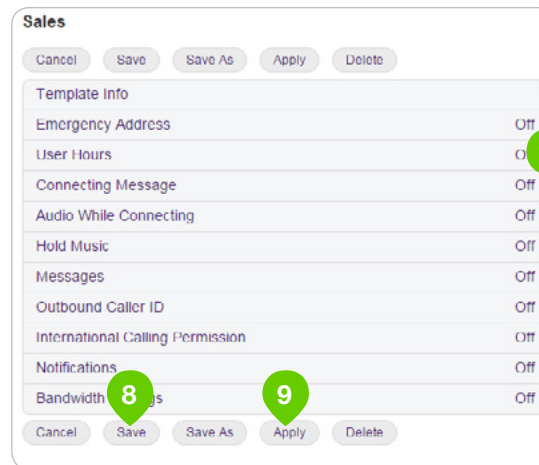
Override User Settings: ☒

Bandwidth Settings ⓘ High ✓

\*International Calling must be enabled on the account.  
NOTE: Optional depending on rules applied to Groups or Call Queues.

## Create a Template for User Settings (cont.)

8. Click **Save**.
9. Click **Apply**.
10. Read the E911 Notice and check the **checkbox** to agree.
11. Click **I Accept**.
12. Select the users who you'd like to apply the template to.
13. Click the **arrow** to move the selected members to the column on the right. You can select users and use the arrows to add or remove them from the column that will have the template applied.
14. Click **Next**.
15. Confirm application of your new template.
16. Enter additional email addresses if you'd like more confirmation emails.
17. Click **Done**.



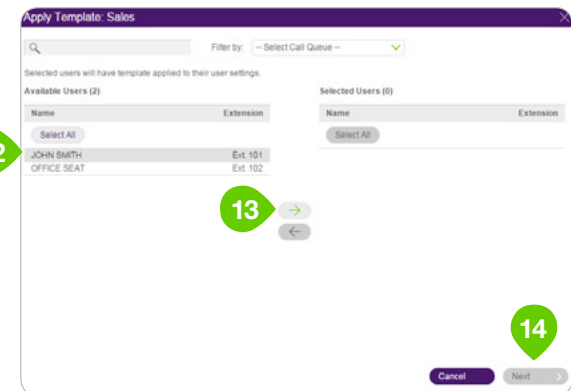
**Sales**

Cancel Save Save As Apply Delete

Template Info

Emergency Address	Off
User Hours	Off
Connecting Message	Off
Audio While Connecting	Off
Hold Music	Off
Messages	Off
Outbound Caller ID	Off
International Calling Permission	Off
Notifications	Off
Bandwidth	Off

Cancel Save Save As Apply Delete



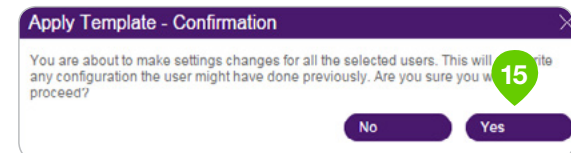
**Apply Template: Sales**

Filter by: -- Select Call Queue --

Selected users will have template applied to their user settings.

Available Users (2)		Selected Users (0)	
Name	Extension	Name	Extension
JOHN SMITH	Ext. 101		
OFFICE SEAT	Ext. 102		

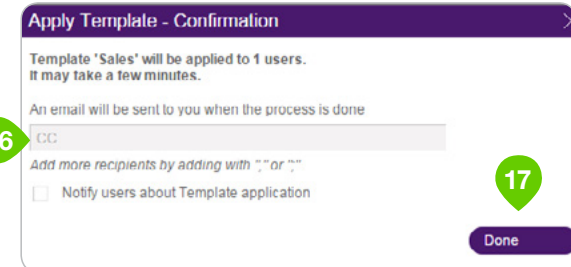
Cancel Next



**Apply Template - Confirmation**

You are about to make settings changes for all the selected users. This will overwrite any configuration the user might have done previously. Are you sure you want to proceed?

No Yes



**Apply Template - Confirmation**

Template 'Sales' will be applied to 1 users. It may take a few minutes.

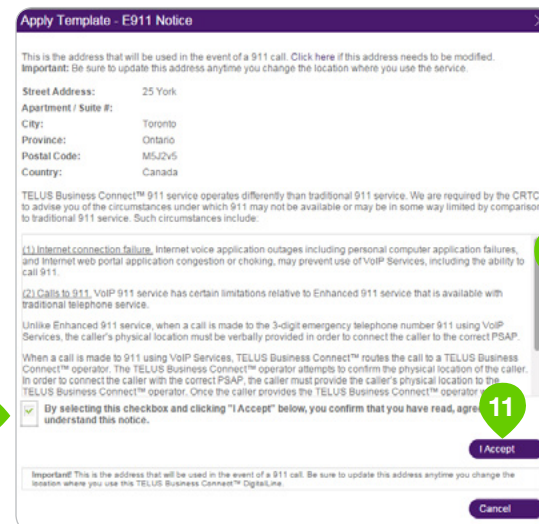
An email will be sent to you when the process is done

CC:

Add more recipients by adding with ";" or ""

☐ Notify users about Template application

Done



**Apply Template - E911 Notice**

This is the address that will be used in the event of a 911 call. Click here if this address needs to be modified. Important: Be sure to update this address anytime you change the location where you use the service.

Street Address: 25 York  
 Apartment / Suite #:   
 City: Toronto  
 Province: Ontario  
 Postal Code: M5J2V5  
 Country: Canada

TELUS Business Connect™ 911 service operates differently than traditional 911 service. We are required by the CRTC to advise you of the circumstances under which 911 may not be available or may be in some way limited by comparison to traditional 911 service. Such circumstances include:

(1) **Internet connection failure.** Internet voice application outages including personal computer application failures, and Internet web portal application congestion or choking, may prevent use of VoIP Services, including the ability to call 911.

(2) **Calls to 911.** VoIP 911 service has certain limitations relative to Enhanced 911 service that is available with traditional telephone service.

Unlike Enhanced 911 service, when a call is made to the 3-digit emergency telephone number 911 using VoIP Services, the caller's physical location must be verbally provided in order to connect the caller to the correct PSAP.

When a call is made to 911 using VoIP Services, TELUS Business Connect™ routes the call to a TELUS Business Connect™ operator. The TELUS Business Connect™ operator attempts to confirm the physical location of the caller. In order to connect the caller with the correct PSAP, the caller must provide the caller's physical location to the TELUS Business Connect™ operator. Once the caller provides the TELUS Business Connect™ operator with their physical location, the call will be routed to the correct PSAP.

☒ By selecting this checkbox and clicking "I Accept" below, you confirm that you have read, agree, and understand this notice.

I Accept

Important! This is the address that will be used in the event of a 911 call. Be sure to update this address anytime you change the location where you use this TELUS Business Connect™ Digital Line

Cancel

Appendix A:

# Multi-Account Access

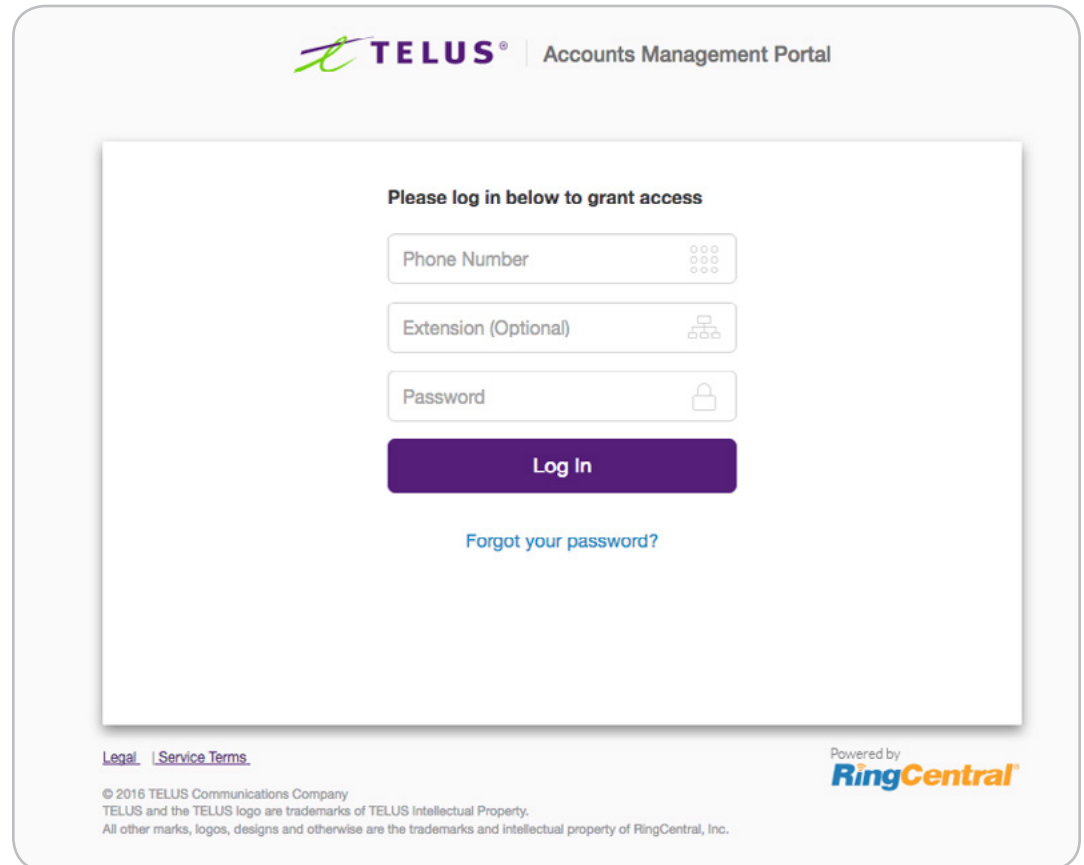
## Account Management Portal

The Multi-Account Access feature centralizes access for customers with multiple TELUS Business Connect accounts, and allows them to link all of their accounts in the Accounts Management portal. It allows company admins to access their TELUS Business Connect accounts from a single log in. It also allows administrators to view services for all accounts from a single location.

The Multi-Account Access feature increases the efficiency of multiple account management for those administrators who manage multiple accounts, or who support multiple clients. From the management portal, you can easily switch from one account to another. The portal provides a consolidated view of all accounts, while they remain separate entities.

To access the management portal:

1. Go to <https://accounts.businessconnect.telus.com>.
2. Enter your credentials for an account.
3. Click **Log In**.



The screenshot shows the TELUS Accounts Management Portal login interface. At the top, the TELUS logo is on the left and "Accounts Management Portal" is on the right. Below this, a white box contains the login form. The form has the heading "Please log in below to grant access". It includes three input fields: "Phone Number" with a numeric keypad icon, "Extension (Optional)" with a numeric keypad icon, and "Password" with a lock icon. Below these fields is a purple "Log In" button. Under the button is a blue link "Forgot your password?". At the bottom of the white box, there are links for "Legal" and "Service Terms". Below the white box, the footer contains copyright information: "© 2016 TELUS Communications Company", "TELUS and the TELUS logo are trademarks of TELUS Intellectual Property.", and "All other marks, logos, designs and otherwise are the trademarks and intellectual property of RingCentral, Inc.". On the right side of the footer, it says "Powered by RingCentral" with the RingCentral logo.

## Manage Linked Accounts

You can manage any number of accounts from the account management portal. Each page in the portal can display up to 20 linked accounts, and different pages are identified by page numbers.

To add accounts to the portal:

1. Click **Link Account**.
2. Enter the credentials of the account.
3. Click **Log In**.
4. Repeat for each account to add.

To unlink an account:

1. Select one or more account(s).
2. Click **Unlink selected account**.
3. The account is removed from the view.

To edit the account name with descriptive text:

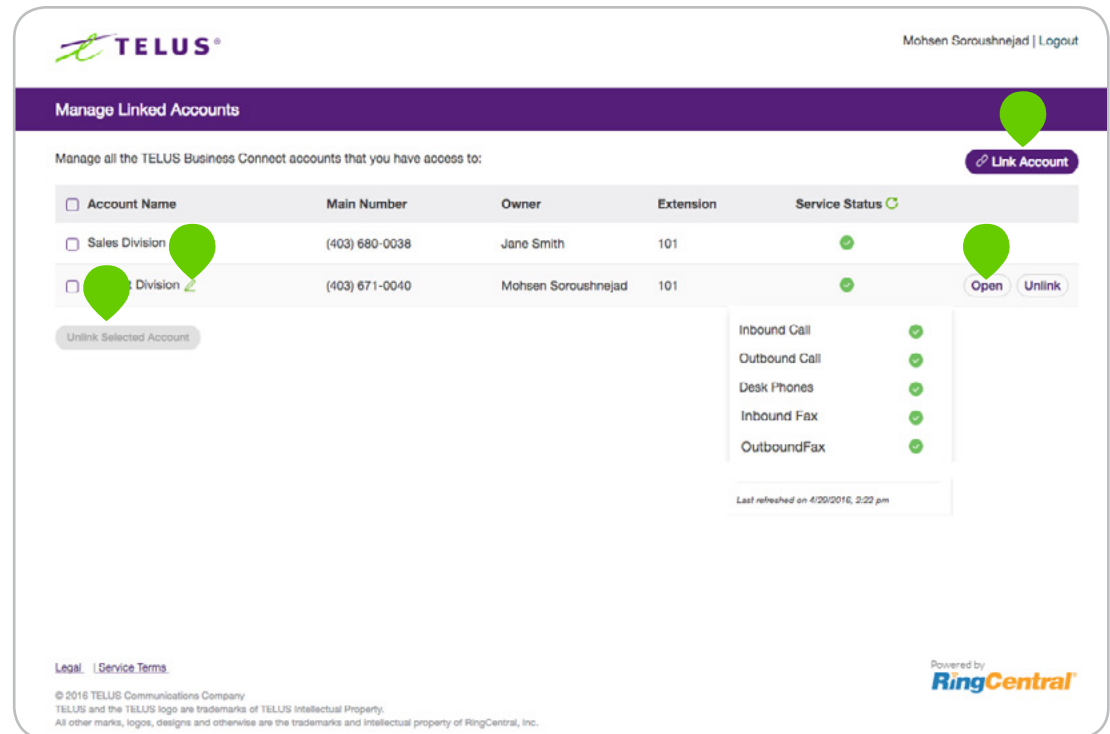
1. Click the **Edit** icon beside the account.
2. Enter the new **Account Name**.
3. Press **Enter**.

## Access Accounts

The account management portal allows you easily launch the **Admin Portal** for any of your accounts, avoiding the complexity of logging in and logging out of multiple accounts.

To trigger a login to an account:

1. Click **Open** beside the account.
2. A new browser tab is launched and you are automatically logged into the **Admin Portal** for the account.
3. Manage your account as normal.



**Manage Linked Accounts**

Manage all the TELUS Business Connect accounts that you have access to:

<input type="checkbox"/> Account Name	Main Number	Owner	Extension	Service Status	
<input type="checkbox"/> Sales Division	(403) 680-0038	Jane Smith	101		
<input checked="" type="checkbox"/> Division	(403) 671-0040	Mohsen Soroushnejad	101		<b>Open</b> <b>Unlink</b>

**Unlink Selected Account**

Inbound Call

Outbound Call

Desk Phones

Inbound Fax

OutboundFax

Last refreshed on 4/29/2016, 2:22 pm

[Legal](#) | [Service Terms](#)

© 2016 TELUS Communications Company  
TELUS and the TELUS logo are trademarks of TELUS Intellectual Property.  
All other marks, logos, designs and otherwise are the trademarks and intellectual property of RingCentral, Inc.


Powered by **RingCentral**







## View Service Status

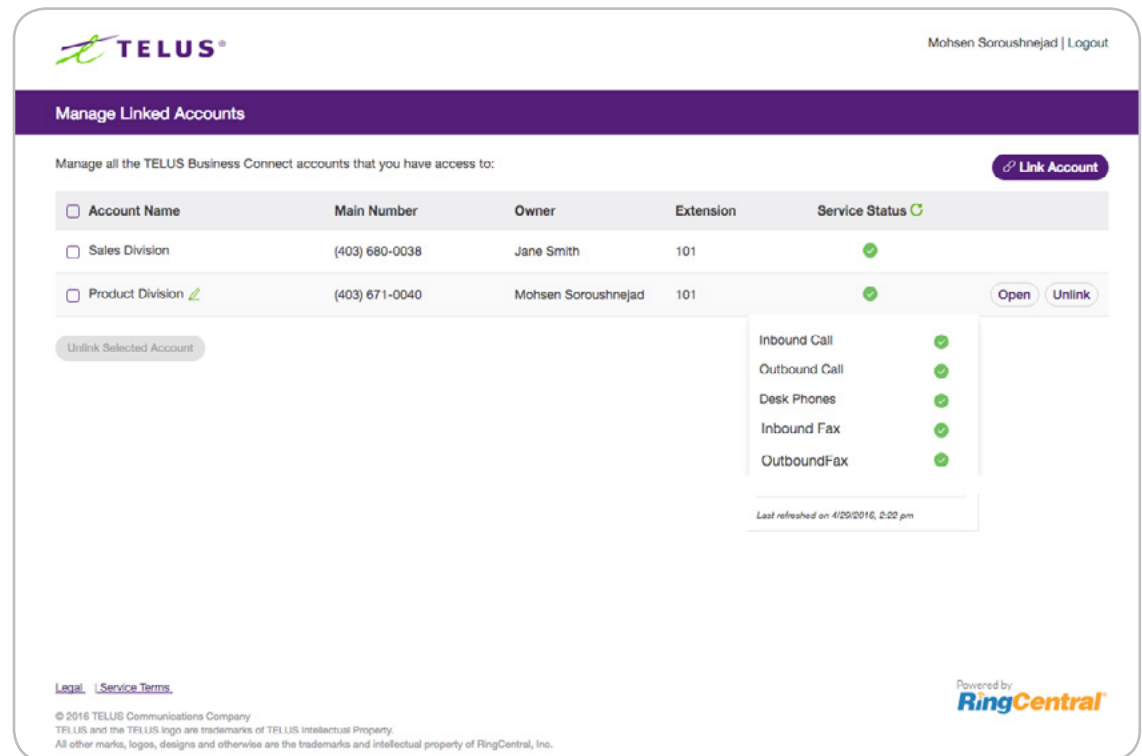
The account management tool reports status for the following services:

- Inbound Calls
- Outbound Calls
- Desk Phones
- Inbound Fax
- Outbound Fax

Service status is refreshed automatically every three minutes. Service status details and the date of the last refresh are displayed when you hover. To manually refresh the service status, select the **Refresh** icon. 





An abnormal service status results in the display of an error reason when you hover on the status. The following statuses are reported:

-  **Green:** The service is available.
-  **Yellow:** There is an error related to the service.
-  **Red:** The service is unavailable.
-  **Grey:** Service status has not been reported.





**Manage Linked Accounts**


Manage all the TELUS Business Connect accounts that you have access to: [Link Account](#)


<input type="checkbox"/> Account Name	Main Number	Owner	Extension	Service Status 
<input type="checkbox"/> Sales Division	(403) 680-0038	Jane Smith	101	
<input checked="" type="checkbox"/> Product Division 	(403) 671-0040	Mohsen Soroushnejad	101	 <a href="#">Open</a> <a href="#">Unlink</a>


[Unlink Selected Account](#)

Inbound Call 

Outbound Call 

Desk Phones 

Inbound Fax 

OutboundFax 

Last refreshed on 4/29/2016, 2:02 pm

[Legal](#) | [Service Terms](#)

© 2016 TELUS Communications Company  
TELUS and the TELUS logo are trademarks of TELUS Intellectual Property.  
All other marks, logos, designs and otherwise are the trademarks and intellectual property of RingCentral, Inc.

Powered by **RingCentral**