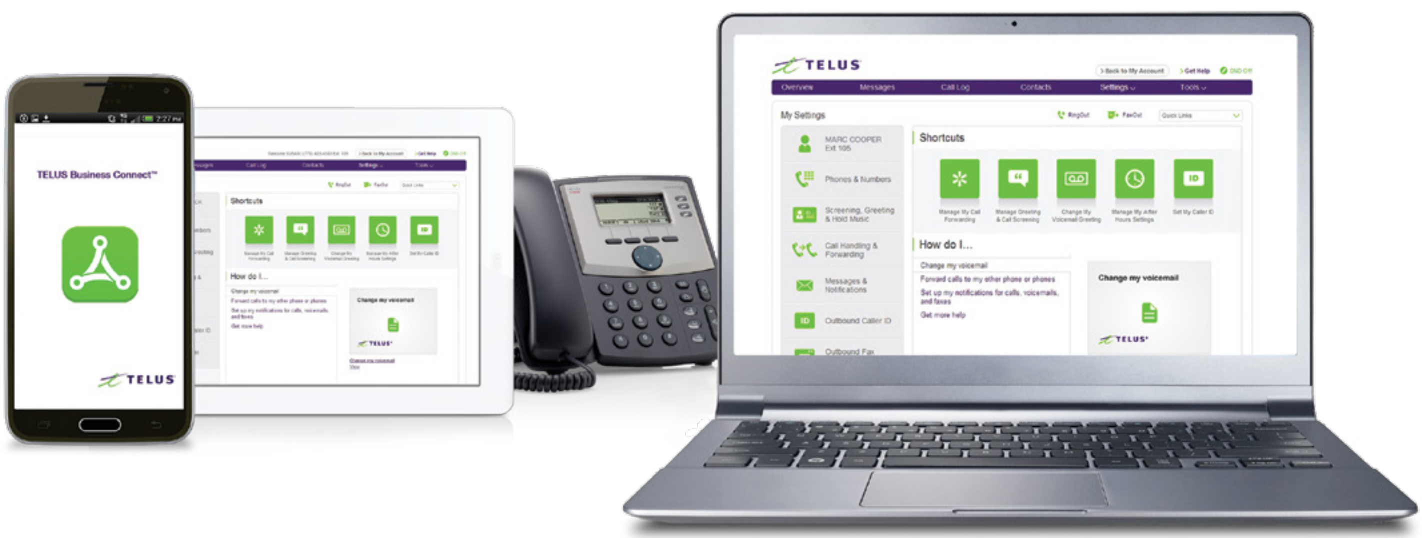
TELUS Business Connect™

Admin Guide



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

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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
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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

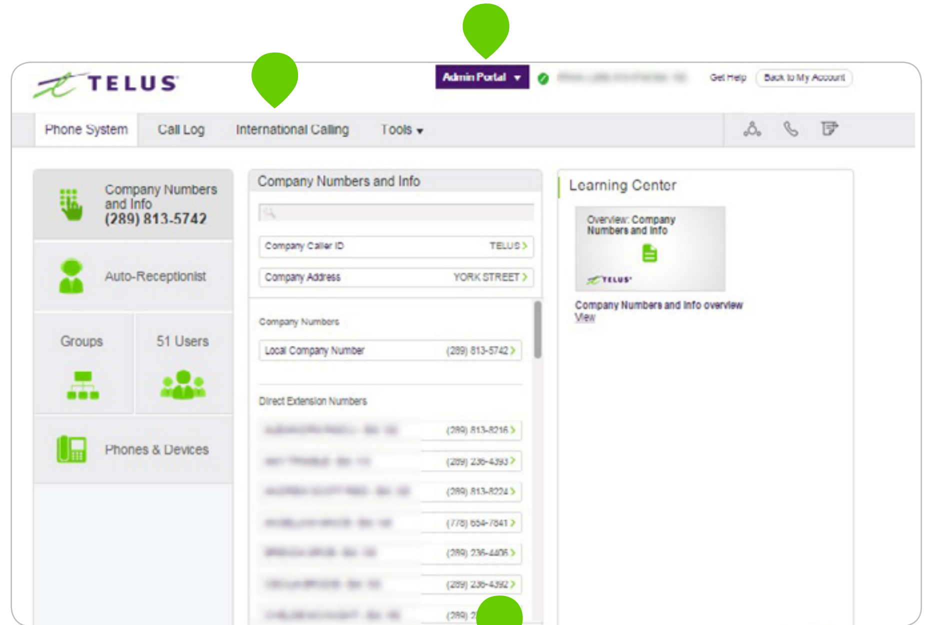
There are a few main functions that administrators can access from any online page. These functions are Edit Company Business Hours, Change Company Greeting and Set Company Caller ID.

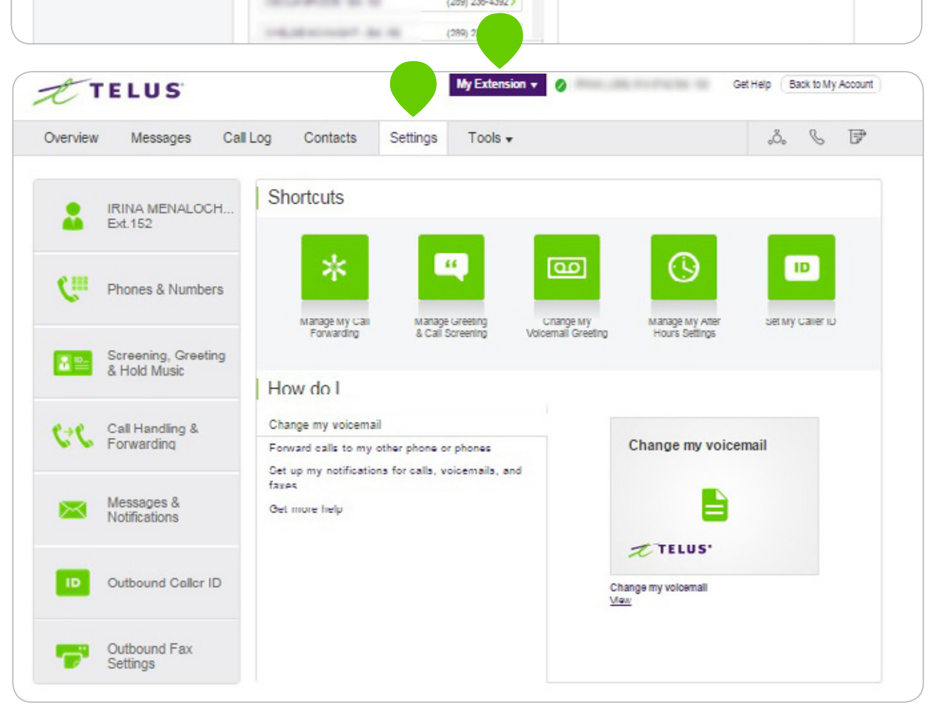
Admin Portal

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.

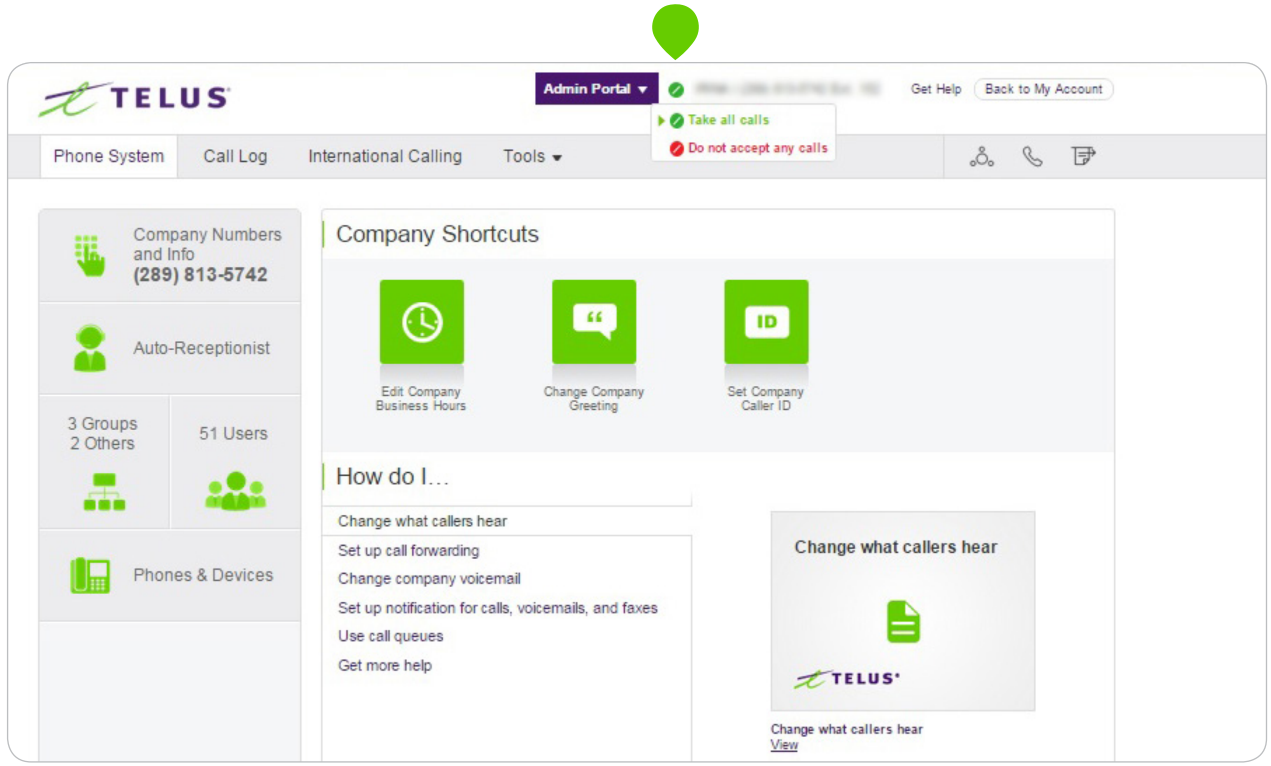




Do Not Disturb

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.

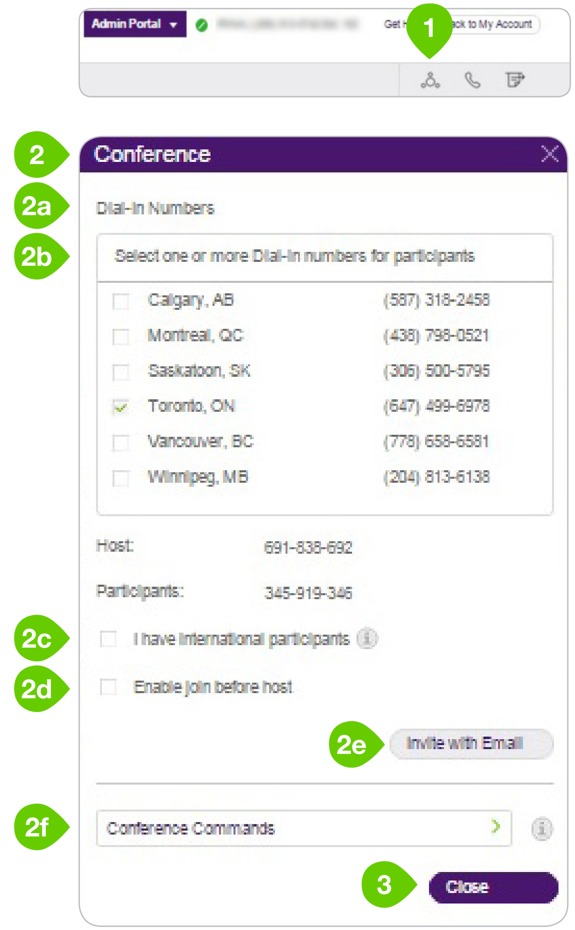
Each customer receives a unique conference bridge number, and each user on the phone system gets his or her own host and participant access code so that you and your team can hold independent conferences whenever you want.

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 allow participants** 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**.



*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.

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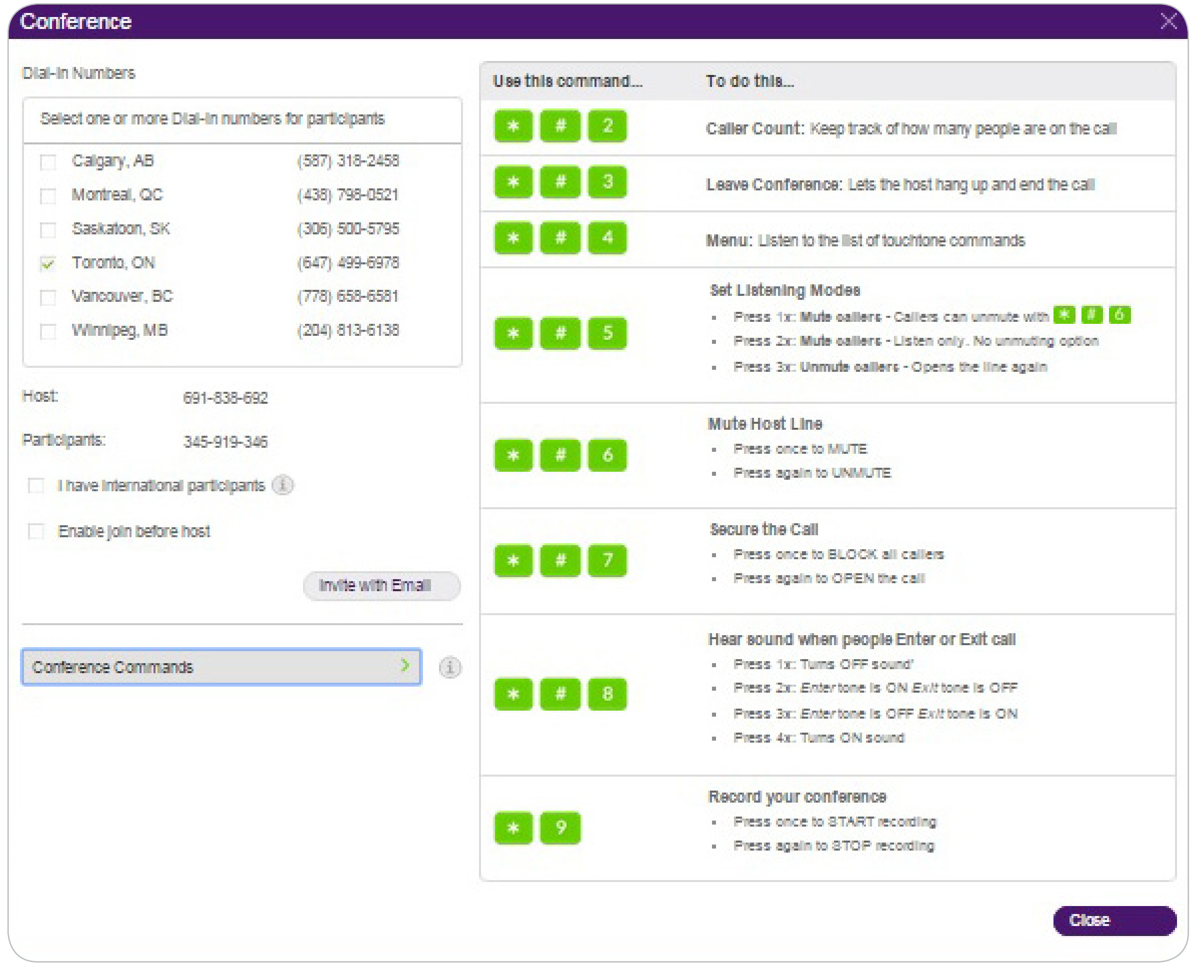
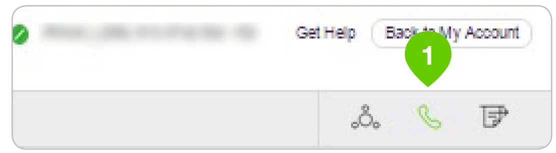
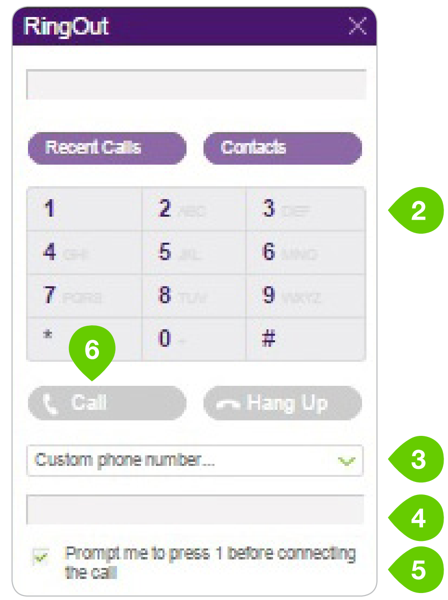


RingOut

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.



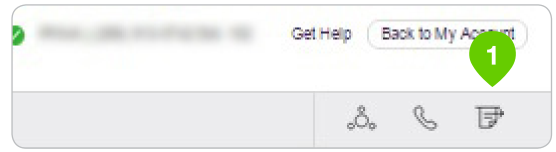
FaxOut

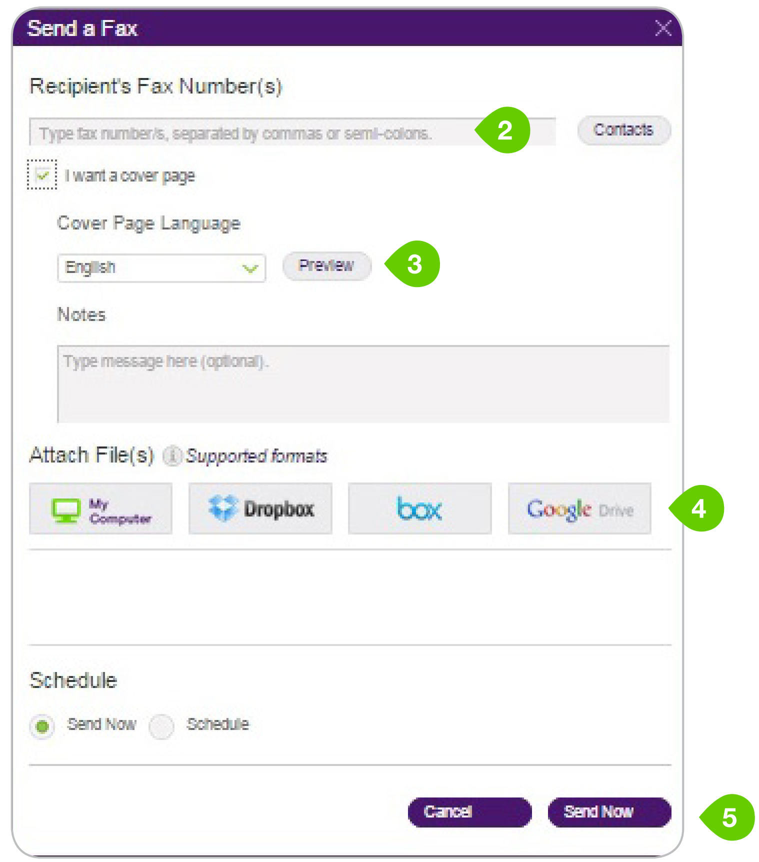
To quickly send a fax from your online account, click the FaxOut icon located in the upper right corner. Fill in the form with recipient's fax number and cover page information, and attach or scan a document, which will automatically be converted into a fax.

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.





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:

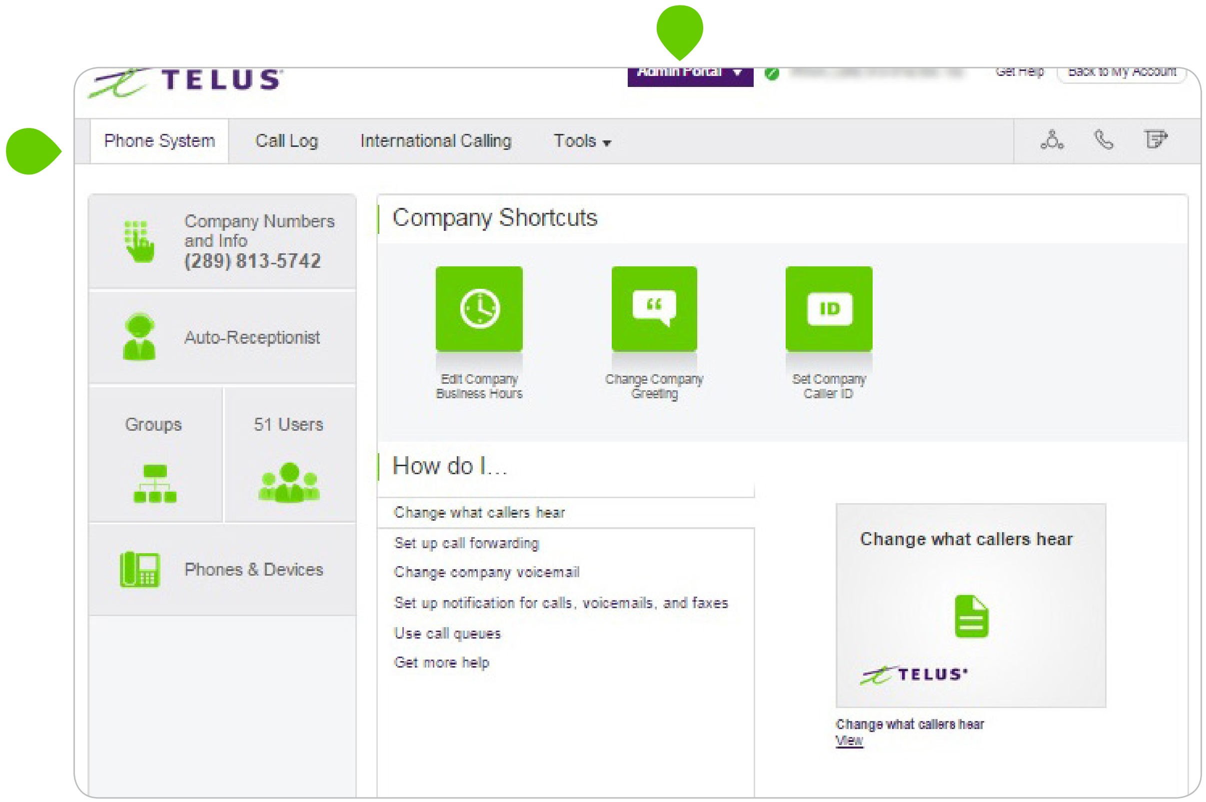
- Company Numbers and Info
- Auto-Receptionist Settings
- Auto-Receptionist
- Groups
- Users
- Phones & Devices

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

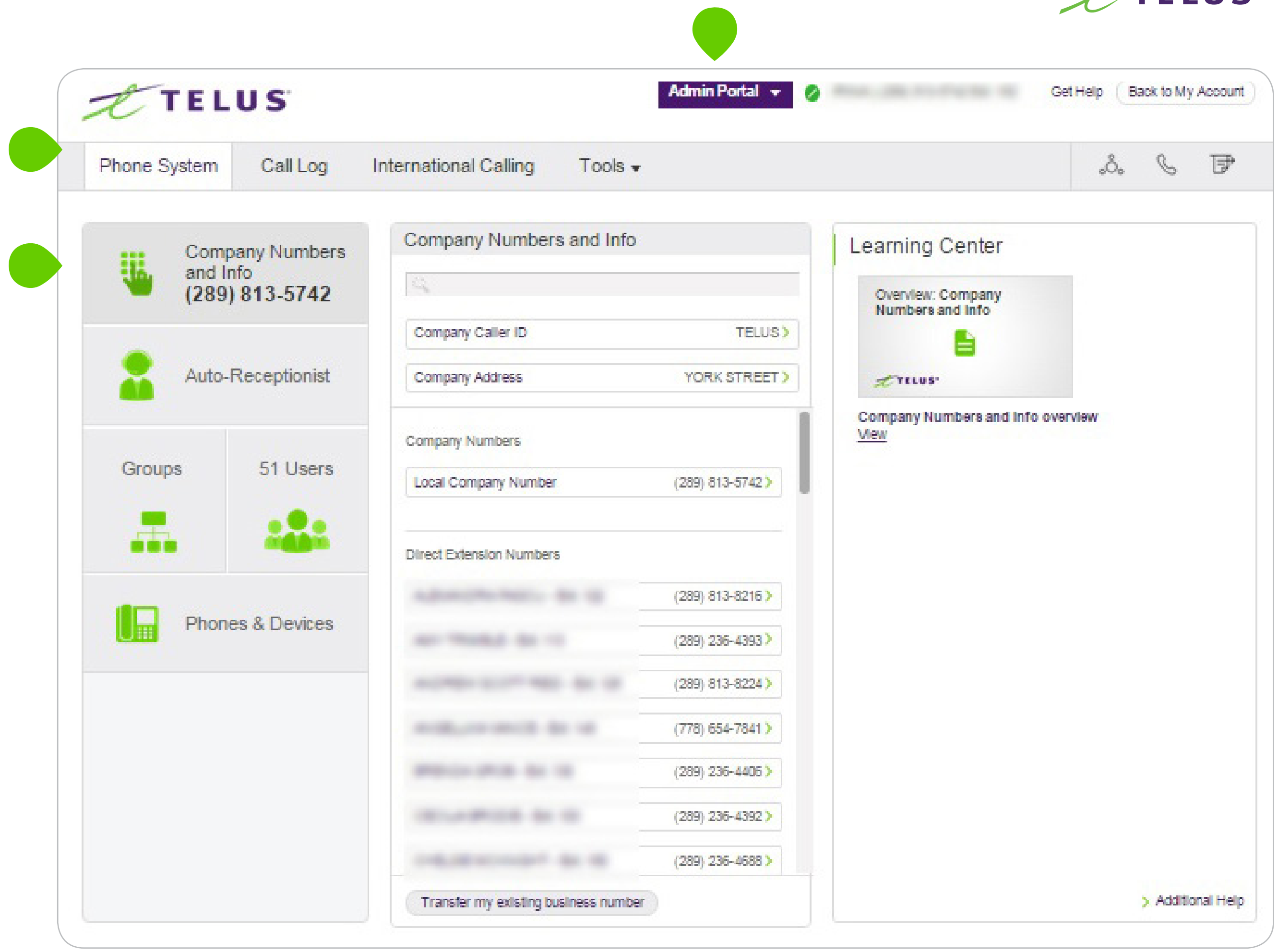
How do I…

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



Company Numbers and Info

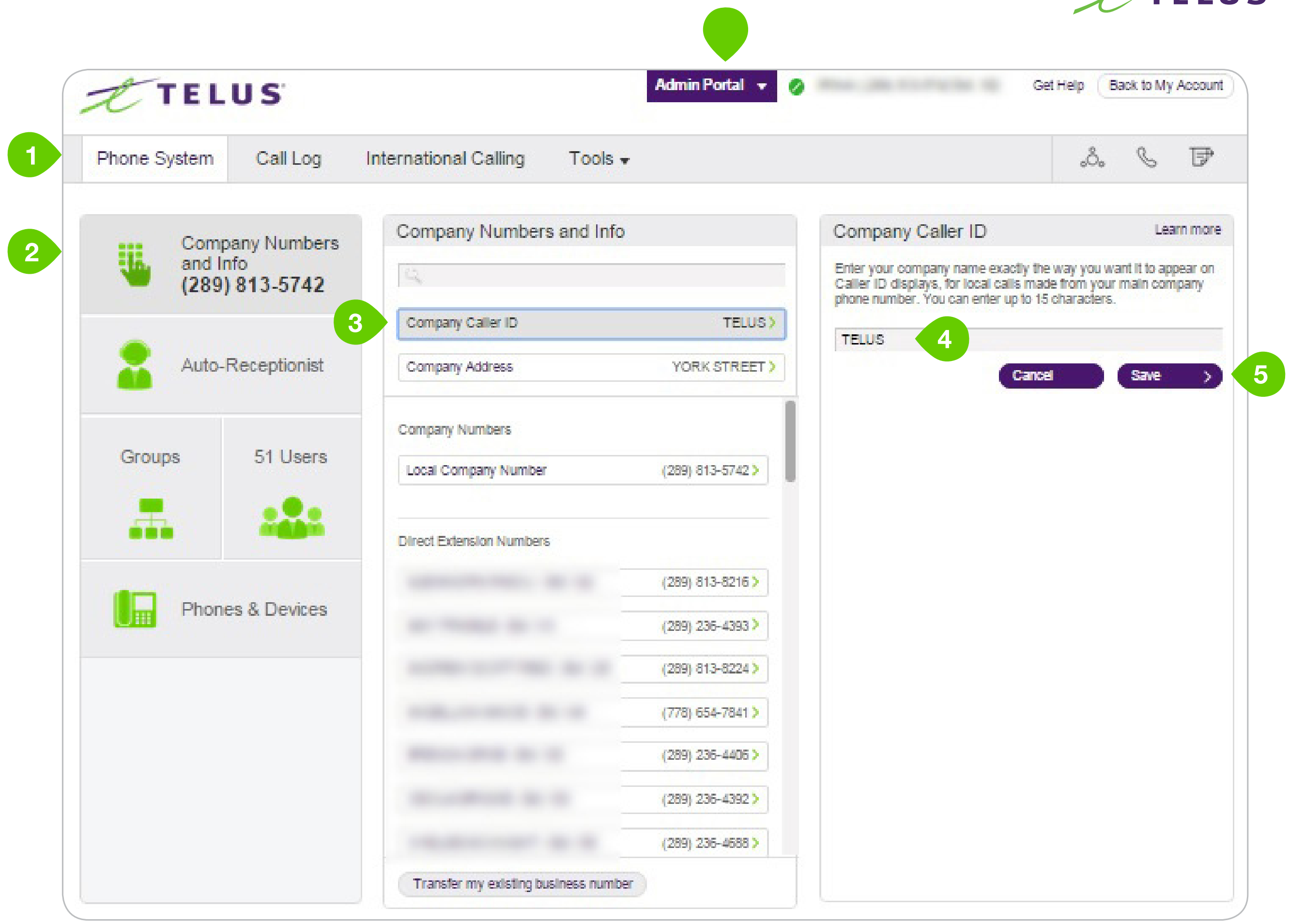
The Company Numbers and Info settings include Company Caller ID, Company Numbers, Direct Extension Numbers, and the option to add additional numbers.



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.

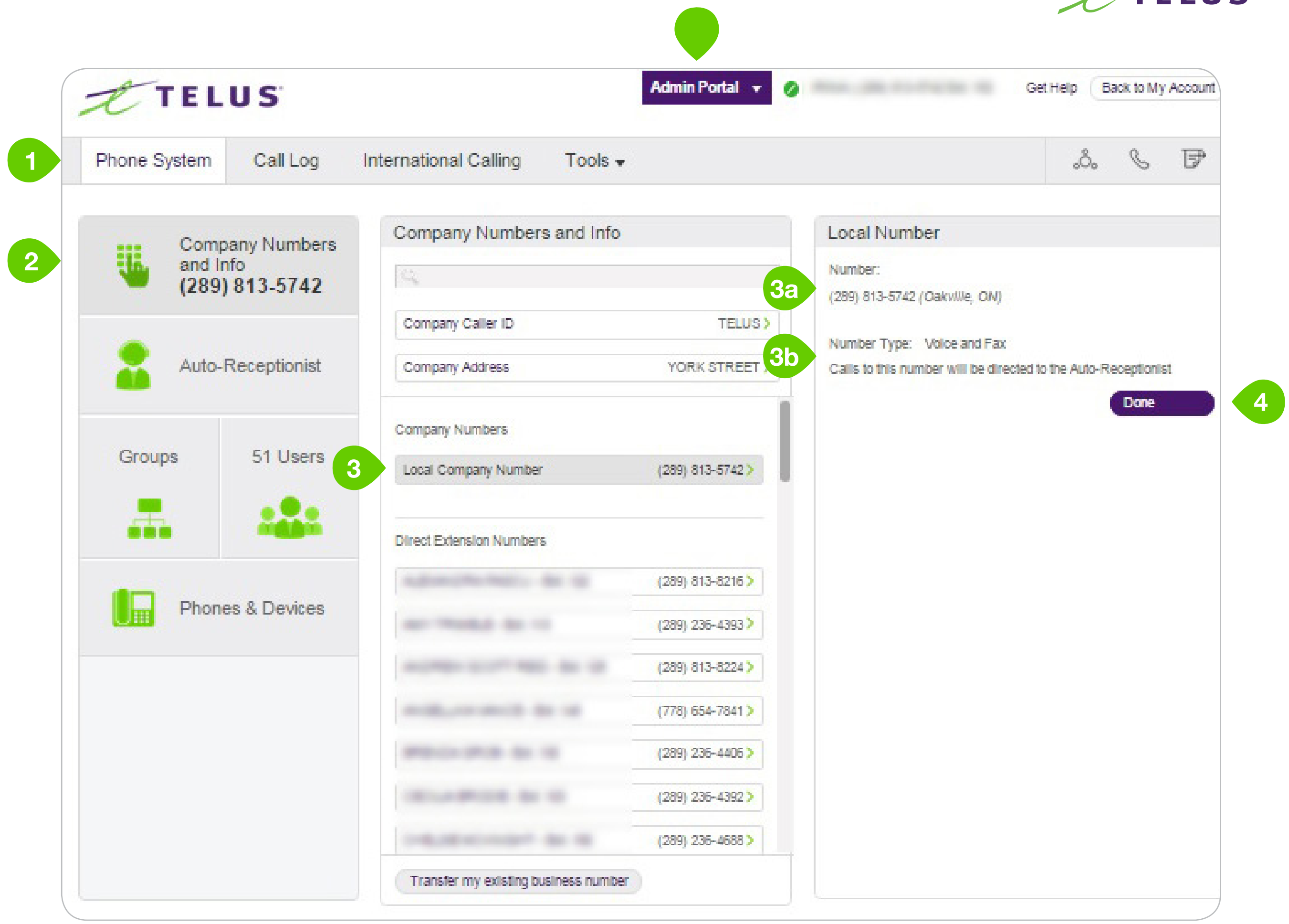
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Numbers and Info**.
3. Click **Company Caller ID**.
4. Enter your company name exactly the way you want it to appear on Caller ID displays, for local calls made from your main company phone number. You can enter up to 15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



Company Numbers

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

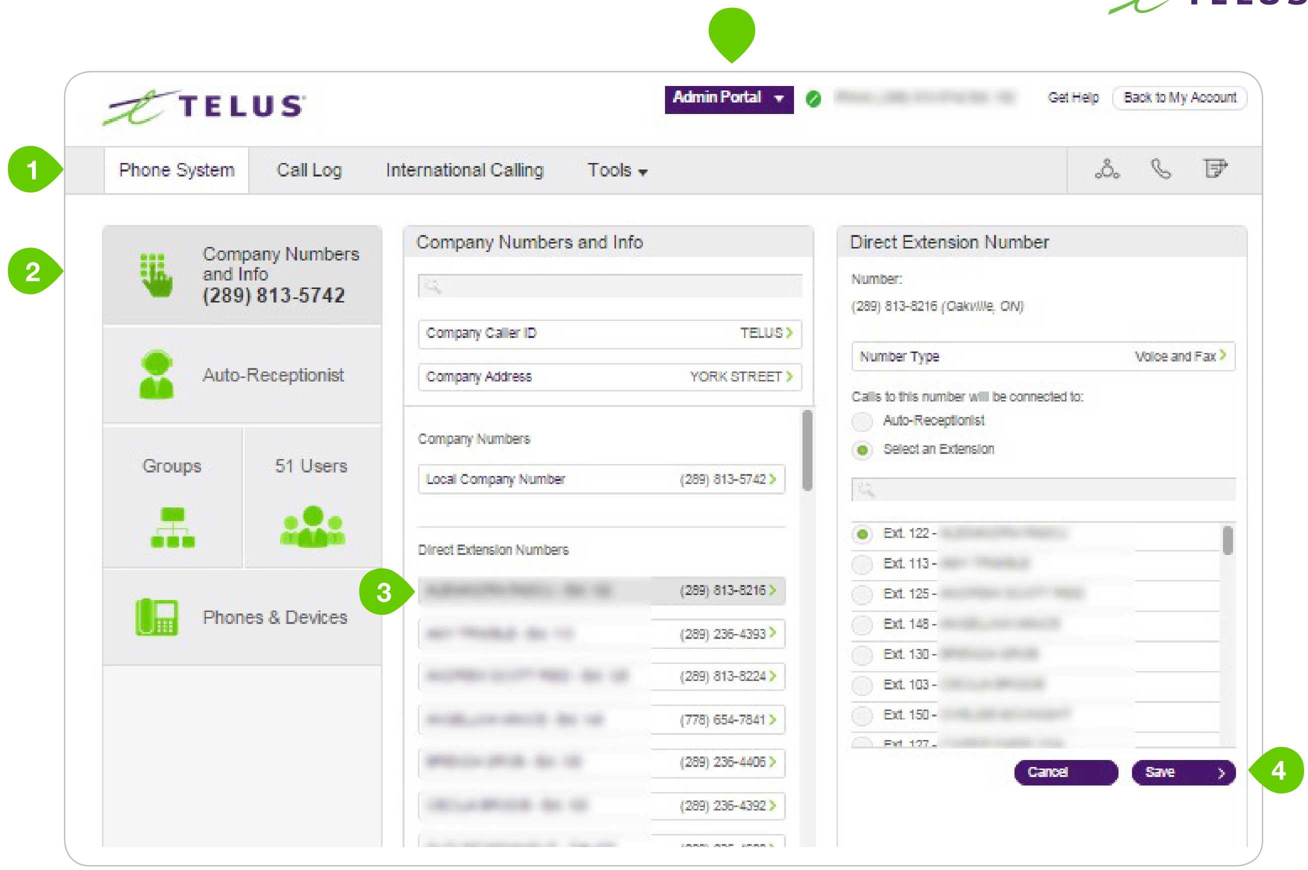
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Numbers and Info**.
3. Click a number under **Company Numbers** to see more details.
   a. **Number** – View your number and additional information.
   b. **Number Type** – View your number type.
4. Click **Done**.



Direct Extensions

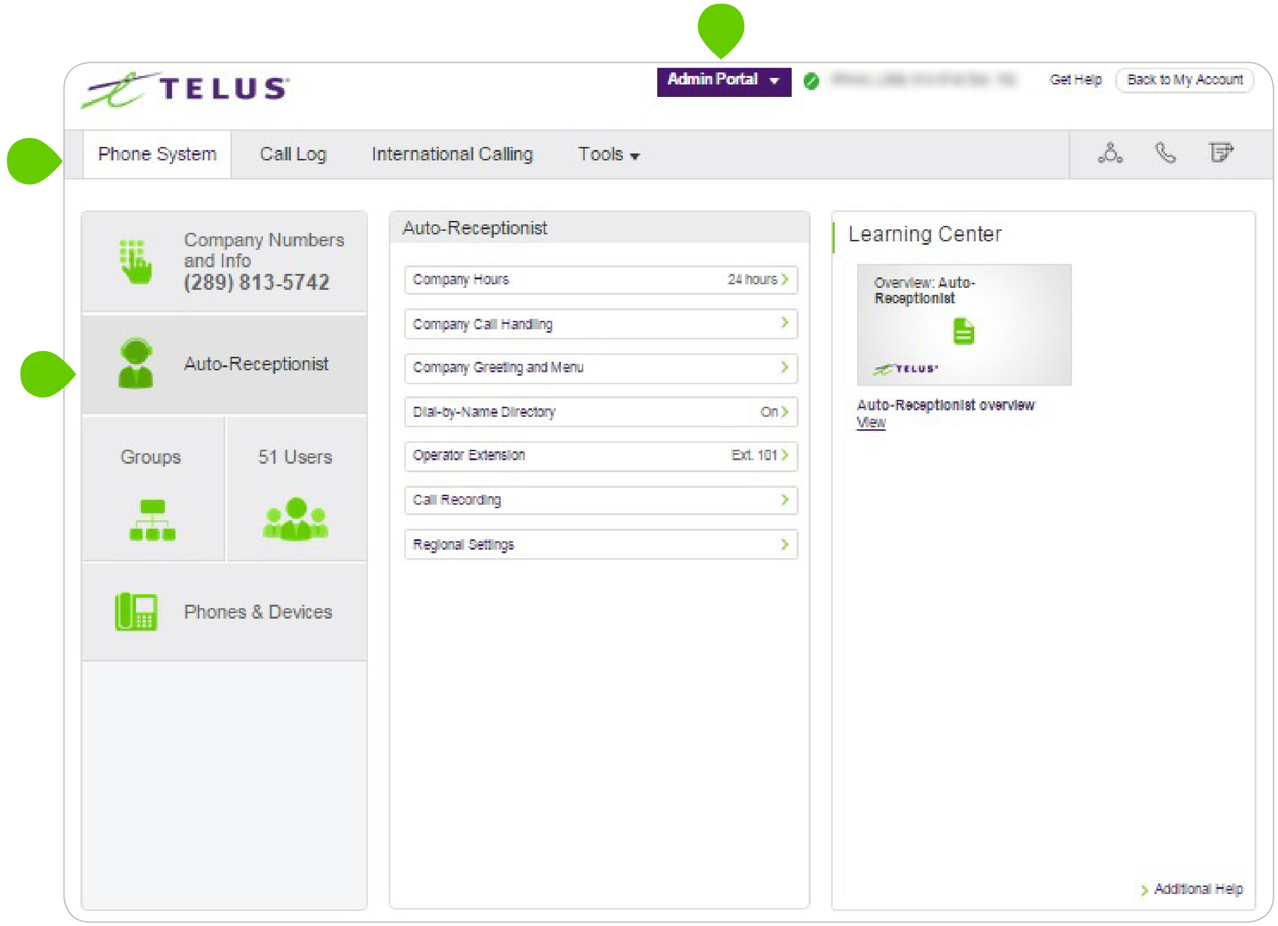
Under Direct Extensions, you will see the all of the Direct Extension Numbers that have been set for your phone system.

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**.



Auto-Receptionist Settings

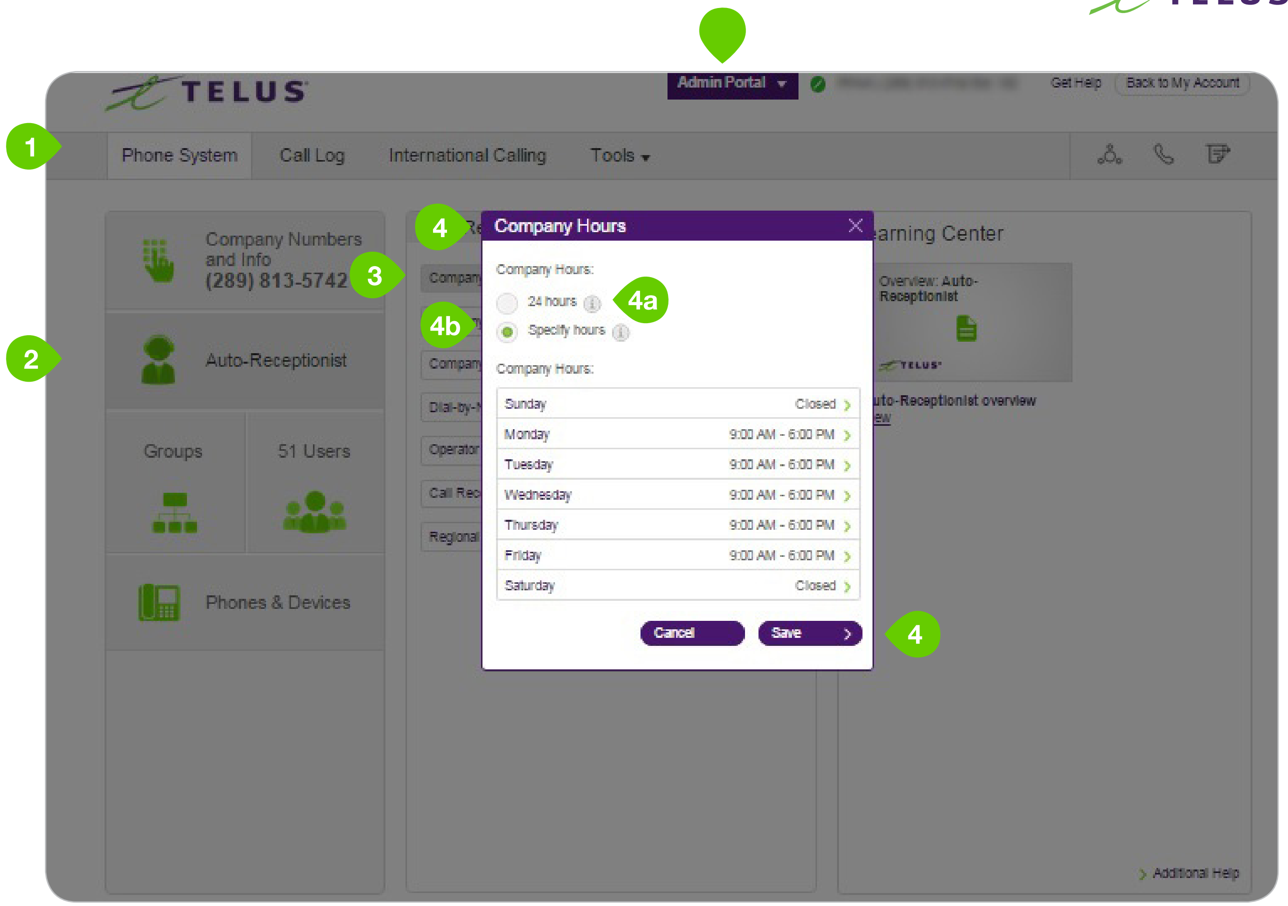
Create your own auto-receptionist for your phone system. Customize your options for effective call management. Choose your company hours, set your company greeting, define rules for call handling and more.



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**.



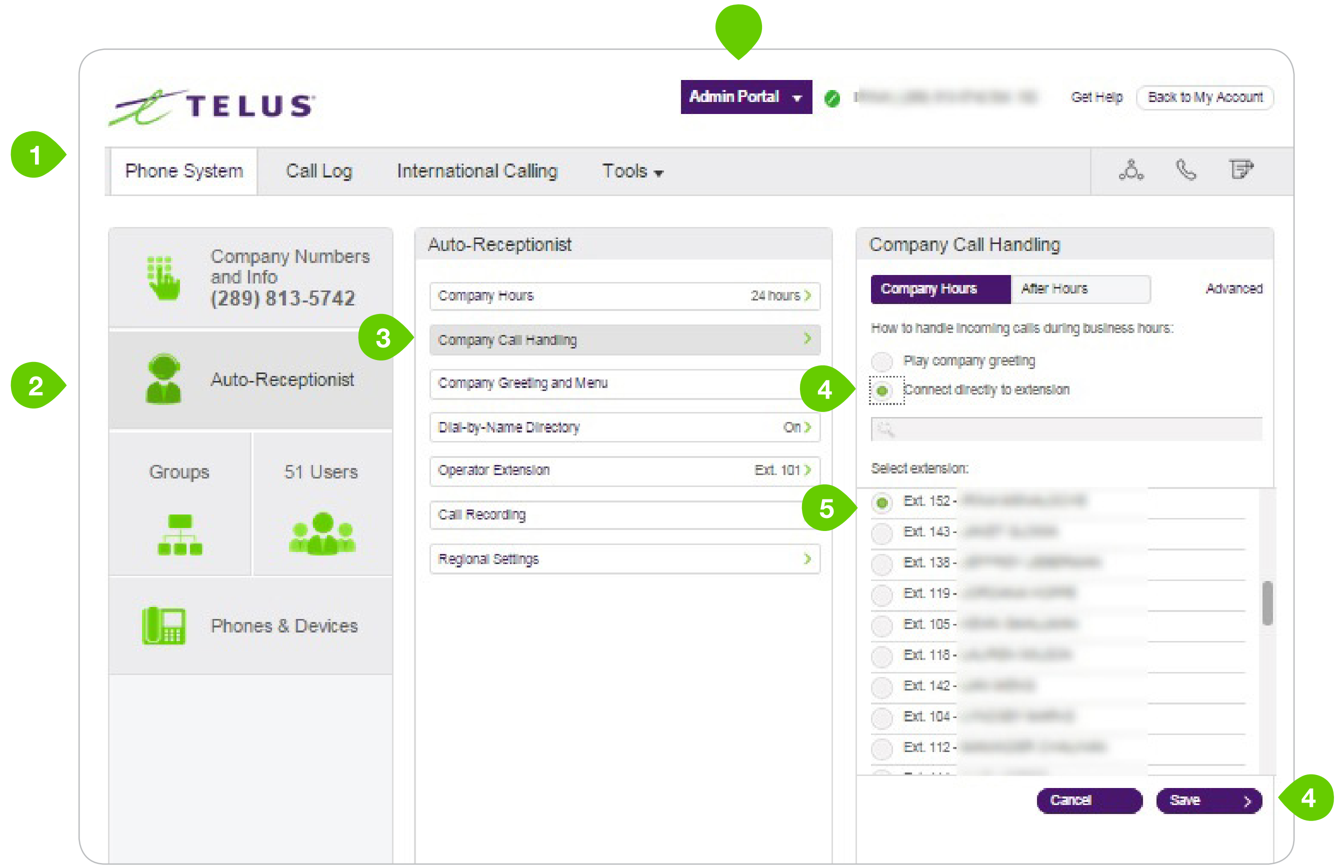
Company Call Handling

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

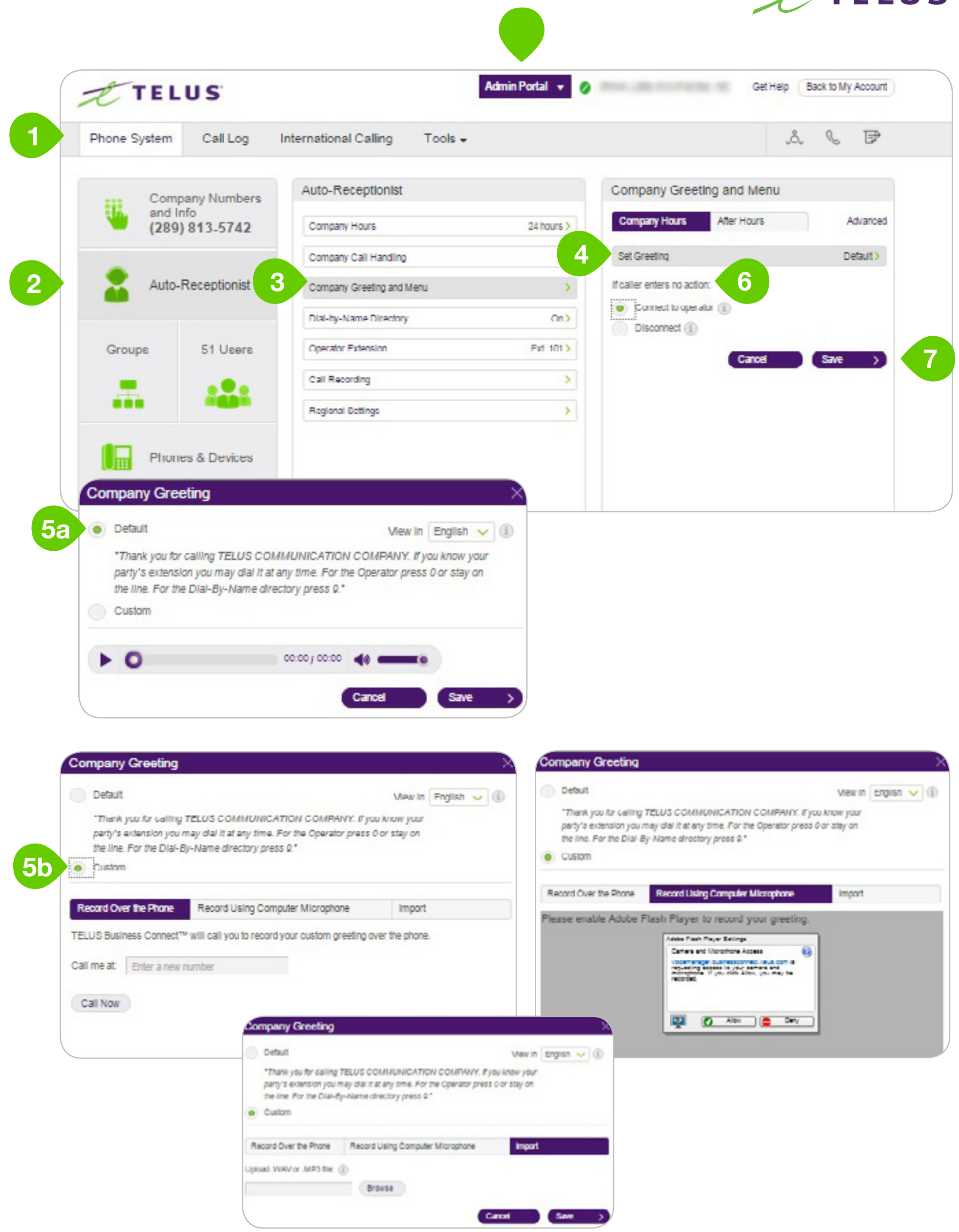
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Call Handling**.
4. Select the radio button next to **Connect directly to extension**.
5. Select an extension to receive all calls.
6. Click **Save**.

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



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.

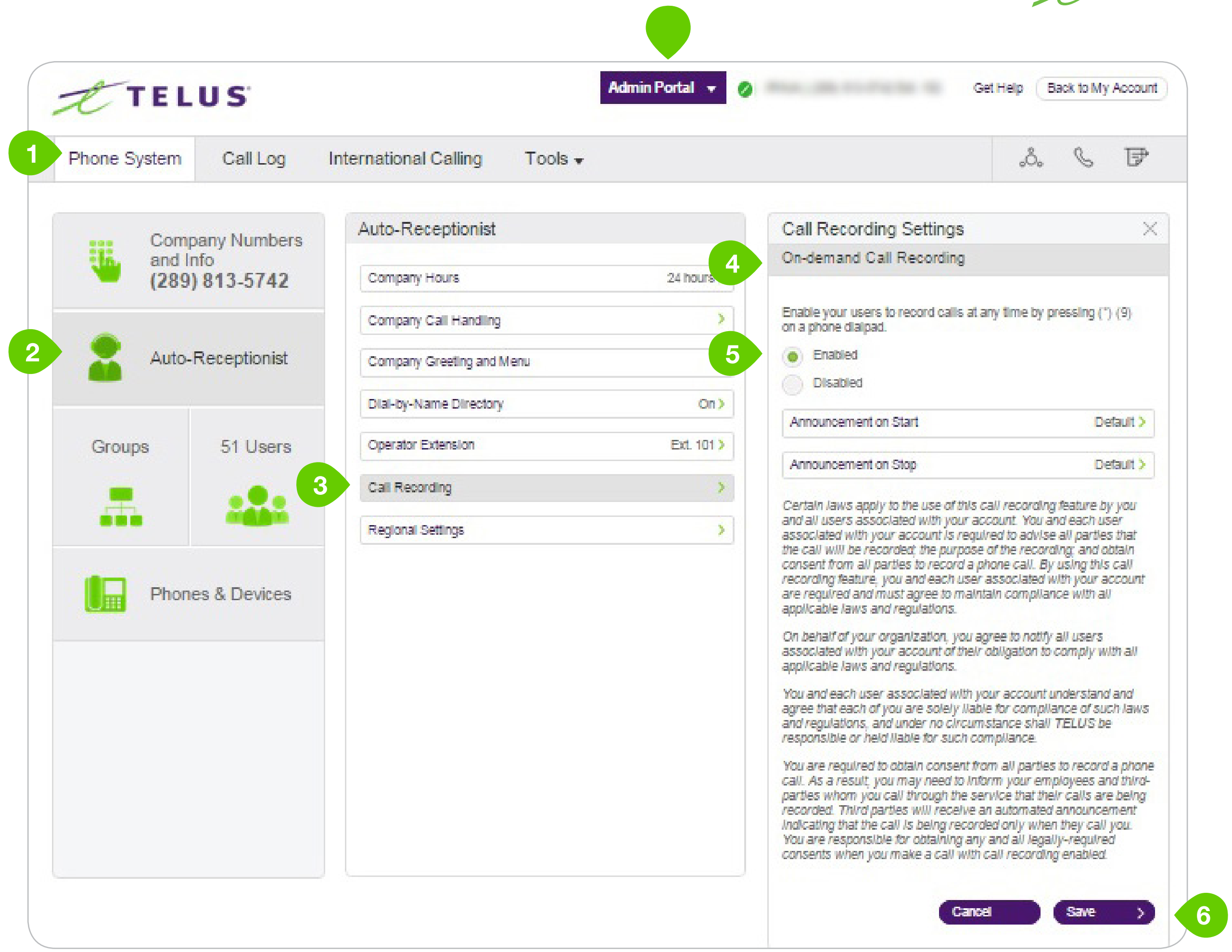
On-demand Call Recording

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

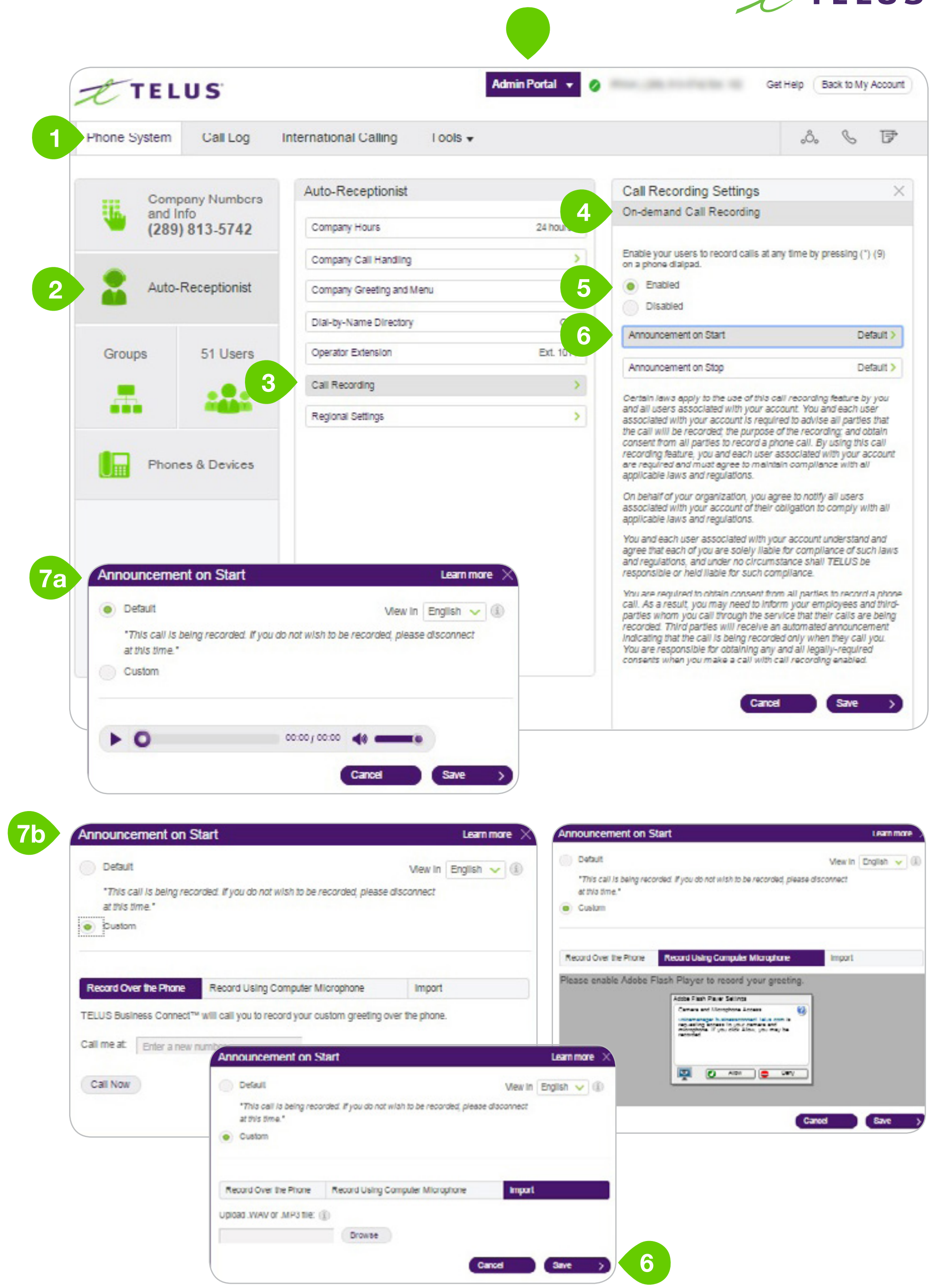
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Click **On-demand Call Recording**.
5. Select the radio button next to **Enabled**.
6. Click **Save**.



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.



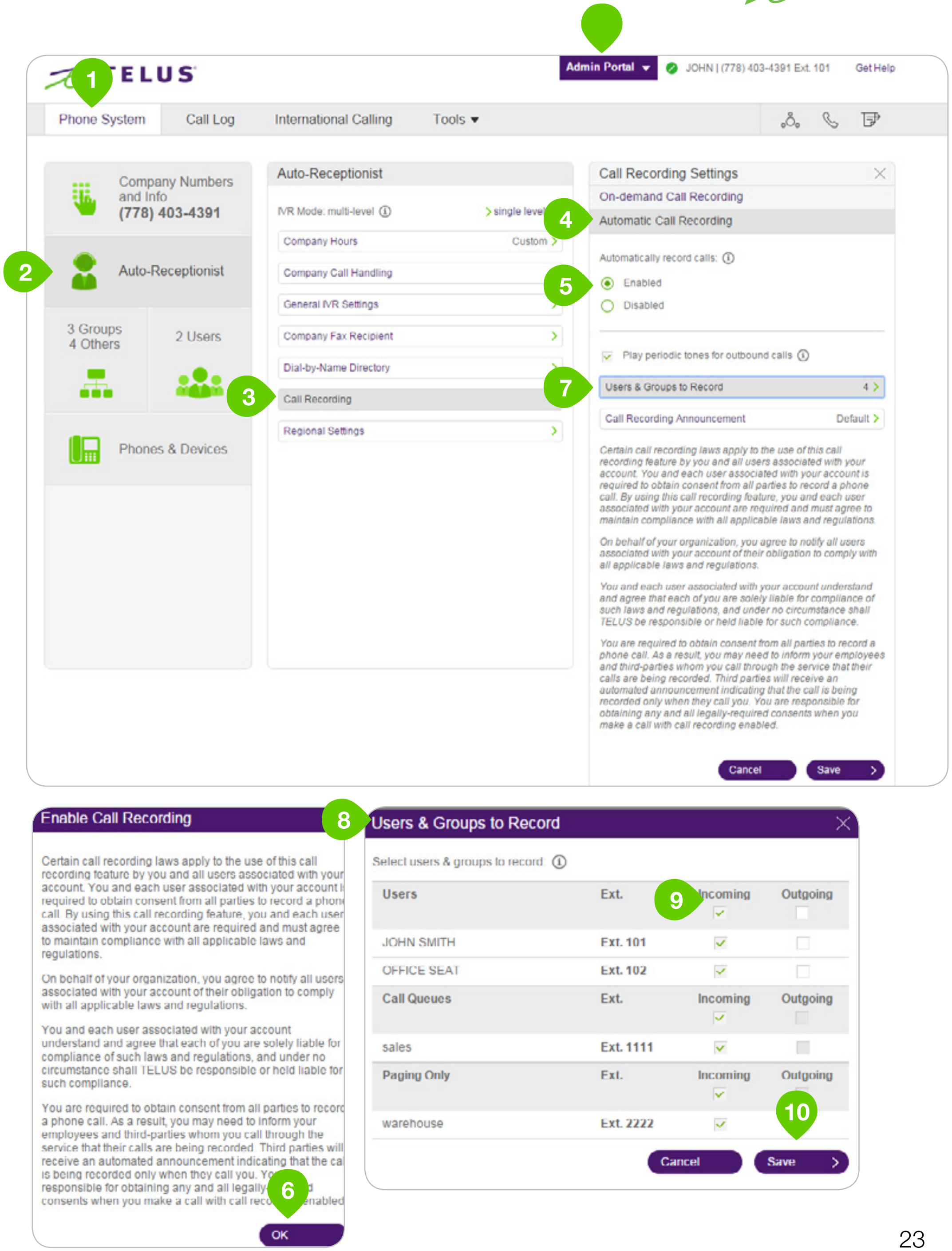
Automatic Call Recording*

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

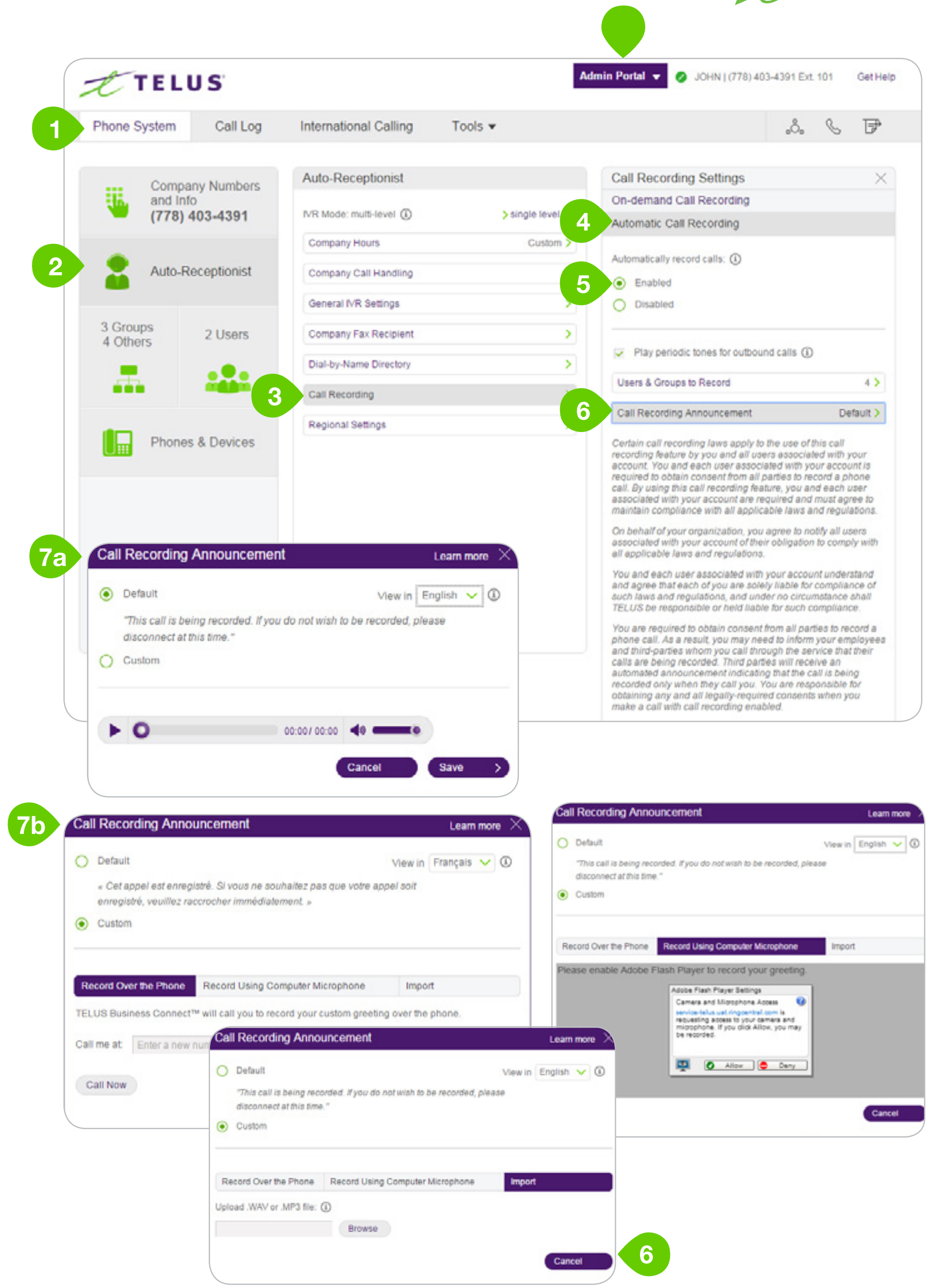
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist.**
3. Click **Call Recording**.
4. Click **Automatic Call Recording**.
5. Under **Automatically record calls**, select the radio button next to **Enabled**.
6. Click **OK** on the agreement pop-up.
7. Click **Users & 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.



*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

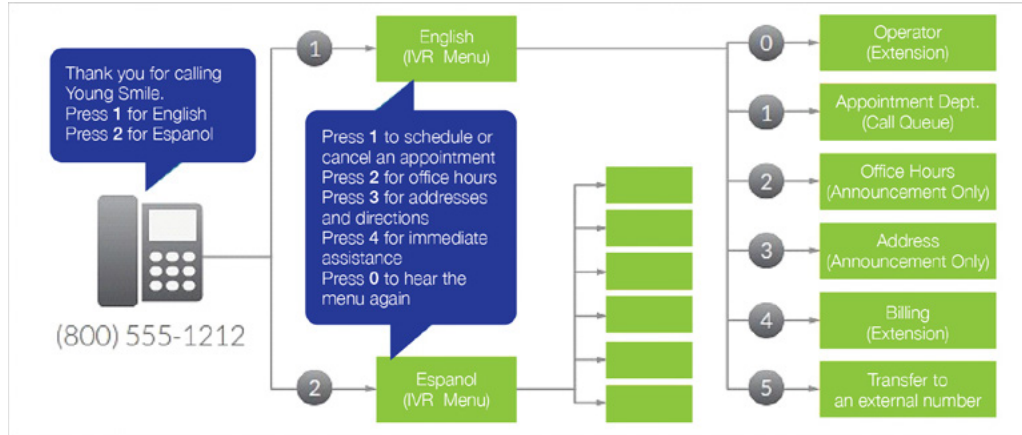
The TELUS Business Connect Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar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

Single-Location IVR Use Case

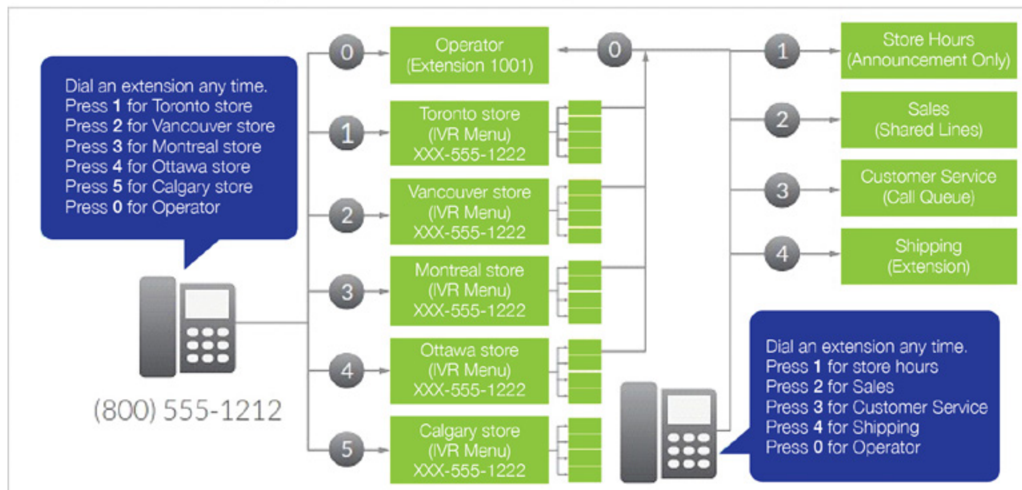
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

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

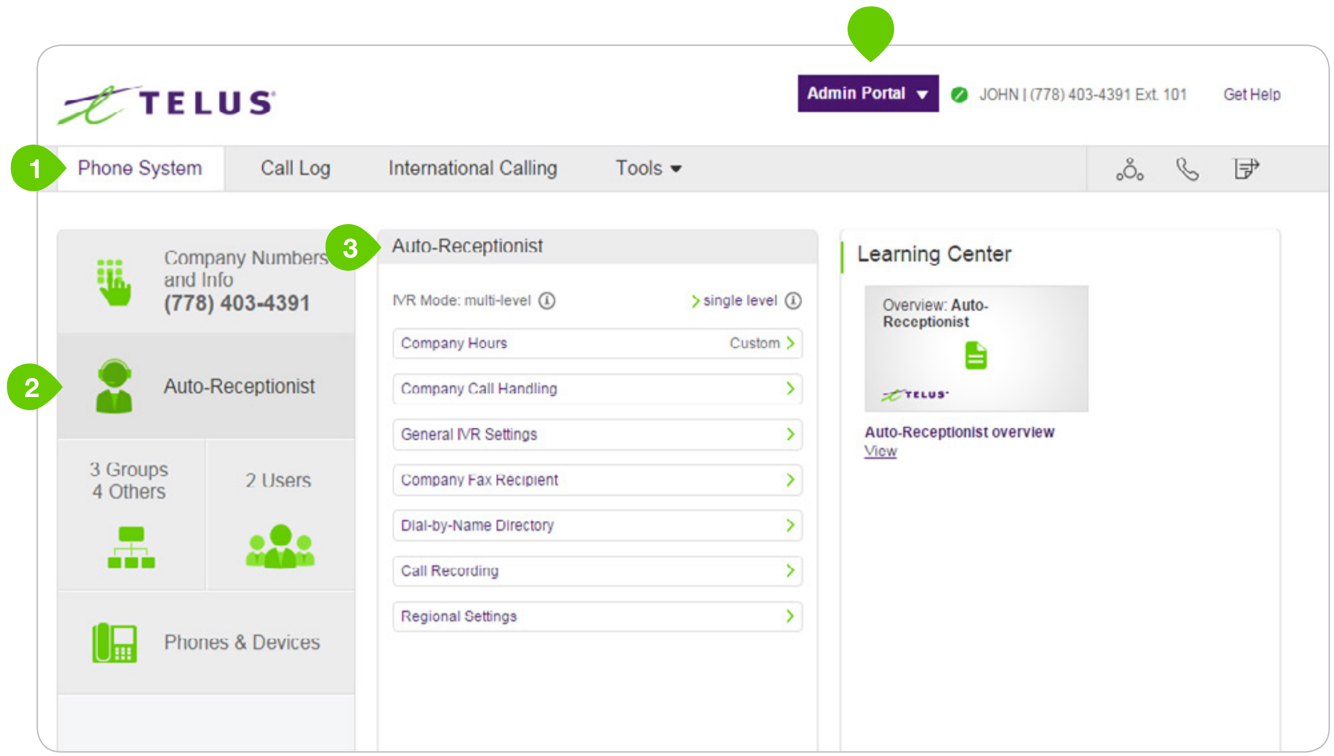
Switch to Multi-level IVR Mode

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.

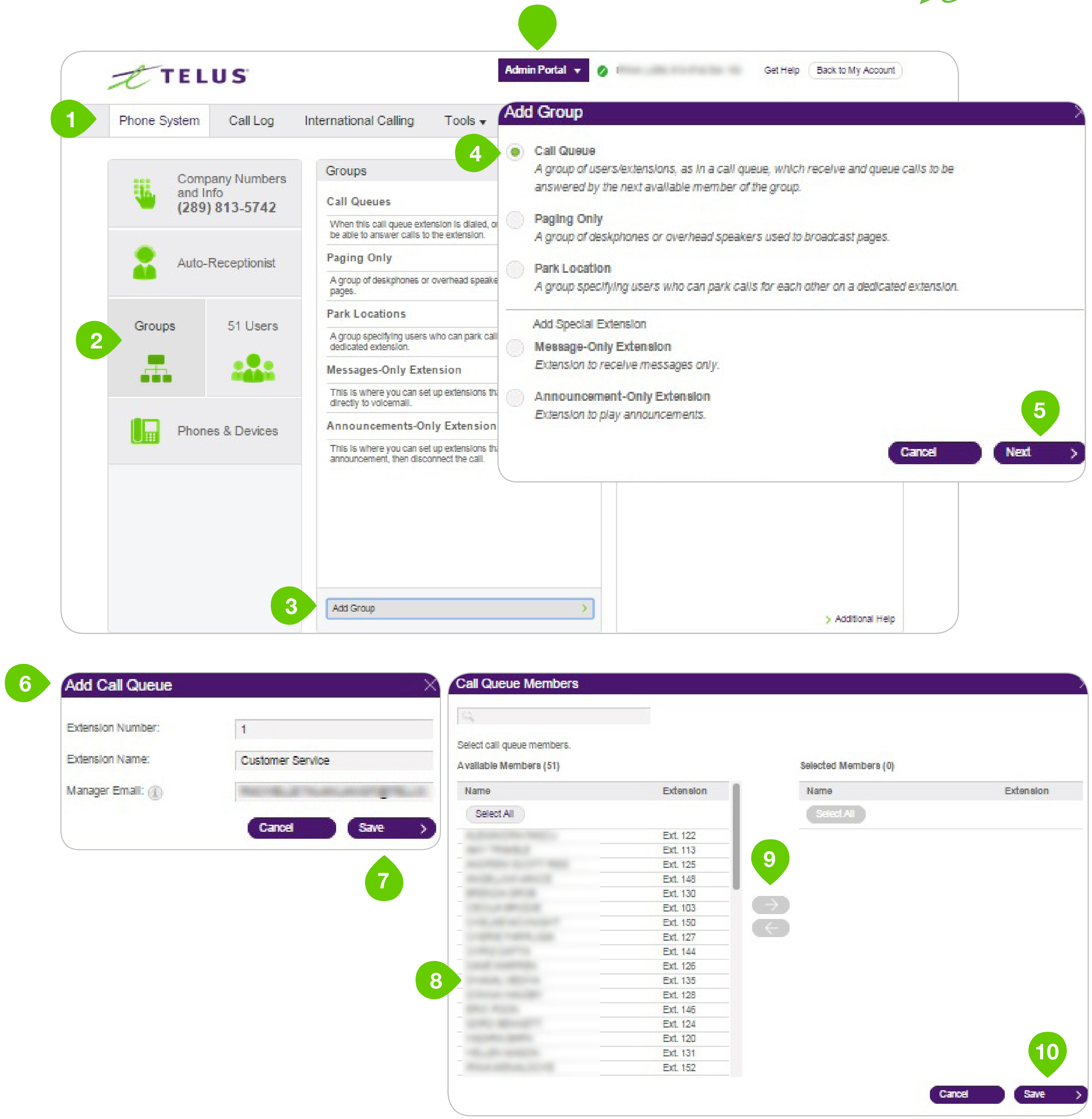
*Not available for one-line accounts.
**Available for Premium and Premium Plus users only.

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.

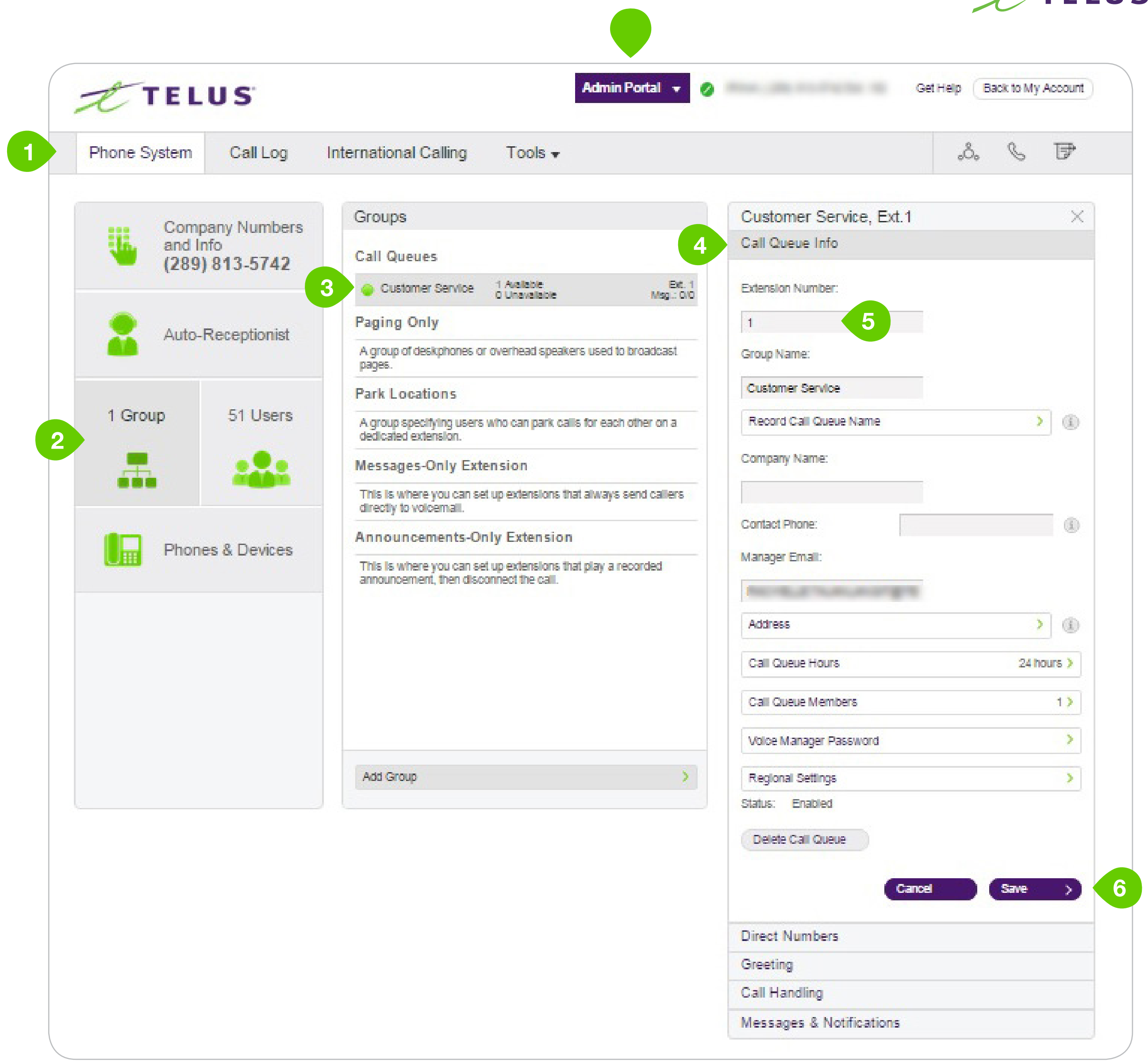
Add a Call Queue Group

1. From the **Admin Portal**, select the P**hone 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**.

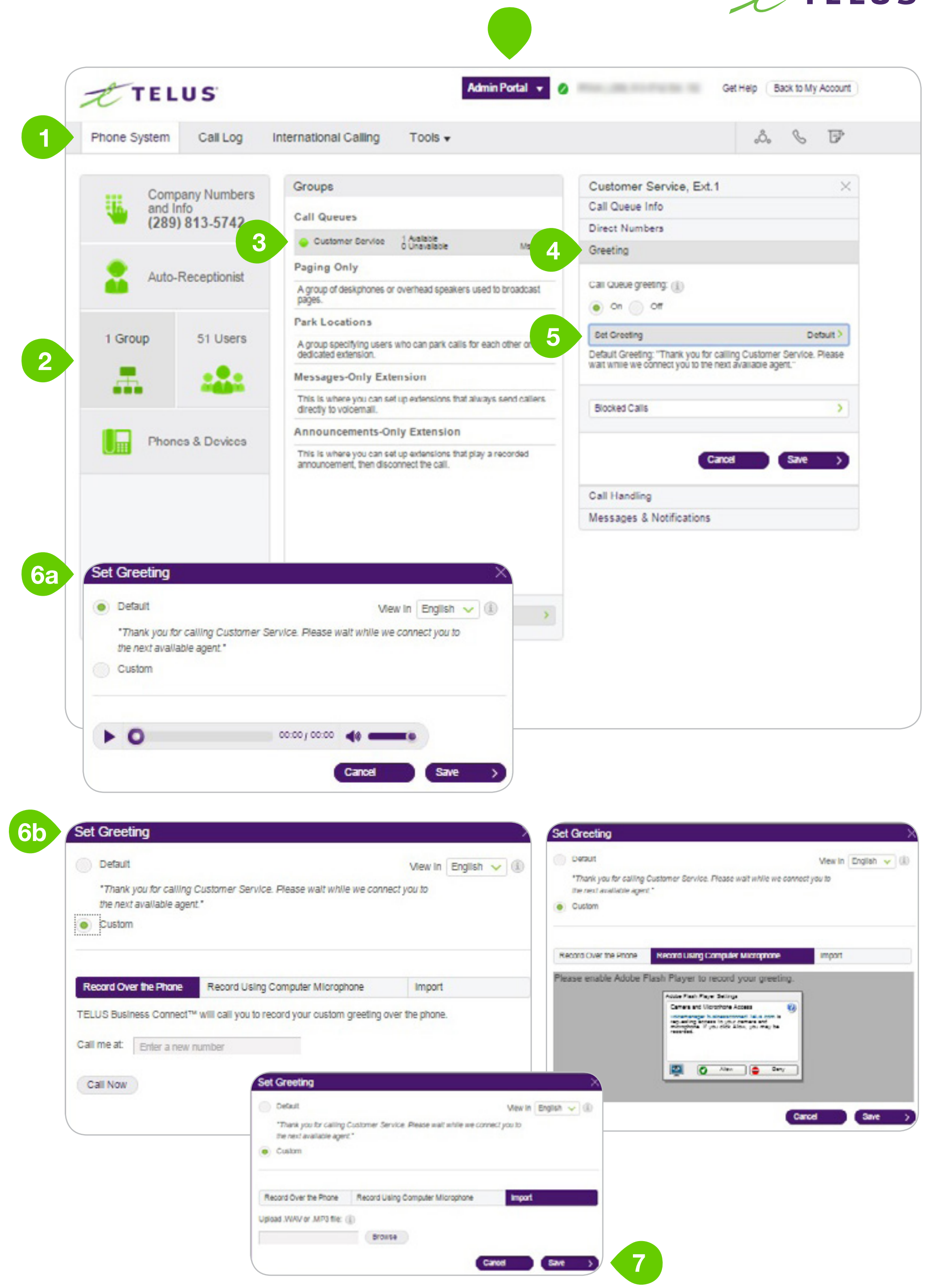
Call Queue Greetings

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.
    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 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.

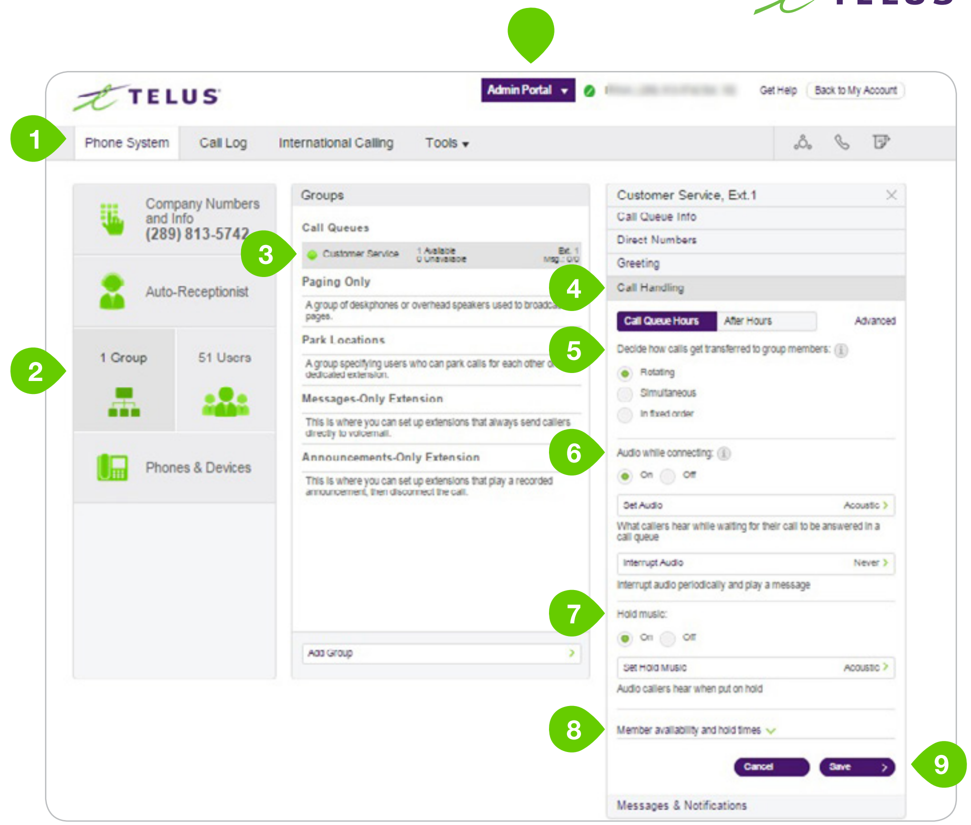


Call Handling

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.



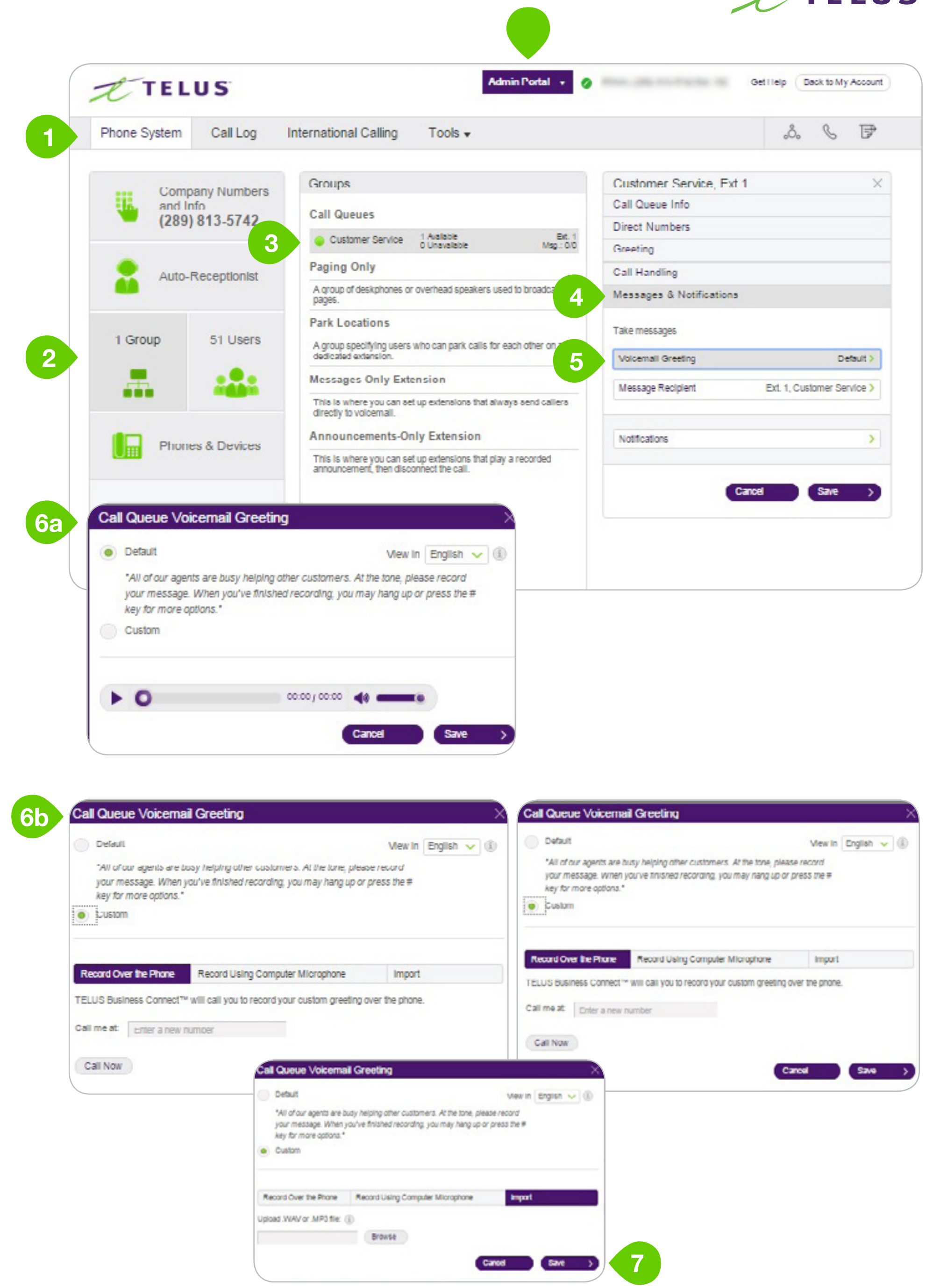
Messages & Notifications

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

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 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 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**.

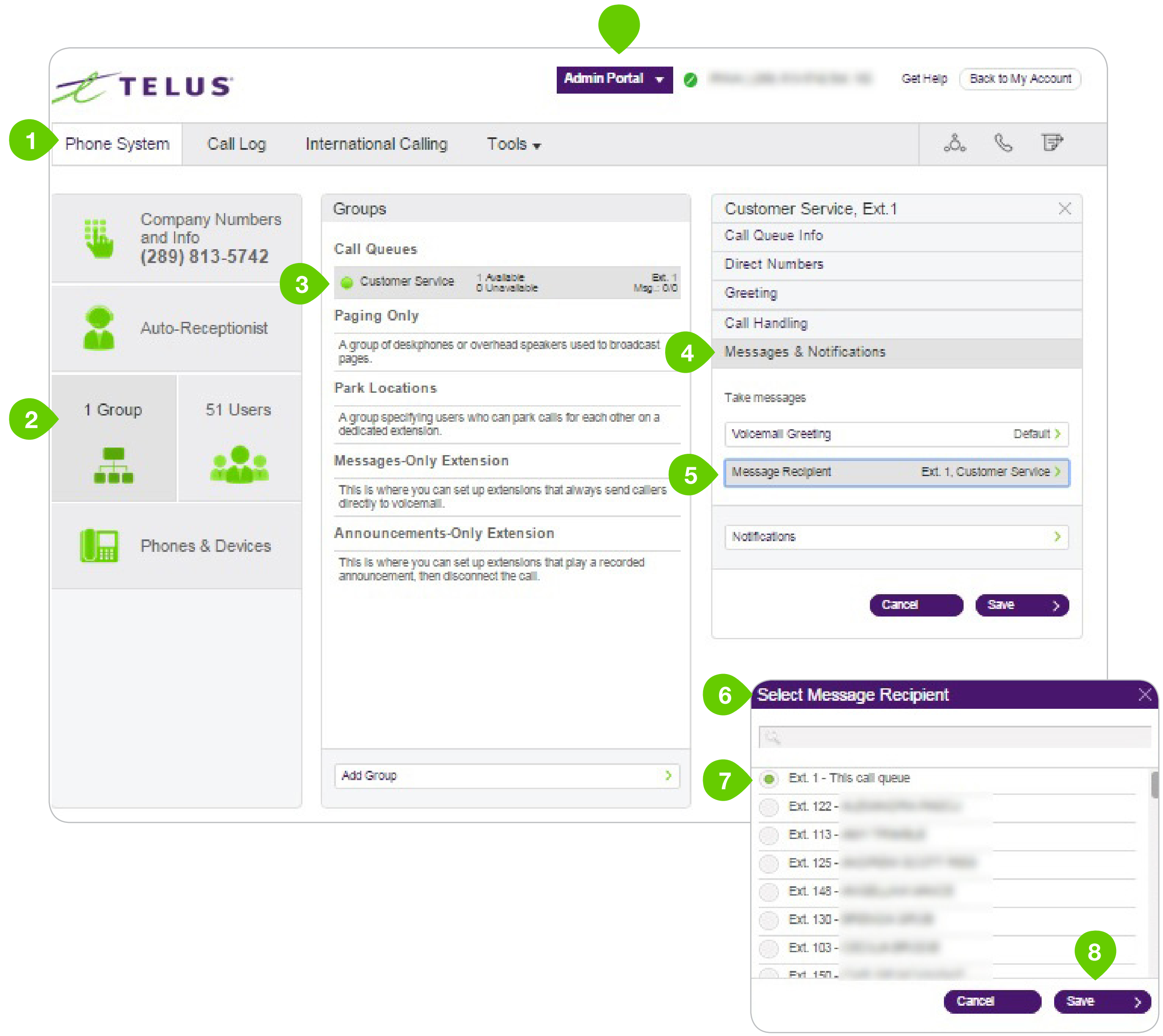
NOTE: If you have set custom Company Hours, follow these steps for both the Company Hours and After Hours tabs.



Message Recipient

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

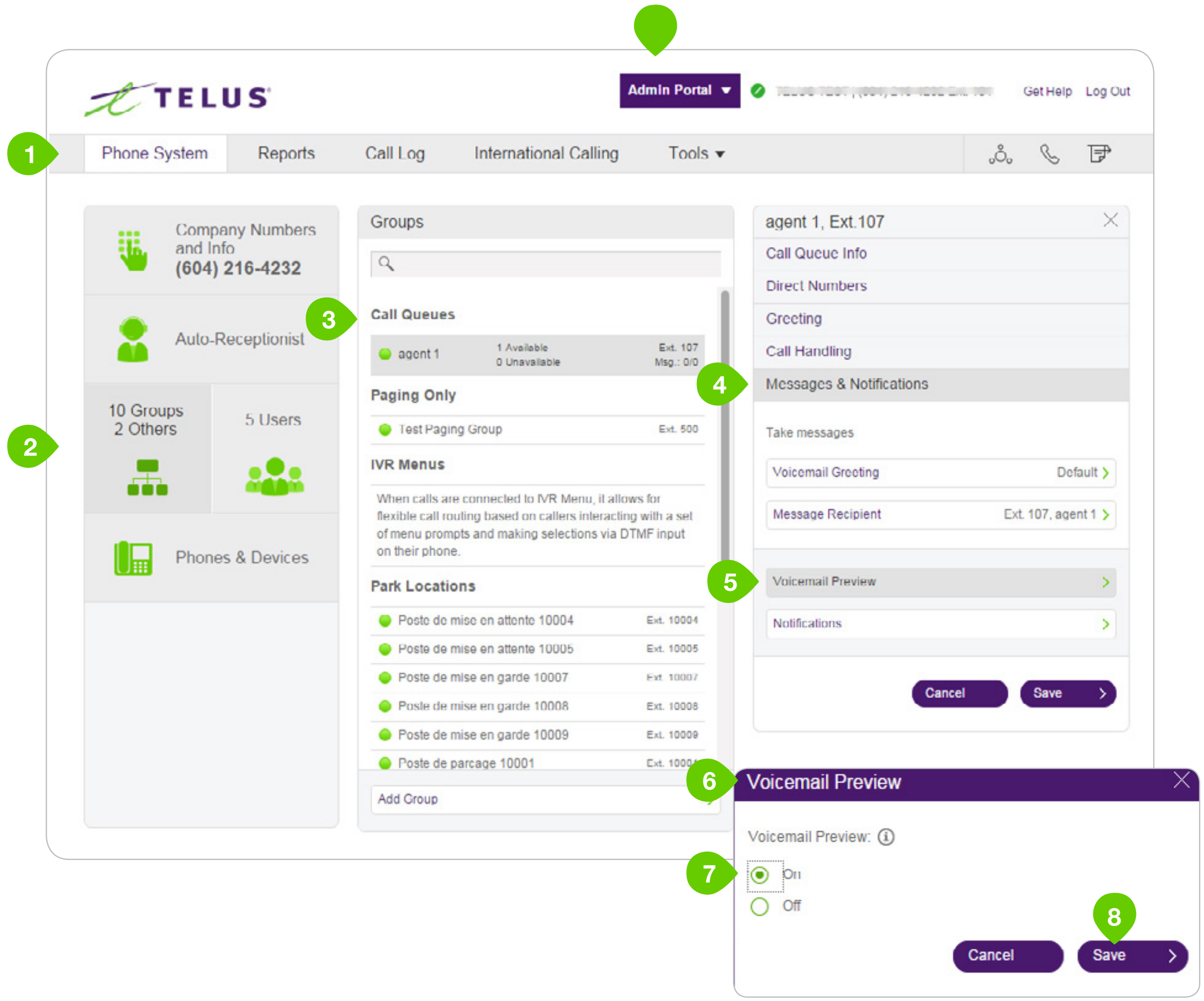
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select a **Call Queue** (Customer Support in this example).
4. Click **Messages and Notifications**.
5. Click **Message Recipient**.
6. A pop-up will appear with a list of members to receive messages left for this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



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**.

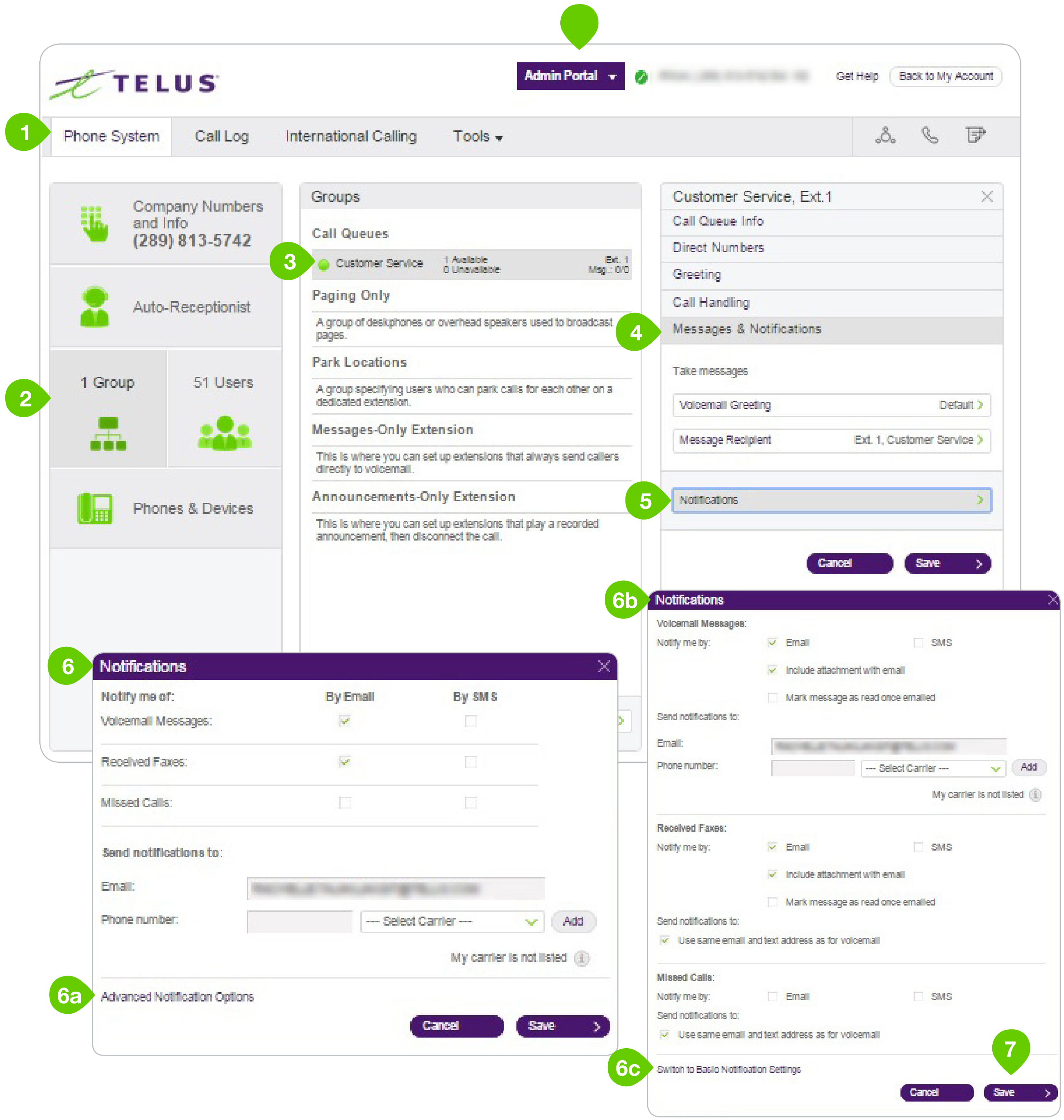


*Available for Premium Plus users only.

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.



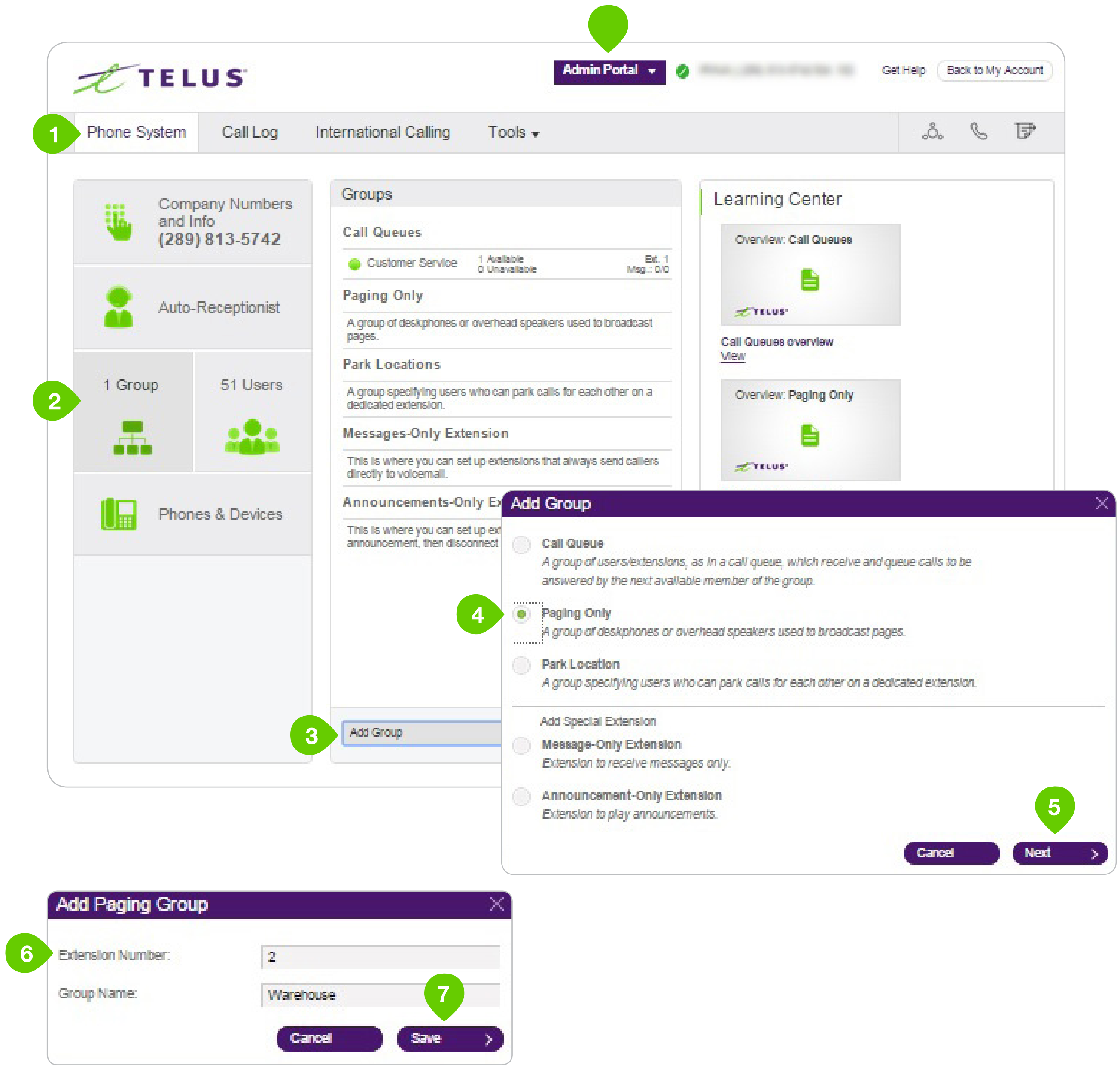
Paging Only

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

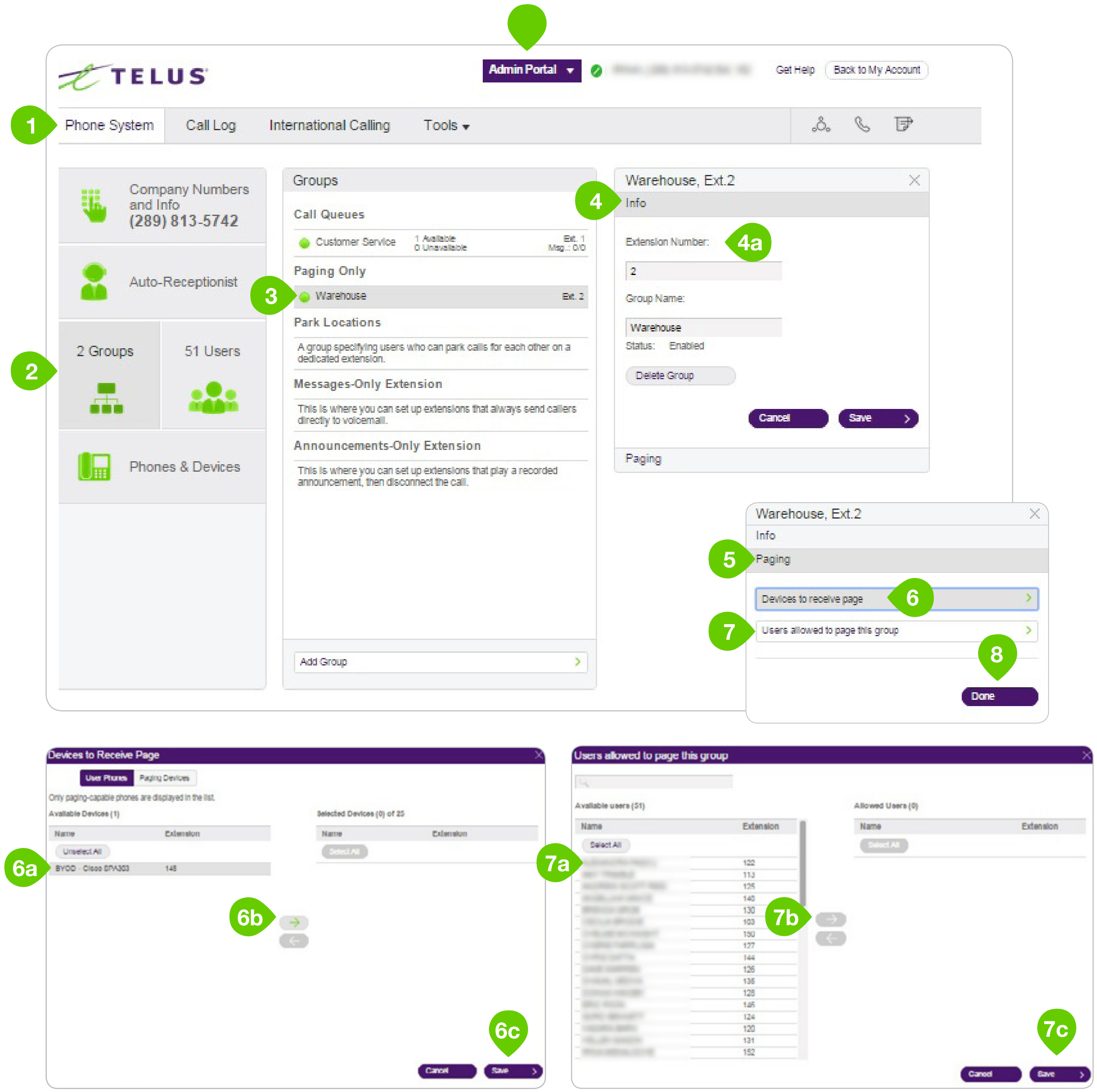
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **Paging Only**.
5. Click Next.
6. Enter the **Extension Number** and **Group Name**.
7. Click **Save**.



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**.



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

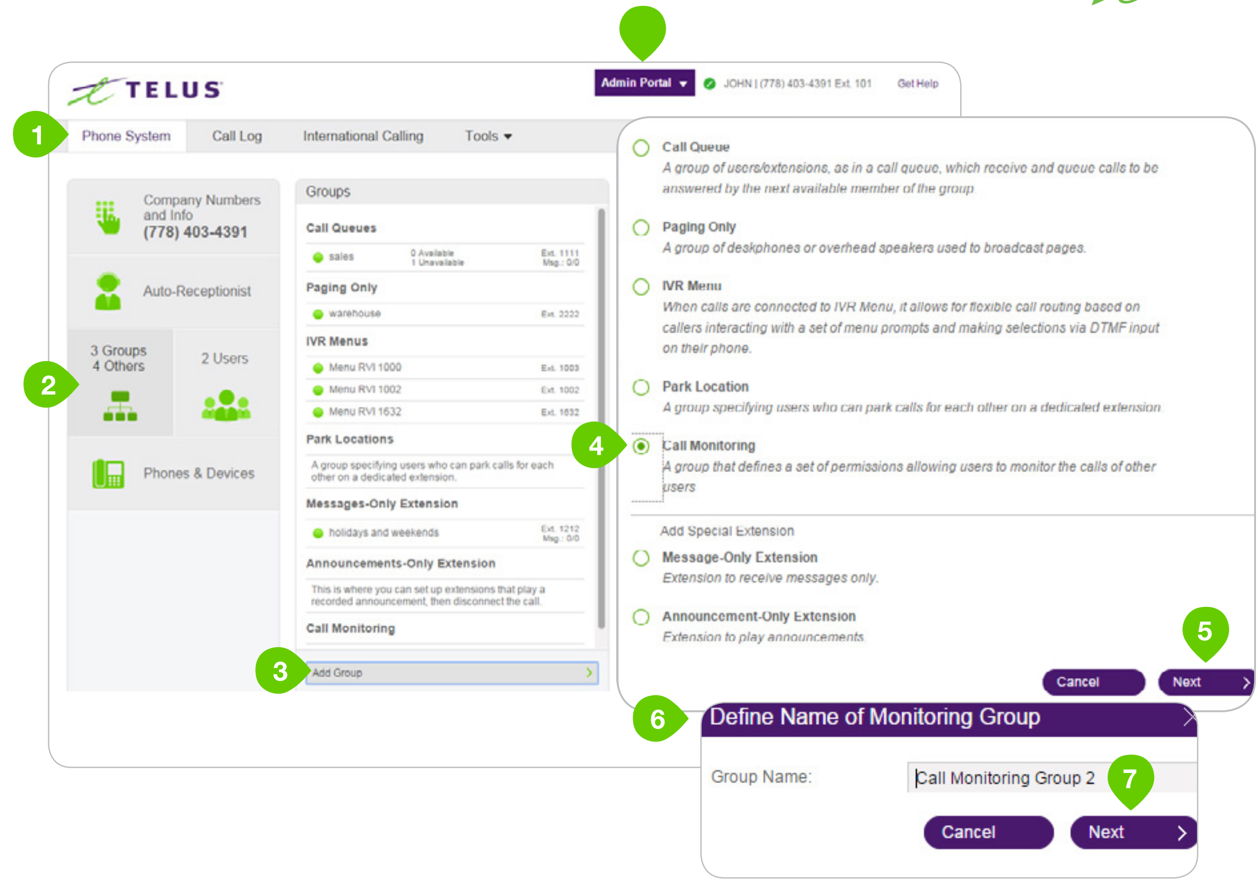
ACTION	DESCRIPTION	EXAMPLE	TOUCH TONE
Monitor	Silently listen in on a call.	Supervisors/QA to monitor performance.	*80
Whisper	Speak only to the employee without the caller on the other end hearing.	Provide supprot to uers to help them handle a call.	*81
Barge	Join the call so all parties can communicate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

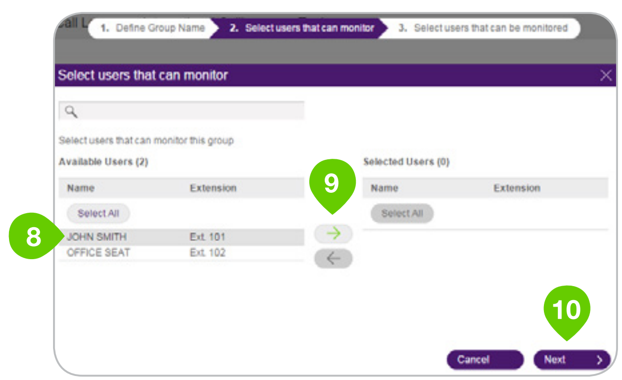
*Available for Premium and Premium Plus users only.

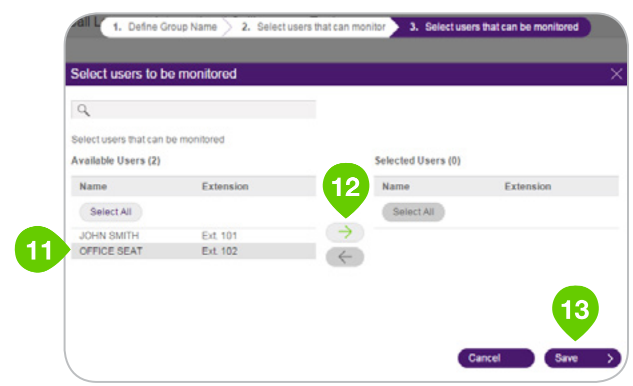
Add a Call Monitoring Group*

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.

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.





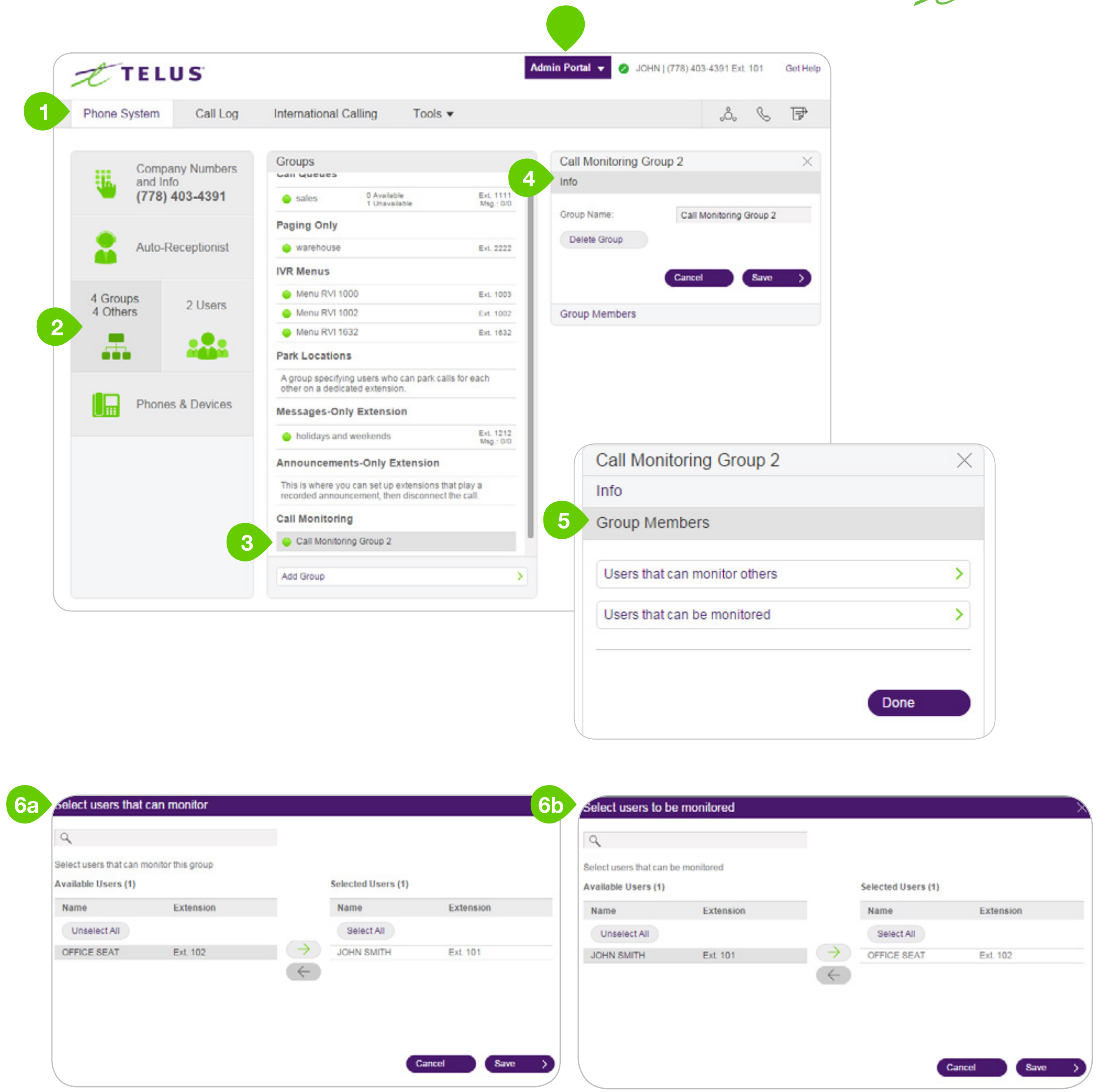


*Available for Premium and Premium Plus users only.

Configure a Call Monitoring Group

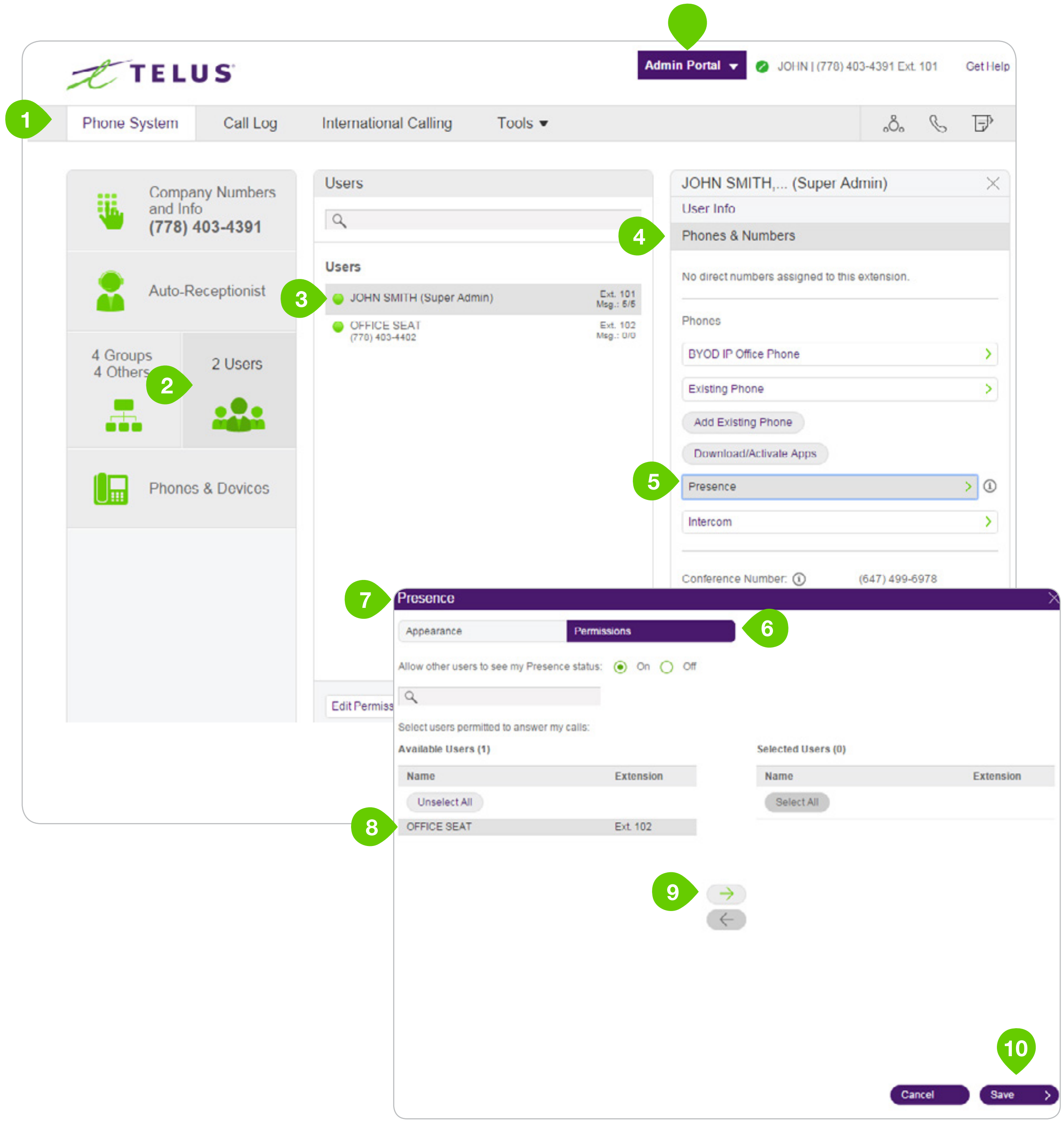
After you create your Call Monitoring Group, you can edit the group members and set up Presence for members of the group.

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**.



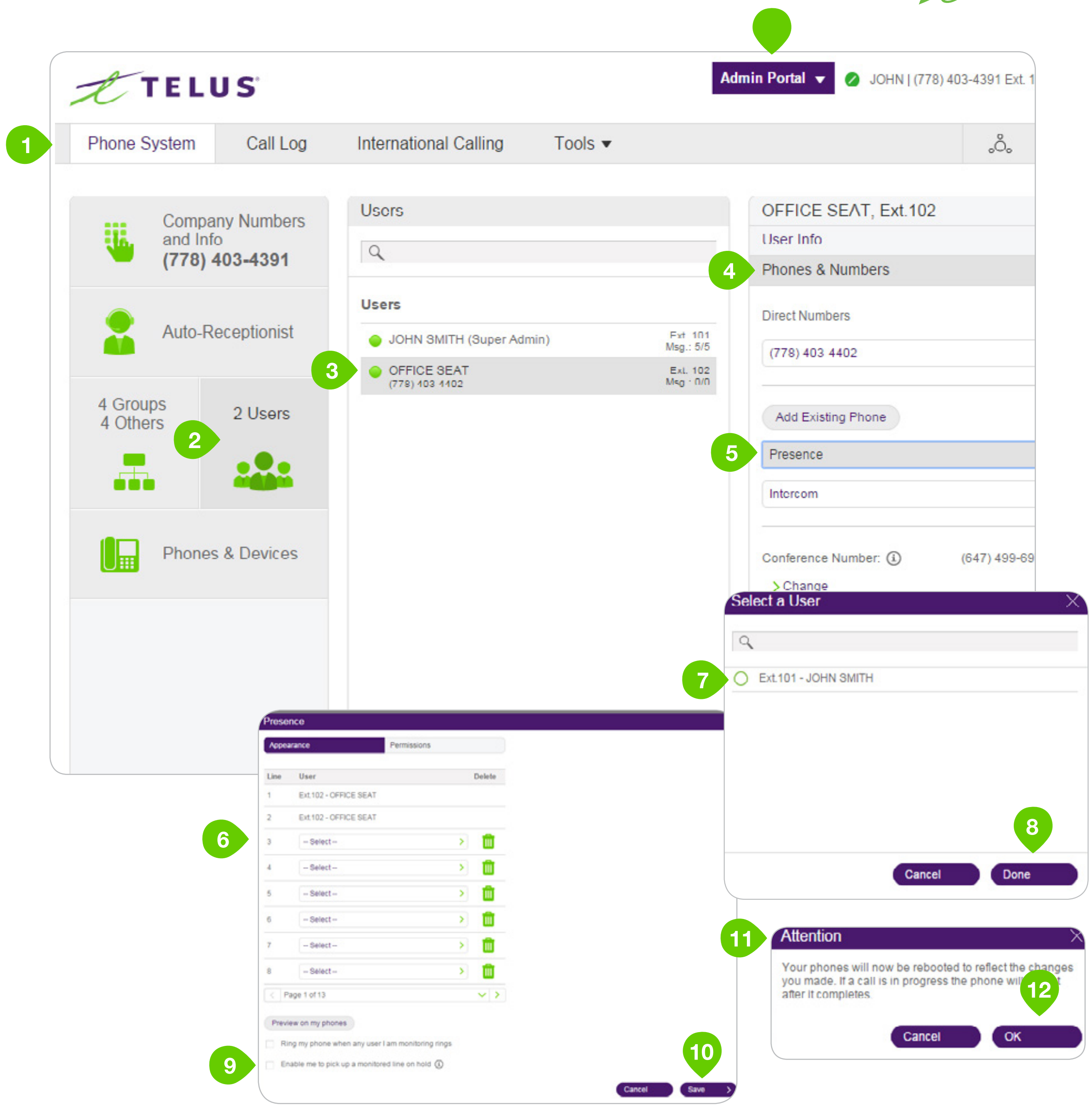
Set up Presence for Users that can be monitored by others

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**.



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.

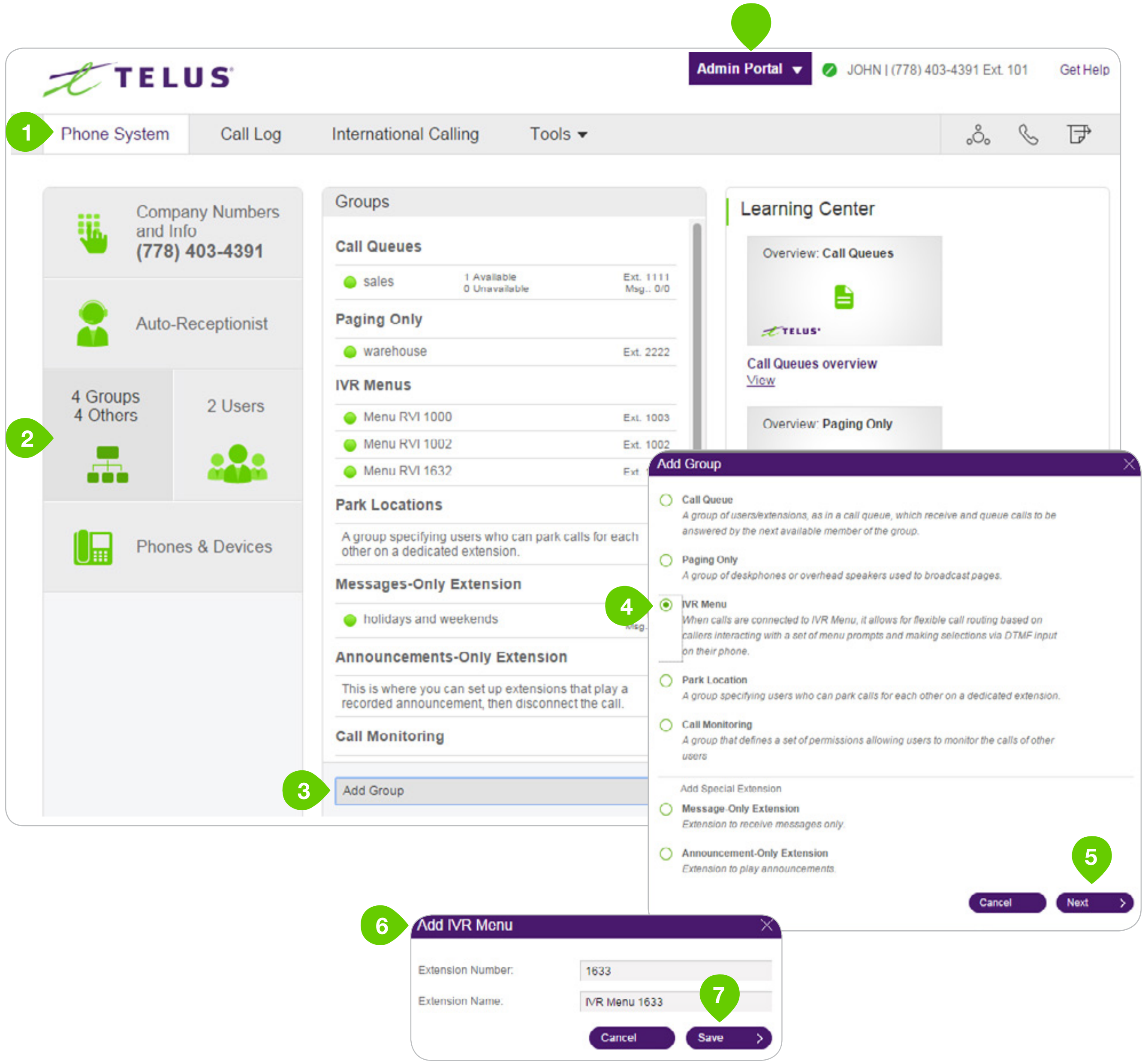


IVR Menus*

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**.



*Available for Premium and Premium Plus users only.

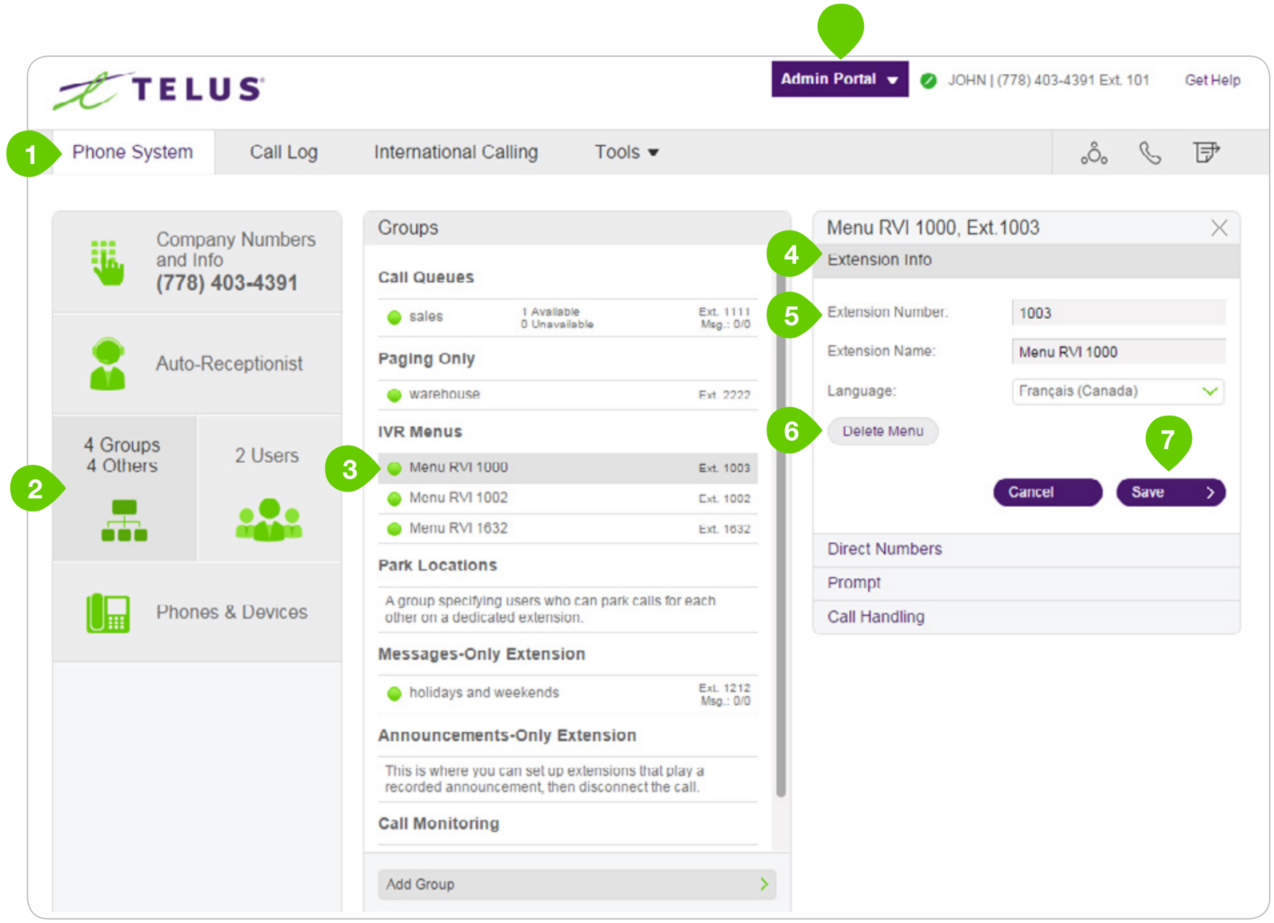
Configure an IVR Menu

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**.

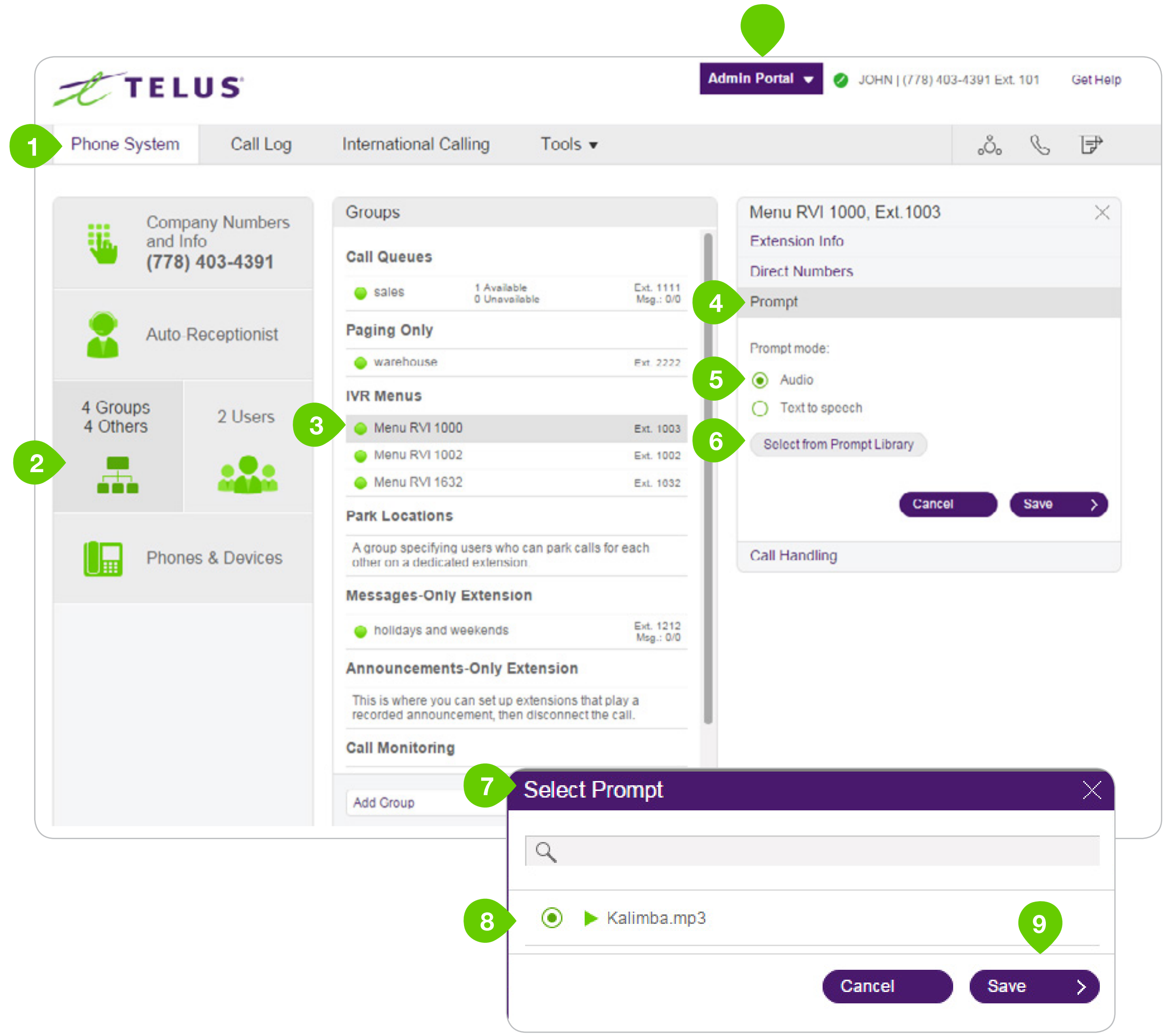


Select Prompt Mode: Audio

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.



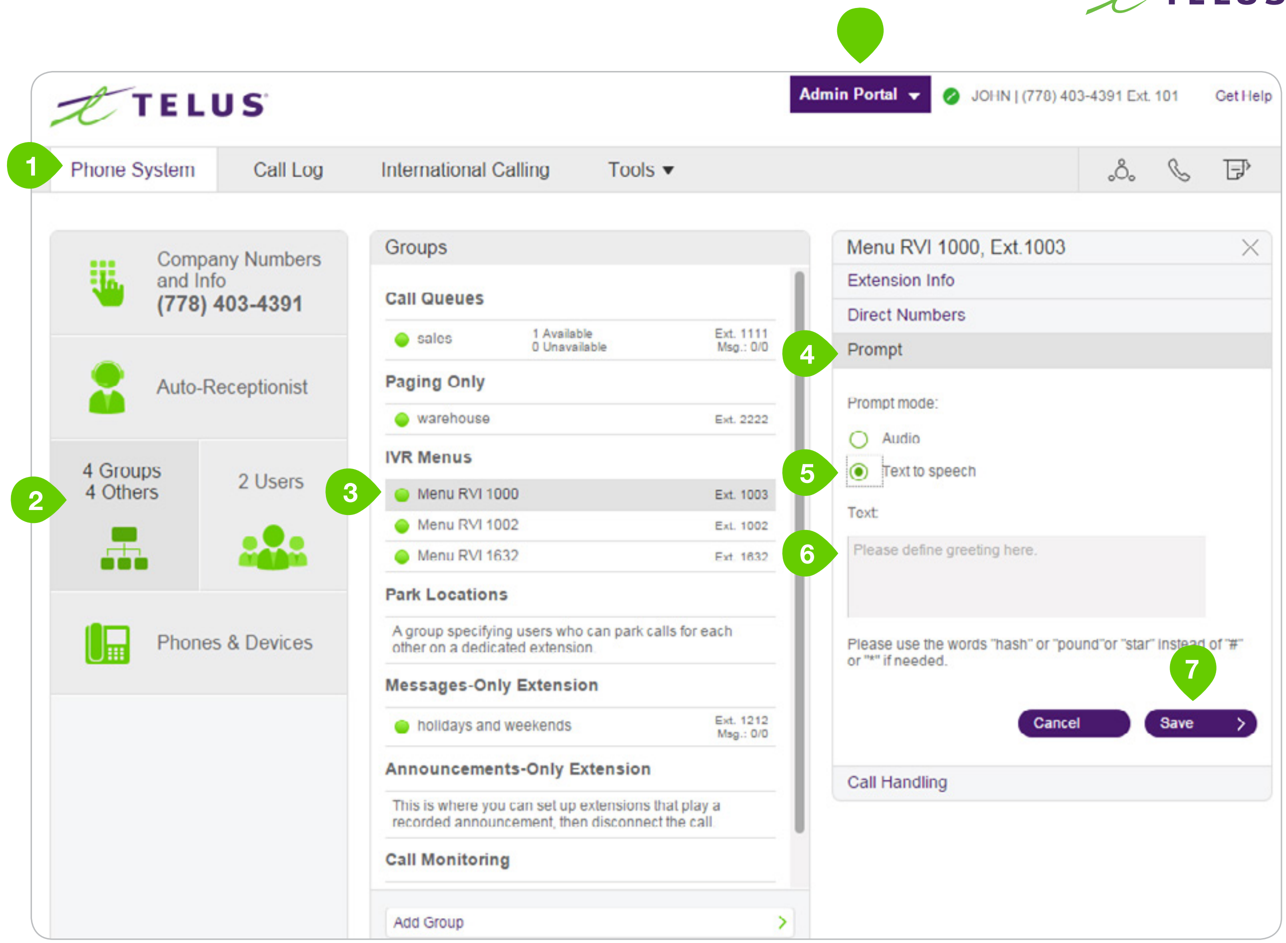
Select Prompt Mode: Text-to-Speech

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.

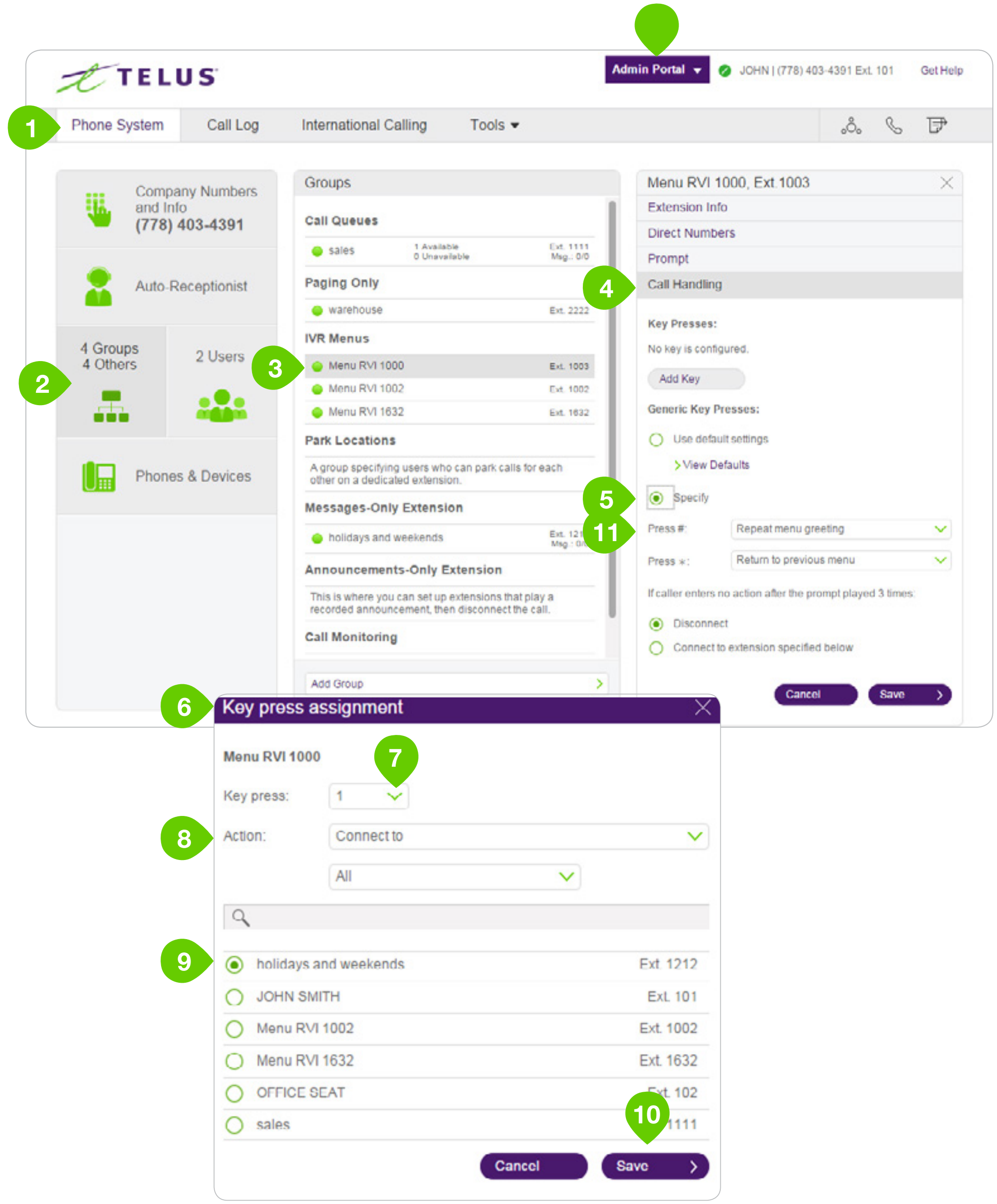


Call Handling

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.



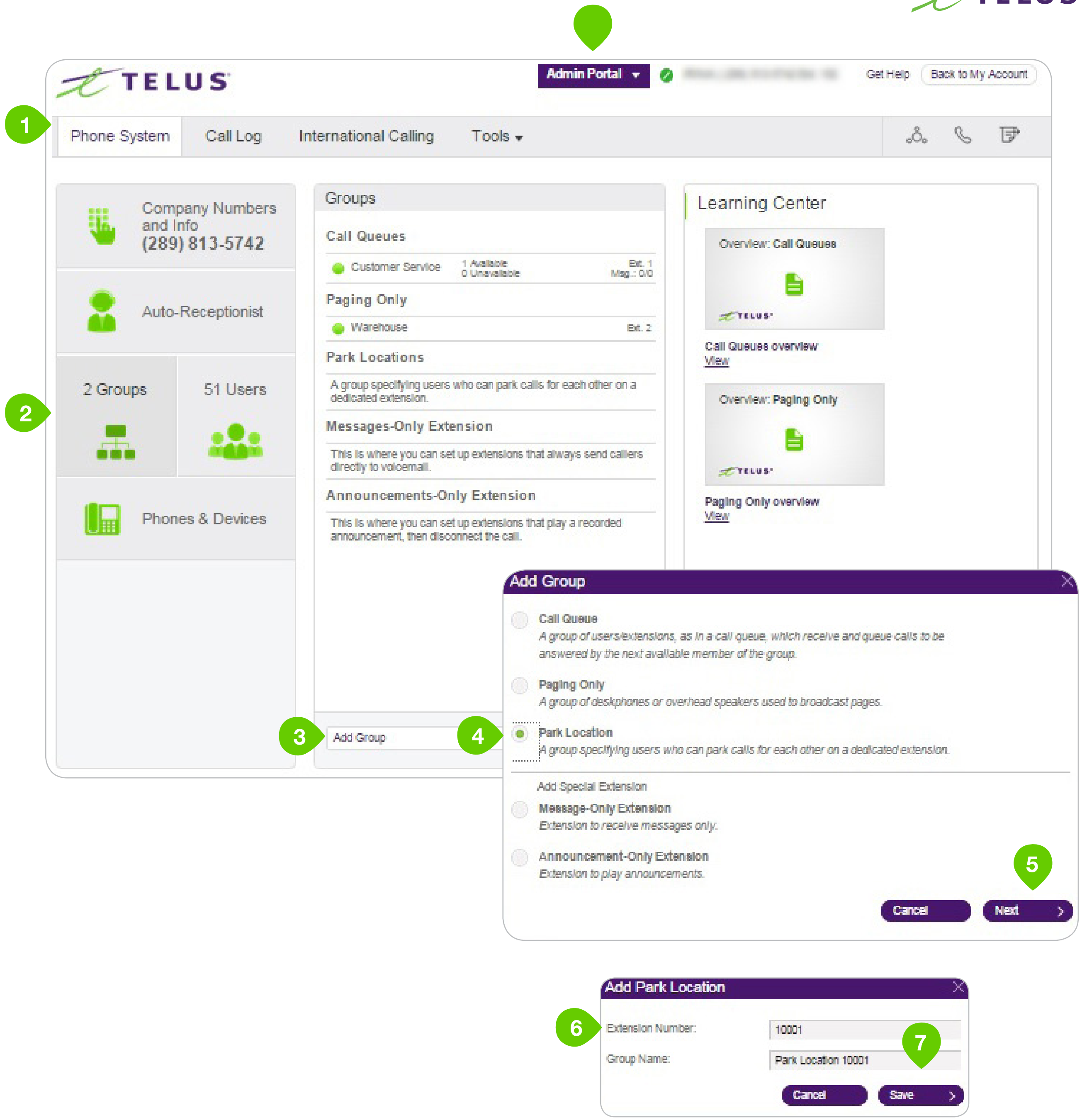
Park Locations

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.



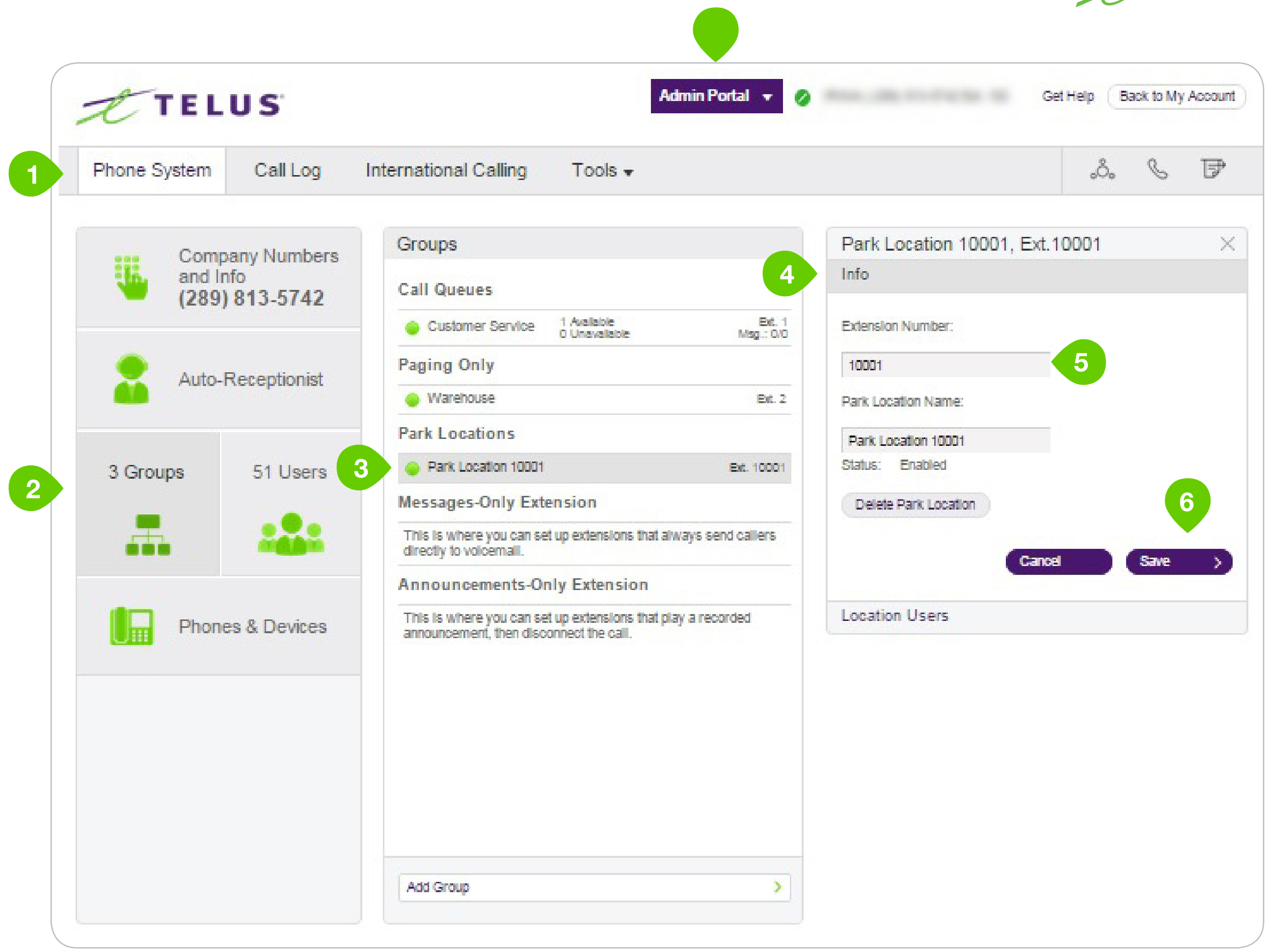
Configure a Park Location

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:

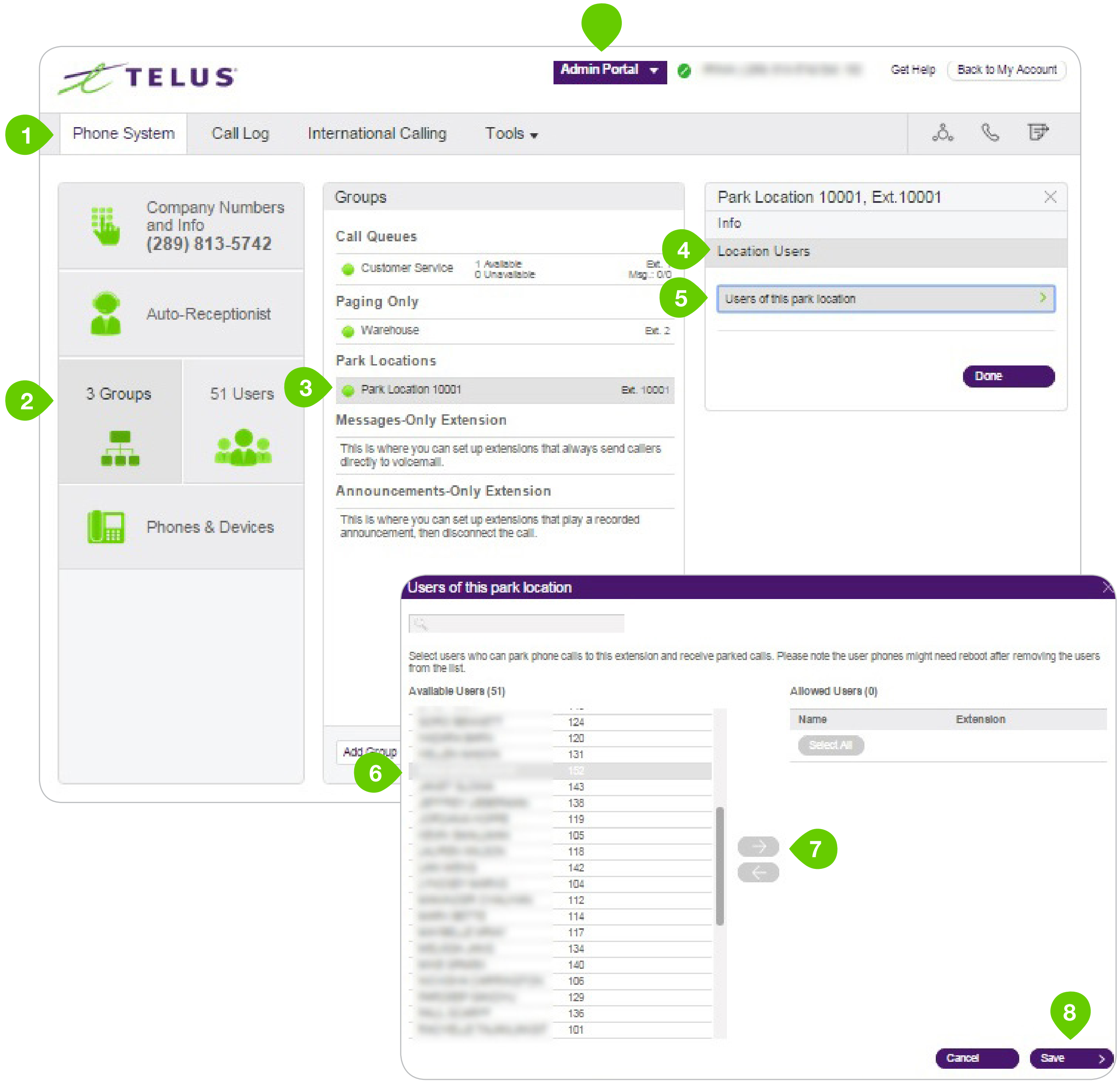
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Select an existing **Park Location** (Park Location 1001 in this example).
4. Click **Info**.
5. Edit the **Extension Number** and **Park Location**.
6. Click **Save**.



Users

To add or remove users from a Park Location:

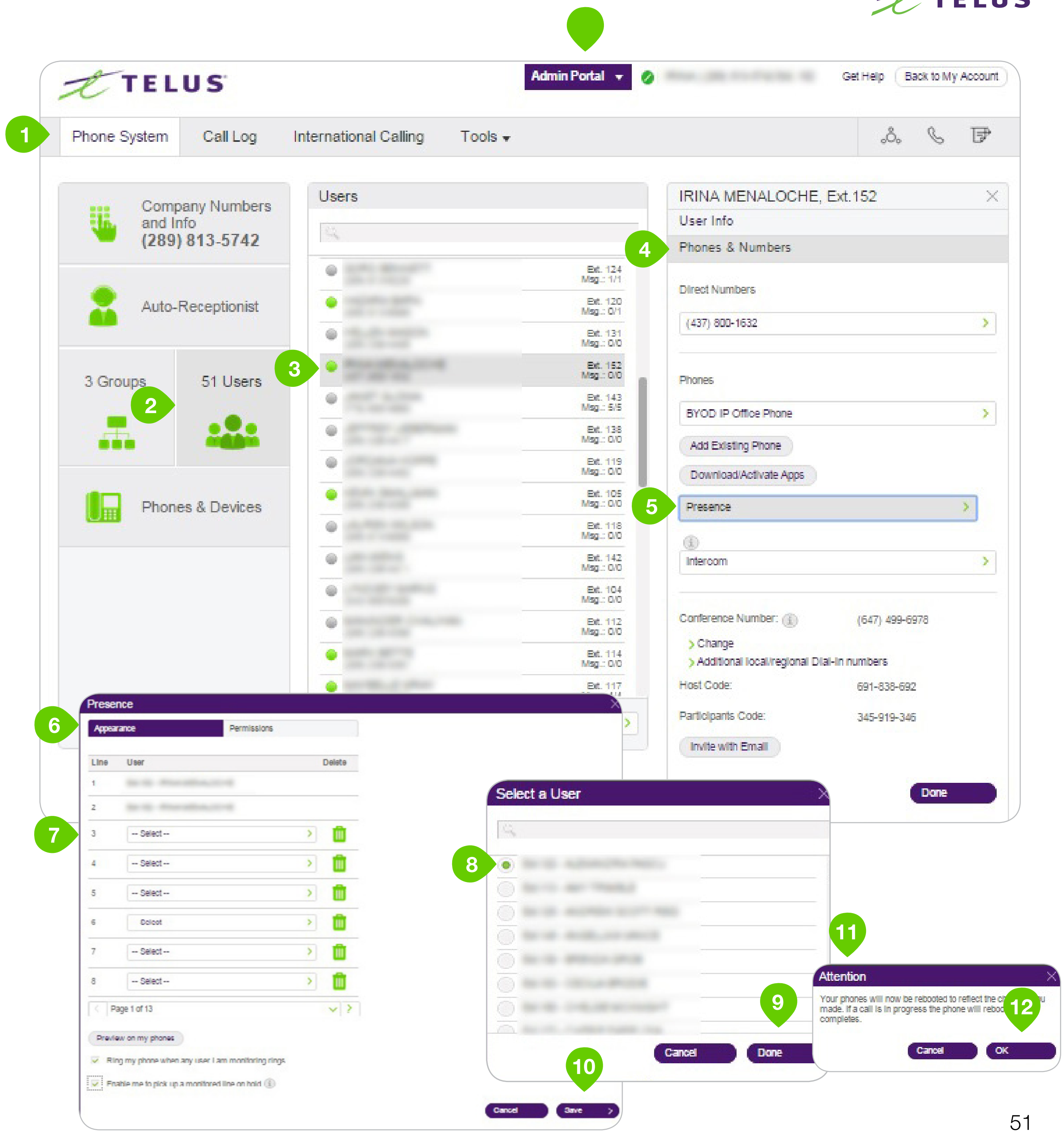
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Select an existing **Park Location** (Park Location 1001 in this example).
4. Click **Location Users**.
5. Click **Users** of this park location.
6. Select users you'd like to add to the group from the right column.
7. 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**.



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.

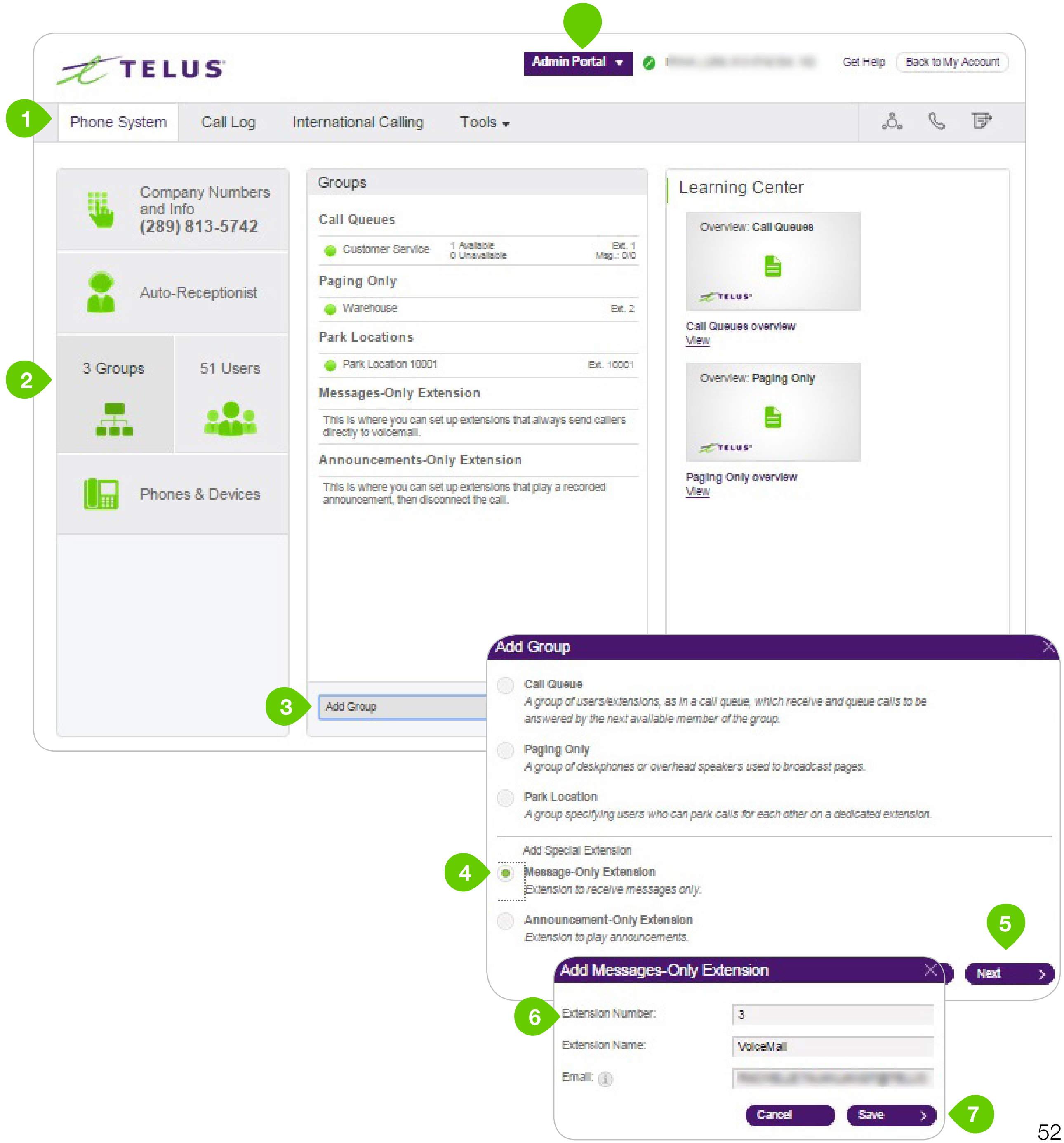


Message-Only Extensions

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**.



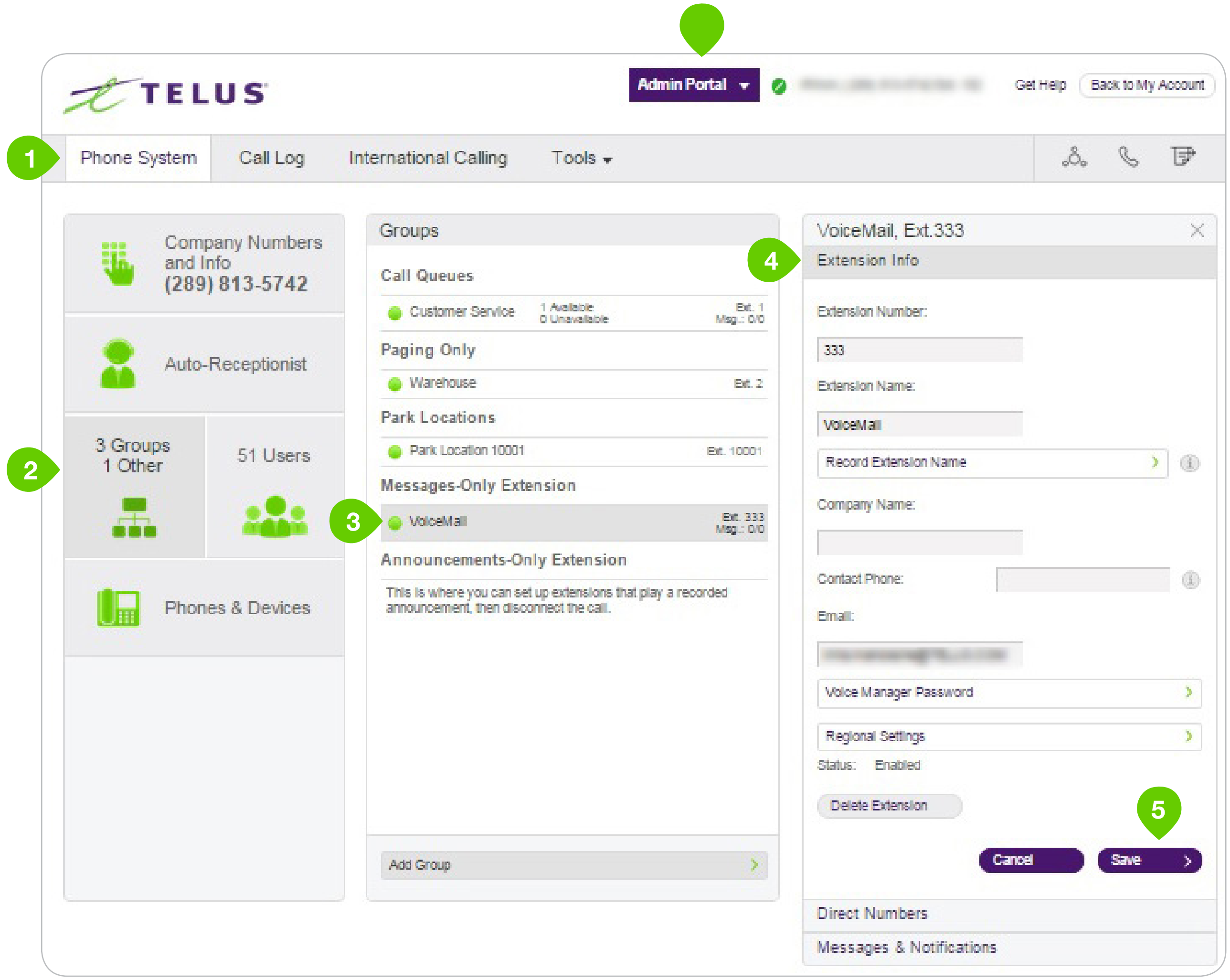
Configure a Message-Only Extension

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**.

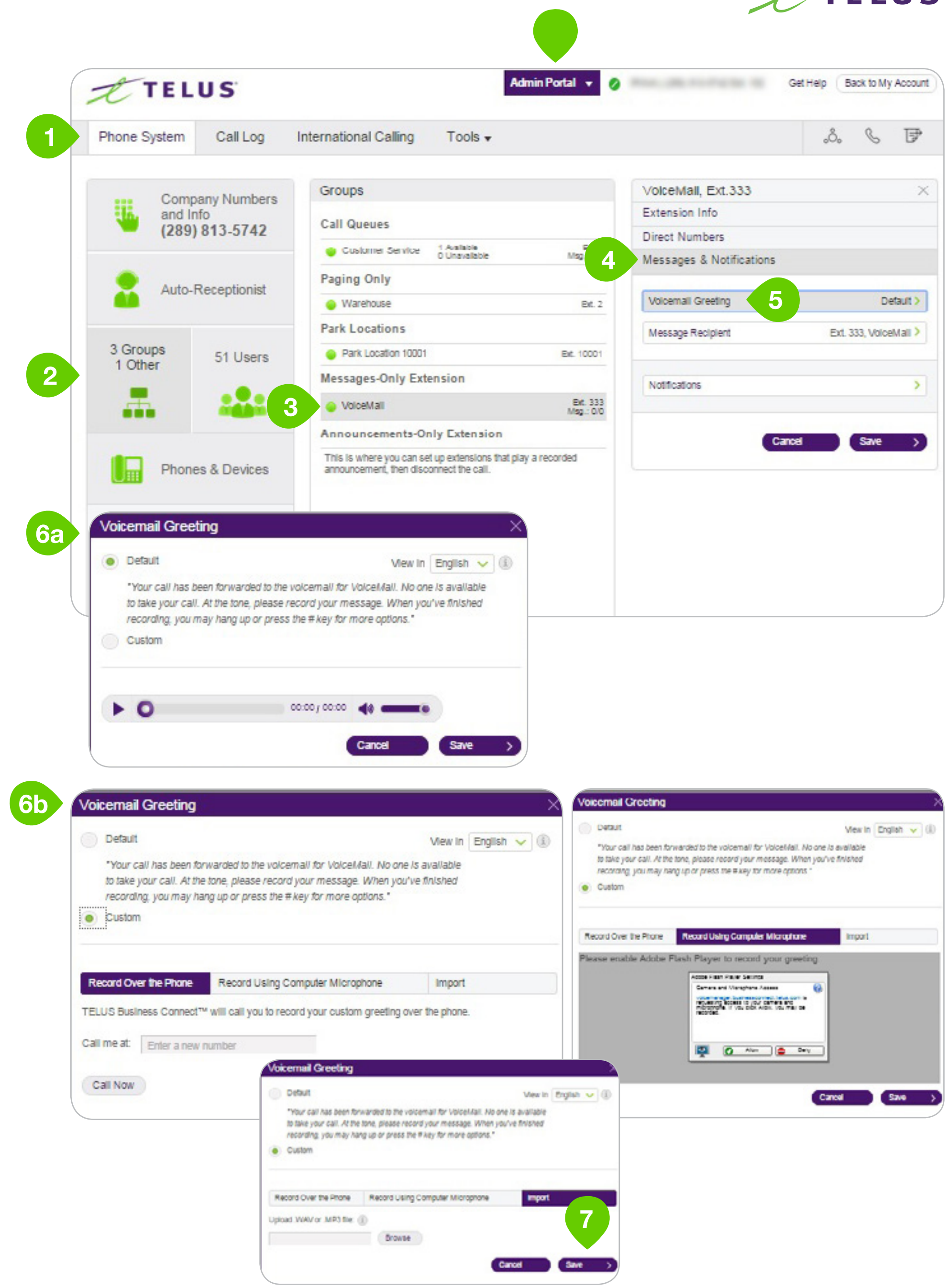


Messages & Notifications

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

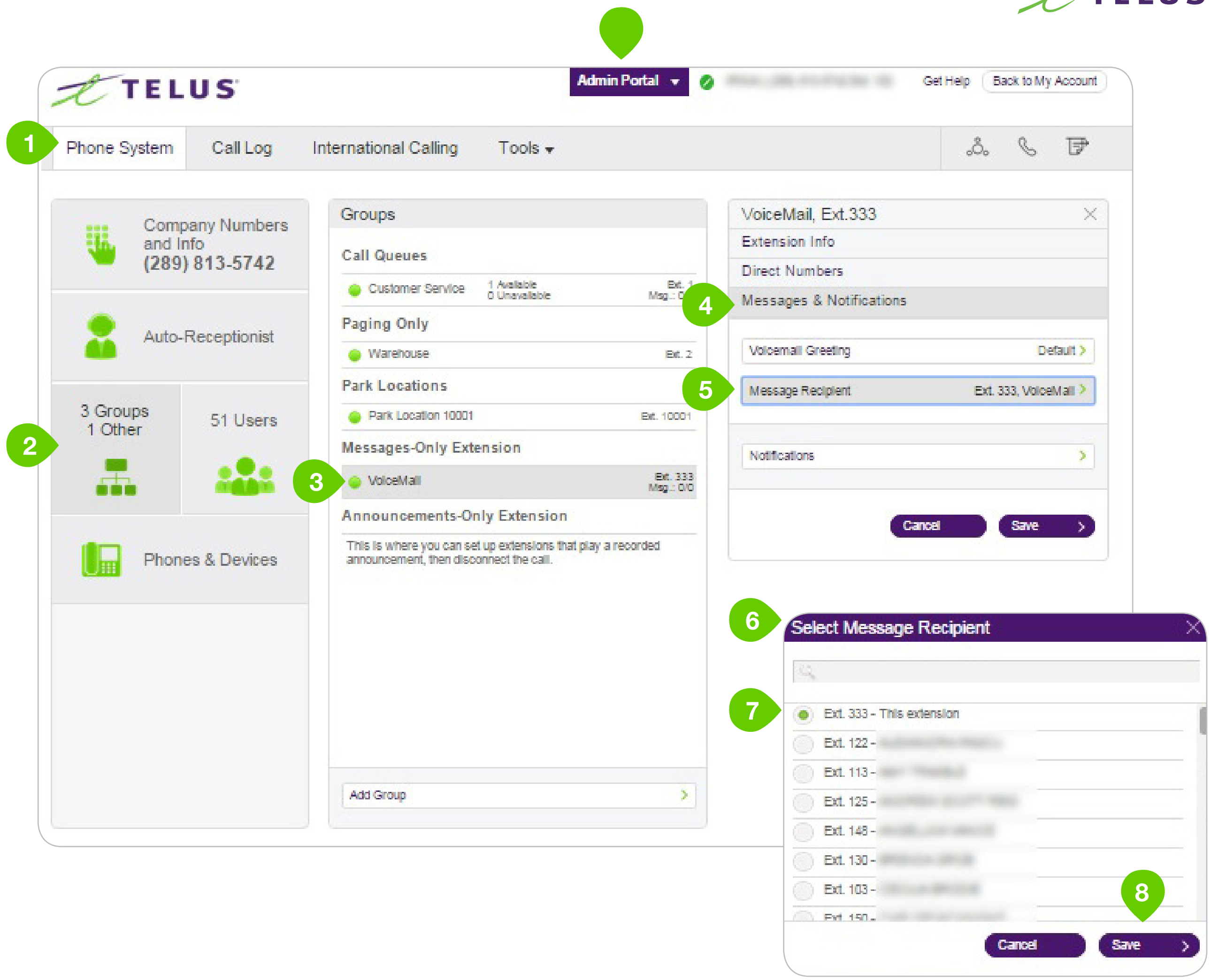
Set a Voicemail Greeting

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 V**oicemail 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

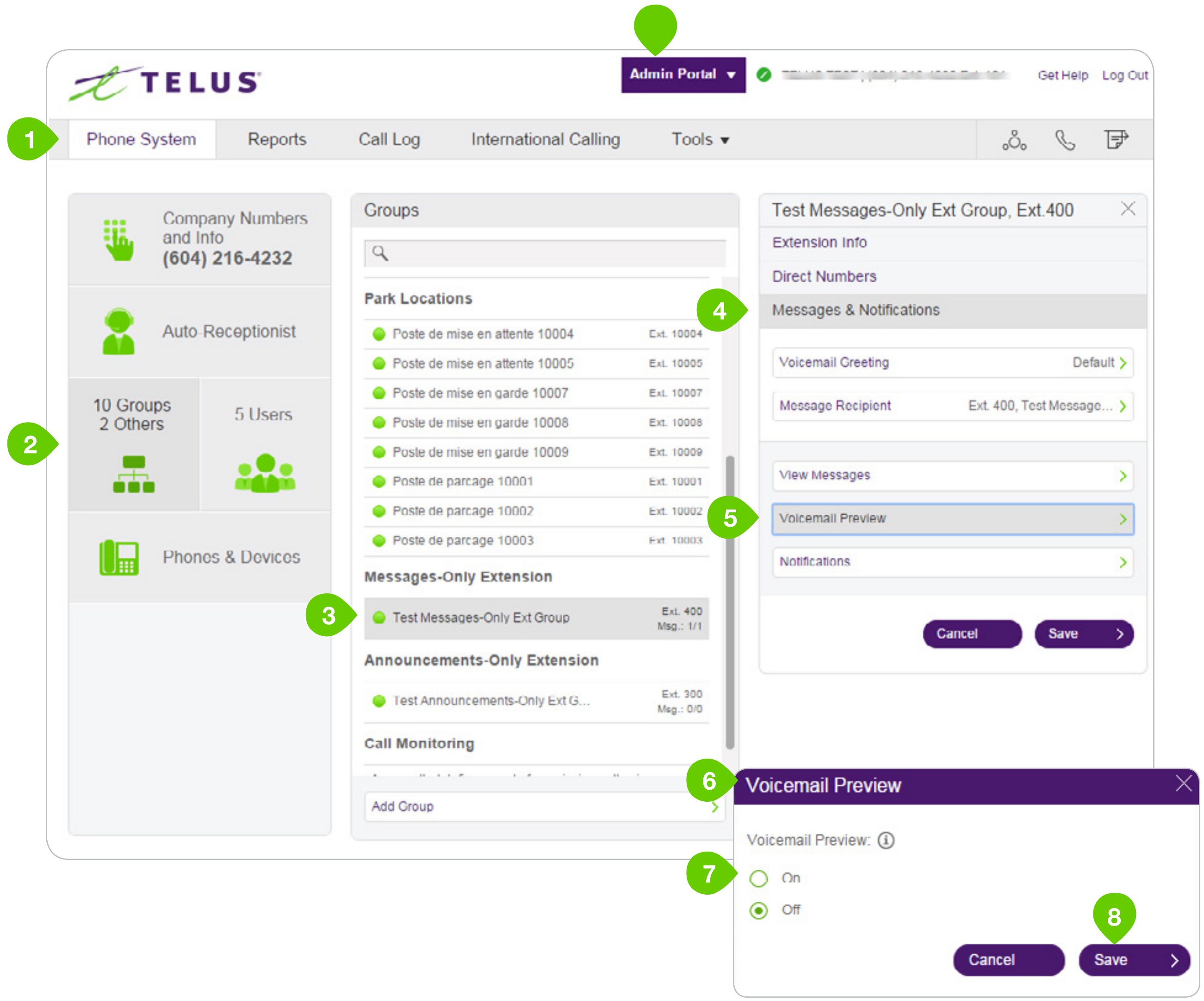
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select an existing **Message-Only Extension** (Voicemail in this example).
4. Click **Messages & Notifications**.
5. Click **Message Recipient**.
6. A pop-up will appear with a list of recipients.
7. Select the radio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



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**.

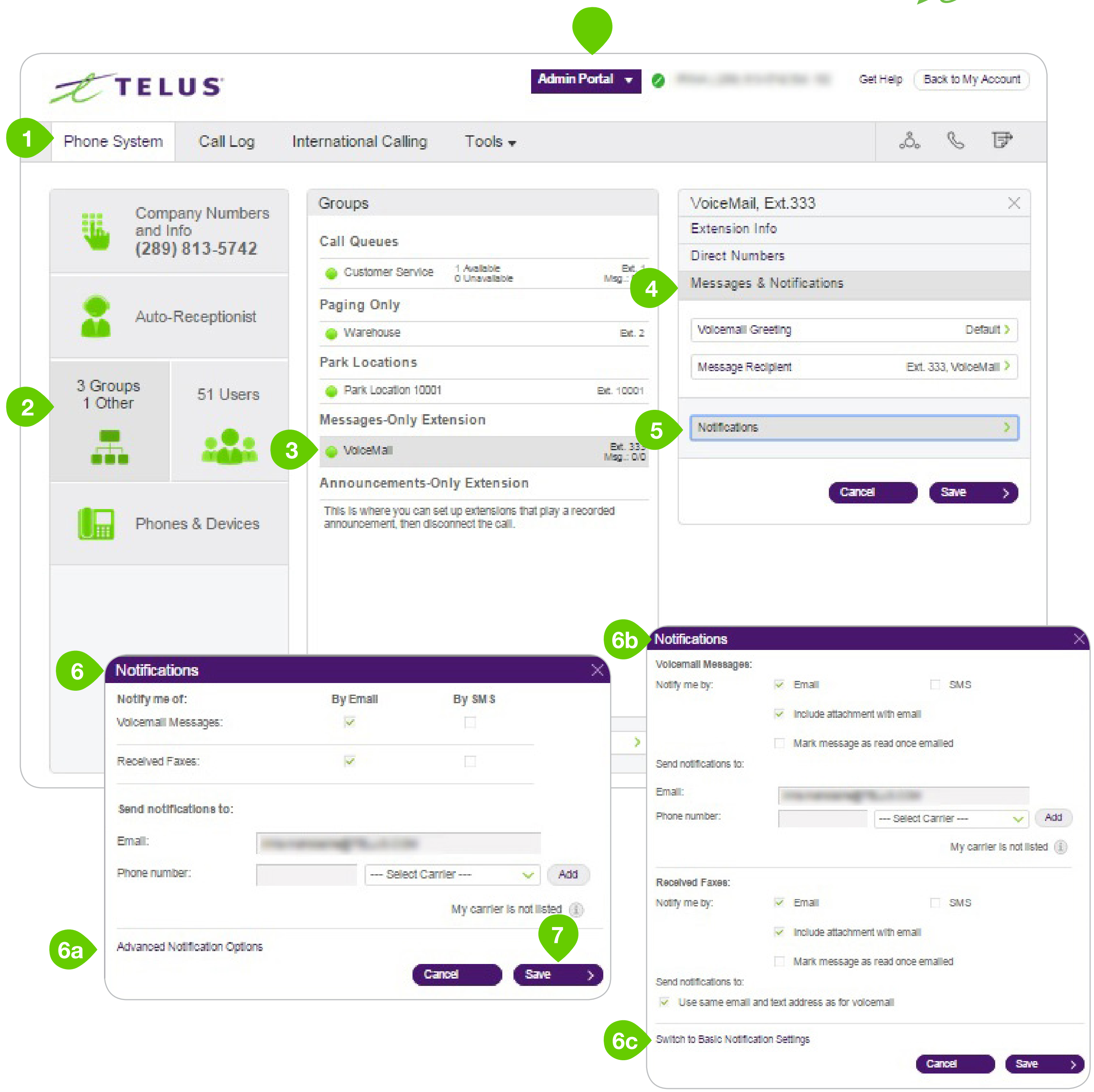


*Available for Premium Plus users only.

Notifications

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

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 **Notifications**.
6. A pop-up will appear with notification options. 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**.

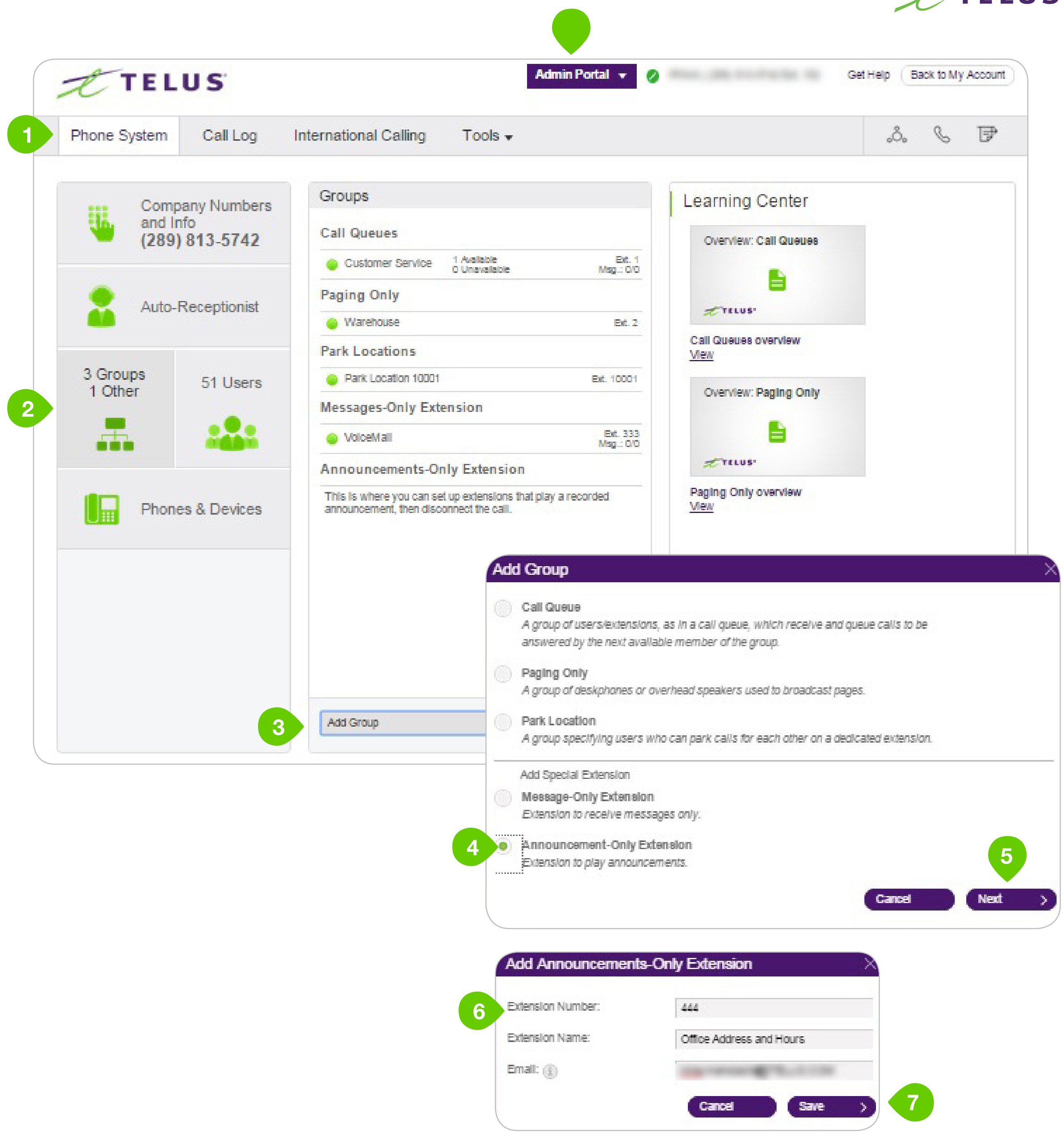


Announcements-Only Extensions

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

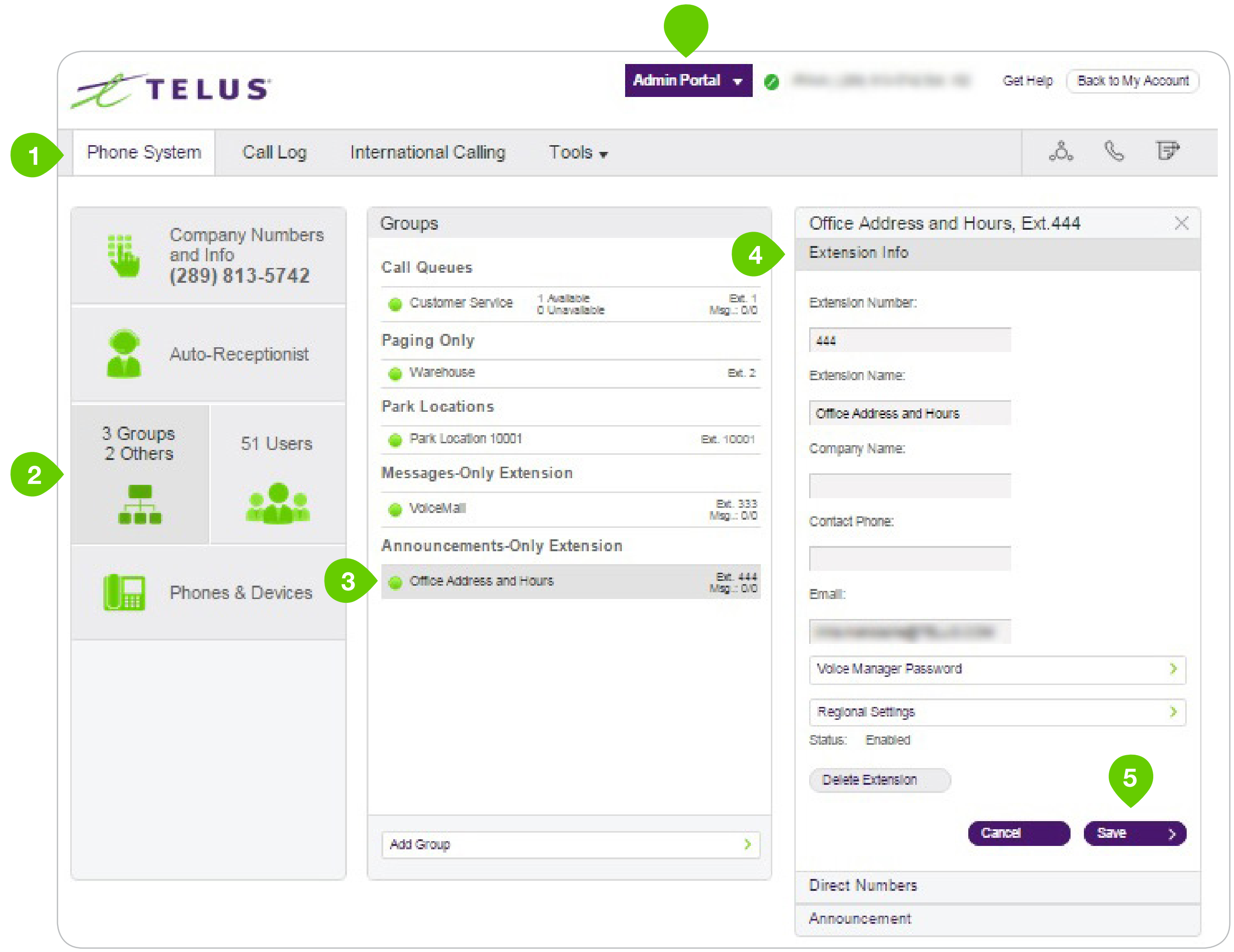
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Add Group**.
4. Select the radio button next to **Announcement-Only Extension**.
5. Click **Next**.
6. Enter an **Extension Number**, **Extension Name**, and **Email**.
7. Click **Save**.



Extension Info

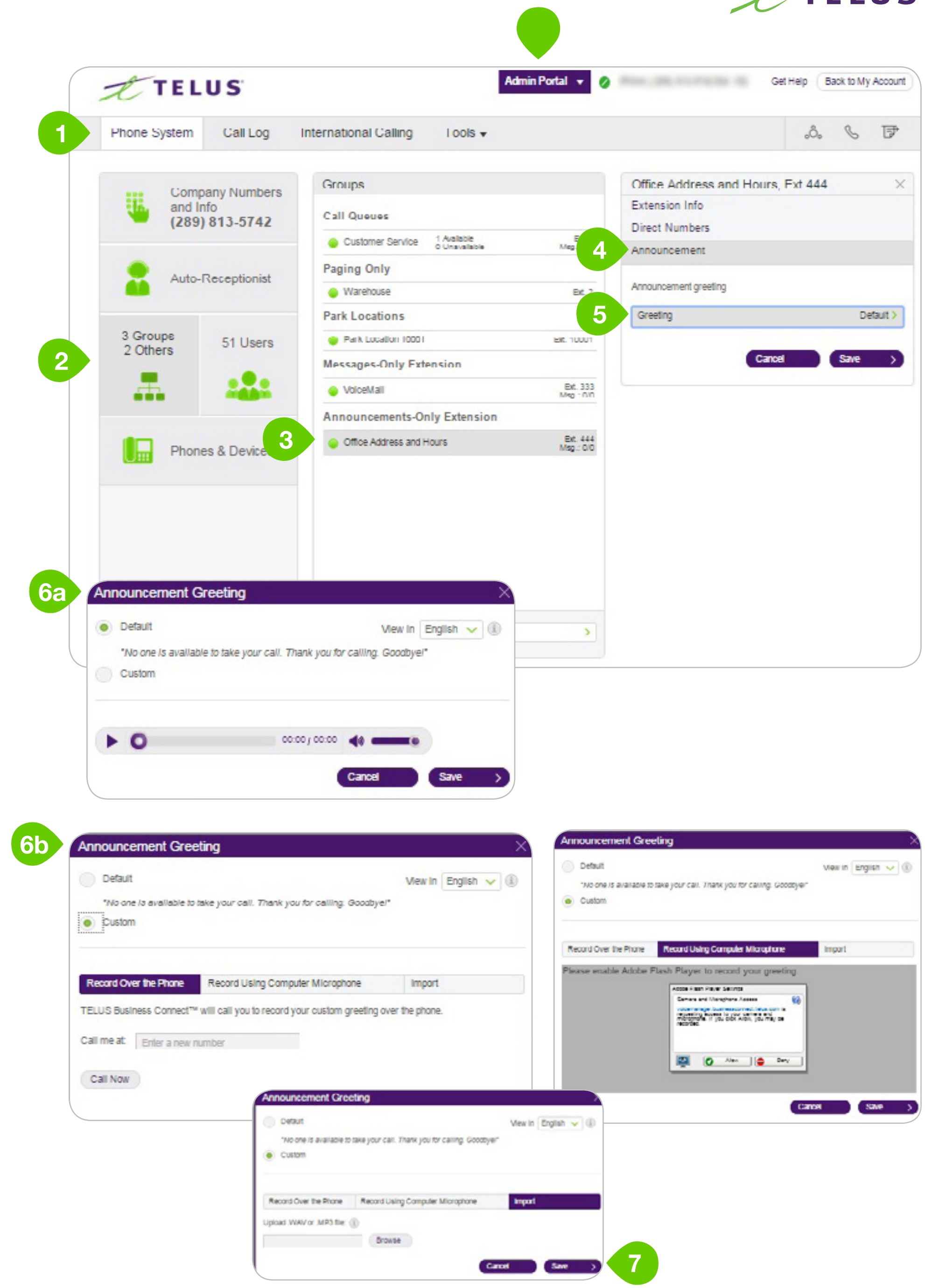
Edit your extension number, name, and delete your menu.

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**.



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**.



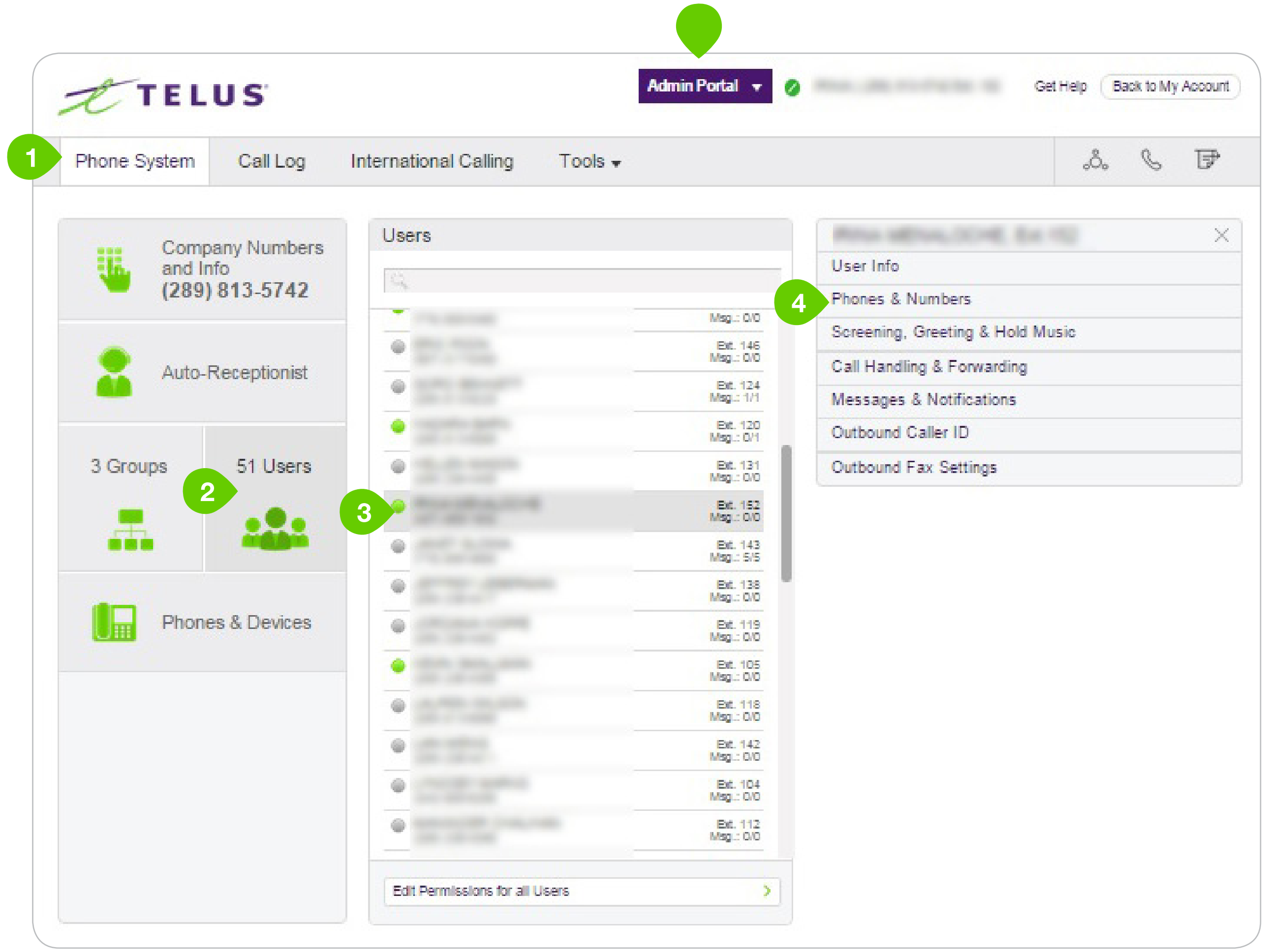
Users

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.

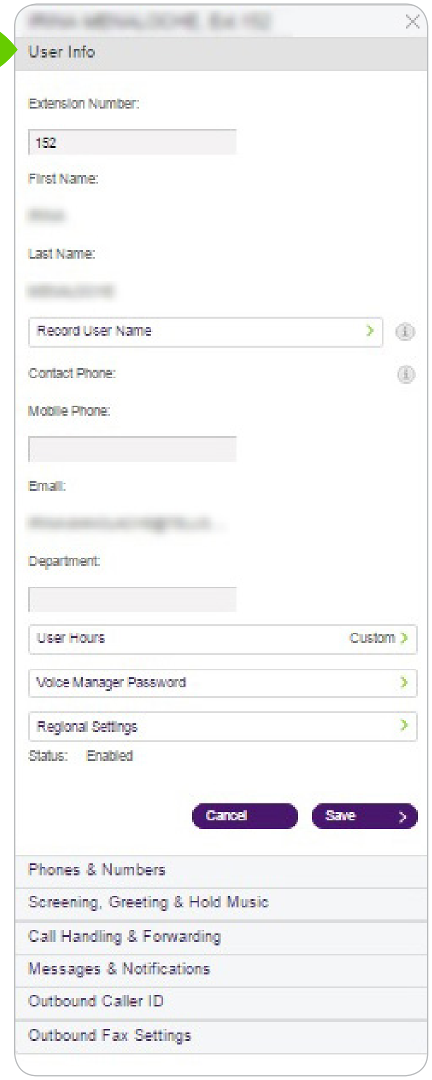


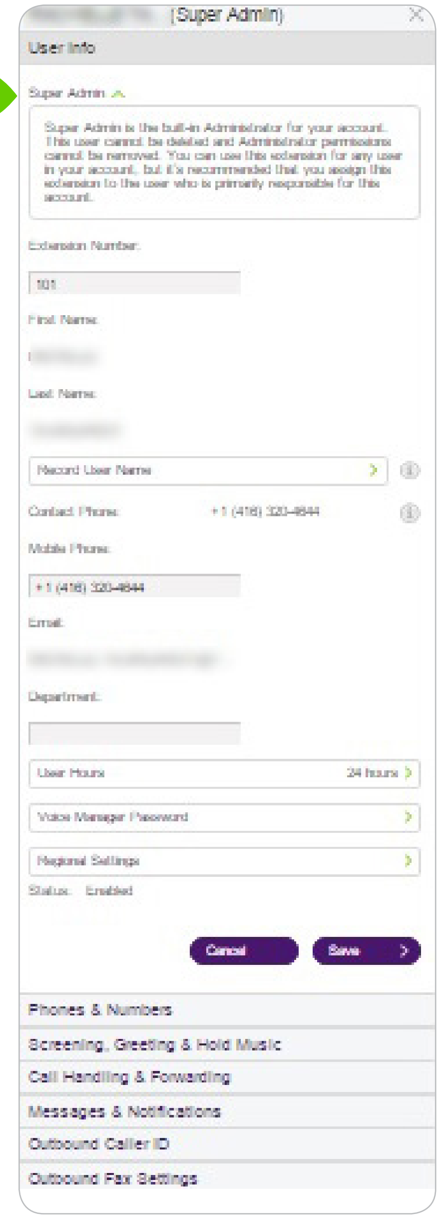
User Info

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.



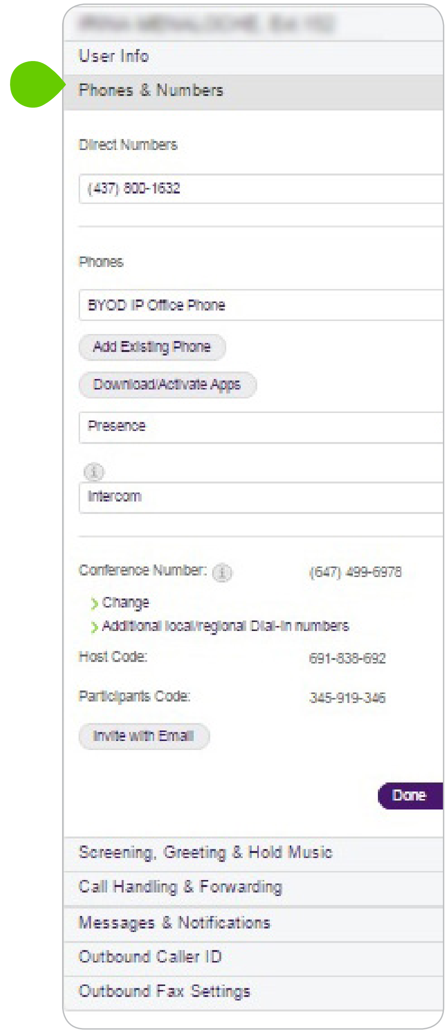


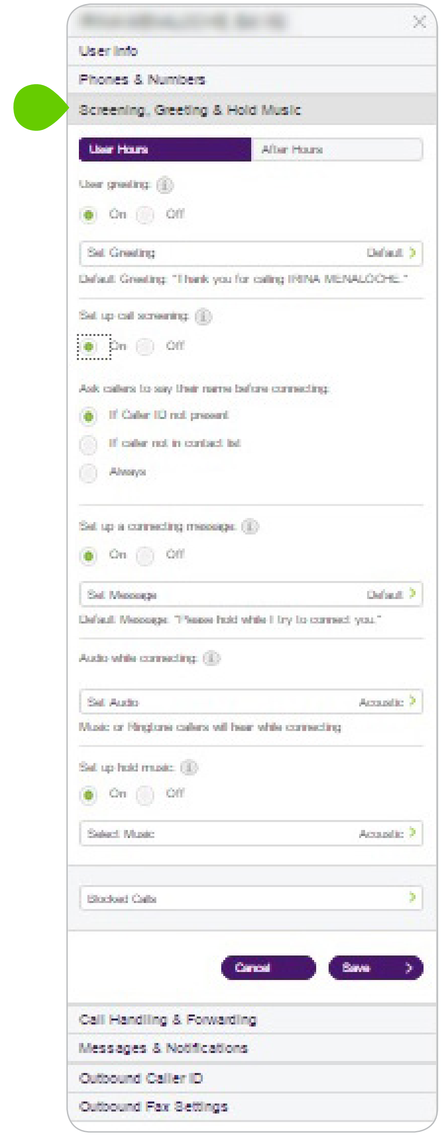
Phones & Numbers

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.



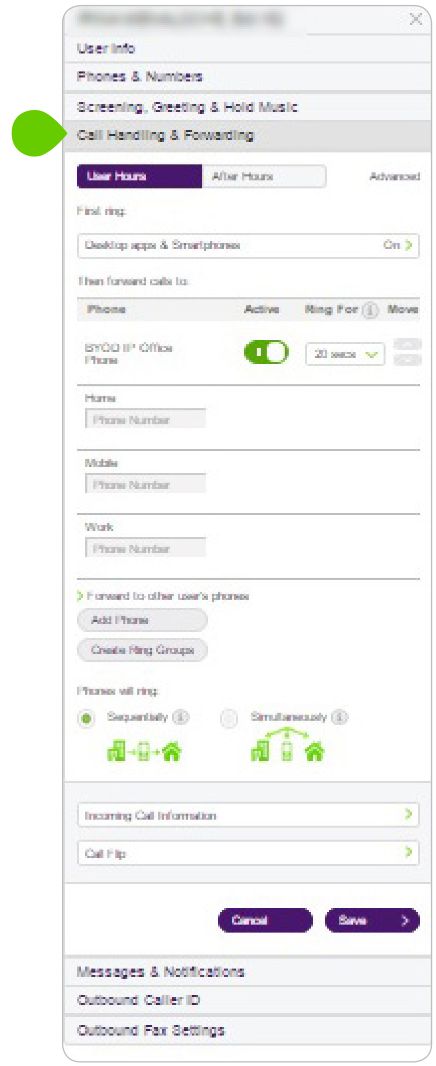


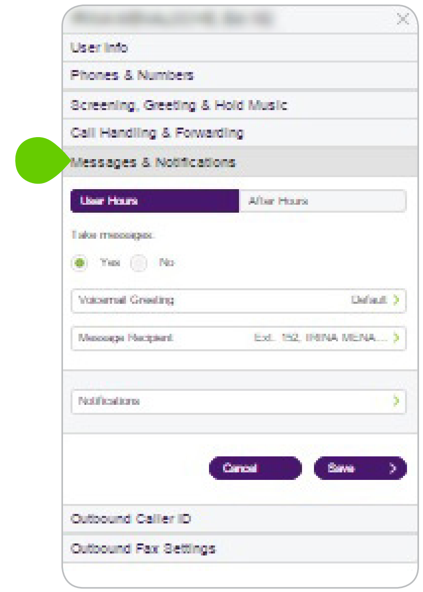
Call Handling & Forwarding

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.



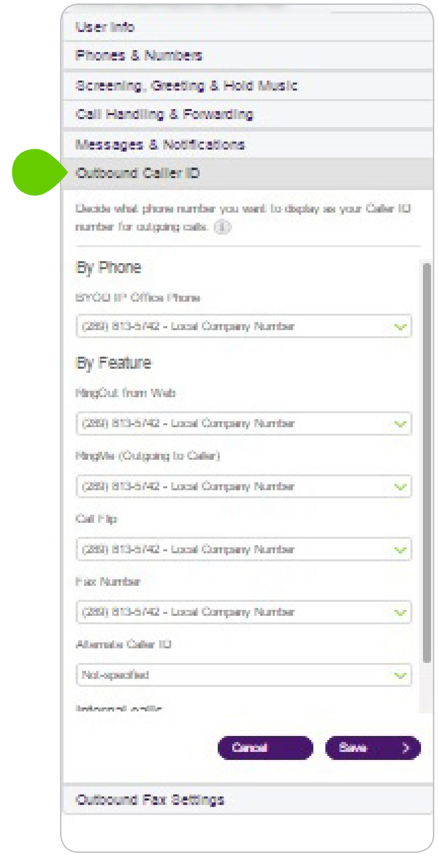


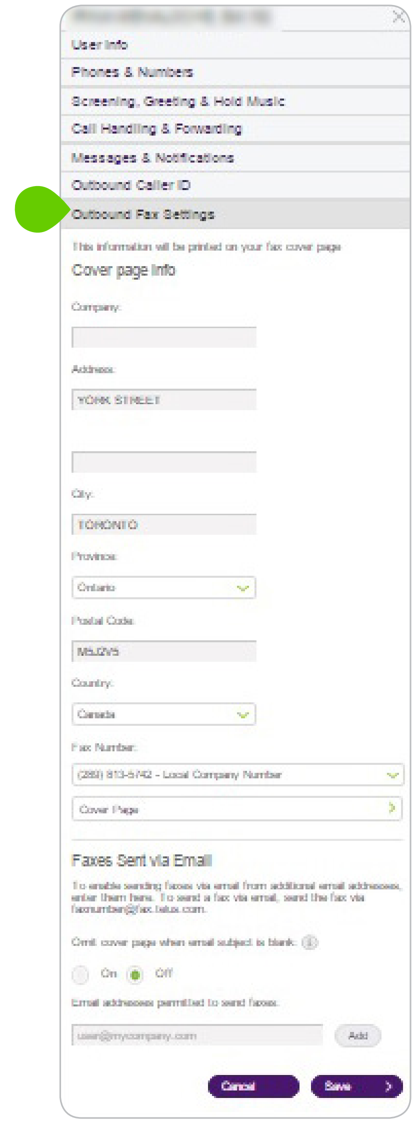
Outbound Caller ID

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:

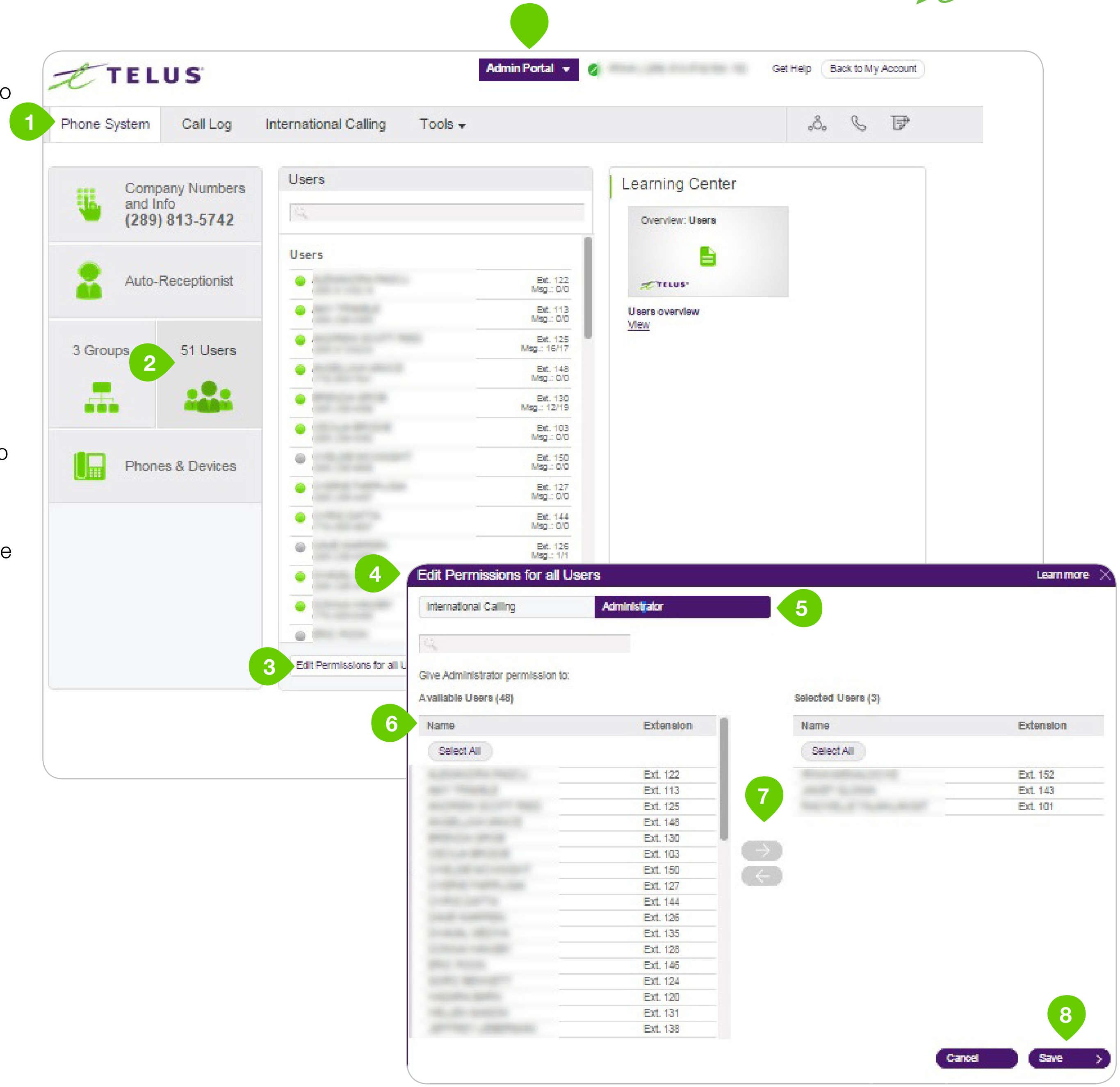
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **User(s)**.
3. Click **Edit Permissions for all Users**.
4. A pop-up will appear displaying administrator options.
5. Click the **International Calling** tab.
6. Select the users who you'd like to allow international calling for.
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**.

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.



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.

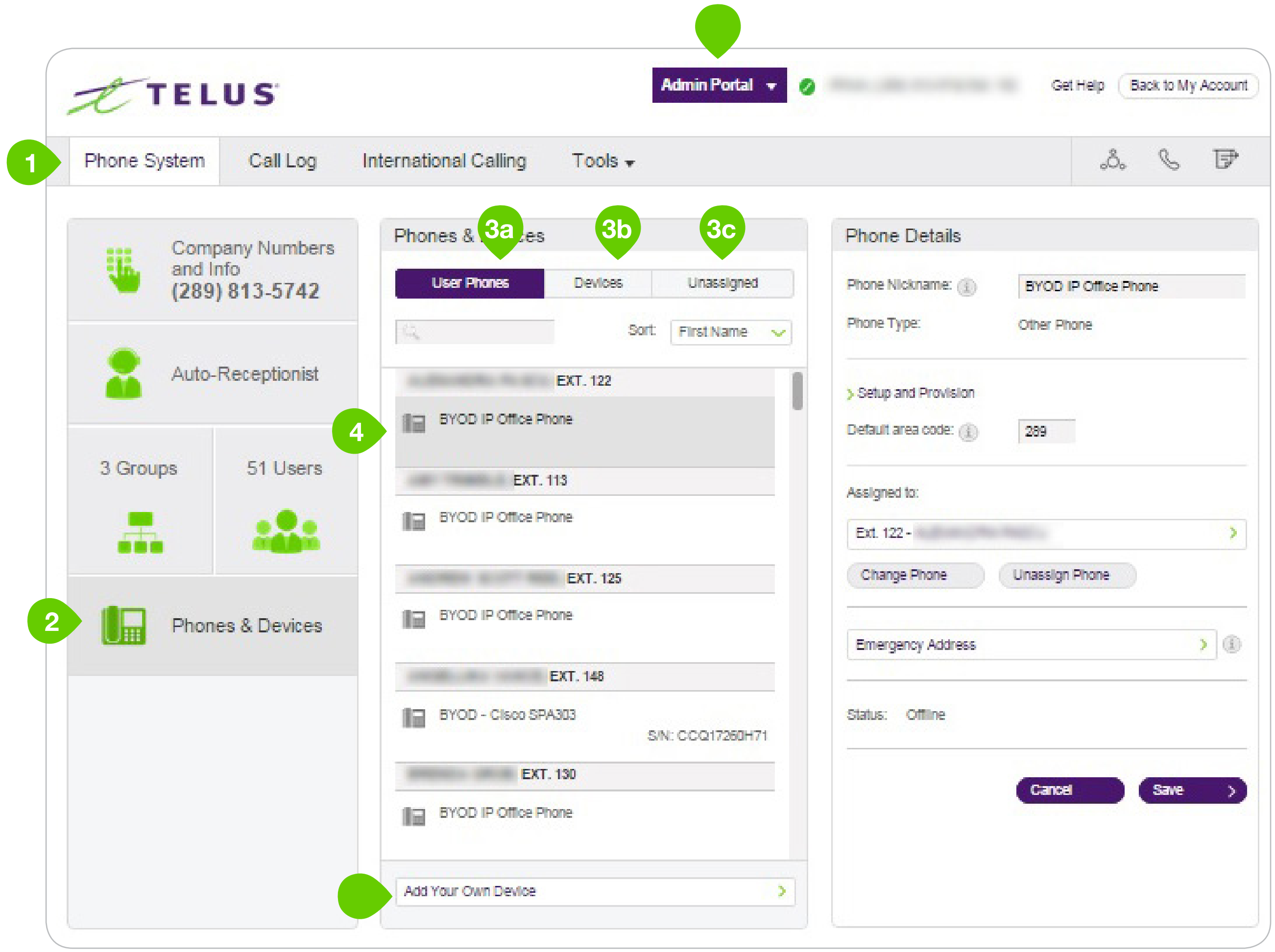
User Phones, Devices, Unassigned

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

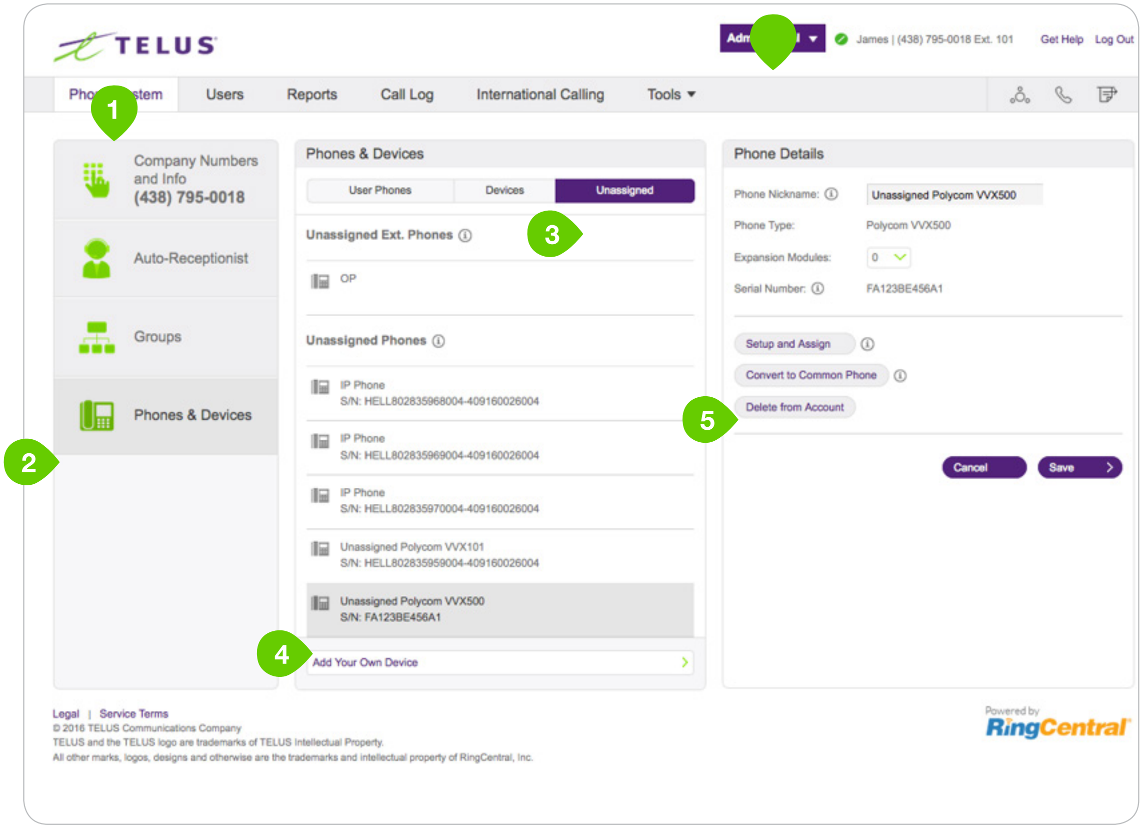
You can add a desktop phone, conference phone, or paging device by clicking **Add your own device** at the bottom of the middle panel.



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:

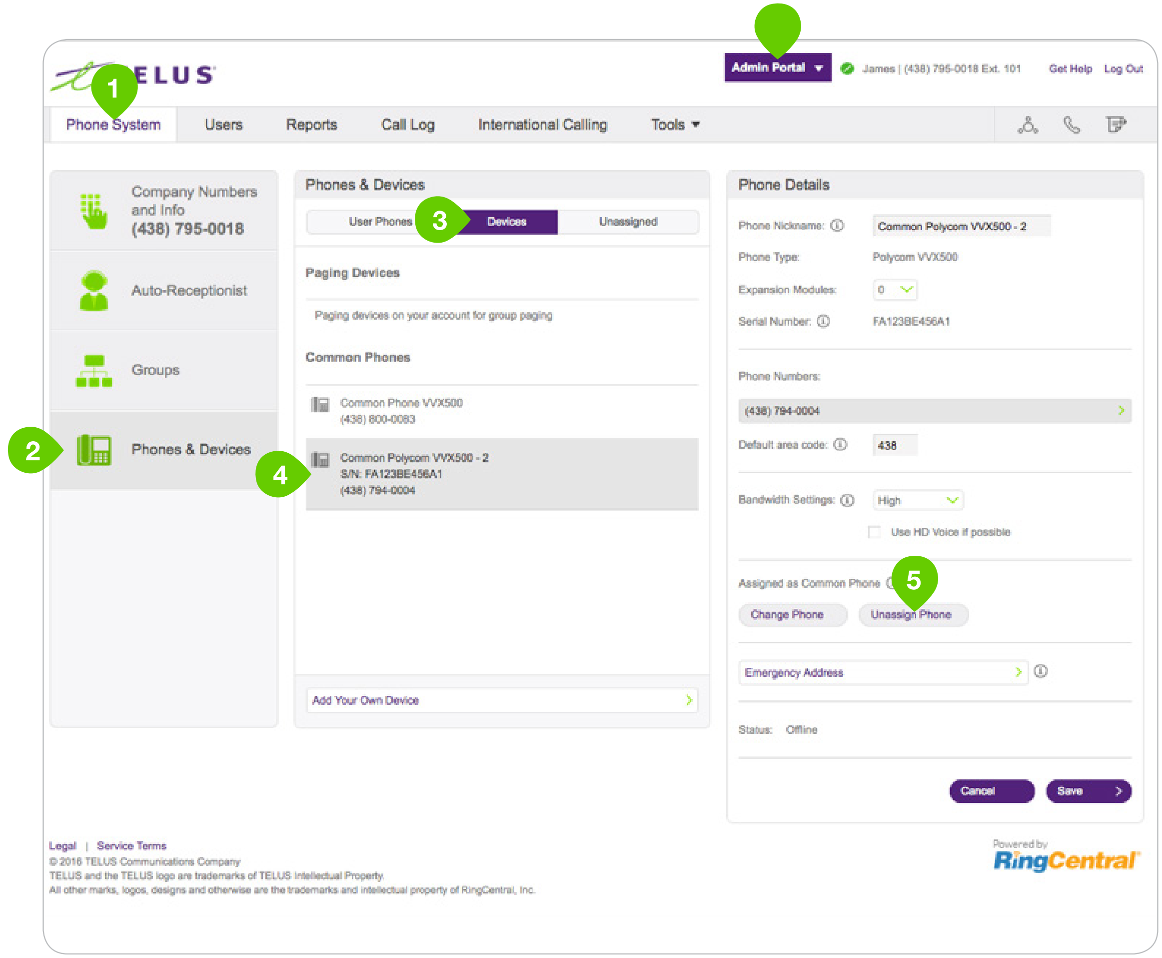
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Devices** tab.
4. Select a common phone.
5. Under Phone Details, select **Unassign Phone**.

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**.

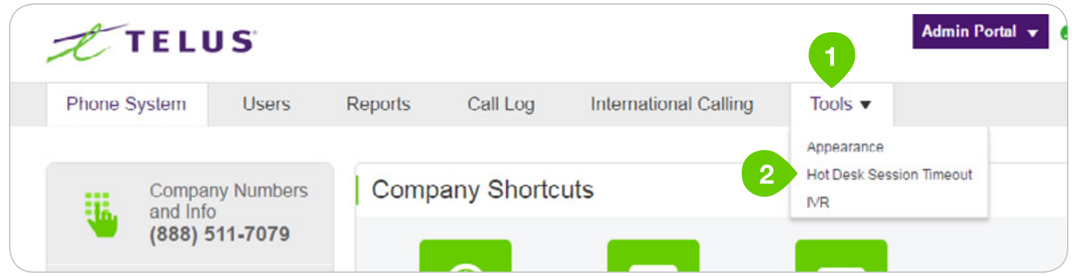


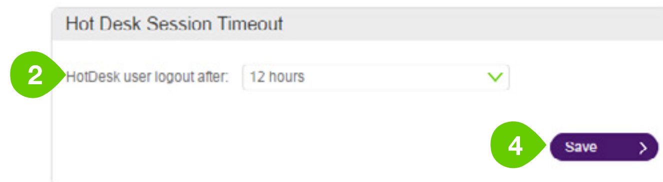
Setting the Hot Desking Session Timeout

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*

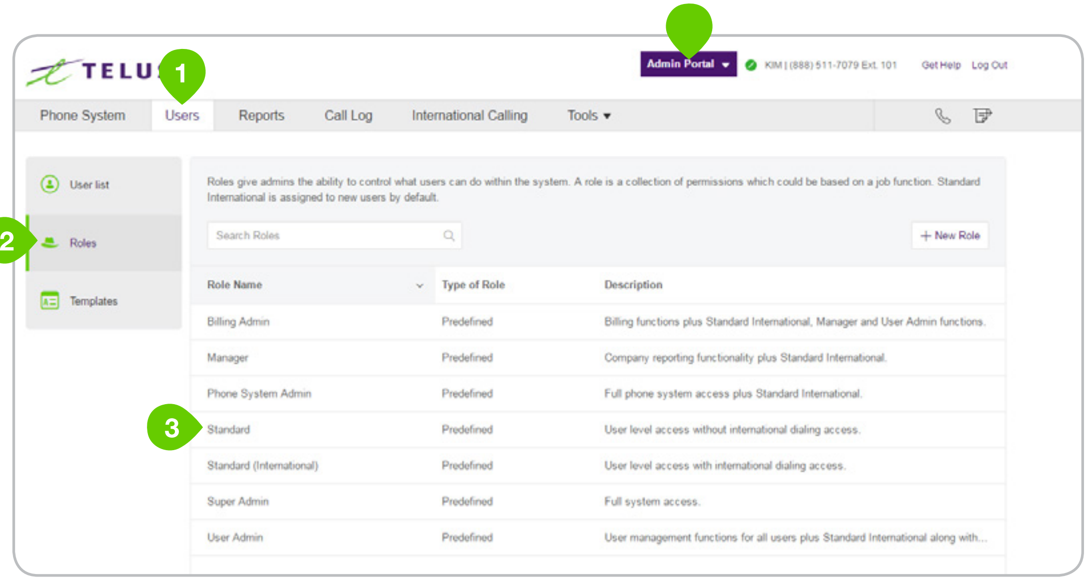
You can create custom roles to meet your business needs. When creating a custom role you select an existing role as a starting point, and select permissions to be assigned to the role.

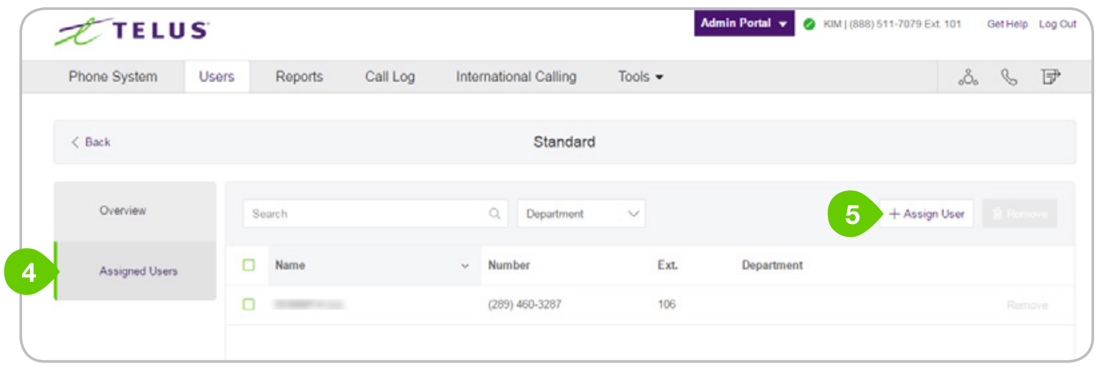
*This feature is available for Premium and Premium Plus only.

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**.



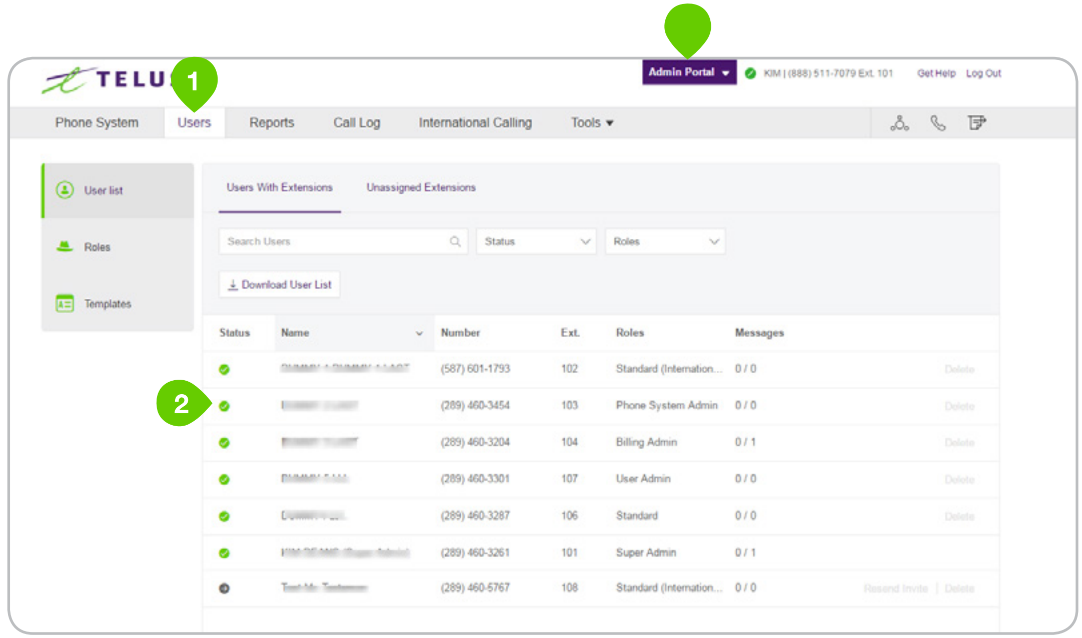


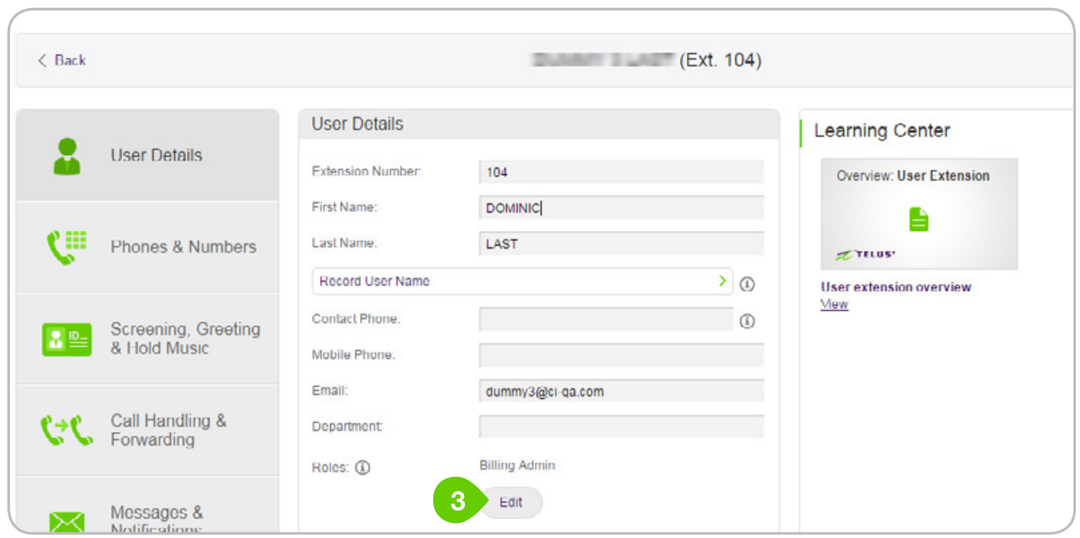
Note: the New Role option is available for Premium and Premium Plus users only.

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**.

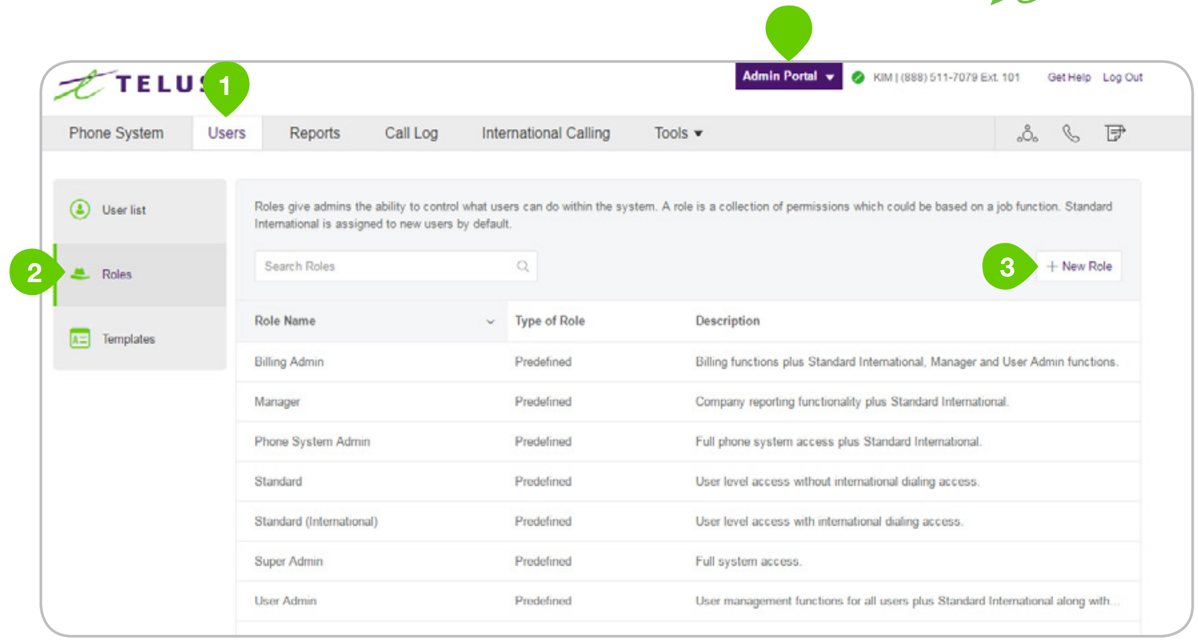




Create a New Role*

To create a new, custom role:

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



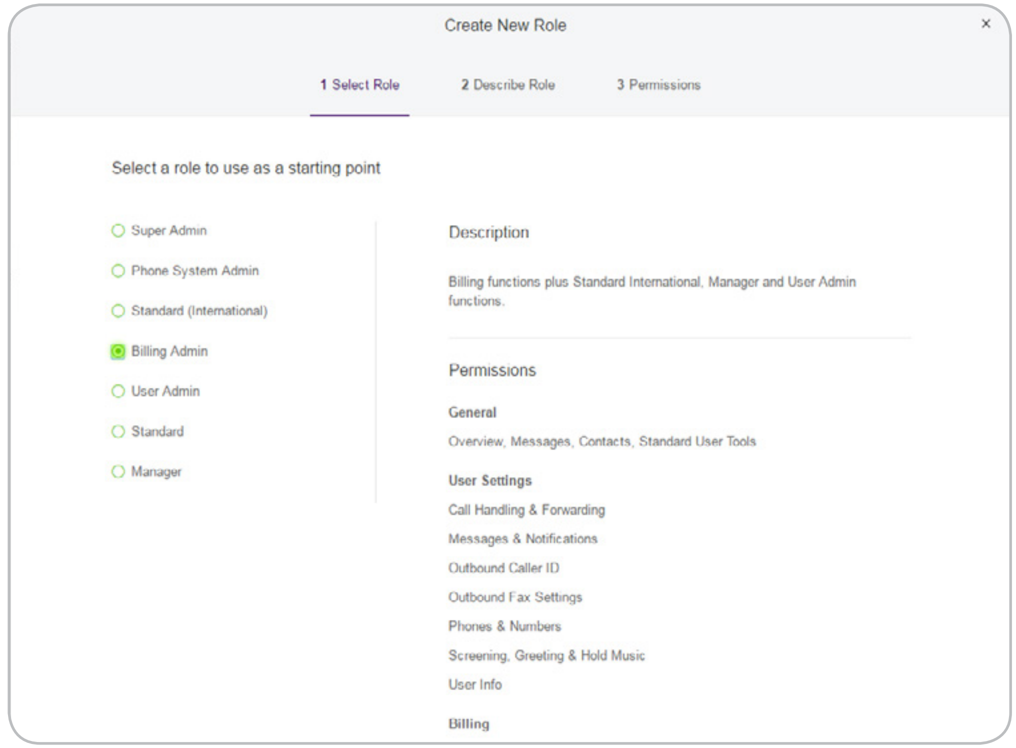
*This option is available for Premium and Premium Plus only.

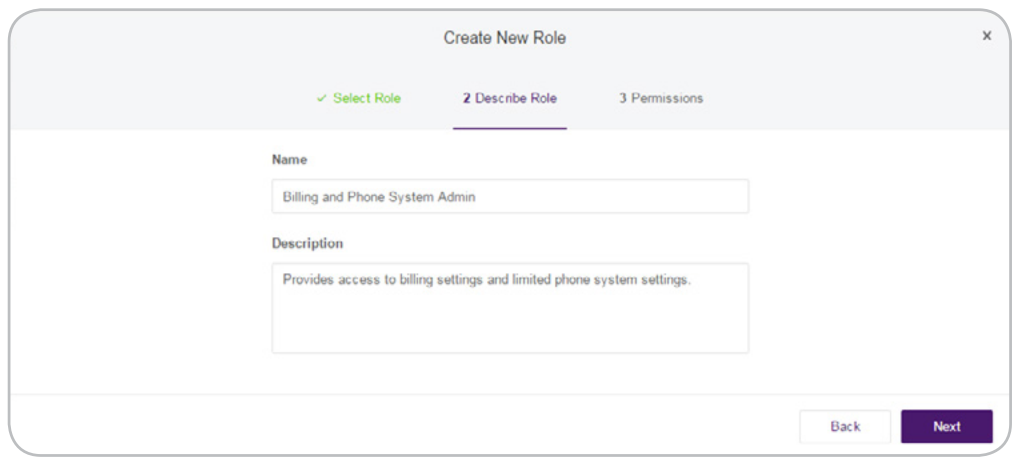
Step 1: Select Role

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

Step 2: Describe Role

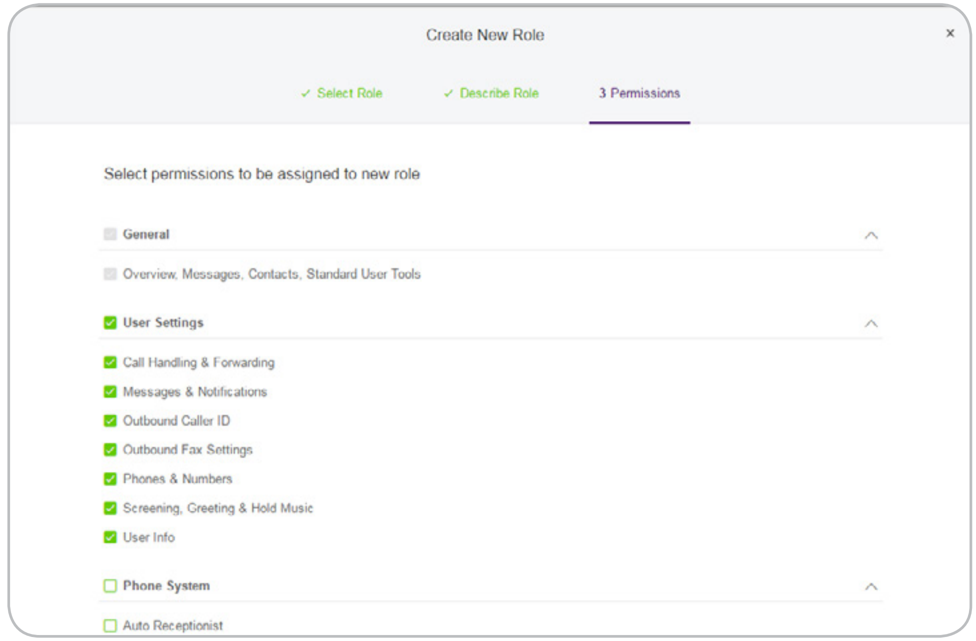
Enter a **Name** for the role and a **Description** of the permissions of the role.





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.

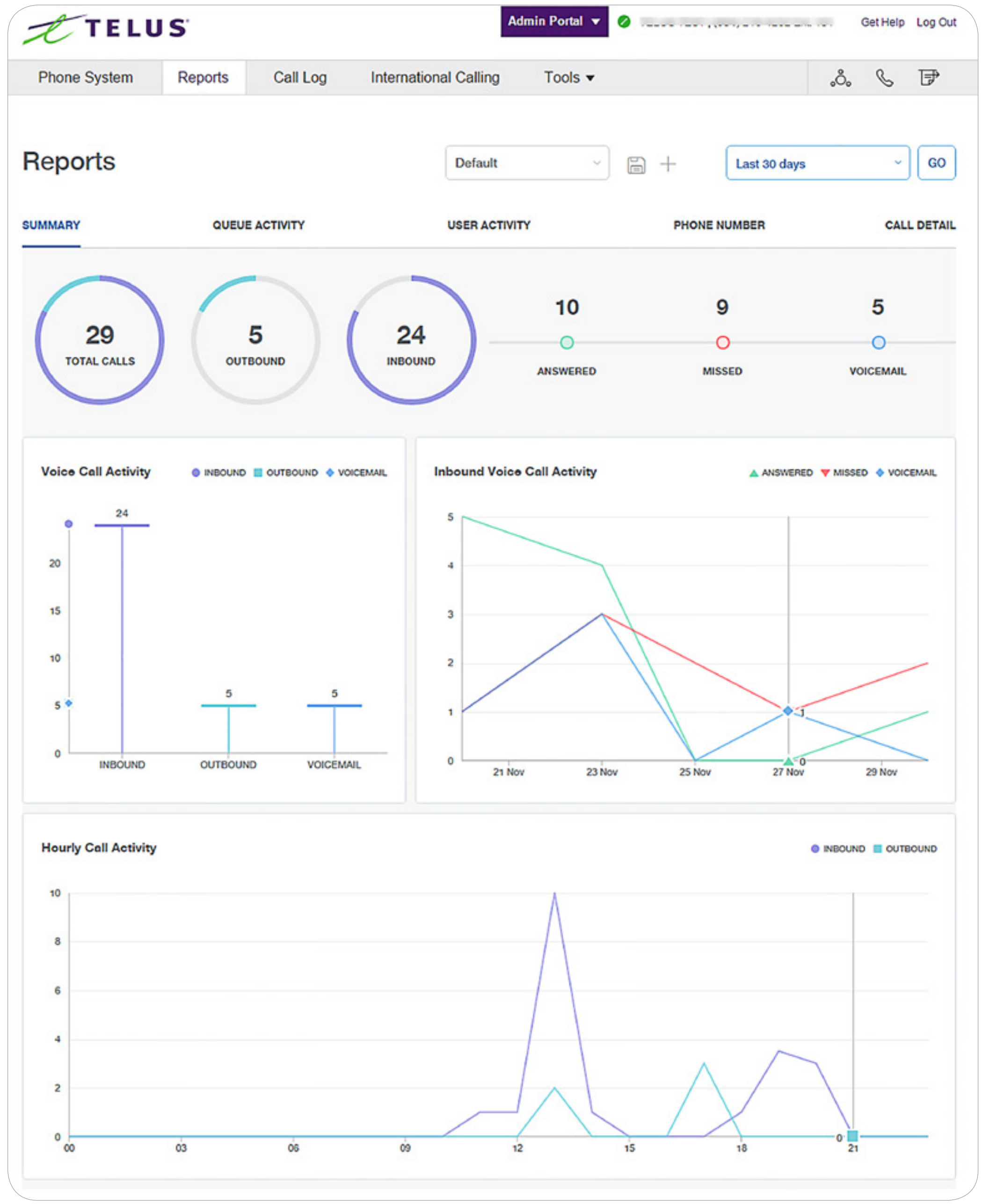
The **Summary** report provides an overview of all call activity - Total, Outbound, Inbound, Answered, Missed, Voicemail, and Call Activity during a selected date range. The **Queue Activity** report presents a summary of Total Call Volume, Total Talk Time, Average Call Duration, Missed Calls, and Time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

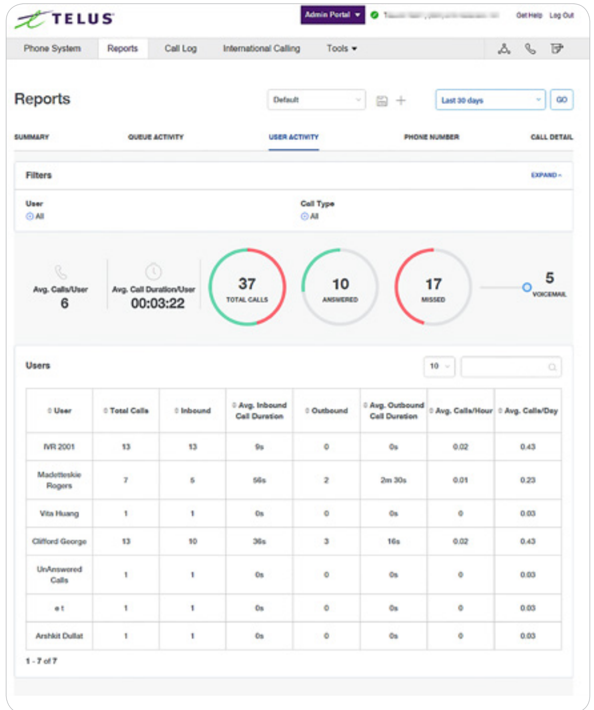
The **Phone Number** report provides Total Call Count, Average Calls per Day, and Average Inbound Call Duration for individual phone number over a selected date range. The **Call Detail** report (not available on mobile) provides details regarding calls made to a particular extension–call direction,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

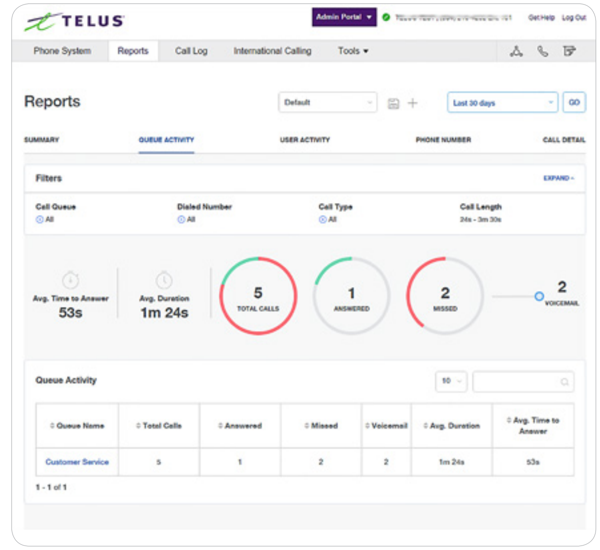
Reports can be saved as a custom report, or exported for later analysis as a an Excel file with tabs separating groups of related metrics. To export a report, select the data to be included in the report from the filter, and click **Export**. To learn more, click here.

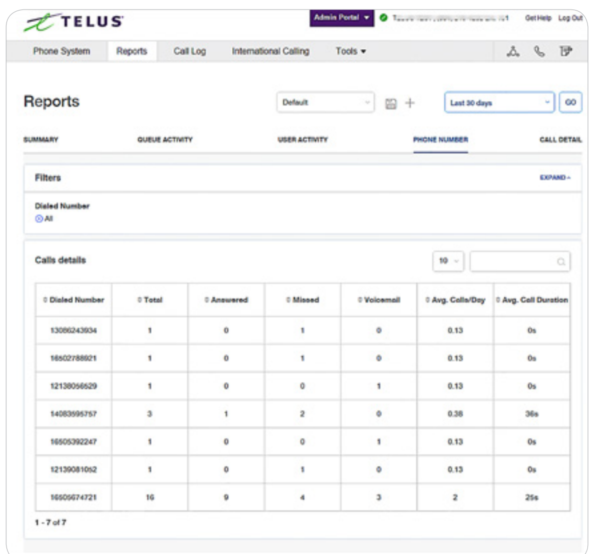
(More reports on the following page)

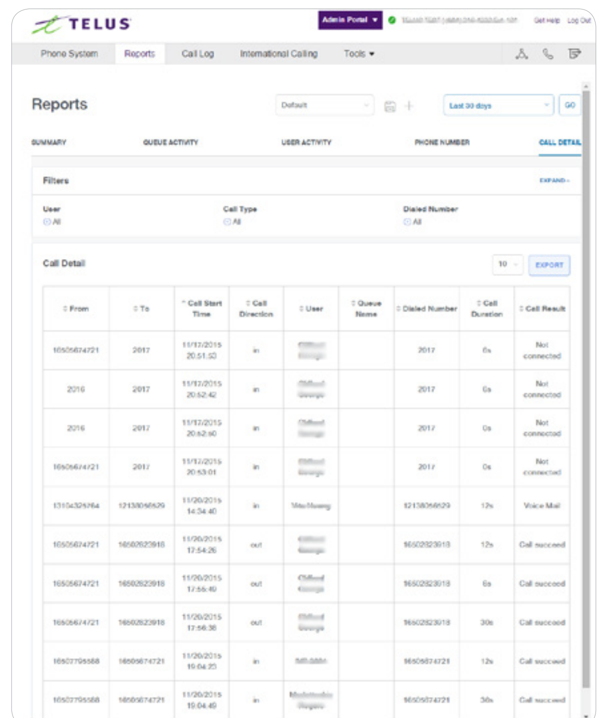


Reports for User Activity, Queue Activity, Phone Number, and Call Detail



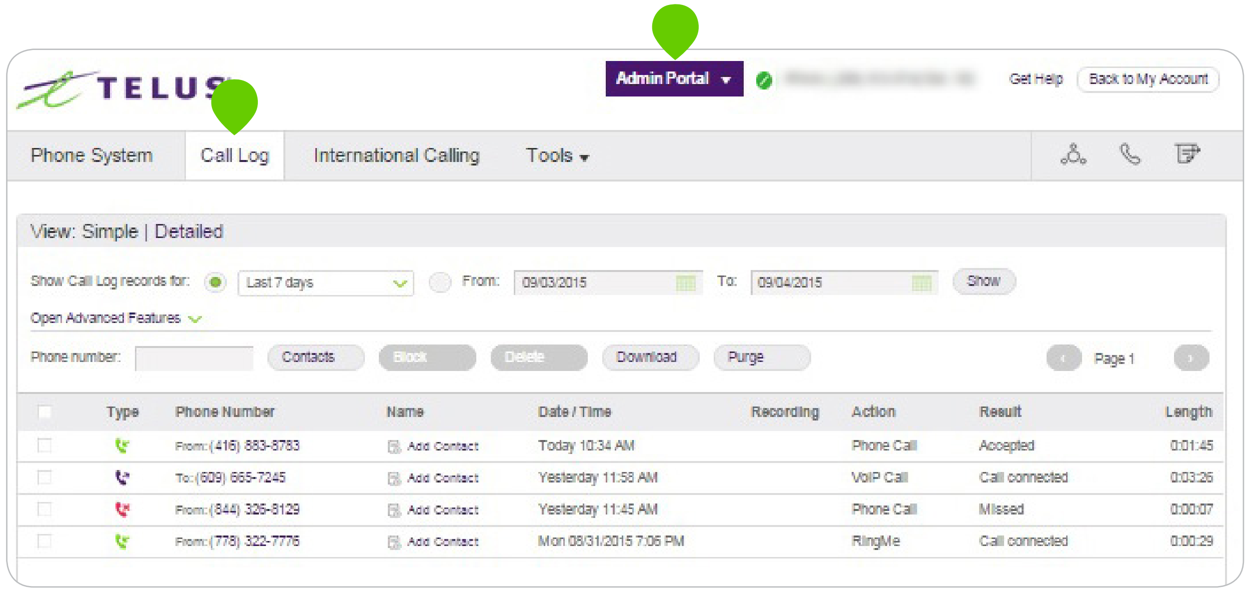






Call Log

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

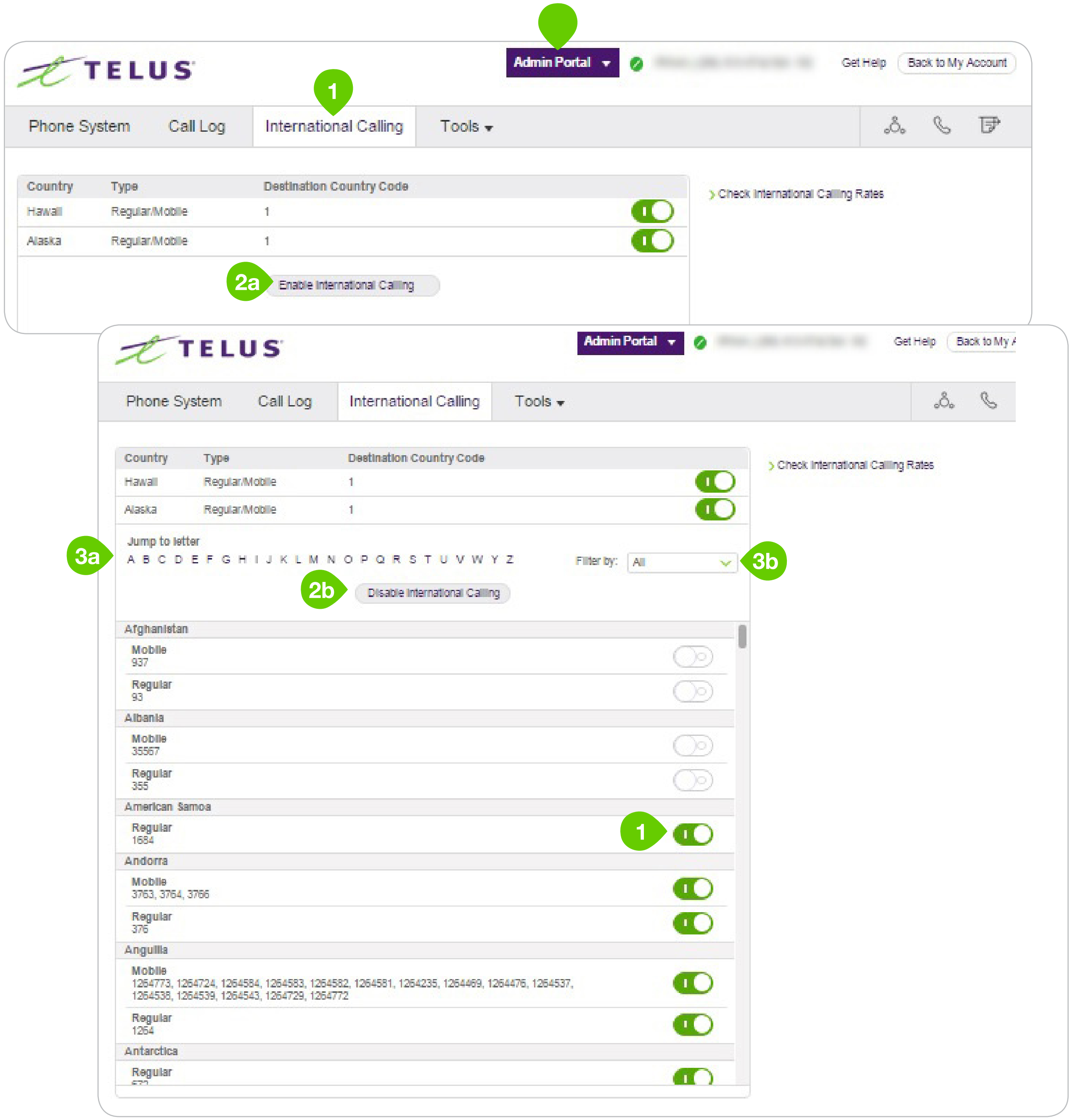
In the **Recording** column, you will see an icon if the call has been recorded. Hover over the icon to listen to the recording.

Listen to a call recording

International Calling

To enable, disable, and view international calling rates:

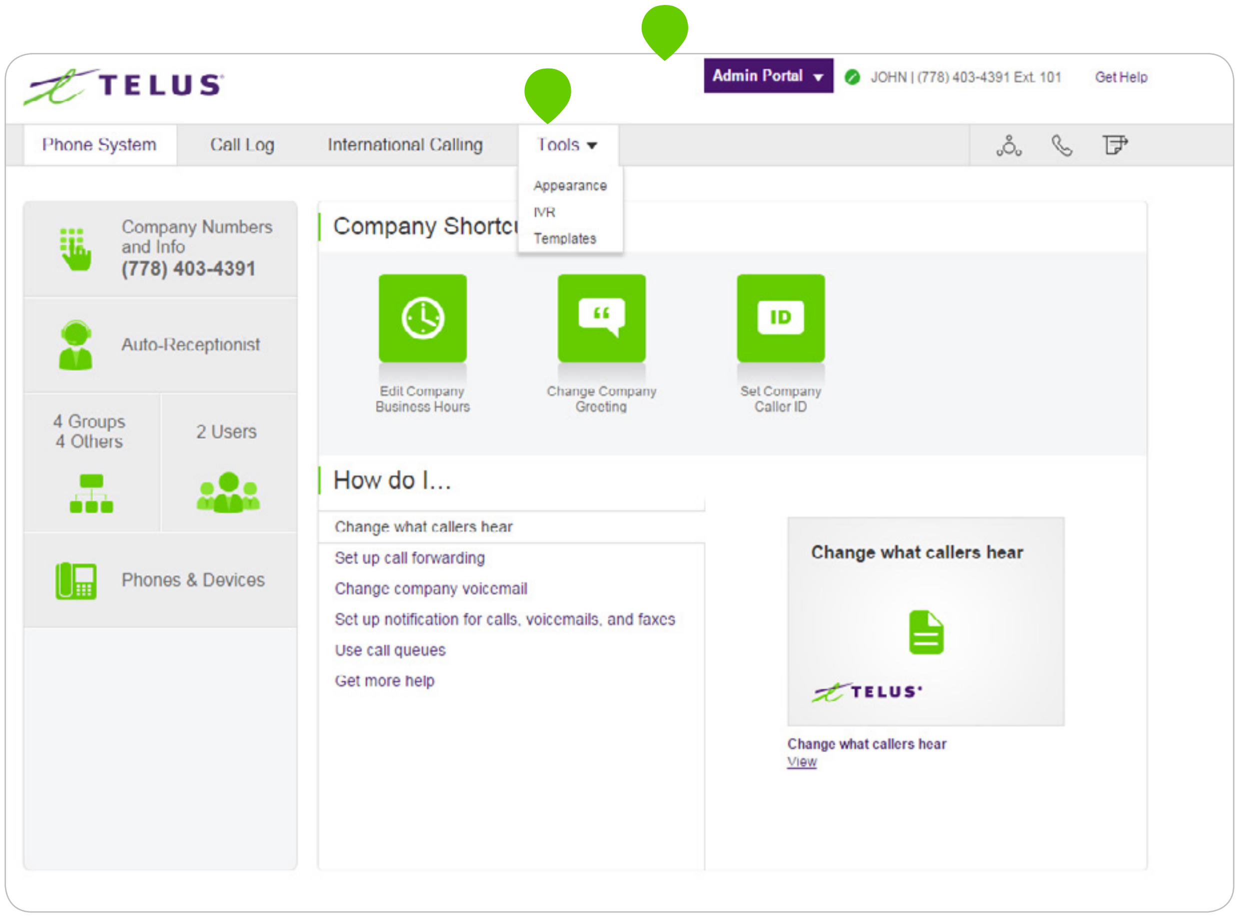
1. From the **Admin Portal**, select the **International Calling** tab.
2. Options under **International Calling** are the following:
   a. If International Calling is not enabled, click **Enable International Calling** to enable it.
   b. If International Calling is enabled, you can disable international 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.



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

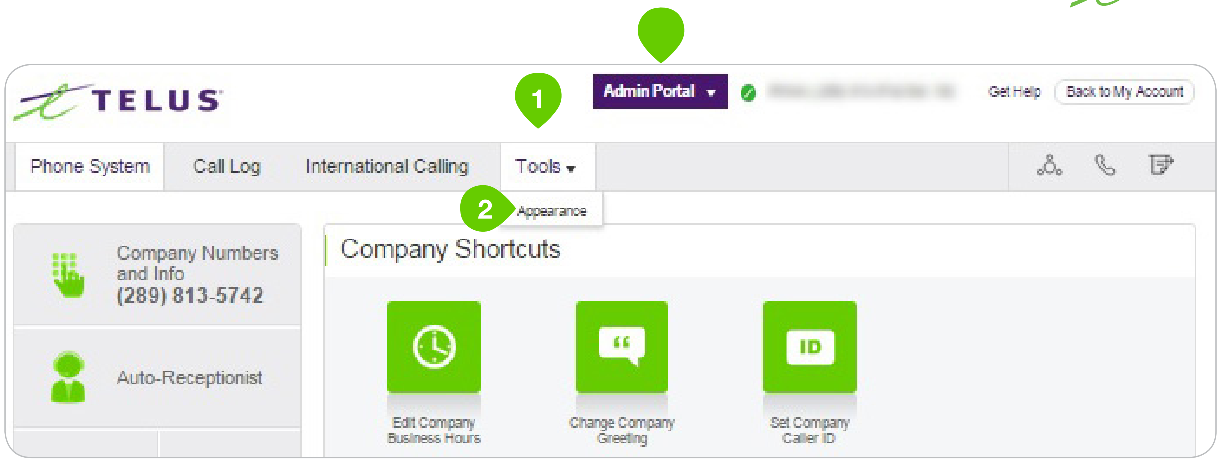


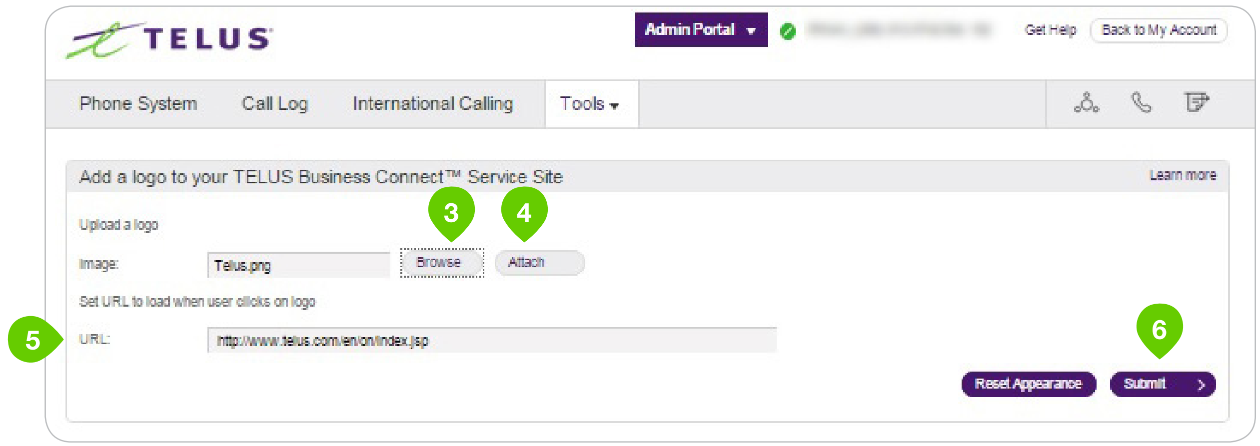
Appearance

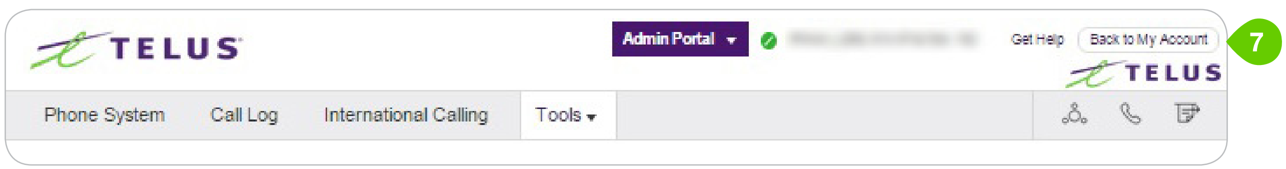
Add your company logo to your TELUS Business Connect online account for a custom look. Take one step further and link your company logo to your company's website for easy navigation.

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.

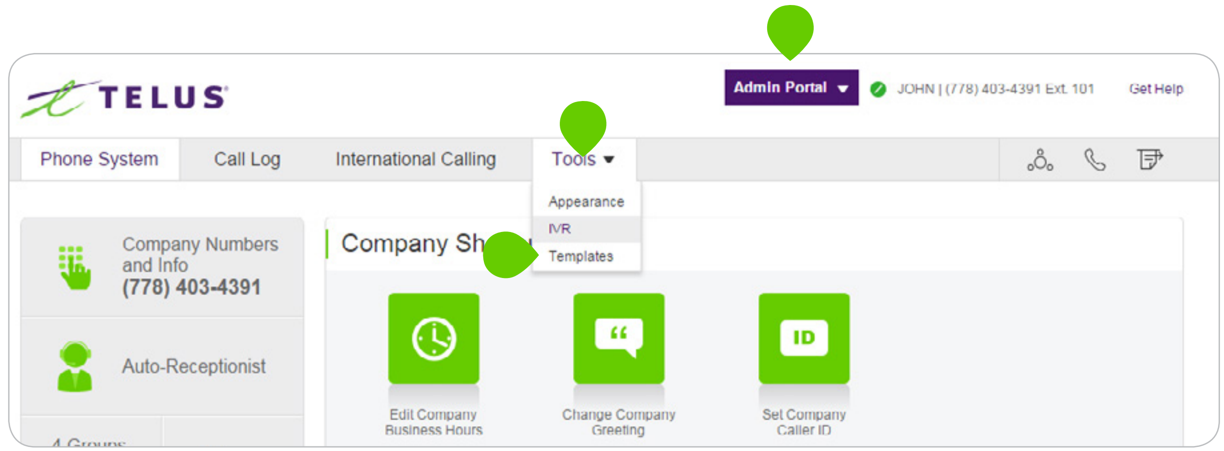






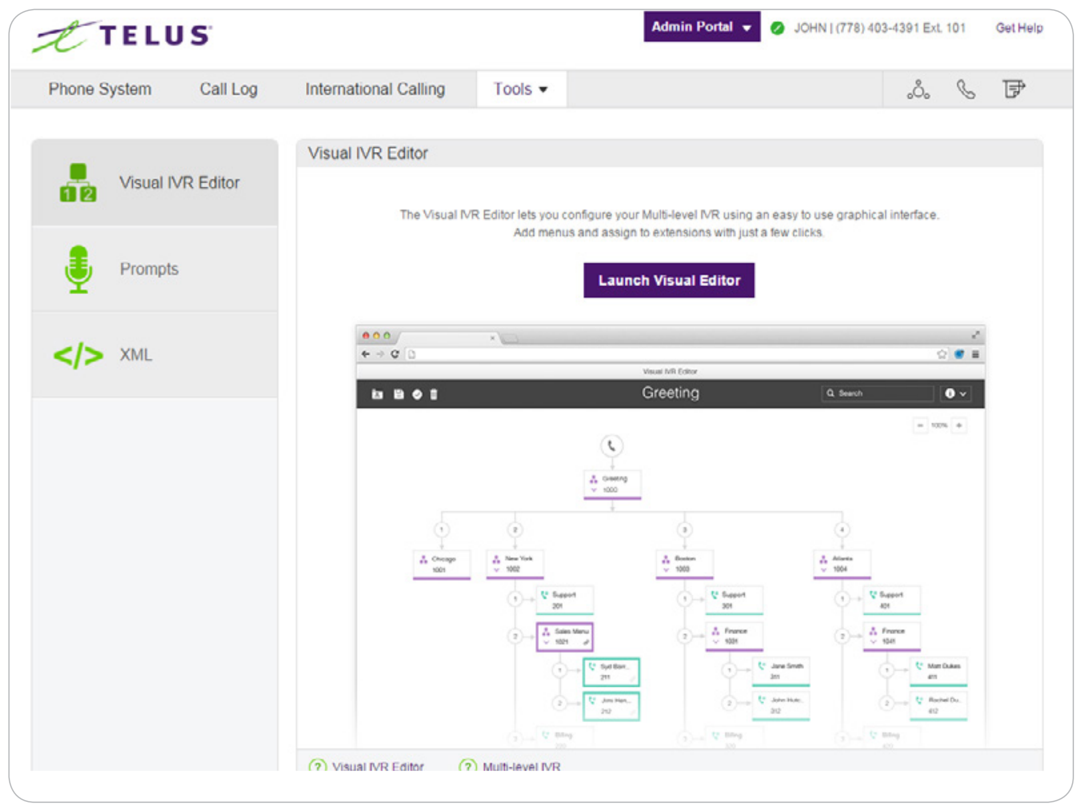
IVR Tool*

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

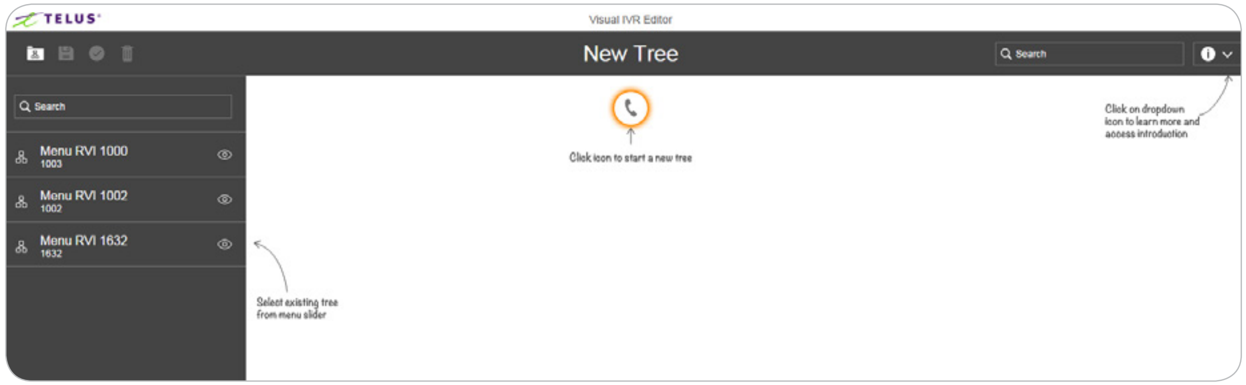


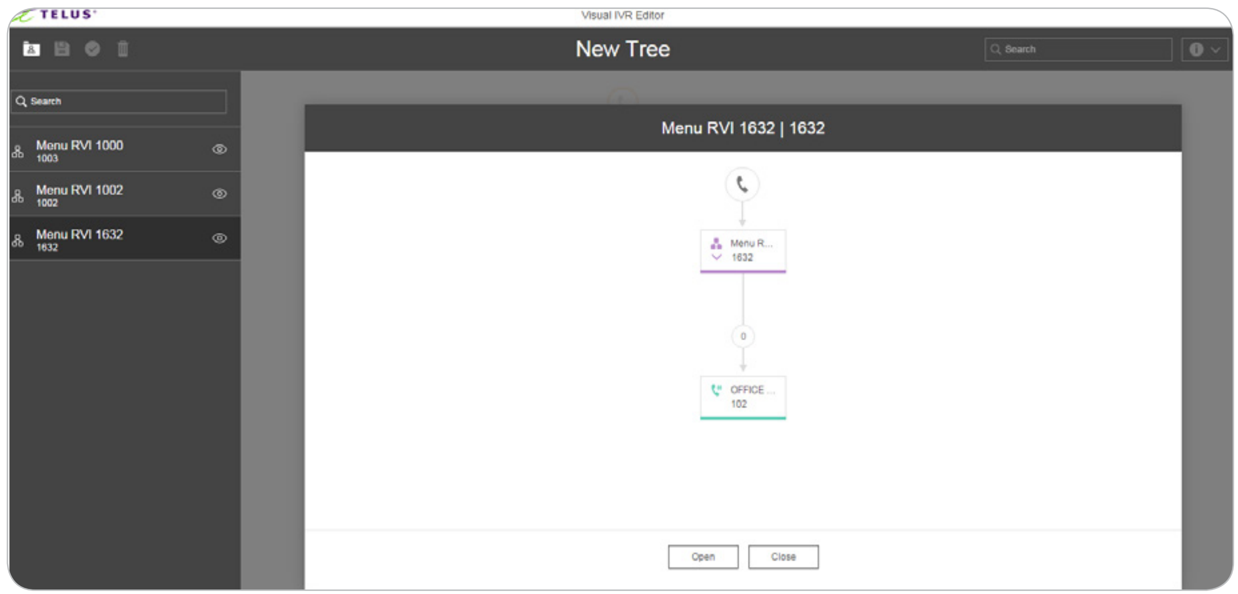
NOTE: Any change on the IVR menu will overwrite the imported XML file. It is suggested that you export and save a new XML file after making changes.

*Available for Premium and Premium Plus users only.

Visual IVR Editor

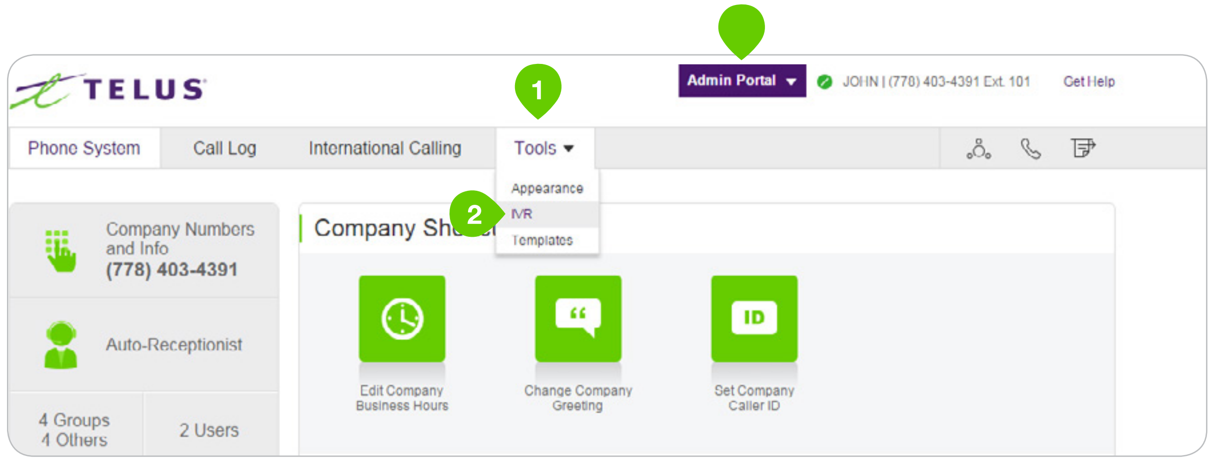
The Visual IVR Editor lets you configure your Multi-level IVR using an easy to use graphical interface. Add menus and assign to extensions with just a few clicks.

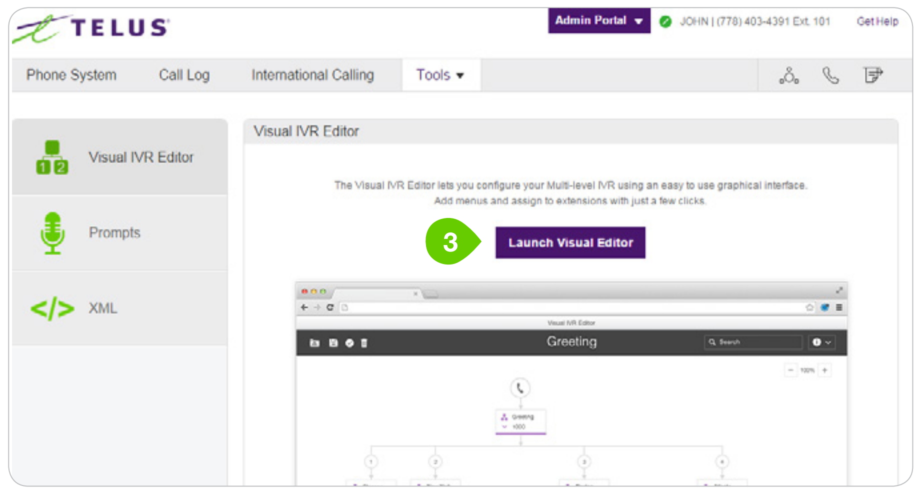


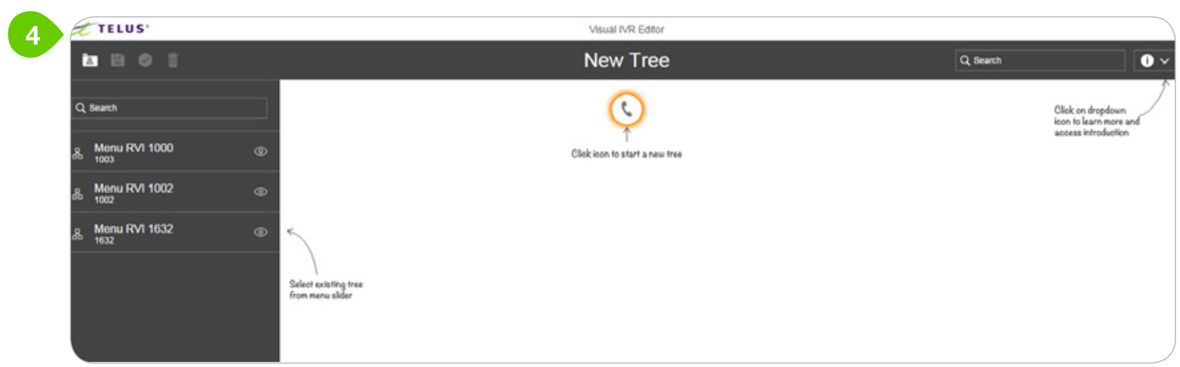


Create a new IVR Menu with the Visual IVR Editor

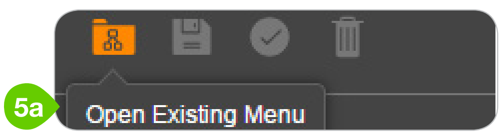
1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Launch Visual Editor**.
4. The **Visual IVR Editor** will open in a new tab.

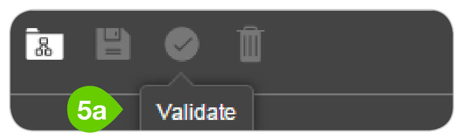




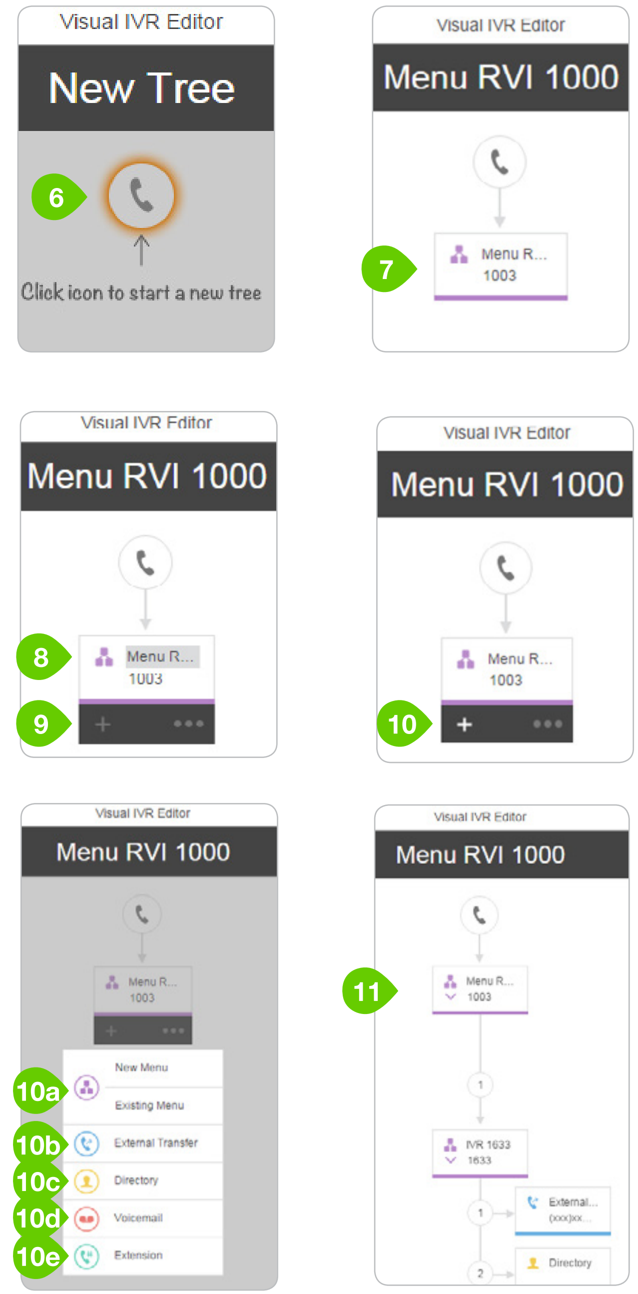


5. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the **Visual IVR Editor**.
   a. In the upper left corner of the screen you have 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.



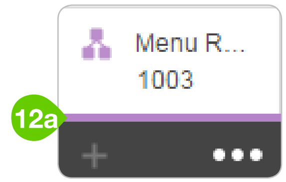


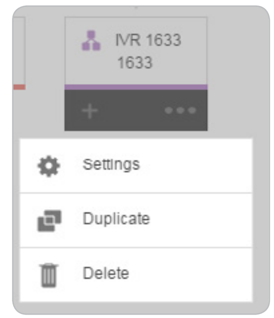
6. Click the **Phone** icon to start a new tree.
7. Your new tree will be automatically assigned a name and extension number.
8. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
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.

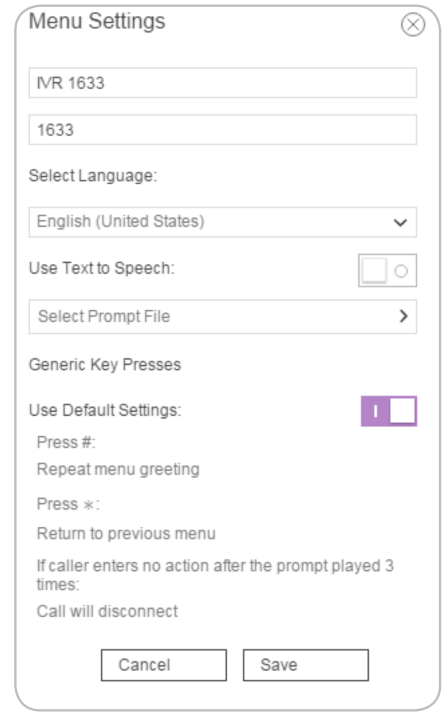


12. Once you have added your items to your menu, hover over an item to edit it and see more options. For some items you will see a "+" and "…" and other items will only have the trashcan icon.

   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.







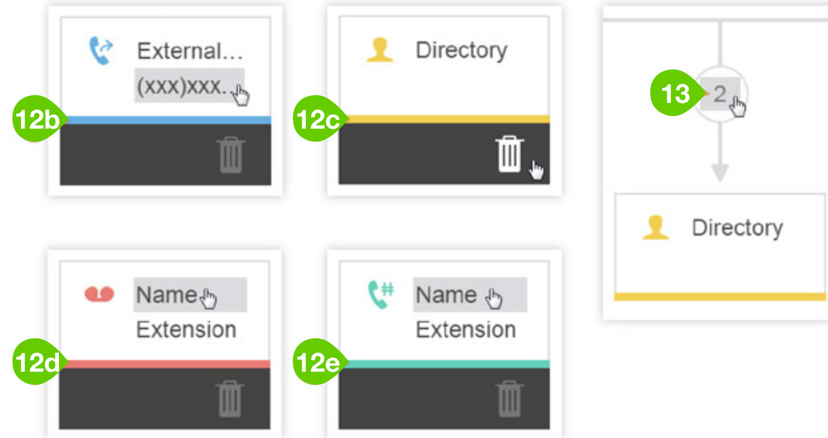
12.

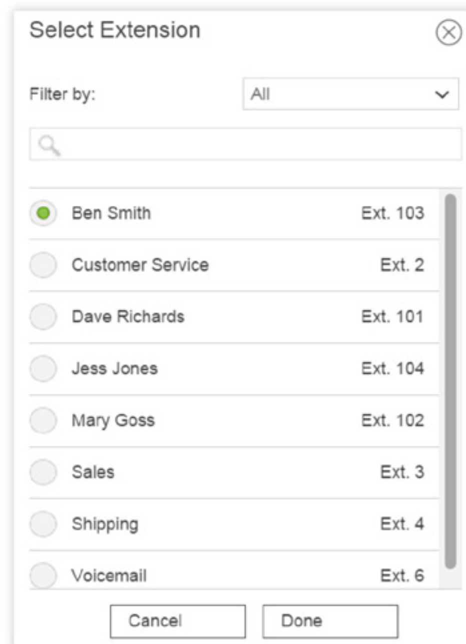
b. **External Transfer**
- Click the phone number text field to enter the external transfer number of your choice.
- Click the trashcan icon to delete this item.

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.

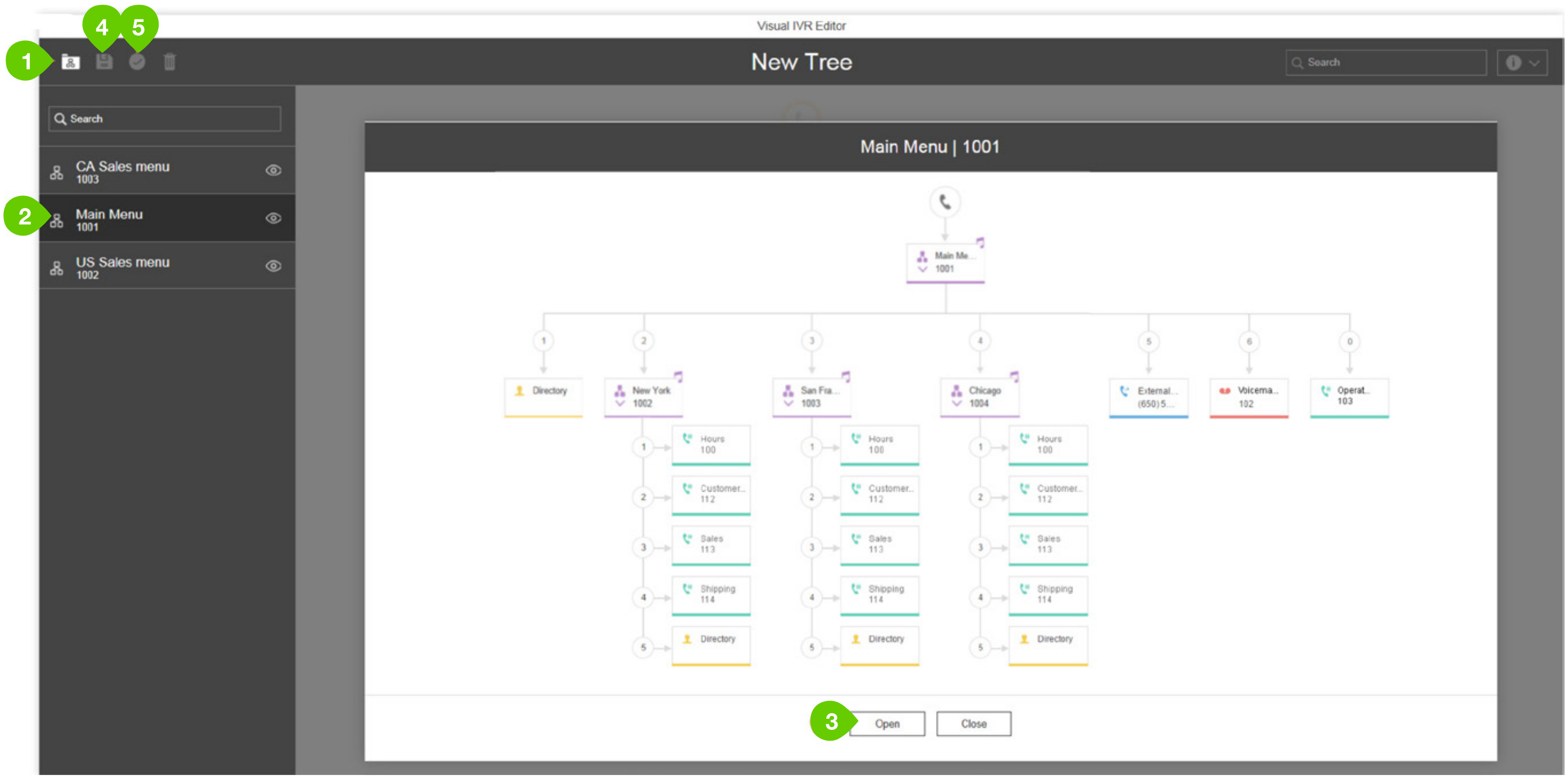
e. **Extension**
- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trashcan icon to delete this item.
- You can also change the order and key press of an item by click on the existing number and typing a new number. Click out to save.





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

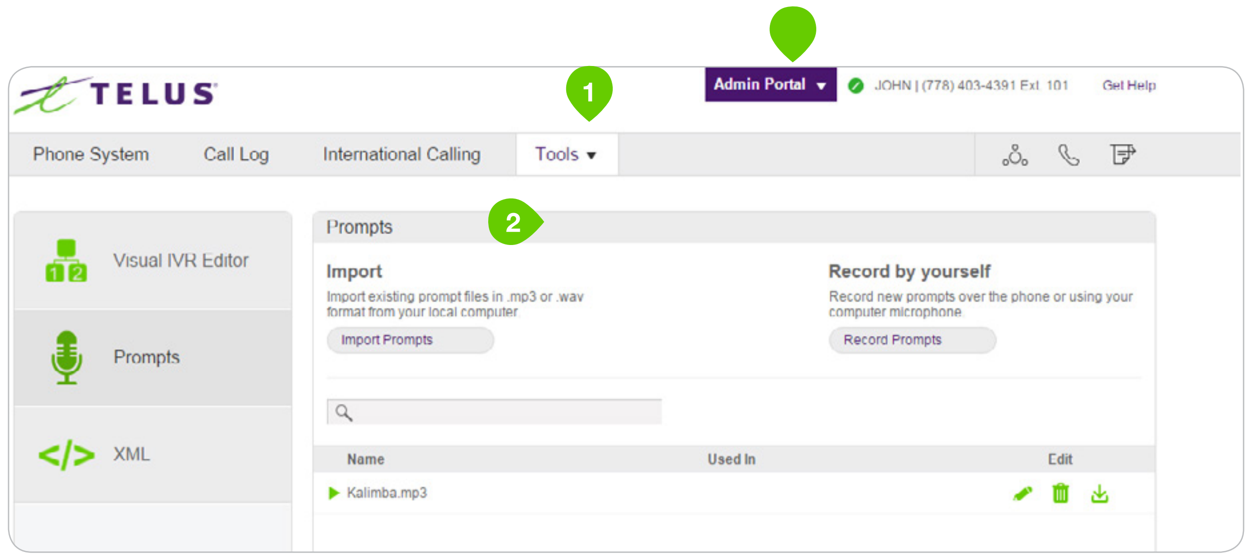


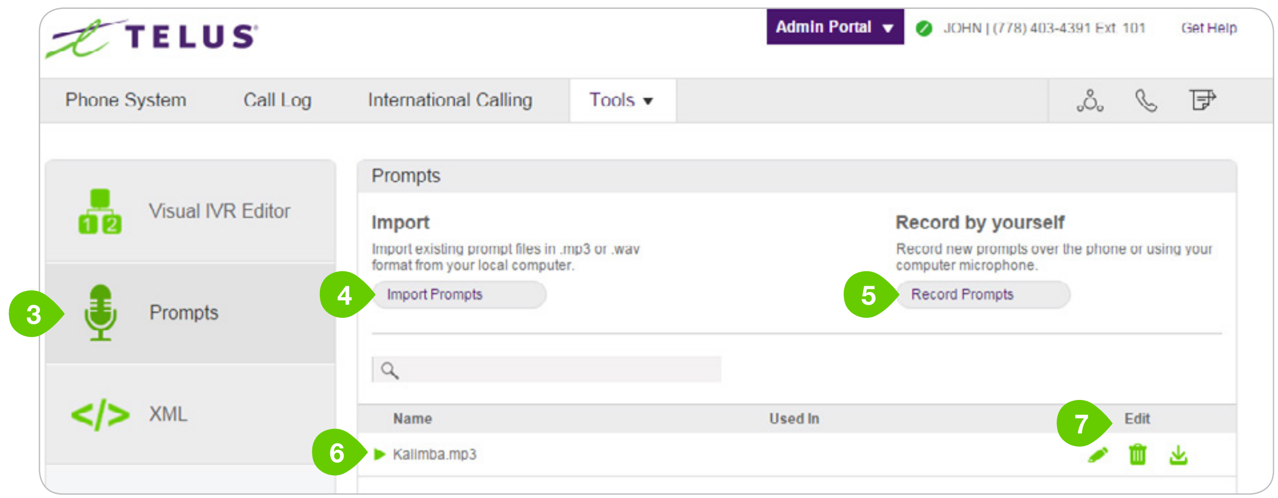
Prompts

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:

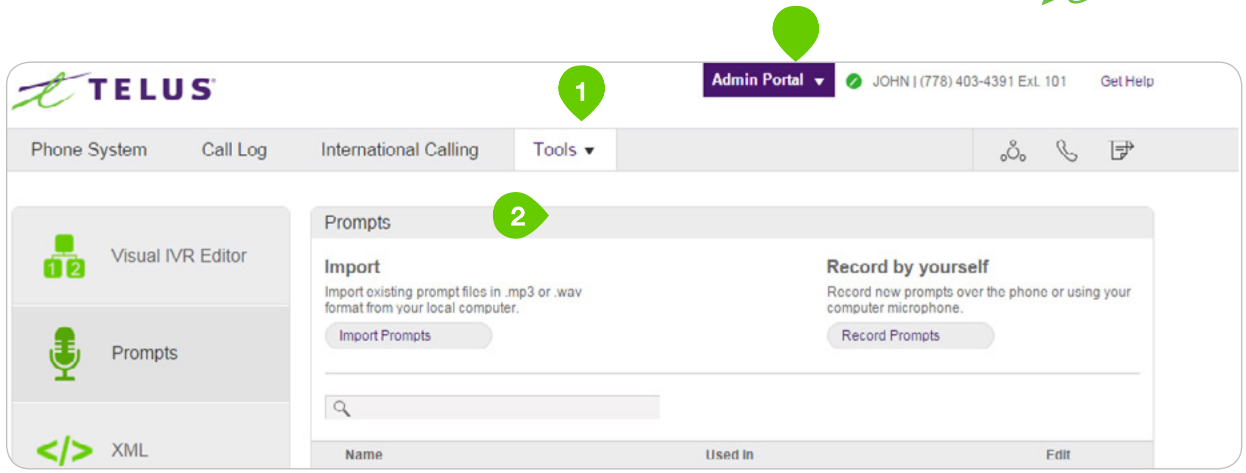
1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Prompts**.
4. Click **Import Prompts** to import a .wav or .mp3 file to set as your IVR prompt.
5. Click **Record Prompts** to record an IVR prompt. Learn more about recording your own prompt on the next pages.
6. Click 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.

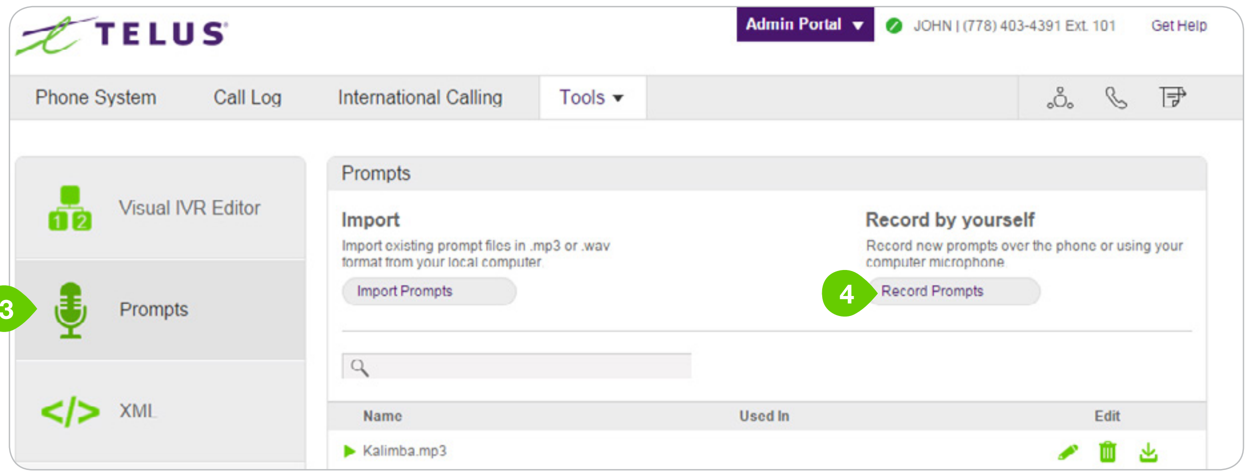


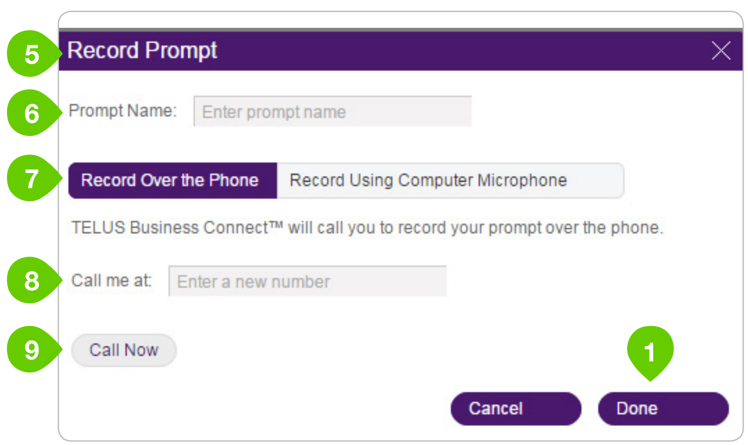


Record a Prompt over the phone

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**.

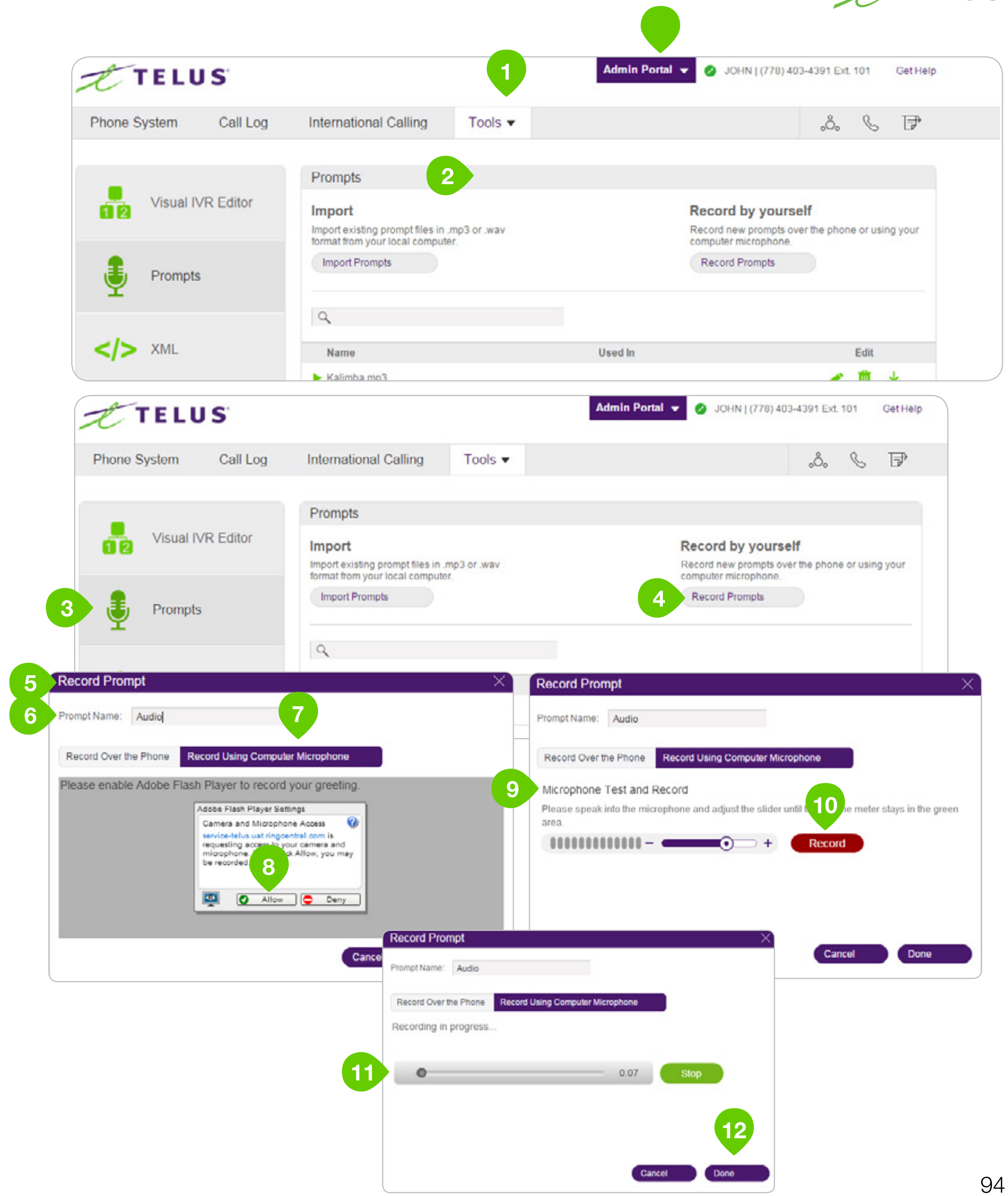






Record a Prompt using your computer microphone

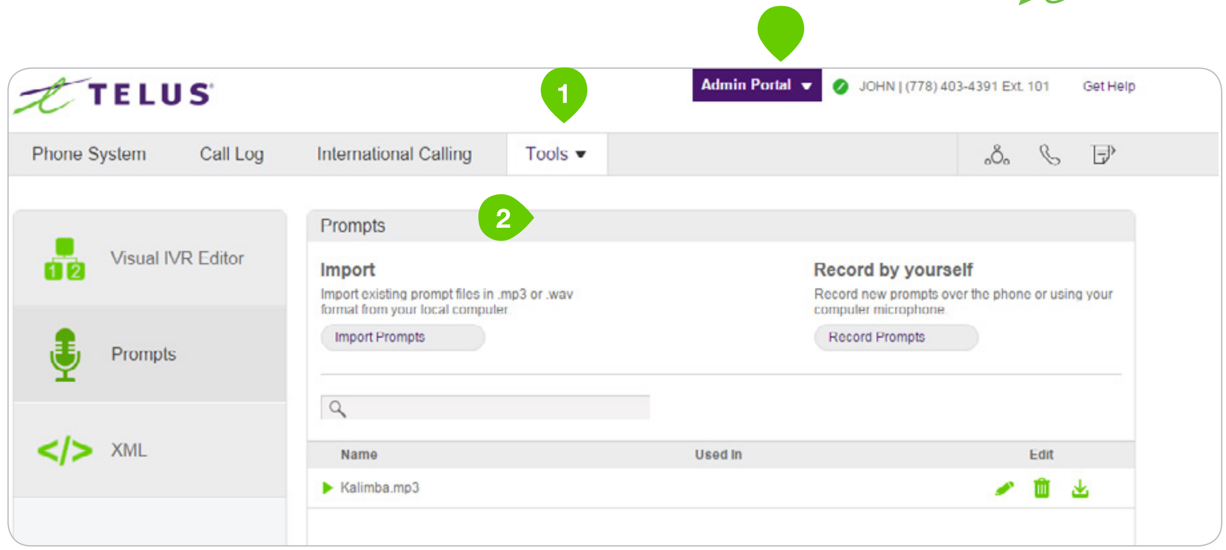
1. From the **Admin Portal**, click the **Tools** tab.
2. Click **IVR**.
3. Click **Prompts**.
4. Click **Record Prompts.**
5. A pop-up will appear.
6. Enter a name for your prompt.
7. Click **Record Using Computer Microphone**.
8. Click **Allow** on the **Adobe Flash Player Settings** pop-up. (Also, 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**.

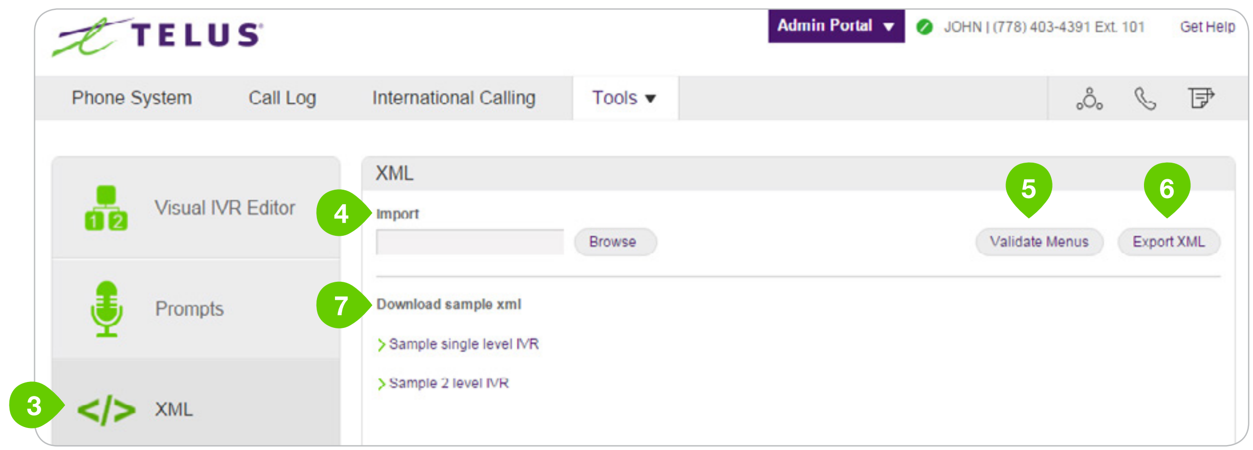


XML

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.



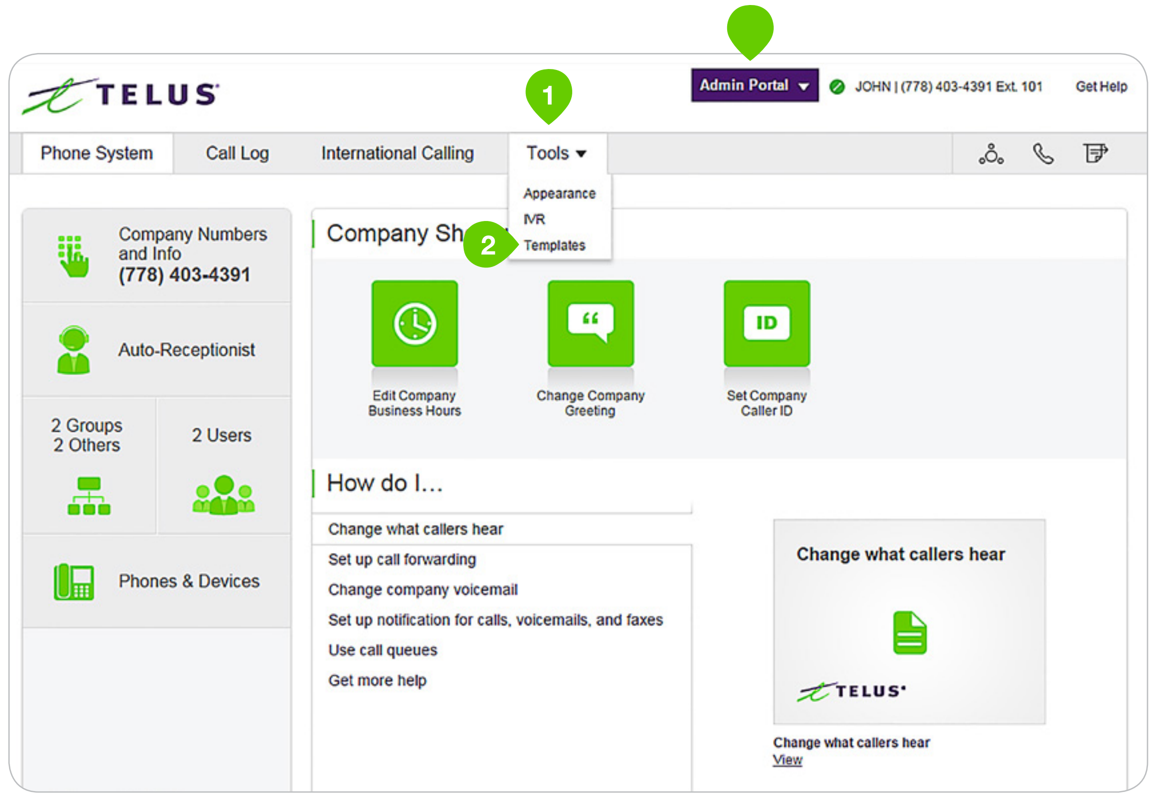


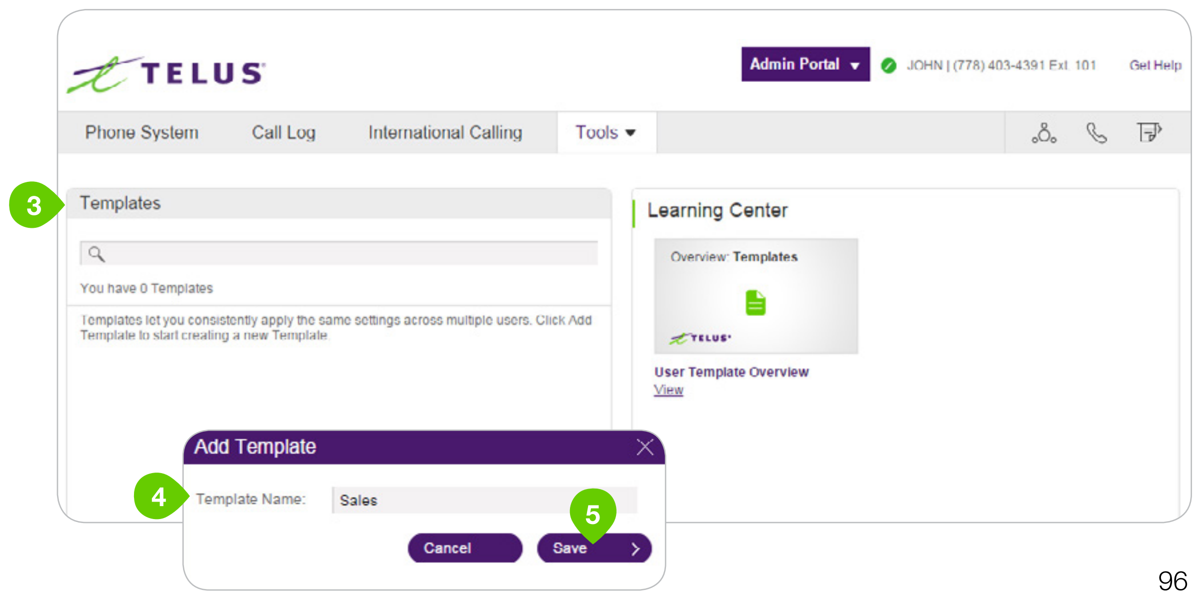
Templates*

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**.

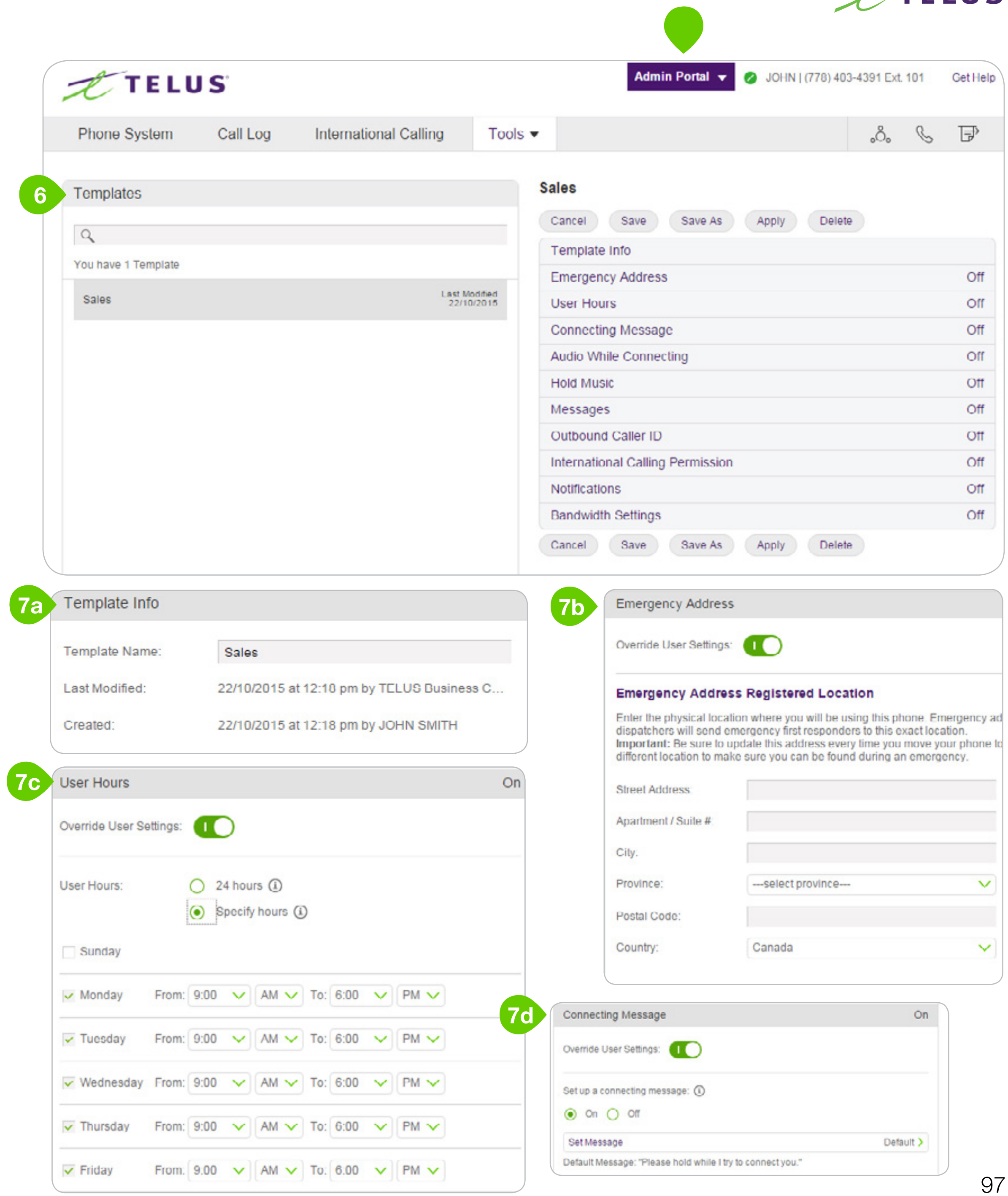




Not available for one line accounts. If you would like to activate this feature, please call the dedicated toll-free TELUS Business Connect support number at 1-844-626-6638, enter your TELUS Business Connect phone number, then press 1 or 2.

Create a Template for User Settings (cont.)

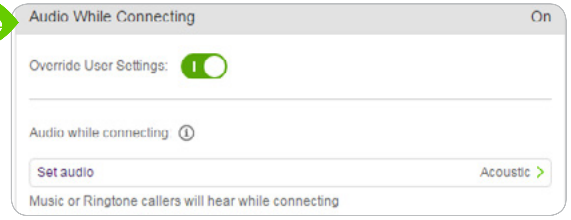
6. Click the name of a template.
7. You will see the options you can set for this template in the right panel (Sales in this example). For each setting, you have the ability to allow the template settings to override each user's settings. Slide the tab to the right to allow the override. The icon will 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.



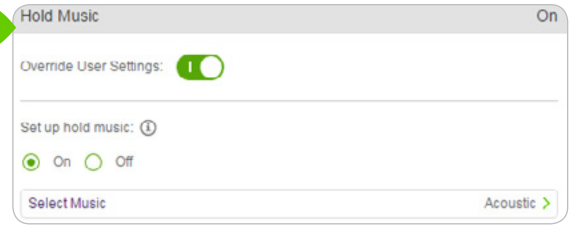
Create a Template for User Settings (cont.)

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.

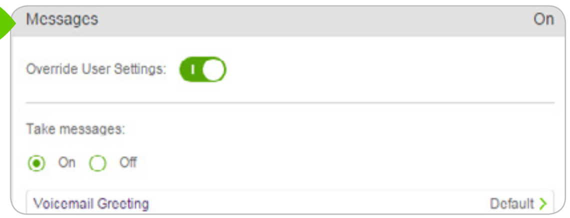
7e



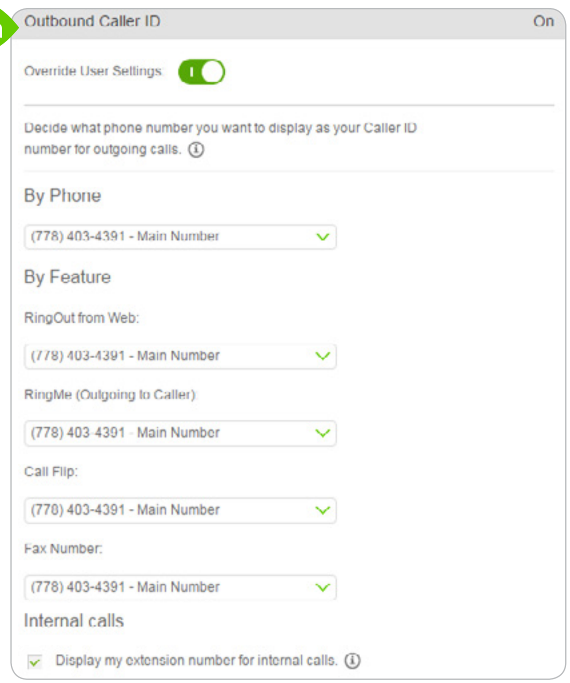
7f



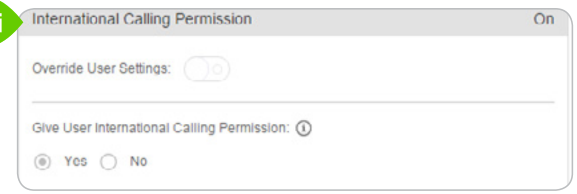
7g



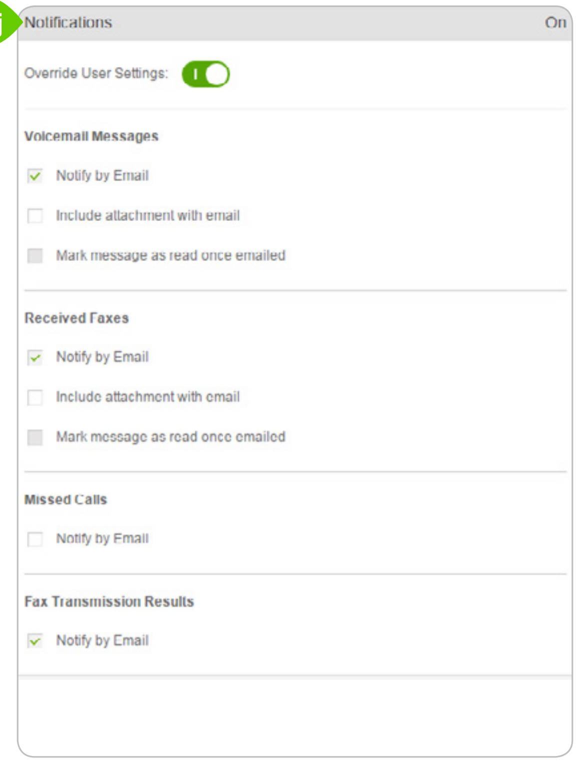
7h



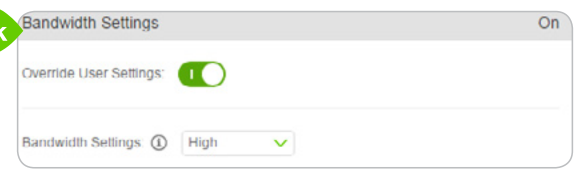
7i



7j



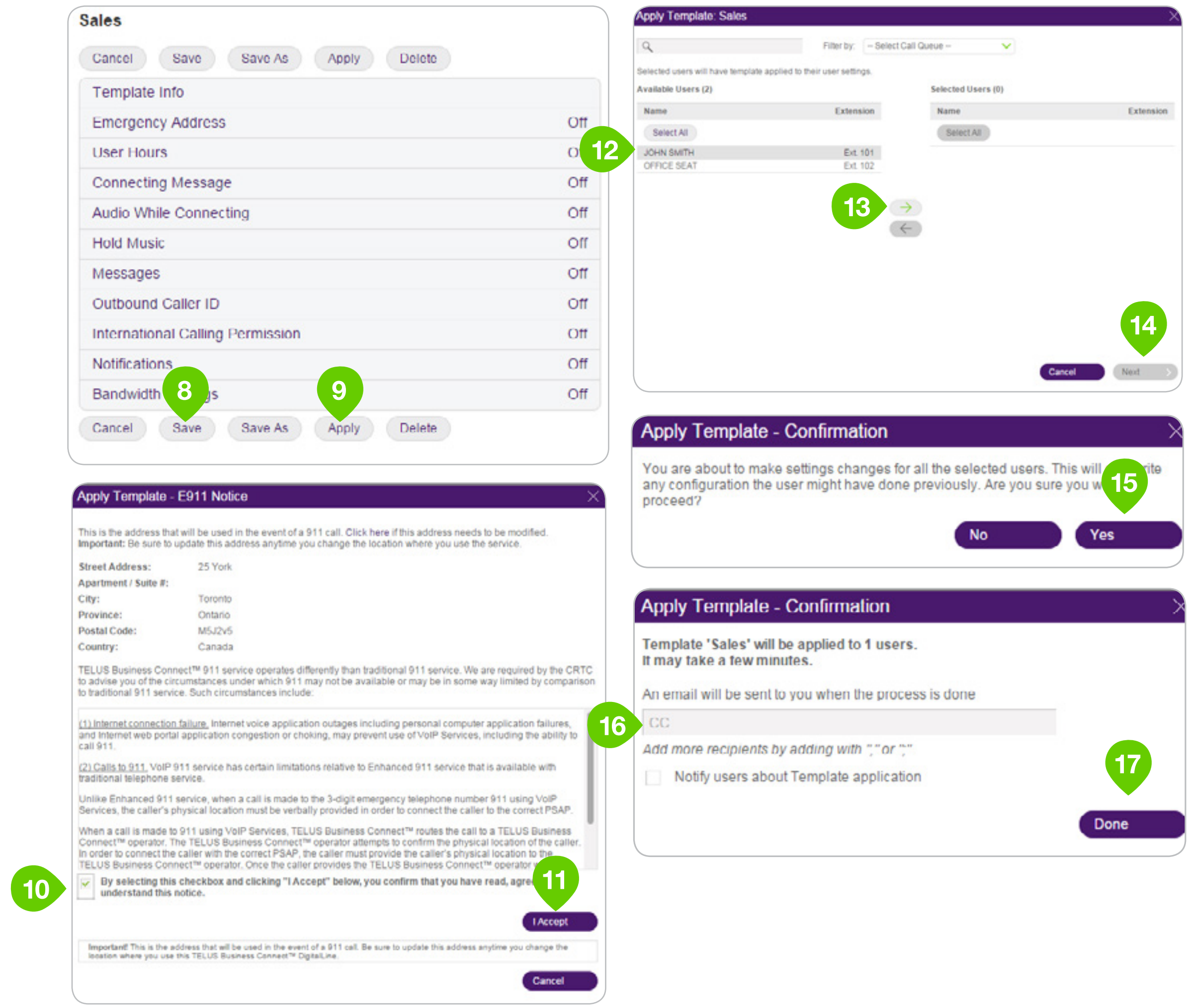
7k



*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**.



Appendix A:

Multi-Account Access

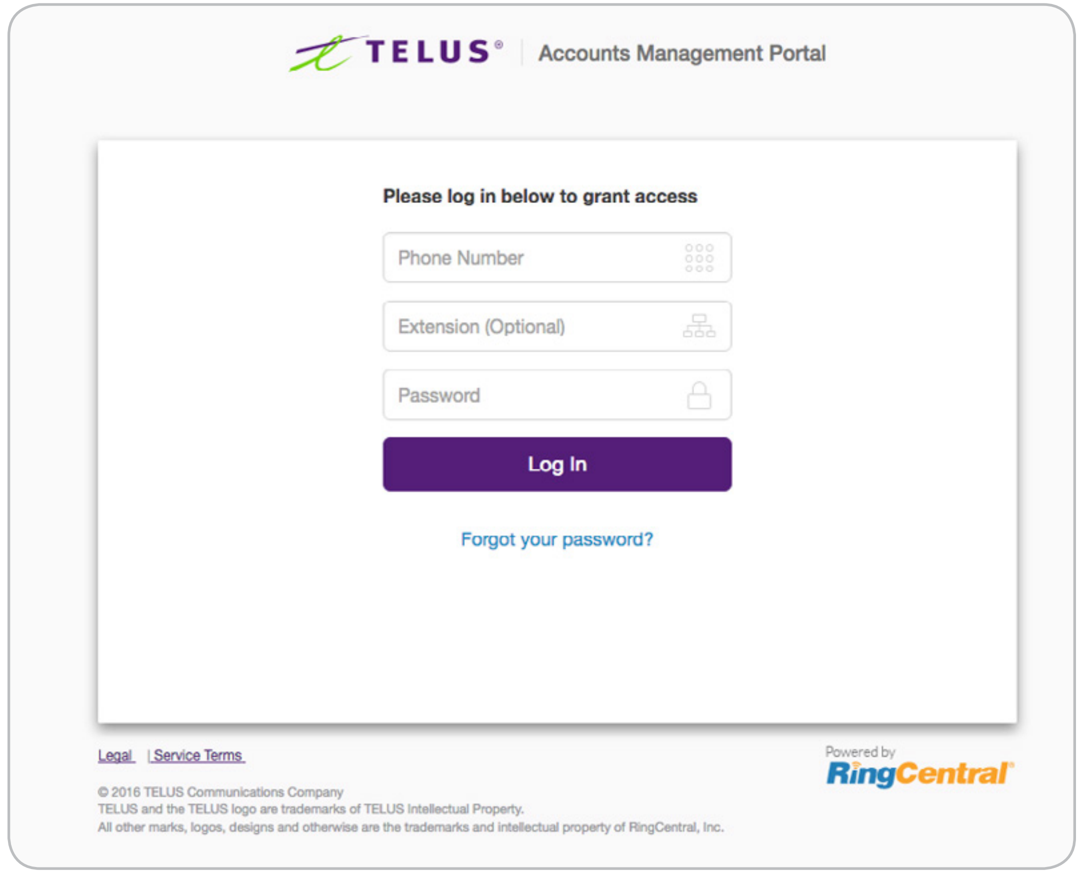
Account Management Portal

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**.



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:

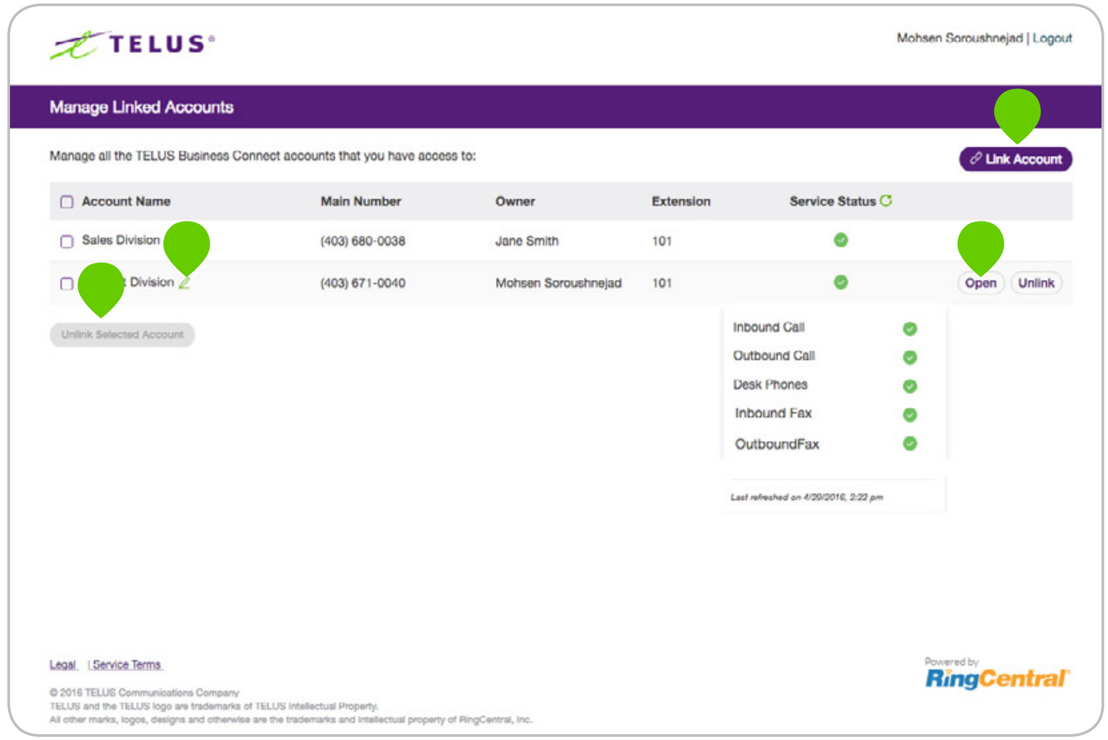
1. Click the **Edit** icon beside the account.
2. Enter the new **Account Name**.
3. Press **Enter**.

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.



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.