

# SmartMail Call Manager

## COMPLETE USER INTERFACE GUIDE






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## Dashboard

The top line on all pages provides navigation between your key features, and is always visible. Below that, to the right are a number of fixed components:

- Phone Number Indicator, which reminds you which phone number you are accessing.
-  Logout button, which you can use when you have finished.
-  Refresh button, which updates the page with recent phone and message activity.
-  Help button, which brings up the online help window.

The dashboard provides a way to quickly access some of your key features.

## Messages

This shows at a glance how many new messages you have, and your total number of messages. You can click on the link to go and manage those messages.

## Missed Calls

Shows your recent missed calls.

If calls are from people in your contact list, their name is displayed along with their phone type. Click on a caller's name to jump directly to their contact list entry.

## Contacts




Provides an easy way to look up a contact by name and view their details. For more information, see the help for the contacts page.

## Call Manager Settings

Shows you how your incoming calls are handled. You can change this by following the "Change Settings" link through to the Call Manager tab.

## Messages & Calls



The top line on all pages provides navigation between your key features, and is always visible. Below that, to the right are a number of fixed components:

- Phone Number Indicator, which reminds you which phone number you are accessing.
-  Logout button, which you can use when you have finished.
-  Refresh button, which updates the page with recent phone and message activity.
-  Help button, which brings up the online help window.

The Messages & Calls page allows you to manage and listen to your voicemails, and view details of your recent missed, dialed, received and rejected calls.

### Messages

This tab lists all of the voicemails in your inbox. New messages (those you have not yet listened to) appear in **bold type**.





For each message in your inbox, you can see who the caller was, the time of the call, and the length of the message. If the call was from a telephone number that appears in your contact list or the caller's name was provided, then the name of the caller will be displayed. Otherwise you will just see their telephone number. You can also see if the caller marked the message as  Urgent or  Private.

Your inbox may also contain special **System Messages**, such as delivery failure notifications.

The following actions are available to you on this tab.

- Play a voicemail or save a local copy on your computer
- Manage your voicemails by deleting them, or marking them as either new or heard
- Reply to or forward a voicemail
- Leave a voicemail for someone
- View contact details or add new callers to your contact list.

### Play or save a voicemail

- **To play a message**, click on the  or  icon to bring up the Voicemail Player.
- **To save a copy of the message on your computer**, right click on the  or  icon, and select *Save Target As...* or *Save Link As...*


### Manage your voicemails

- **To delete one or more messages**, select the checkboxes next to the messages you wish to delete, and then press the  button at the bottom of the panel. To quickly select or deselect all messages, use the checkbox at the top of the list.

- Messages are automatically marked as listened to when you play them. **To mark one or more messages you have previously listened to as New** (so that they appear in bold again), select the messages (as above) and press **Mark As New** at the bottom of the panel.
- Similarly, **to mark messages as heard** without listening to them, select the messages and press **Mark As Heard** at the bottom of the panel.


## Reply to or forward a voicemail

If you have received a voicemail from another user on the same voicemail system, you can record and send a voicemail as a response.


You can also forward voicemails (as long as they are not marked as  private).

- If you wish to forward a voicemail to another user (or users) on the same voicemail system, you can forward the message as a voicemail.
- Otherwise, you can forward the voicemail as an email to one or more email addresses (the voicemail will be attached to the email as a WAV file).

To reply to a voicemail:

1. Click the  icon corresponding to the message you wish to reply to, and select either Reply or Reply to All to bring up the Voicemail Reply overlay. Note: if you attempt to reply to a message from someone who is not a user on the same voicemail system then when you try to send the reply it will fail.
2. Record a response.
3. The Voicemail Reply overlay also allows you to optionally
  - flag a response as urgent or private
  - listen to the original message by clicking on the "original voicemail" header to access the voicemail player controls
  - add other recipients to the To field, separating them with semicolons.
4. When you are done, press the **Send** button to send the message.


To forward a voicemail as a voicemail:

1. Click the  icon corresponding to the message you wish to reply to, and select Forward as Voicemail to bring up the Forward as Voicemail overlay.
2. Enter one or more recipients in the To field. The recipients specified must be other users on the same voicemail system, or the attempt to send the message will fail. If a recipient is configured in your contact list, then you can identify them by name, otherwise you must enter their telephone number directly. You can specify multiple recipients by separating them with semicolons.
3. The Forward as Voicemail overlay also allows you to optionally
  - flag the voicemail as urgent or private

- record an introductory message - when the recipient listens to the voicemail, they will hear your introductory message first followed by the message you are forwarding
- listen to the original message by clicking on the "original voicemail" header to access the voicemail player controls.

4. When you are done, press the **Send** button to send the message.

To forward a voicemail as an email:

1. Click the  icon corresponding to the message you wish to forward, and select Forward as Email to bring up the Forward as Email overlay.
2. Enter one or more recipients in the To field. If the recipient is configured in your contact list, then you can identify them by name. Otherwise you must enter their complete email address. You can specify multiple recipients by separating them with semicolons.
3. The Forward as Email overlay also allows you to optionally
  - specify additional recipients in the Cc or Bcc fields
  - adjust the subject line of the email message
  - add text to be included along with the voicemail attachment.
4. When you are done, press the **Send** button to send the message.

*Note:* When forwarding a message as an email, the From address specified will include your name as displayed on the settings page.

## Leave someone a voicemail

This feature enables you to leave voicemails for other users of this voicemail system by recording and sending a message through the Web UI rather than phoning them. You can also record a single message in this way to be left for multiple users rather than phoning them each individually.




To send a voicemail:


1. Press the **New Voicemail** button, to bring up the Voicemail Composer overlay.
2. Enter one or more recipients in the To field. The recipients specified must be other users on the same voicemail system, or the attempt to send the message will fail. If a recipient is configured in your contact list, then you can identify them by name, otherwise you must enter their telephone number directly. You can specify multiple recipients by separating them with semicolons.
3. Optionally flag the voicemail as Urgent or Private.
4. Record your message.
5. Press the **Send** button to send your message.

## View contact details or add new callers to your contact list

- If a message has been left from a telephone number that appears in your contact list, then the name of the caller will be displayed. To view your contact list entry for the caller, click on their name.
- Otherwise you will just see the caller's telephone number. In this case, you can create a contact list entry for the caller by clicking on their number, and selecting "Add to contacts".

## Troubleshooting


I have a  warning indicator that says Flash is Not Installed, and clicking on the  or  icon does not bring up the Voicemail Player.

The Voicemail Player uses a technology called Flash from Adobe, which you do not have installed. If you click on the  warning indicator then it will give you a link to Adobe's website that will install Flash for you.




*Note:* Adobe Flash is currently not supported for Apple users.

## Missed Calls

This tab lists your recent missed calls. The following actions are available to you on this tab.

- **To add an unrecognized caller to your contact list**, click on the  icon.
- **To go to a contact's entry in your contact list**, click on their name.
- **To go to the rule in Call Manager which handled a call**, click on the Set of Rules name.


The following information is displayed for each missed call.

- Voicemail icon. If the missed call resulted in a voicemail, one of the following icons will be displayed.
  -  You have an unheard voicemail as a result of this call.
  -  You have already heard the voicemail resulting from this call.
  -  A voicemail was left, but it is no longer in your inbox.
- Caller details. Each caller is identified in the following ways.
  - Name. The caller's name was provided or the number of the caller matches an entry in your contact list.
  - Phone type. Accompanies the name when matched via your contact list.
  - Telephone number. The number of the caller does not match any entry in your contact list.
  - *Unknown*. The caller withheld their identity, and so no information about them is available.
- Set of Rules. The Set of Rules which handled the call.
- Date and time of the call.



## Dialed Calls

This tab lists your recent dialed calls. The following actions are available to you on this tab.


- **To add a dialed number to your contact list**, click on the  icon.
- **To go to a contact's entry in your contact list**, click on their name.

The following information is displayed for each dialed call.

- Call details. Each call is identified in the following ways.
  - Name. The number dialed matches an entry in your contact list.
  - Phone type. Accompanies the name when matched via your contact list.
  - Telephone number. The number dialed does not match any entry in your contact list.
  -
- Date and time of the call.
- Call duration in hours, minutes, and seconds.

## Received Calls

This tab lists your recent received calls. The following actions are available to you on this tab.


- **To add an unrecognized caller to your contact list**, click on the  icon.
- **To go to a contact's entry in your contact list**, click on their name.
- **To go to the rule in Call Manager which handled a call**, click on the rule name.
- **To see which number a call was terminated at**, place the cursor over the rule name.

The following information is displayed for each received call.

- Caller details. Each caller is identified in the following ways.
  - Name. The caller's name was provided or the number of the caller matches an entry in your contact list.
  - Phone type. Accompanies the name when matched via your contact list.
  - Telephone number. The number of the caller does not match any entry in your contact list.
  - *Unknown*. The caller withheld their identity, and so no information about them is available.
- Set of Rules. The set of rules which handled a call.
- Date and time of the call.
- Call duration in hours, minutes, and seconds.

## Rejected Calls


This tab lists your recent rejected calls. The following actions are available to you on this tab.

- **To add an unrecognized caller to your contact list**, click on the  icon.
- **To go to a contact's entry in your contact list**, click on their name.
- **To go to the rule in Call Manager which handled a call**, click on the rule name.

The following information is displayed for each rejected call.

- Caller details. Each caller is identified in the following ways.
  - Name. The caller's name was provided or the number of the caller matches an entry in your contact list.
  - Phone type. Accompanies the name when matched via your contact list.
  - Telephone number. The number of the caller does not match any entry in your contact list.
  - *Unknown*. The caller withheld their identity, and so no information about them is available.
- Set of Rules. The set of rules which handled a call.
- Date and time of the call.

## Mailbox quota

You have restrictions on the total amount of content that can be stored in your mailbox. If you reach this limit, or are close to reaching this limit, you will see a  warning icon appear on this page. Clicking on this warning icon will tell you how much content you have, and what your limits are.

If you are close to reaching your limit, then you may wish to delete some of your voicemails to free up space. If you reach your limit and don't delete any content, you will be unable to receive further messages in your mailbox.

In addition to voicemail content you may be told that you also have "other" content.

- This other content includes voicemails in your secondary group mailboxes. You may need to log in to your secondary mailboxes and delete some of the content from them to free up space.
- You may also have "other" content if you have accessed your mailbox using a remote email client (such as Microsoft Outlook) over IMAP and accidentally moved, for example, emails into your mailbox. Such content will take up space in your mailbox, but you will be unable to access it through the Web UI - you will need to use your remote email client again to remove it.

## Export Calls

This feature allows you to export lists of your missed, dialed, received and rejected calls as a text file in CSV format. This file can then be stored locally, and accessed using a range of other applications such as text editors or spreadsheets. If you run a business, you might for example use the data in this file to help you track the calls you have made and received against individual customer accounts.

To export a list of your calls press the **Export** button on any of the call list tabs to bring up the Export Call Lists overlay.

1. Select the call lists you wish to export, and then press the **Export** button to begin the export.
2. Once the export operation has completed, you will have the opportunity to specify where you wish to save the exported file to.

For dialed calls only records of the last 10 calls are available for export. For missed, received and rejected calls records of the last 60 days of calls (up to a maximum of 500 calls across all types) are available for export.

## Voicemail Player

The Voicemail Player allows you to listen to your voicemails using a similar interface to an MP3 player.

The top part of the player shows who left the voicemail, when they did so, and how long it lasts. An 📞 icon appears if the caller marked the voicemail as urgent.

Below these a status message shows whether the voicemail is loading, playing or paused. The slider that follows shows progress as the recording plays, and allows you to drag to a different part of the recording.

A set of round buttons provide the actual playing interface:



steps back to play the previous voicemail.



plays the current voicemail.




replaces the play button - pauses the currently playing voicemail.



stops the currently playing voicemail.



steps on to play the next voicemail.

The remaining controls for the player concern the playback volume - you can toggle between the unmuted 🔊 and muted 🚫 states by clicking these icons, and adjust the  slider to set a particular volume level.

Finally, there is a set of buttons:

**Save** allows you to download and save the voicemail to your computer

**Delete** deletes the current voicemail

**Close** closes the voicemail player

## Recording a message

A number of controls are provided for recording your message.



Starts recording. This will overwrite any message you have previously recorded.




Plays back your recorded message. This action will be unavailable if you have not yet recorded a message.





Stops recording or playing the message.




This control allows you to adjust the gain of your microphone. While recording, the  lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear then the gain is set too high and your message will be distorted.





This control allows you to adjust the playback volume. You can mute or un-mute playback by clicking the  or  icons, and adjust the slider to set a particular volume level.

When you first attempt to record a message, an "Adobe Flash Player Settings" overlay will appear. Ensure that the "Allow" radio button is selected, and if you do not wish to be shown these settings in future tick the "Remember" checkbox.

## To record a message you need to carry out the following steps.

1. When you are ready to record your message, press the  button.




2. Read your message into your microphone, and when you have finished, press the  button.

3. Playback your message to check that it has recorded correctly by pressing the  button. If there is a problem with the recording, e.g. you cannot hear it, or it is very quiet, see the section on troubleshooting below.


4. If you are not happy with your message content, then record a new message by pressing the record button again. This will overwrite your previous message.

## Troubleshooting

### I have recorded my message, but when I try to play it back I cannot hear anything




- Check you have actually recorded something. The length of the current recording is shown as e.g. 0:01:35 (1 minute and 35 seconds). If the current recording length is 0 or much lower than expected then try recording your message again.
- Check that playback is not muted, and that the volume is turned up. If playback is muted then the  icon will be displayed - press this to un-mute the speaker. Volume can be adjusted using the volume slider described above.
- Try re-recording the message, and as you are recording, watch the  lights above the gain control 
  - If no lights appear, or only one or two appear, then check the following.
    - Increase the gain of your microphone by moving the gain control to the right hand end.
    - Click the microphone icon to the left of the gain control to bring up the "Adobe Flash Player Settings" and make sure that the Allow option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the dropdown, and that the record volume is turned up.
    - If you are using an external microphone, check that this is plugged in correctly.
  - If this still doesn't solve the problem, then it may be that your microphone has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.
  - If several green lights appear consistently while recording your message, then it is likely that your message has recorded correctly and the problem is occurring when playing it back. If you are using external speakers, check that these are plugged in correctly and turned on. If this does not resolve the problem, then it may be that your speaker has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.

### I have recorded my message, but when I try to play it back it is distorted

This may be because your microphone gain is set too high. Reduce the gain by moving the gain control  to the left hand end.

## Contacts

The top line on all pages provides navigation between your key features, and is always visible. Below that, to the right are a number of fixed components

- Phone Number Indicator, which reminds you which phone number you are accessing.
-  Logout button, which you can use when you have finished.
-  Refresh button, which updates the page with recent phone and message activity.
-  Help button, which brings up the online help window.

### Contact List

The contact list allows you to store information about your telephone contacts. Adding your contacts to this list makes other features easier to use. For example:

- when you receive a call, if the caller is configured in your contact list then instead of seeing their telephone number in your call history, you will see their name.
- when configuring services such as rejecting callers, you can select people from your contact list to reject calls from instead of needing to enter their phone numbers explicitly.

Each contact list entry may contain:

- first and last names
- nickname
- job title, and organization
- home, work, mobile, fax and other telephone numbers
- two email addresses
- an SMS address
- home and work postal addresses

When multiple telephone numbers are configured, one number can be identified as the main (or default) number. Similarly one of the email addresses can be marked as the main one.

Your contact list may also contain groups, which make it easy to group together individual contacts whom you wish to refer to all at once. Groups may also be nested within other groups.

Viewing the details of a group shows which contacts and groups are members of it, and viewing the details of a contact shows which groups it is a member of.

The contact list interface consists of two columns:

- the *contacts and groups* column which lists your contacts and groups in alphabetical order
- the *details* column used for viewing the details of a single contact entry or group, for adding new contacts or groups, or for editing existing ones.

## Finding a contact list entry

There are multiple ways of finding an existing contact list entry.

- Alphabetically by name. Scroll through the names in the contact list column, and click on the one you want to view the details of.
- Searching by name. To search by name type the first few letters of any component of the name into the search box at the top of the contact list column. Matching proceeds as you type, and the more you type, the more constrained the list of matches is. Matching is performed against contacts' first and last names, and also against various other text fields within the contact.
- Searching by number. To search for a contact by number type the first few digits of one of their telephone numbers into the search box.


Within the details view, the matching search text will be highlighted for quick recognition.

## Adding a new contact entry

To add a new contact to the list, click the **New Contact** button below the contact list column. You can fill in as many or as few of the details as you want.

Telephone numbers can be entered in any format. Normally, this should be the full 10 digit number.

Once you have finished entering the details for the new contact, click the **Save** button to submit your changes. If you wish to discard the new entry, click **Cancel**.

**Hint:** When you receive a call from someone who is not already recognized as a contact, the various lists of calls display a  symbol alongside the call. Using this will bring you straight to this *New Contact* display, where you can easily fill in any additional information about the contact, then press **Save** to save them to your contact list.

## Editing a contact entry

To edit an existing contact, first find the contact you wish to edit (see above) and select it to make it appear in the details column.

Now click the **Edit** button below the details column. Make the necessary updates, and then click either the **Save** or **Cancel** buttons to commit or discard your changes.

When editing a contact, you can also change which groups it is a member of.

## Adding a group entry

To add a new group to the contact list, click the **New Group** button below the contact list column. There are entry fields for the Group Name and a numerical ID you can use to refer to the group over the telephone. You can also select individual contacts and groups to be added as group members by ticking the checkbox along their names in the rightmost column. This column also holds a search box which can be used to quickly locate the names you want if you already have a long contact list.

Once you have finished entering the details for the new group and selecting its members, click the **Save** button to submit your changes. If you wish to discard the new group, click **Cancel**.

## Editing a group entry

To edit an existing group, first find the group you wish to edit (see above) and select it to make it appear in the details column.

Now click the **Edit** button below the details column. Make the necessary updates, and then click either the **Save** or **Cancel** buttons to commit or discard your changes.

## Deleting a contact list entry

To delete an existing contact list entry, find the entry you wish to delete (see above) and select it to make it appear in the details column, then click the **Delete** button below the details column.

## Contact List Import

This feature allows you to import contacts from another application such as Microsoft Outlook or Outlook Express. This provides a very quick way of populating your contact list if you already have contacts defined in another application. If you maintain multiple contact lists then this feature can also be used to periodically update your contact list with the changes you have made to contacts in other applications.

To import contacts, you must first generate a CSV file containing them. This file is typically generated by exporting your contacts from another application. For example, the following steps describe how you would export your contacts from Microsoft Outlook. Note: the steps may vary slightly depending upon the version of Outlook you are using.

1. Select File > Import and Export from the main menu
2. Choose "Export to a file" and press the Next button
3. Choose Comma Separated Values (Windows) and press the Next button
4. Select your Contacts folder and press the Next button
5. Choose a location to save the CSV file to and press the Next button. Remember where you have saved the file as you will need this again shortly.
6. Press the Finish button.



Once you have created a CSV file containing your contacts, you can import them by pressing the **Import** button on the Contact List tab. This will bring up the Import Contacts overlay.

1. First press the **Browse** button, and locate the CSV file containing the contacts that you wish to import.
2. Select what you would like to happen if a contact you are importing "matches" a contact already defined in your contact list. See the section below on Matching Contacts.
3. Press **Import** to start the import operation. If you are importing a large number of contacts, then this may take a little while to complete.
4. Once the process has completed, you will be shown counts of the number of new contacts added, existing contacts updated, and, if appropriate, counts of how many existing entries were deleted and how many imported contacts were ignored (see Matching Contacts below). At this stage you can also press the **Details** button to check what updates have been made to your contact list.
5. Having checked the counts and details, if you are happy then press the **Confirm** button to commit the changes. If you're not happy, press the **Cancel** button - the import operation will be abandoned, and no changes will be made to your contact list.

## Matching Contacts

Generally, an imported contact is considered to "match" an existing contact if they have the same name. The only exception to this is if you have previously exported your contacts using Native format – see Exporting in native format below.

- If there is a match, but the two versions do not contain any conflicting information then the import operation will simply add any additional details from the imported version of the contact to the existing version.
- If there is a match, and the two entries conflict with one another, e.g. you have an existing entry for John Smith with his address as "101 Mountview Drive", and you are importing an entry for John Smith which has his address as "17 Pelican St" then what happens depends upon the action you choose in the import contacts overlay.
  - **Overwrite the contact.** The imported version will overwrite the version already in your contact list. You should select this option if you are confident that the list of contacts you are importing will always contain the most up-to-date information.
  - **Duplicate the contact.** The imported version will be added as a new contact list entry, so, in the example above you will end up with two entries for John Smith. You can then go through and manually choose whether to keep one or both entries once the import process has completed.
  - **Ignore imported entry.** The entry will not be imported, and the version currently in your contact list will be left unchanged. You should select this option if you are confident that your existing contact list will always contain the most up-to-date information.

## Contact List Export

This feature allows you to export your contacts as a CSV text file. This is useful if you wish to import your contacts into another application such as Microsoft Outlook or Outlook Express.

To export your contacts, press the **Export All** button on the Contact List tab. This will bring up the "export contacts" overlay.

1. Select the appropriate "Export mode" from one of the following.
  - **Outlook/Outlook Express compatible.** You should select this option if you wish to subsequently import your contacts to Microsoft Outlook, Outlook Express or some other application that supports importing contacts from Outlook or Outlook Express.
  - **Windows Contacts on Vista.** You should select this option if you wish to subsequently import your contacts to Windows Contacts on Vista.
  - **Native format.** See below
2. Press the **Export** button.
3. Once the export operation has completed, you will have the opportunity to specify where you wish to save the exported file to.

## Exporting in native format

Native format is generally only of use to advanced users.

In native format, each exported contact list entry also includes a unique numerical identifier. If a CSV file containing such identifiers is subsequently re-imported, then contacts in the CSV file are considered to match entries in the contact list if their numerical identifiers match; matching is done on the basis of this identifier in preference to using the contact name.




This is valuable if, for example, you wish to export your contacts to a spreadsheet, make a set of changes and then re-import them - even if you change a contact's name, it will still be correctly correlated with the existing contact list entry.

## Troubleshooting

- **I've added an entry to my contact list, but I cannot find it by name in the contact list column.**  
The contacts column only shows the names for entries that match what you have already typed into the search box - delete a few characters to widen the search again.
- **I've added someone to my contact list, but when I receive calls from them, I do not see their name in my call history.**  
The number as shown in the call history list does not sufficiently closely match the number configured in your contact list.
- **A call manager rule is not working.**  
Ensure that all contact phone numbers include the area code.

## Call Manager

The top line on all pages provides navigation between your key features, and is always visible. Below that, to the right are a number of fixed components:

- Phone Number Indicator, which reminds you which phone number you are accessing.
-  Logout button, which you can use when you have finished.
-  Refresh button, which updates the page with recent phone and message activity.
-  Help button, which brings up the online help window.

Call Manager allows you to define how your incoming calls are handled.

You can configure Call Manager to perform one of the following actions by selecting its corresponding radio button.

- **Ring your phone.** This will not apply any Rules to your incoming calls, and effectively turns off Call Manager. All incoming calls will make your phone ring.
- **Forward to voicemail.** This will divert all incoming calls to voicemail.
- **Forward unconditionally.** This will direct all your calls to another phone without applying any rules.
- **Apply one of your Sets of Rules all the time.** This ignores your Weekly Schedule and any Special Days.
- **Apply different Sets of Rules** depending on the day or time. This lets you choose which Set of Rules you want to apply during the periods defined in your Weekly Schedule, and on Special Days.

Selecting an action will activate any drop-down menus associated with that action. Use these drop-down menus to tailor the behavior of Call Manager by selecting forwarding options or a Set of Rules to apply as applicable.

Clicking the link "Rules" will take you to the Rules tab. Clicking any of your defined schedule periods will take you to the Weekly Schedule tab. Clicking "Special Days" will take you to the Special Days tab.

Once you have made any changes, click the **Apply** button to save the changes, or click the **Cancel** button to cancel any changes.

## Rules

You can use Rules to configure Call Manager to handle incoming calls based on your preferences.


You can define different rules for different callers, grouping these within Sets of Rules. When combined with your Weekly Schedule and Special Days, these allow you to change which rules apply according to the day or time.

The first time you select this tab, you are given an explanation, and then will start with some typical Sets of Rules, which you can then edit to your needs.

Your Sets of Rules are listed in the left-hand side pane. To add a new Set of Rules, click **Add new Set of Rules**. A new window will open; enter a name for this new Set of Rules then click **OK** to create, or **Cancel** to bypass.

To find out what a Set of Rules does or to edit it, select it in the left-hand pane. The right-hand pane will then list the rules it contains. If the Set of Rules only contains one rule, that rule will be applied to all your incoming calls. If you want Call Manager to use another rule, click **Add New Rule**. This way you can specify how Call Manager will treat different types of callers. When applying a Set of Rules to an incoming call, Call Manager works from the top of the list of rules to the bottom. You can move a rule up or down the list with the **Move Up** and **Move Down** buttons.

If you want to make a change to an existing rule, highlight the rule in the right hand pane and click **Edit**. There is a backup rule that applies to all other types of call that are not covered by the existing rules in the set. You can change this by clicking the description of the action, which appears as a link above the right-hand pane.

If you want to delete an entire Set of Rules, click the  icon next to the name of the Set of Rules in the left-hand pane.

Once you have made any changes, click **Apply** to save the changes, or click **Cancel** to reject any changes.

## Weekly Schedule

The Weekly Schedule tab lets you configure Call Manager based on what you do in a normal week. Call Manager can apply a different Set of Rules for each period you define in your Weekly Schedule, so you can treat the same type of caller differently depending on what you would normally be doing at that time. You set that behavior from the Summary tab.



The first time you select the Weekly Schedule tab you can choose whether you want to start from an empty schedule, or have a typical schedule created automatically for you.


Once you have chosen an empty or typical schedule you are taken to the normal Weekly Schedule tab. The right-hand pane contains a timetable for the week, and the left-hand pane contains a list of the existing periods defined in your schedule. The periods are color-coded.

If you choose the typical schedule, a number of periods will have been defined for you. If you choose an empty schedule, you will have to create a new period before you can modify the timetable.

If you want to add a new period click **Add New Period**. A new window will open; choose and enter a name for this new period. The new period will then appear in the left-hand pane and will be assigned a color. You can define a maximum of 3 periods.

To create your schedule, first select a period from the left-hand pane, and then, in the right-hand pane, highlight the time ranges for that period. A single click highlights a 15 minute interval. Clicking and dragging allows you to highlight a longer time range, and you can drag across multiple days at once. The highlighting is color-coded to match the period you have selected. If you want to delete an entry in the timetable, click (or click and drag) over the entry again. You can overwrite an existing entry with a different period without needing to delete the entry first.

You can press  Zoom In to increase the size of the time segments, making it easier to highlight the correct time period, then press  Zoom Out to return to normal again.

If you want to delete an entire period, click the  icon next to the name of that period.





You can rename a period using the **Rename** button. You cannot have 2 periods with the same name. Periods are listed in alphabetical order.

Once you have made any changes, click **Apply** to save the changes, or click **Cancel** to reject any changes.

## Special Days

The Special Days tab lets you define days on which you will not be following your normal weekly schedule.

The Special Days tab shows a calendar. You can navigate through the months of the calendar using the

-  button to move to the previous month
-  button to move back by 3 months
-  button to move to the next month
-  button to move on by 3 months.

To set a single date as a special day, click that date in the calendar. If you need to add a range of dates, you can click and drag on the calendar to highlight the necessary days. Once you have selected a special day it is highlighted. Clicking or dragging over a previous highlighted day will unselect it.

Call Manager also includes lists of the standard public holidays for the current year. This saves you from having to add each day as a special day yourself. To add these public holidays as special days in your calendar, click **Add Public Holidays**. A new window appears; select the list of public holidays that apply in your area. Click **OK** to have Call Manager add those public holidays as Special Days to your calendar, or **Cancel** not to.

To delete all the Special Days you have defined, press **Clear All**.

Once you have made any changes, click **Apply** to save the changes, or click **Cancel** to reject any changes.

## What is Call Manager?

Call Manager is a service that monitors your incoming calls, and handles them according to your parameters. You can set it up to handle incoming calls differently based on the time of day, the date, and depending on who is calling.

You can select from a number of different options for how you want Call Manager to treat your calls. The following are just a couple of examples of the sort of things Call Manager can do for you.

- During your working hours, forward calls made to your home phone to your mobile phone, only for people in your contact list, and send all other calls to voicemail.
- If you are unable to answer the initial call, ring other numbers in a sequence or all at the same time.

## How Does Call Manager Work?

You can configure Call Manager by defining "Rules", a "Weekly Schedule", and "Special Days".

Rules, which are always part of a "Set of Rules", tell Call Manager what to do when it receives a call. Examples of rules are:

- "If you receive a call from someone on your contact list, make your phone ring in a distinct manner."
- "If you receive a call from a withheld number, send the call straight to your voicemail."

To use a call manager rule, the phone numbers of your contact must be full numbers including the area code.

You use the Weekly Schedule to divide your normal working week into distinct periods. For example, you could break your normal week into:

- normal working hours
- lunchtime
- evenings
- the weekend




You can then configure Call Manager to apply a different Set of Rules during each of those periods.

Applying different Sets of Rules to your Weekly Schedule allows you to treat incoming calls differently depending on your schedule. Specifically this lets you apply different rules to the same callers depending on the time and day they call. For example, when setting up Call Manager to handle calls to your land line, you might want it to forward calls from your family to your mobile phone, but only during your working hours, not during evenings or on the weekend.

You can also designate Special Days on which Call Manager will not operate according to your normal Weekly Schedule. For example, you can add Public Holidays, vacations, or business trips and so on. Call Manager will then ignore your Weekly Schedule and you can select a different Set of Rules to apply on that day.

## Settings

The top line on all pages provides navigation between your key features, and is always visible. Below that, to the right are a number of fixed components

- Phone Number Indicator, which reminds you which phone number you are accessing.
-  Logout button, which you can use when you have finished.
-  Refresh button, which updates the page with recent phone and message activity.
-  Help button, which brings up the online help window.

## Security

The security page allows you to perform the following operations.

- **To change your password**, enter the new password, and then confirm it by entering it again, into the boxes. For security, the text will be hidden as you type. Click  to make the change.
- **To change your Call Services PIN**, update the current PIN field to your chosen value and click  to make the change.

## Preferences

This tab provides access to a number of settings that you are unlikely to need to change on a regular basis.

No changes that you make on this page will be applied until you press the  button.

### Forwarding Preferences

When you are using your phone, and enter the phone access code to turn on forwarding services, you can either allow the service to use the preconfigured number, or to require you to enter the phone number you want to forward to.

This set of preferences allows you to select which of your subscribed to services will require entry of the number each time, and which will just use the preconfigured number.

### Voicemail Preferences

This allows you to set the time in seconds that your phone rings before the call is sent to voicemail. The acceptable range is from zero to 60 seconds.



when using your subscriber line.



when using a remote telephone line.

## Caller ID Preferences

Your caller ID is normally presented when you make a call - select the checkbox to withhold your caller ID when you make a call. You can override the default caller ID presentation setting on a per call basis by dialing the appropriate access code.

You can select whether you get to see caller ID numbers on your phone for incoming calls.

## Messaging

The Messaging Settings tab allows you to configure various aspects of your messaging service. These settings are split across a number of different sub-tabs.

### General Settings

#### *Auto-Forwarding*

You can select to forward all your received voicemails to the email accounts you enter. This should be a semi-colon separated list of up to 3 addresses. When doing this forwarding, you have the choice of leaving the messages so you can still access them here, or of deleting them.

#### *Subscriber name*

This is the name that is associated with your Messaging account. It is used in the From address when you forward a message as an email.

### Mailbox

#### *Mailbox Settings*

These settings allow you to customize your experience when accessing your mailbox via the telephone.

- **Fast Login.** Generally when you dial into your mailbox you are asked to enter both your phone number and PIN. However, if Fast Login is enabled, then when accessing your mailbox from your own telephone, your phone number is recognized automatically and you only need to enter your PIN.
- **Skip PIN.** If Skip PIN is enabled, then when accessing your mailbox from your own telephone you are not required to enter your PIN. This saves you time, but reduces security as anybody with access to your telephone can then access your mailbox.
- **Auto-Play Voicemail/Fax.** If autoplay is enabled, then when you log into your mailbox, instead of hearing the main menu your messages will start playing immediately.
- **Voicemail Playback.** When your messages are played to you, you can choose whether you wish to hear the message details (who the message is from and when it was left), the message itself, or both.

After making any changes to your mailbox settings, press **Save Settings** to apply them.



#### *Live Message Screening*

You can enable or disable live message screening using the checkbox, then pressing **Save Settings**.



## MWI Notification

You can use this panel to specify your other phones whose message waiting indications should be triggered when messages are received, and which types of messages cause the indication.

- To add another of your phones to the list, press **New Entry**. You are prompted for a phone number - this should be the number of another phone you own under the same account as this one; you cannot trigger indicators on arbitrary other phones.
- To change the types of messages that trigger the notification use the checkboxes.
- To delete a phone from the list, press the  icon.
- To clear the entire list use the **Clear List** button.
- If the  shows, these notifications are enabled. Clicking this will switch between the  enabled and  disabled states.
- You must press the **Apply** button for any of your changes to take effect.
- To add another email address to the list, press **New Entry**. You are prompted for an email address - as you type matching contacts from your contacts list will appear.
- To change the types of messages that trigger the email, use the checkboxes.
- To delete an email address from the list, press the  icon.
- To clear the entire list use the **Clear List** button.

If the  shows, these notifications are enabled. Clicking this will switch between the  enabled and  disabled states.

You must press the **Apply** button for any of your changes to take effect.

## Greetings

This page allows you to configure which greeting will be played to callers who get forwarded to your voicemail. You can choose to either use a standard system greeting, or to record and use a personal message of your choice.

You also have the option of just using the same greeting as your primary group mailbox.

As well as defining the default greeting that you wish callers to hear, you can also

- configure alternative greetings to be played outside business hours or when the line is busy
- choose to play an extended absence greeting, and optionally prevent callers from leaving messages while you are away

This page is split into two sections. The "Configure Greeting" panel allows you to specify which greeting(s) you wish to use, and the "Record Greeting" panel allows you to record personal greetings.

After making any changes in the "Configure Greeting" panel you must press **Save Settings** to apply them.

#### *Use a standard system greeting*

If you don't wish to record your own greeting, then in the configure greeting panel select one of the following as your default greeting.

- System - this plays the normal system greeting, with no identifying information.
- System with Number - this plays the normal system greeting, including your phone number.
- System with Name - this plays the normal system greeting, but includes your recorded name. This option will only appear if you have recorded your "spoken name" (see below).

#### *Record and use a personal message of your choice*

If you wish to play callers a personal message then you must first record it. Messages can be recorded either by dialing into your mailbox from your handset, or using the "Record Greeting" panel on this page. Once you have recorded a message, you can then configure it as your default greeting in the "Configure Greeting" panel (with the exception of some "special" greetings - see below).

The dropdown in the "Record Greeting" panel shows you a list of the messages that you can record. Messages that have already been recorded are shown with an \* beside them in the list. To record a new message, or overwrite an existing one, select the message in the dropdown and press the Edit Message press to the button to bring up the greeting recorder control.

A number of the recordable greetings have special meanings.

- Spoken name. When recording this message, you should just record your name, and no other message. This name will be used if you select the System with Name greeting -- see above.
- Forward all calls. This message (if recorded) will be played if you have configured your phone to forward all of your calls directly to voicemail. In this scenario, the forward all calls greeting is played automatically - you do not need to configure it as your default greeting.
- Group. Calls received on a line associated with this primary group mailbox, will first hear this group greeting, and then the default personal greeting. The group greeting is played automatically - you do not need to configure it as your default greeting.
- Extended absence.
- Personal busy

#### *Play an alternative greeting when your line is busy*

If you wish to play a different message when your line is busy, then you need to first record the special "Personal busy" greeting. Once you have done this a new checkbox will appear in the "Configure Greeting" panel allowing you to "Use different greeting when the line is busy". If you select this option then when a caller is put through to voicemail because your line is busy, they will be played your "Personal busy" greeting instead of your default greeting.

#### *Configure an extended absence greeting*

One of the personal greetings that you can record is an "Extended Absence" greeting. If you record this greeting and select it as your default greeting, then you will be given the option "Allow callers to leave a message". If you do not select this option then callers will be prevented from leaving you messages while you are absent.

#### *Override your default greeting until a date of your choice*

If you wish to override your default greeting until a specified date, select the alternative greeting you wish to use from the "override greeting" drop-down, and configure the time and date that you wish it to be used until. You can then specify what should happen when the expiry date is reached:

- reset to default - the system will automatically revert to playing your default greeting
- send a notification - you will be sent a voicemail telling you to change your greeting, but your override greeting will remain active until you turn it off.

#### *Use same greeting as primary mailbox*

If you wish to use the same greeting as your primary group mailbox, simply select "Same as primary" as your default greeting.

### **Recording a message**

A number of controls are provided for recording your message.



Starts recording. This will overwrite any message you have previously recorded.




Plays back your recorded message. This action will be unavailable if you have not yet recorded a message.





Stops recording or playing the message.






This control allows you to adjust the gain of your microphone. While recording, the  lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear then the gain is set too high and your message will be distorted.



This control allows you to adjust the playback volume. You can mute or un-mute playback by clicking the  or  icons, and adjust the slider to set a particular volume level.




When you first attempt to record a message, an "Adobe Flash Player Settings" overlay will appear. Ensure that the "Allow" radio button is selected, and if you do not wish to be shown these settings in future tick the "Remember" checkbox.

To record a message you need to carry out the following steps.

1. When you are ready to record your message, press the  button.
2. Read your message into your microphone, and when you have finished, press the  button.
3. Playback your message to check that it has recorded correctly by pressing the  button. If there is a problem with the recording, e.g. you cannot hear it, or it is very quiet, see the section on troubleshooting below.
4. If you are not happy with your message content, then record a new message by pressing the record button again. This will overwrite your previous message.



## Troubleshooting

*I have recorded my message, but when I try to play it back I cannot hear anything*

- Check you have actually recorded something. The length of the current recording is shown as e.g. 0:01:35 (1 minute and 35 seconds). If the current recording length is 0 or much lower than expected then try recording your message again.
- Check that playback is not muted, and that the volume is turned up. If playback is muted then the  icon will be displayed - press this to un-mute the speaker. Volume can be adjusted using the volume slider described above.
- Try re-recording the message, and as you are recording, watch the  lights above the gain control 
  - If no lights appear, or only one or two appear, then check the following.
  - Increase the gain of your microphone by moving the gain control to the right hand end.
  - Click the microphone icon to the left of the gain control to bring up the "Adobe Flash Player Settings" and make sure that the Allow option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the dropdown, and that the record volume is turned up.
  - If you are using an external microphone, check that this is plugged in correctly.
- If this still doesn't solve the problem, then it may be that your microphone has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.




- If several green lights appear consistently while recording your message, then it is likely that your message has recorded correctly and the problem is occurring when playing it back. If you are using external speakers, check that these are plugged in correctly and turned on. If this does not resolve the problem, then it may be that your speaker has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.

*I have recorded my message, but when I try to play it back it is distorted*

This may be because your microphone gain is set too high. Reduce the gain by moving the gain control   to the left hand end.

## Reminders

The top line on all pages provides navigation between your key features, and is always visible. Below that, to the right are a number of fixed components


- Phone Number Indicator, which reminds you which phone number you are accessing.
-  Logout button, which you can use when you have finished.
-  Refresh button, which updates the page with recent phone and message activity.
-  Help button, which brings up the online help window.

The reminders service allows you to configure your phone to ring at a specified time (for example as a wake-up call).

- once at a time of your choice in the next 24 hours
- every week at a time and day of your choice
- every day at a time of your choice
- every weekday at a time of your choice.
- *Occurs*. This specifies whether you wish the reminder to occur just once (in the next 24 hours), or whether it will be repeated on a regular basis.
- *Time*. This specifies the time of day that you wish your reminder call to be scheduled for.
- When you configure a reminder, you can also record a message to be played when you answer the call.
- As well as configuring one-off reminder calls, you can also schedule reminders to occur at a time of your choice every day, or every weekday.

To schedule a new reminder call

1. Press the New Reminder button, to bring up the New Reminder overlay.
2. Enter a description for the reminder - this is just the name that will appear in the Web UI and can be anything you like.
3. In the phone number to notify dropdown, select which of your phones you wish to receive the reminder on. You can only schedule reminders on phones that are registered with your account.
4. In the occurs dropdown, select whether you wish this to be a one-off reminder, or a reminder that recurs every day or every weekday.
5. Enter the time of day that you want the reminder call, and if this is a one-off reminder, also enter the date. All times must be entered relative to the timezone in which your line is registered.
6. Optionally record the message that you want to be played when you answer the reminder call. If you don't record a message you will still receive a call at the specified time.

7. Press the **Add** button to return to the main reminders page. Note: your reminder will not actually be saved until you subsequently press the **Apply** button to commit your changes.
- **To cancel a currently scheduled reminder call**, click the  icon next to the reminder call that you wish to cancel.
  - **To cancel all your reminder calls**, press the **Clear List** button.

Having made any alterations to your scheduled reminder calls, you must press the **Apply** button to commit your changes, or the **Cancel** button to discard your changes.

## Recording a message

A number of controls are provided for recording your message.



Starts recording. This will overwrite any message you have previously recorded.




Plays back your recorded message. This action will be unavailable if you have not yet recorded a message.





Stops recording or playing the message.



This control allows you to adjust the gain of your microphone. While recording, the  lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear then the gain is set too high and your message will be distorted.





This control allows you to adjust the playback volume. You can mute or un-mute playback by clicking the  or  icons, and adjust the slider to set a particular volume level.

When you first attempt to record a message, an "Adobe Flash Player Settings" overlay will appear. Ensure that the "Allow" radio button is selected, and if you do not wish to be shown these settings in future tick the "Remember" checkbox.

**To record a message you need to carry out the following steps.**




1. When you are ready to record your message, press the  button.

2. Read your message into your microphone, and when you have finished, press the  button.


3. Playback your message to check that it has recorded correctly by pressing the  button. If there is a problem with the recording, e.g. you cannot hear it, or it is very quiet, see the section on troubleshooting below.
4. If you are not happy with your message content, then record a new message by pressing the record button again. This will overwrite your previous message.

## Troubleshooting

*I have recorded my message, but when I try to play it back I cannot hear anything.*

- Check you have actually recorded something. The length of the current recording is shown as e.g. 0:01:35 (1 minute and 35 seconds). If the current recording length is 0 or much lower than expected then try recording your message again.
- Check that playback is not muted, and that the volume is turned up. If playback is muted then the  icon will be displayed - press this to un-mute the speaker. Volume can be adjusted using the volume slider described above.
- Try re-recording the message, and as you are recording, watch the  lights above the gain control 
  - If no lights appear, or only one or two appear, then check the following.
  - Increase the gain of your microphone by moving the gain control to the right hand end.
  - Click the microphone icon to the left of the gain control to bring up the "Adobe Flash Player Settings" and make sure that the Allow option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the dropdown, and that the record volume is turned up.
  - If you are using an external microphone, check that this is plugged in correctly.
- If this still doesn't solve the problem, then it may be that your microphone has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.
- If several green lights appear consistently while recording your message, then it is likely that your message has recorded correctly and the problem is occurring when playing it back. If you are using external speakers, check that these are plugged in correctly and turned on. If this does not resolve the problem, then it may be that your speaker has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.

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This may be because your microphone gain is set too high. Reduce the gain by moving the gain control  to the left hand end.