Management Portal Basic User Guide

The portal can be accessed by navigating to https://portal.trueipsolutions.com. Once the portal loads, you will be greeted by a login screen. You can use "Log in with Office 365" to get started.

The Home Screen

Upon logging in, you'll be redirected to the Home Screen. This is a one-stop-shop page that has quick overviews of New Voicemail Messages (if you choose to leave them in the system), Recent Call History, Active Answering Rules, and your Active Phones.

- *Note: The Voicemail Default Settings will not leave voicemails on the system. An audio file will be attached to an email that has the transcribed voicemail within.*

HOME ⟳

NEW VOICEMAIL MESSAGES » ⟳

From	Date	Duration

No new messages.

RECENT CALL HISTORY » ⟳

Number	Name	Date	Duration
📞 93368558807		Today, 12:40	0:00
📞 1 (336) 522-6322	GUILFORD COUNTY	Today, 11:48	0:35
📞 1 (336) 908-9493	DWAYNE CROSSEN	Today, 11:40	1:31
📞 292112	Joy Gottshall 292112	Today, 8:48	0:22
📞 292102	Robyn Ankney 292102	Apr 28th, 16:03	0:02
📞 1 (336) 410-2786	CALLER WIRELESS	Apr 28th, 15:29	3:39
📞 1 (336) 254-9143	HARDIE RASHIDAH	Apr 28th, 14:34	2:03
📞 292102	Robyn Ankney 292102	Apr 28th, 14:11	1:18

ACTIVE ANSWERING RULE »

Default ⌄

Simultaneously ring:
- x292100

ACTIVE PHONES »

| 292100 | Yealink SIP-T58W 150.86.0.5 249ad80a3... |

Messages

This area allows you to view (if you choose to leave voicemail on the system, ***see note above***), delete, and listen to Voicemail.

MESSAGES ⟳

Voicemail   Chat   Settings

New ⌄

| New |
| Saved |
| Trash |

The Settings Tab offers you the ability to set various voicemail options and edit your Voicemail Greeting. Here are some settings highlights:

- Copy to Extension – Allows to send copies of your VMs to other users/extensions.

- Voicemail Transcription – Enable/Disable VM Transcription

- Voicemail Greeting – Play/Manage your Greetings. Record, Upload, or use Speech to Text.

- Recorded Name – These play in the audio directory when searching for a user.

- Email Type lets us know how you would like us to send your voicemail.

- After Email Notification tells us how you would like us to process your voicemail on the phone/portal once we deliver to you via email.

Time Frames

Time Frames allow us to manipulate how your inbound calls are handled during certain times or days. Common scenarios are PTO/Holidays, Inclement Weather, or After Hours. In the scenario of PTO/Holidays, you could leverage Time Frames within your Answering Rules to forward your calls to other users, an outside cell phone, or send them straight to your Voicemail Box.

To add a Time Frame, navigate to the Time Frames tab, and click on Add Time Frame. *Note: You may see the County Wide Time Frames listed there, which can be used as well.*

Once you see the 'Add a Time Frame' pop-up, you can select from the following Time Frame types:

- Always – Not typically used by Basic User. Remains active 24/7 when enabled. Primarily used for routing for an unspecified period of time (i.e. inclement weather or internet outage).
- Days and Times: Allows you to set a daily schedule based on specified time ranges. Typically used for business hours or after-hours schedules. Clicking on the check beside the day will activate a slider. In the example below for a user working 8 AM to 5 PM, click on Monday, then move the slider to fill the 8 AM to 5 PM area.

- Specific Date Ranges: Allows you to create schedules for specific dates and times. Typically used for events like holidays, scheduled closings, or PTO. In this example, the user is creating a PTO Time Frame and setting it to 05/05/2023 from 8 AM to 5 PM.

Clicking on the Green Plus symbol to the right of each range will add another row so you can add multiple ranges.
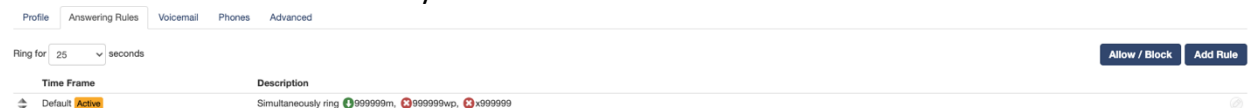
Answering Rules

Answering rules work in conjunction with time frames to determine where calls will be routed during each portion of the schedule. All users will have a Default time frame, which is your catch all. In the examples below, we'll use the Default as our All Day/Work Hours.
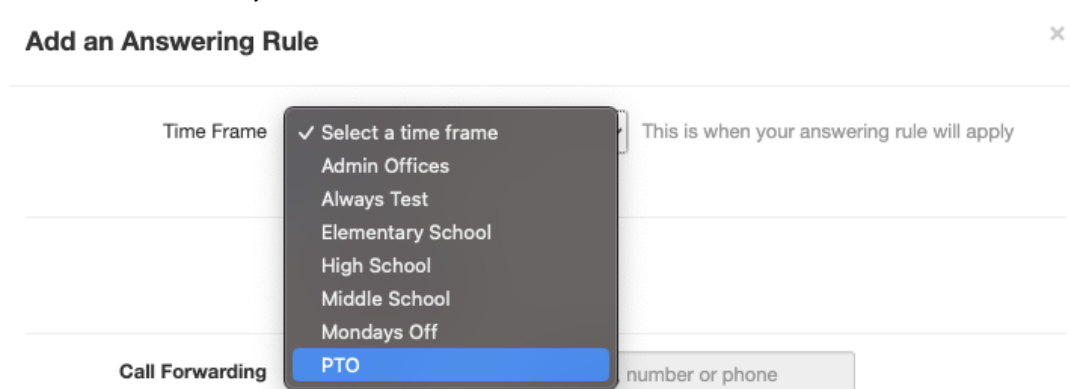
Example:

"I would like my phone to ring all my devices anytime. However, during PTO, I would like to forward my calls to Chris Williams (725213) and have calls go to my Cell Phone during my Mondays off."

1. Currently, the user is set to ring all of their devices by default. We'll first need to add the PTO time frame and the Monday time frame.

2. Click on **Add Rule.**
3. Under **Time Frame,** select PTO.

4. Choose the Call Forwarding Option(s):
   a. ***Always** – Immediately forwards calls to the specified destination 24/7. *Note: This is what we'll use for our example.*
   b. On Active – Forwards calls to the specified destination when the user is on an active call. You can set this to forward anywhere, including your own Voicemail Box.
   c. **When busy** – Acts the same as "On Active" but is only relevant if there is a call limit set on your domain. *Note: This feature is unavailable if simultaneous ring is enabled.*

d. When unanswered – Forwards calls to the specified destination after the ring time (5 rings/25 seconds by default) is met. If unused, calls will forward to voicemail.

e. When Offline – Forwards calls to the specified destination if all devices are offline.

5. Once saved, repeat the process, and add the Mondays Off time frame. You can set your Forward Always to your 10-Digit Cell Phone number if you need to transfer off-net.

6. Once complete, your Time Frames and Answering Rules will appear as shown below:

One thing to note is the order in which answering rules are listed. The system will go in order from the top down and stop at the first time frame that matches the current date/time. One general rule is to organize the answering rules from least to most common time frame. This will ensure that the correct action is taken in case the time frames overlap. In the example scenario, PTO would be on the top and Mondays Off would be second.

Phones

This page allows the user to view their current phones and devices. From here, you will see your Phone, as well as a gear icon button to the left. Clicking that button will take you to a feature called Button Builder, which allows you to edit your Speed Dial keys and sync them to your

phone.
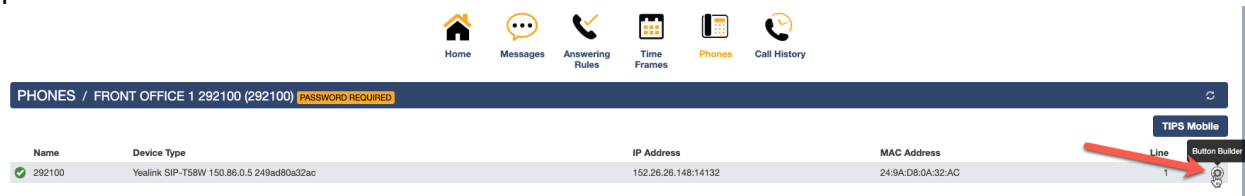
Button Builder

Once inside Button Builder, you can edit existing buttons or add new ones. On your phone model, you currently have 26 additional buttons you can configure.

To assign a button, click on the phone picture's buttons, or the Button Map on the right pane. Once you've selected the location to place the button, you can select from two options within the "Select a Feature" drop down:

- User (BLF) – This is used for Internal Users/Extensions. The BLF key is great for other uses, like Call Pickup and being able to see a Status of a User (Alerting, On a Call/Busy, Available).
- Speed Dial – Used for dialing off-net, external numbers. You can use 7-Digit or 10-Digit here.

Once your Feature is selected (BLF in the example below), enter a user's name, or if you know the user's extension, start typing it.
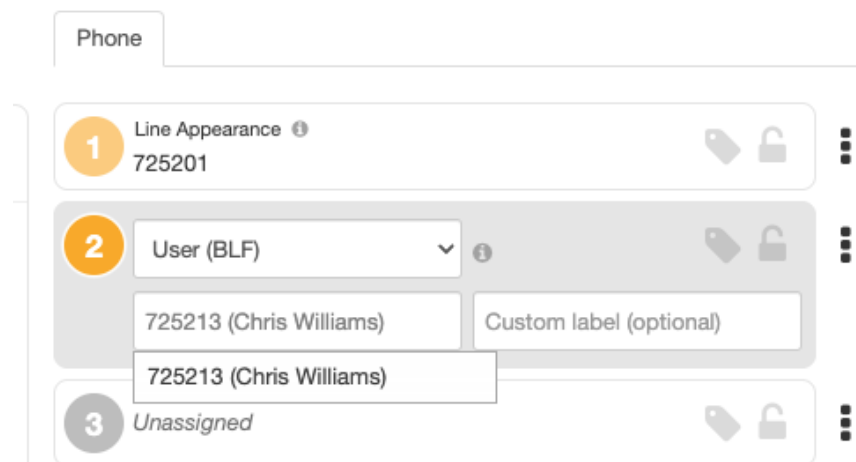
By default, it should display Chris Williams (shown in parentheses above). However, if you would like to create a Custom Label, you can do so in the second box on the right.
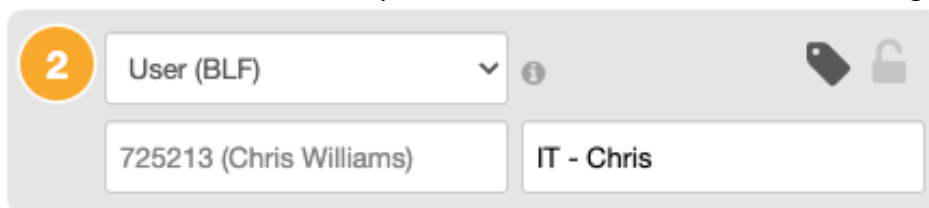
Once you have placed your buttons where you'd like them, click on Save at the bottom of the page to ensure your changes are saved. If you're not on an active call, you can click on the triangle next to Save and select Save and Resync. This will immediately sync all your new button changes to your phone.
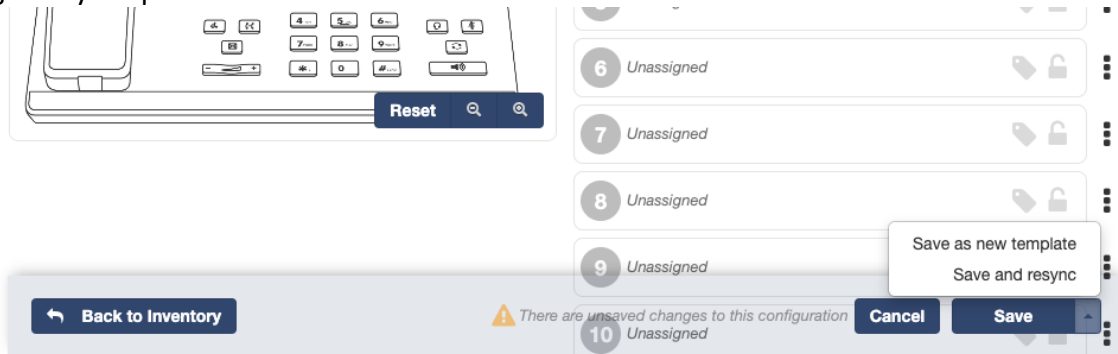
Call History

This section allows you to view all your Inbound/Outbound Calls. You can filter by telephone number and dates/times.

CALL HISTORY

Filters 04/30/2023 — 05/01/2023

From Name	From	Dialed	To	Date	Duration	Route	Release Reason
Counselor 529201	529201	93363344822	93363344822	Today, 2:27 pm	0:00		No Dial Rule
Front Office 2 415101	415101	415613	415613	Today, 2:27 pm	0:00	sip:*@*	Orig: Cancel
Treasurer 398240	398240	93363708366	93363708366	Today, 2:27 pm	0:00		No Dial Rule
Media Circ 415300	415300	415611	415611	Today, 2:27 pm	0:09	sip:*@*	Orig: Bye
545175 Smith Academy Front Door 2N	545175	545170	545110	Today, 2:27 pm	0:06	sip:*@*	Term: Bye
406175 High Point Central Front Door 2N	406175	406170	406100	Today, 2:27 pm	0:05	sip:*@*	Term: Bye
Rm 1 472606	472606	0	472900	Today, 2:27 pm	0:03	sip:*@*	Orig: Bye

Scheduled Exports   Export