

# **User Guide: Answering Rules & Time Frames**

# Contents

## 1. **Answering Rules**

1.1 RingTime / Ring for \_Seconds

1.2 Allow and Block Phone Numbers

1.3 Add Rule

1.3.1 Answering Rule Time Frame

1.3.2 Enable or Disable

1.3.3 Do Not Disturb

1.4 Call Screening

1.5 Call Forwarding

1.6 Simultaneous Ring

1.6.1 How to Create New Answering Rule with Simultaneous Ring

## 2. **Time Frames**

2.1 Adding Time Frames

2.2 Specific Dates or Ranges

2.3 Edit & Delete Time Frame

# 1. Answering Rules

The Answering Rules icon as seen in figure 1.a will take you to your Answering Rules Center. Answering Rules are how you control what devices ring and how long those devices ring for when receiving a call. Here, you can also configure the action triggered when a call is unanswered.

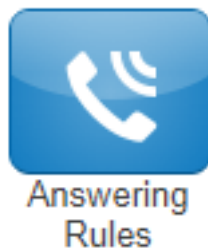


Figure 1.a

Clicking the Answering Rules icon will take you to your Answering Rules Center where your answering rules are listed, as seen in figure 1.b. Every account is configured with a Default rule that cannot be deleted.

If you have multiple answering rules configured the answering rule that is currently in effect will say Active next to it. Every rule is displayed with the name, description of how the rule will route the call, and the options to edit or delete the rule (except the default rule).

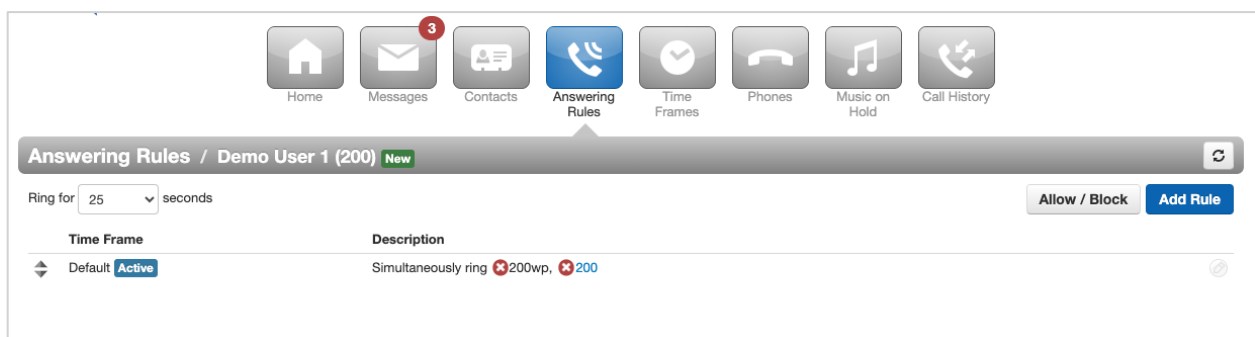


Figure 1.b

## 1.1 Ring Time / Ring for \_\_ Seconds

When you click on Answering Rules you will see the option to set how many seconds you would like a device to ring during call attempts, as seen in figure 1.1.a.

To set the Ring Time, click the drop-down to select how many seconds you would like a device to ring before sending the call to voicemail, or the specified destination entered into the When Unanswered field in the active answering rule.

If you do not want a ring to time out, meaning you want your phone to ring forever, select Unlimited at the bottom of the drop-down.

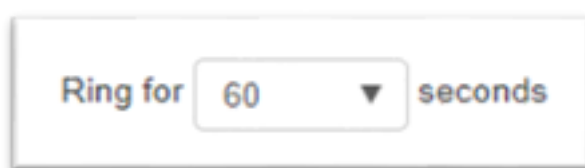


Figure 1.1.a

## 1.2 Allow and Block Phone Numbers

The Allow / Block button as seen in figure 1.2.a will open the Allow / Block window, as seen in figure 1.2.b. From this window, you can control what numbers are allowed to call you or not by adding the number to the Allow or Block lists.



Figure 1.2.a

When numbers are blocked by your domain, adding the number to the Allow list will let you bypass the domain block and still receive calls from that number / user.

Phone numbers added to the Allow list will also bypass Call Screening. As a screening measure, callers must record their name before the call can be directed. Adding the phone number to the Allow field will send the call directly to you without the user having to record their name first.

The Spam Calls option allows you to set how the system handles incoming potential spam calls. You can set whether suspected spam calls are set to Ring as normal, Send to voicemail, Drop call, or Screen call.

The Block list allows you to add phone numbers you do not want to be able to reach you. To add a phone number to the Allow or Block list, enter the number into the respective field and click the plus sign to add the phone number.

To block all anonymous or unknown callers, click the check box next to Block Anonymous or Unknown.

Figure 1.2.b

### 1.3 Add Rule

The Add Rule button as seen in figure 1.3.a allows you to configure new Answering Rules for your account. Clicking the Add Rule button will display the Add an Answering Rule window as seen in figure 1.3.b.

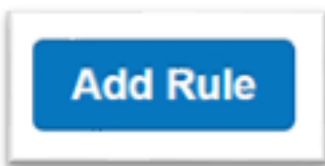


Figure 1.3.a

Figure 1.3.b

### 1.3.1 Answering Rule Time Frame

Time Frame is a set period that controls the time that certain events, like ringing phones or sending voicemail, take place. Click the suggested time frame from the dropdown to set the rule.

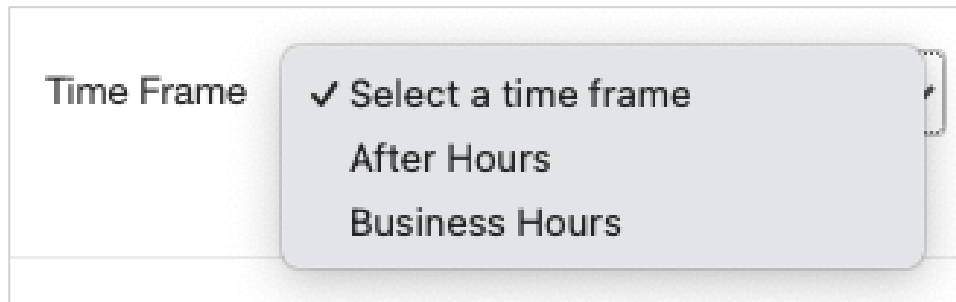


Figure 1.3.1.a

### 1.3.2 Enable or Disable

Enable or disable the rule by clicking the Enable option. A check in the box means the rule is enabled and will be in affect during the selected time frame.

### 1.3.3 Do Not Disturb

The Do not Disturb option as seen in figure 1.3.3.a will prevent calls from reaching your devices and send the call directly to voicemail. Call direction depends on the enabled or disabled status.

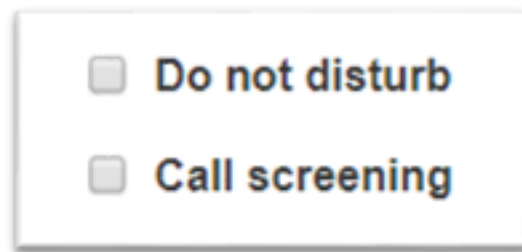


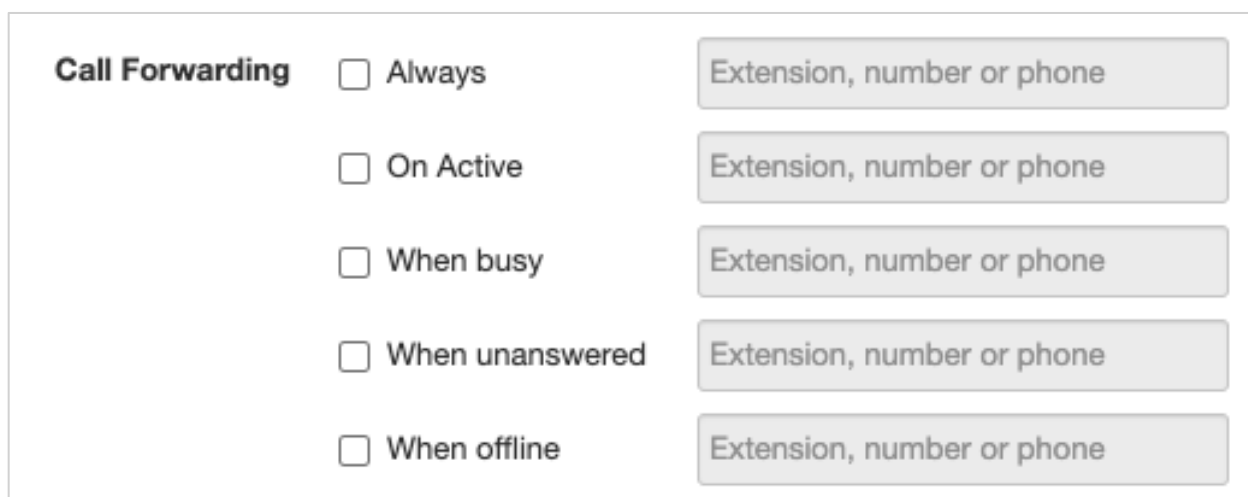
Figure 1.3.3.a

## 1.4 Call Screening

When Call Screening is enabled, callers record their name before the call can be directed. Once completed, your device will ring and upon pick up you will be given the choice to press one to be connected or to simply hang up and send the call to voicemail.

## 1.5 Call Forwarding

The Call Forwarding option, as seen in figure 1.5.a will route calls based on the options selected. The forwarding destination can be any user or another telephone number, it does not have to be associated with your account or in your system.



Call Forwarding	Options	Destination
<input type="checkbox"/> Always		Extension, number or phone
<input type="checkbox"/> On Active		Extension, number or phone
<input type="checkbox"/> When busy		Extension, number or phone
<input type="checkbox"/> When unanswered		Extension, number or phone
<input type="checkbox"/> When offline		Extension, number or phone

Figure 1.5.a

### **Always**

Always will forward the call to the destination entered in the Extensions, Number, or Phone field every time your account receives a call.

### **When Busy**

When Busy will forward calls only when your line is in use.

### **When Unanswered**

When Unanswered dictates where to send the call when the length of ring time you set in the Ring for \_ Seconds field, as seen in figure 1.1.a, has been reached.

### **When Offline**

When Offline routes incoming calls that occur when your devices are offline. Calls will be routed to the desired destination entered in the Extension, Number, or Phone field, as seen in figure 1.5.a. If using a softphone through your computer but you shut the computer down, calls will be forwarded to the softphone.

## 1.6 Simultaneous Ring

The Simultaneous Ring option, also known as SIM ring, seen in figure 1.6.a allows you to configure what devices ring when receiving a call. When you click the Simultaneous Ring box, you enable ringing on multiple extensions and / or phone numbers.

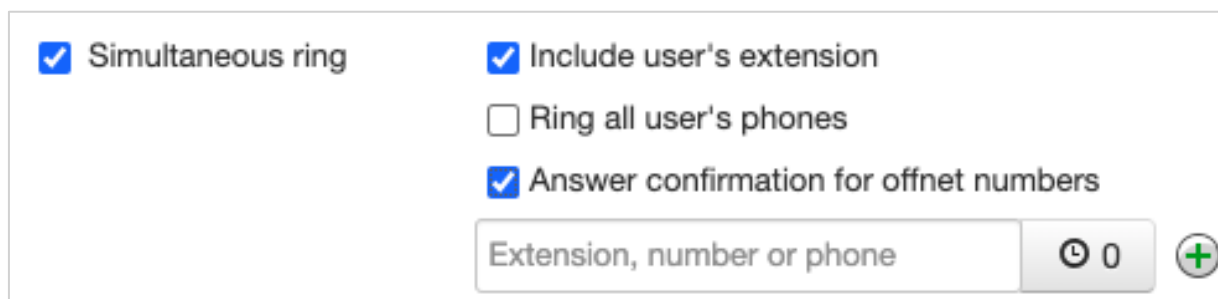
The image shows a configuration panel for 'Simultaneous ring'. It contains four checkboxes: 'Simultaneous ring' (checked), 'Include user's extension' (checked), 'Ring all user's phones' (unchecked), and 'Answer confirmation for offnet numbers' (checked). Below these is a text input field labeled 'Extension, number or phone' with a clock icon and a plus icon to its right.

Figure 1.6.a

### **Include User's Extension**

Enabling this option will make sure your extension rings when SIM Ring is enabled.

### **Ring All User's Phones**

This option will ring all devices registered to your account.

### **Answer Confirmation for Offnet Numbers**

This option lets the user know the call is forwarded from their phone system and gives them the option to be connected to the caller by pressing one or hanging up the call, so they are not connected with the forwarded calling party.

### **Just Ring User's Extension**

As seen in the bottom of figure 1.3.b, this option is only available if Simultaneous Ring is not enabled. If Just Ring User's Extension is enabled, it will just ring your default device configured under your account.

## 1.6.1 How to Create new Answering Rule with Simultaneous ring

Ex. You would like to create a rule for receiving incoming calls during business hours with the time frame set to ring your extension for 45 seconds before sending the call to voicemail. After 10 seconds you would like the call to ring your cell phone, then after 30 seconds you would like the call to ring a receptionist's extension 1003. Finally, after business hours, you would like calls to go to voicemail.



Steps to create the above example are as follow:

1. On the Answering Rule page, adjust the Ring for Timeout option to 45 seconds.
2. Create a new rule by clicking Add Rule in the Answering Rules center.
3. On the Add an Answering Rule window select the time frame you would like the rule to be in effect.
4. Make sure the Enabled box is checked.
5. Click the Simultaneous Ring option under Call Forwarding.
6. Click Include User's Extension to ring phone.
7. Enable Answer confirmation for Offnet Numbers so the cell phone voicemail does not pick up in place of the system voicemail.
8. In the Extension, Number, or Phone field enter the cell phone number you would like to ring, then click the Ring Delay option and slide to 10 seconds.
9. Click the plus sign next to the Extension, Number, or Phone field and in the new window that appears enter the extension of the receptionist 1003, click save. Your rule should look like the example in figure 1.6.1.a.
10. Once the answering rule is created you will see it appear in the Answering Rules list as seen in figure 1.6.1.b. Active will show next to the new rule when enabled.
11. Click the Edit icon for the default answering rules to send calls directly to voicemail after hours.
12. On the Edit Answering Rule for the default rule, select Always in the Call Forwarding options, then enter your extension, select Voicemail, and click Save.
13. Then slide the rule with During Business Hours selected to the top of the answering rules. The Default rule will be on the bottom as seen in figure 1.6.1.b.

## Edit Answering Rule

Time Frame

Default

This is when your answering rule will apply

☒ Enabled

☐ Do not disturb

☐ Call screening

Call Forwarding

☐ Always
 

Extension, number or phone

☐ On Active
 

Extension, number or phone

☐ When busy
 

Extension, number or phone

☐ When unanswered
 

Extension, number or phone

☐ When offline
 

Extension, number or phone

☒ Simultaneous ring
 

☒ Include user's extension
 ☒ Ring all user's phones
 ☐ Answer confirmation for offnet numbers
 

Extension, number or phone

🕒 0

+

☐ Just ring user's extension

Cancel

Save

Figure 1.6.1.a

Answering Rules / Demo User 1 (200)

New

Ring for 25 seconds

Allow / Block

Add Rule

Time Frame	Description	
Business Hours <b>Active</b>	Ring x200	ⓘ ✕
After Hours	Do not disturb	ⓘ ✕
Default	Simultaneously ring 📞200wp, 📞200	ⓘ

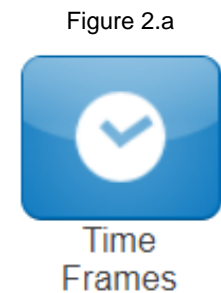
Figure 1.6.1.b

Now that the Business Hours rule is set, when your extension receives calls during business hours your extension will ring. After 10 seconds your cell phone will start ringing in addition to your extension. Then after 30 seconds it will ring the receptionist at extension 1003. If no one answers after 45 seconds, the call will be sent to your voicemail.

If a call reaches your extension outside of the selected business hour time frame, the Default rule will be active and route the calls directly to voicemail.

## 2. Time Frames

The Time Frames icon as seen in figure 2.a will take you to the Time Frames Application Center. Time Frames apply time and date ranges to answering rules, allowing you to control how calls are routed depending on the time of the day the call occurs.



To view and create your available Time Frames, click on the Time Frame icon in the top navigation menu bar as seen in figure 2.a. Here you will see all the Time Frames available for you as displayed in figure 2.b.

Time Frames with names in black, not showing the option to edit or delete, are Time Frames created at the domain level, and are available to everyone in the domain to use.

Only Time Frames with names in blue text that you created can be edited. If you need domain level time frames changed, contact your Office Manager.



Name ^	Owner	When	Recurrence	Ends On
After Hours	Domain	Days of the Week  Sun, Mon, Tue, Wed, Thu, Fri, Sat	Every Week	Never
Business Hours	Domain	Days of the Week  Mon, Tue, Wed, Thu, Fri	Every Week	Never

Figure 2.b

## 2.1 Adding Time Frames

To create a Time Frame, click the Add Time Frame button as seen in figure 2.1.a. The Add Time Frame window will appear as seen in figure 2.1.b.

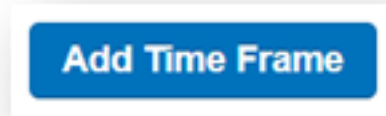


Figure 2.1.a

A screenshot of the "Add a Time Frame" window. The window has a title bar with the text "Add a Time Frame" and a close button (X) in the top right corner. Below the title bar, there is a "Type" dropdown menu. Underneath, there is a "Name" text input field followed by a note: "Note: Name cannot be changed". Below the name field, there is a "When" section with five radio button options: "Always" (selected), "Days of the Week", "Specific Dates", "Holidays", and "Custom". Each option has a small information icon (i) next to it. At the bottom right of the window, there are two buttons: "Cancel" and "Save".

Figure 2.1.b

The Name field allows you to give the Time Frame a name for easier identification. Once a rule has been created, the name cannot be changed. If you want to change the name, you will have to delete the rule and recreate it with the new name. Under the Name field, there will be five options for when the Time Frame should be in effect:

### **Always**

Choosing this option will make the time frame active 24/7.

### **Days of the Week and Times**

Allows you to select specific days of the week and the hours in the day you want the Time Frame to be active. Select what days of the week you would like the Time Frame to be active by checking the box.

## Specific Dates

This option allows you to select specific dates you want the Time Frame to be active (such as PTO). Once selected, a new tab appears that allows you to input the specific dates and whether or not the event recurs.

## Holidays

This options gives you the ability to set a Time Frame for country-specific recognized holidays and/or observed holidays.

## Custom

The custom Time Frame option allows you to create a custom Time Frame that combines days of the week, specific dates, and holidays together.

Once you have selected a day of the week, a new tab will appear, allowing you to select the days and times to when you would like the Time Frame to stop and start, as seen in figure 2.1.c.

**Add a Time Frame**

Type Days of the Week

Create a weekly schedule with optional start and end dates.

Days of the week

<input type="checkbox"/> Sunday				
<input checked="" type="checkbox"/> Monday	8:00 am	to	5:00 pm	
<input checked="" type="checkbox"/> Tuesday	8:00 am	to	5:00 pm	Copy to all
<input type="checkbox"/> Wednesday				
<input type="checkbox"/> Thursday				
<input type="checkbox"/> Friday				
<input type="checkbox"/> Saturday				

Recurrence Every week

Cancel Back Save

Figure 2.1.c

If you would like a break in the middle of the Time Frame, click the plus sign next to the end of the Time Frame as seen in figure 2.1.d. You will then see another set of fields appear, representing when the Time Frame will take effect, as seen in figure 2.1.e.



Figure 2.1.d


☒ Monday
  to   
 to  

Figure 2.1.e

## 2.2 Specific Dates or Ranges

This option will allow you to configure a Time Frame active for specific dates and times. After selecting the Specific Date or Ranges option you will see the To and From dates as seen in figure 2.2 a.

Specific dates
 
 to

Figure 2.2.a

When you click in the To or From date fields a calendar will appear, as seen in figure 2.2.b.

Specific dates
 
 to

Recurrence

Figure 2.2.b

Once the calendar opens, select the end date you would like the Time Frame.

Next to the calendar are the Hour and Minute options to configure your Time Frames at specific hours on the selected dates.

Clicking the plus sign will allow you to add more date ranges that the Time Frame will be active in.

## 2.3 Holidays

This option will allow you to configure a Time Frame active for country-specific holidays and/or observed holidays. After selecting the Holidays option you will see two new tabs available, as seen in figure 2.3.a.

The screenshot shows a dialog box titled "Add a Time Frame" with a close button (X) in the top right corner. It has three tabs: "Type", "Holidays", and "Observed Holidays". The "Holidays" tab is selected. Below the tabs, there is a text prompt: "Choose from a selection of local and international holidays." Under this, there is a section labeled "Holidays" containing a dropdown menu with "United States" and "All" options, and a search bar with the placeholder text "Search holidays". Below the search bar, it says "No holidays added yet". Further down, there is a "Time" section with two input fields: "12:00 am" and "11:59 pm", separated by "to", and a green plus icon. Below that is a "Recurrence" section with a dropdown menu set to "Does not recur". At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

Figure 2.3.a

Use the drop-down menu to select a specific country as seen in figure 2.3.b. Some countries allow you to refine further by state or region.

After selecting the location you desire, you'll then have to use the Search bar to select the specific holidays you want to include in your Time Frame.

The Observed Holidays tab allows you to choose when you or your company observes the holiday, as seen in figure 2.3.c.

The screenshot shows a configuration option for observed holidays. It includes a label "If holiday is on" followed by a small information icon. To the right is a dropdown menu with "Sun" selected. Further right is another dropdown menu with the text "Observe on next workday".

Figure 2.3.c

The screenshot shows a dropdown menu for selecting a country. The menu is open, showing a list of countries: Australia, Canada, Mexico, United Kingdom, United States, Afghanistan, Albania, and Algeria. The "United States" option is highlighted. Above the list, there are two dropdown options: "United States" and "All".

Figure 2.3.b

## 2.4 Edit and Delete Time Frame

To edit a Time Frame, click the pencil icon to the right as seen in figure 2.4.a. You can edit the When options but not the name. If you would like to rename the Time Frame, you must delete it and create a new Time Frame. Use the same When options but add your new desired name.

To delete a time frame, click the red x Delete icon, as seen in figure 2.4.a.



Figure 2.4.a