simplifi®

Simplifi Contact

Core: End User Editing & Navigating

With the new portal comes new names, new looks, and new features. This document is meant as a quick guide on editing components in Core that you may notice are a bit different than the old portal. This guide assumes that you have full permissions in the new Core portal. Any place where you are unsure of the available option, mouse-over the option and you will see your cursor change to a question mark. Hold the mouse steady for 2 seconds and a tool tip will pop up aiding in explanation.

PHONE NUMBERS

Navigate to VOIP > Phone Numbers > Select Phone Number to Edit

> Use the drop down the Route To list, and select the destination category. I.E. – Time of Day. A secondary box will appear where required so you can then define the specific destination. I.E. – Business Hours

DEVICE USERS

Device users are a new feature that allow a single user to be associated with more than one phone/device at the same time while keeping the same extension number for all devices, much like a group. The extension number is defined at the device user instead of the phone/device itself. A device user can have up to 5 devices assigned to them including desk phone, soft phone, and webphone, etc. When a device user has a log in to the portal, they can edit their call routing logic at any time, giving them greater freedom and flexibility.

Navigate to VOIP > Device Users > Select User to Edit

- Basic USER INFORMATION includes their email addresses, time zone, extension number, voicemail ON/OFF, voicemail to email ON/OFF, and whether or not include them in the company directory.
- Under CALL LOGIC, there are choices on how and where to route calls, ring duration, and caller ID options for that device user both internal (on-net) and external (off-net) calls.
- The DEVICES section visually displays what devices are currently assigned to this user, and ring durations if Find Me Follow Me is enabled.
- You can assign existing devices to this user – the drop down list will only list devices that are currently available and not already assigned to another device user.
- RESTRICTIONS allow you to set calling restrictions for that device user. Please note, "Inherit" will pick up your account restrictions, and not necessarily allow those kinds of calls. Please reach out to your account representative if you need to update your account restrictions.

DEVICES

Navigate to VOIP > Devices

- You may select a device to view the device information.
- The list view of devices red/green demonstrates whether the phones are online or offline.

VIRTUAL EXTENSIONS (FORMERLY CLOUD EXTENSIONS)

Navigate to VOIP > Virtual Extensions

- You may select a virtual extension to edit its routing, but you may not add additional virtual extensions. Please reach out to support@simplifi.io if you require additional virtual extensions.

VOICEMAIL BOXES (FORMERLY MAILBOXES)

Navigate to VOIP > Voicemail Boxes > Add/Edit Voicemail Box

- You may configure the voicemail boxes for all the users.
- You can upload new voicemail greeting recordings from here.
- You can reset the mailbox PIN number, and adjust other mailbox options.
- You may add additional mailboxes.

TIME OF DAY ROUTING (FORMERLY TIME FRAMES)

Navigate to VOIP > Time of Day Routing

- Time of Day Routings are a way for you to configure different call routing depending on the time of day.

When editing:

- **Set the time zone of the time of day**
- **You will see a slider that reads INSIDE or OUTSIDE**
  - If you want to enable the time of day for that specific day, slide the bar to INSIDE. Then set your time frame. For example, between 9am and 5pm.
  - If you want the call to go to the "Outside Timeframe Route" for the entire day (like a weekend day), set the slider to OUTSIDE
- **Set your Inside Timeframe Route and your Outside Timeframe Route**
  - Between the hours you've defined, the call will go to the Inside Timeframe Route (Example: Between 9am and 5pm, send the call to our open menu)
  - Outside of those defined hours, or if the entire day is slid to OUTSIDE, the calls will be sent to the Outside Timeframe Route (Example: Before 9am and after 5pm, send the call to our closed menu)

MENUS (FORMERLY AUTO-ATTENDANTS)

Navigate to VOIP > Menus > Select Menu to Edit

- You may allow/disallow extension dialing from the menu. This is when a caller can simply dial someone's extension off the menu even though it's not part of the menu options.
- You may update the menu greeting/message
- To route a call, select the button option you would like to use, drop down the Route To list, and select the destination category. I.E. – Device User. A secondary box will appear where required so you can then define the specific destination. I.E. – John Smith

GROUPS

Navigate to VOIP > Groups

- **There are two kinds of groups:**
  - Device Users - Ring all the device users and all their assigned devices
  - Devices (Recommended) - Ring all the devices
- You can now enable music playing to the caller while the phones are ringing instead of the caller hearing ringing
- Simply click and drag the devices from the available column to the selected column

HOLIDAY ROUTING

Navigate to VOIP > Holiday Routing

- You may add/edit any company holidays you have.