QUICK BUTTON OVERVIEW

Each feature is explained in detail in the following slides

VOICEMAIL BUTTON

Push this button to access your voicemail easily from the phone

ONE OF TWO TRANSFER BUTTONS

Push this button to transfer a call to the desired location.

Next slide will show the other transfer button

SPEAKER PHONE BUTTON

Push this button to access your speaker phone function.

DO NOT DISTURB & MUTE BUTTON

Push this button when NOT on a call to activate DND.
Push while on a call to activate the MUTE function.

VOLUME BUTTON

This is used for both IN-CALL Volume and incoming RING VOLUME.

SEND BUTTON

If you are dialing a number or extension, you can press this send button to push the call through immediately.

CONFERENCE BUTTON

Please Refer to "Using the Conference Button" Section

HOLD BUTTON

Press this while in a call and this will put the customer on hold.

ACCESSING YOUR VOICEMAIL

To access your Voicemail from your phone press the Voicemail button located on the phone.

If you have not set up your Voicemail Box yet, it will prompt you to "enter your password and then press pound #" The "Password" is the 4 Digit PIN that you set up when you got the Welcome Email from us. If you did not receive a welcome email, then your PIN by default is 1234#.

It will walk you through setting up your Voicemail and recording a greeting as well.

After you have set up your Voicemail, you can push the Voicemail button and it will take you right to your messages from now on. Multiple greetings can be set up in the Online Portal that we will cover later on.

MAKING A CALL

When you start dialing a number or extension to call, you will notice the screen options will change to what is shown in the picture to the left.

If you wait a few seconds after typing in the number or extension you wish to dial, it will send the call through automatically. If you push the green SEND [button icon] Button, it will send the call through immediately.

The DIAL "Softkey" button you see does the same function as the SEND button.

QUICK PHONE SCREEN OVERVIEW
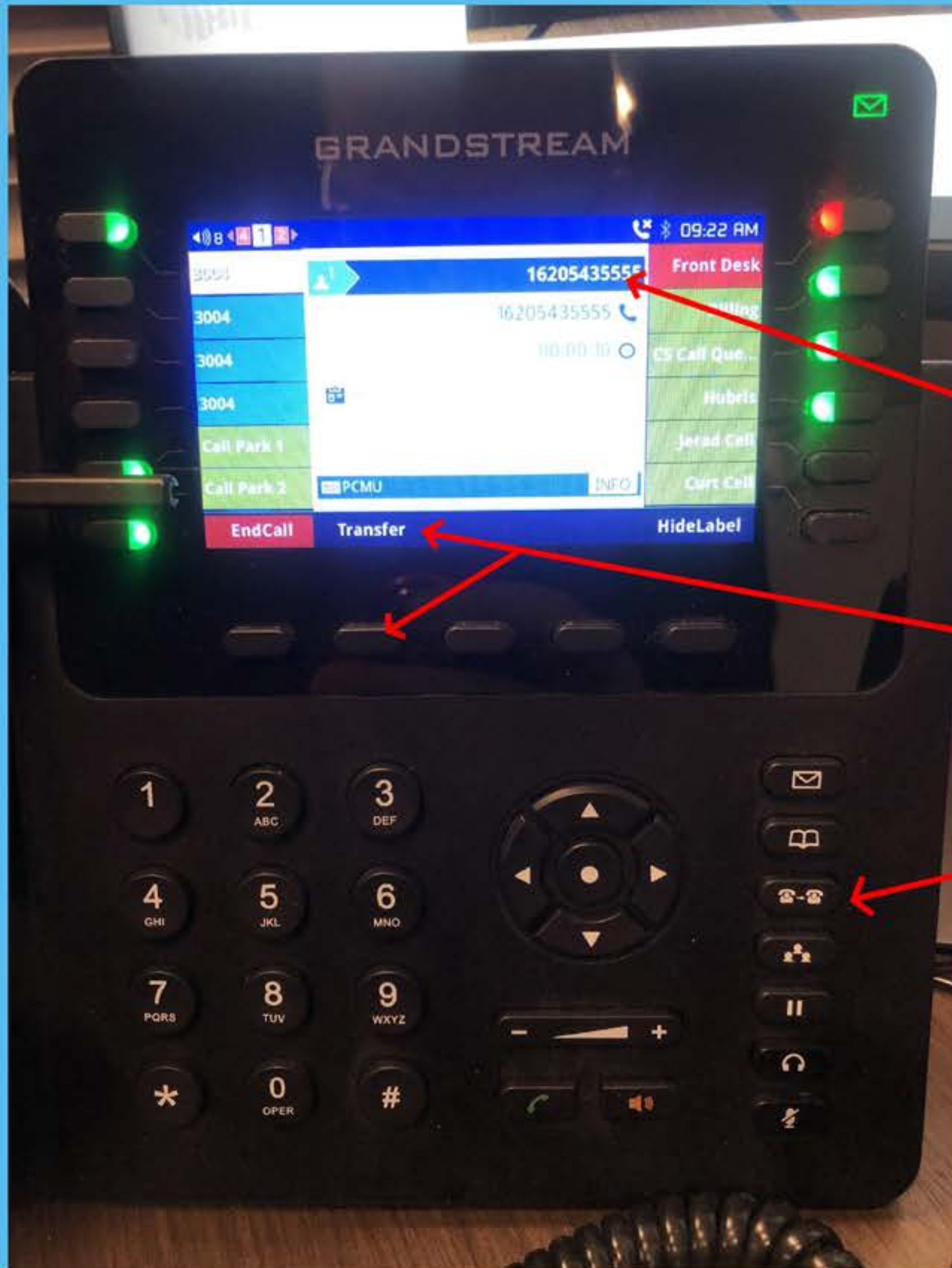
When you are on a call you will notice the name of the caller ID shows the name of the caller and caller info here.

Here you can see the other transfer button that is under "transfer" on the screen. Both transfer buttons do the same thing.

BLIND TRANSFERRING A CALL

A 'Blind Transfer" is when you transfer a call to someone without talking to the recipient before sending.

Transferring a call can be done a few different ways (depending on user preference).
All transfers must be done while you are IN THE CALL and NOT from the on hold position.

First way to transfer a call is to push the transfer button ☎-☎ on the phone and then dial the extension number or phone number you wish to transfer to, and then push the transfer button again to send it or the SEND button 📞

Second way to transfer is to push the "soft key button" for the transfer option on the screen, and then dialing the extension or number you wish to transfer to.

Third way to transfer a call is to press either transfer button and then press the corresponding "BLF" Button that you have programmed as a "Speed Dial". These are either on the phone or on a "Side Car" as seen to the left.
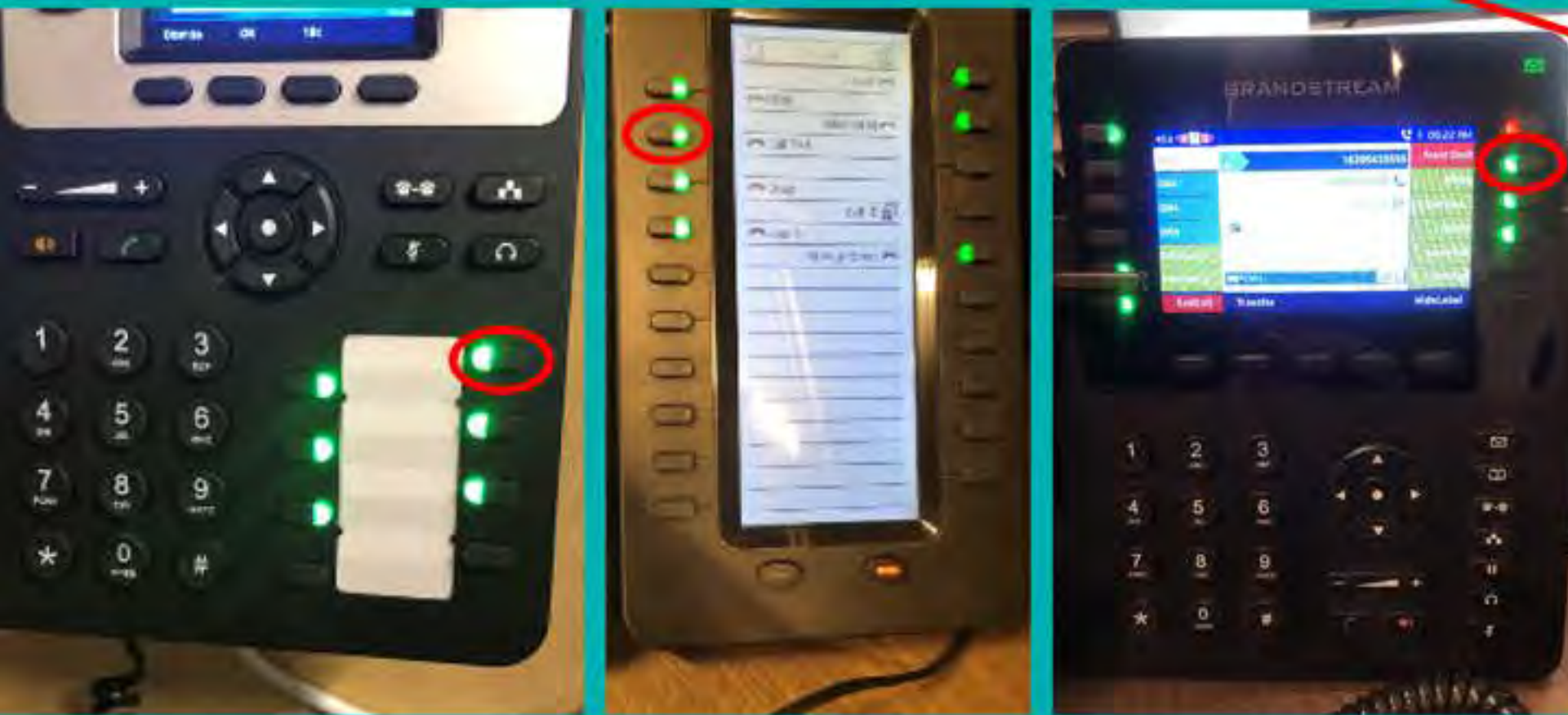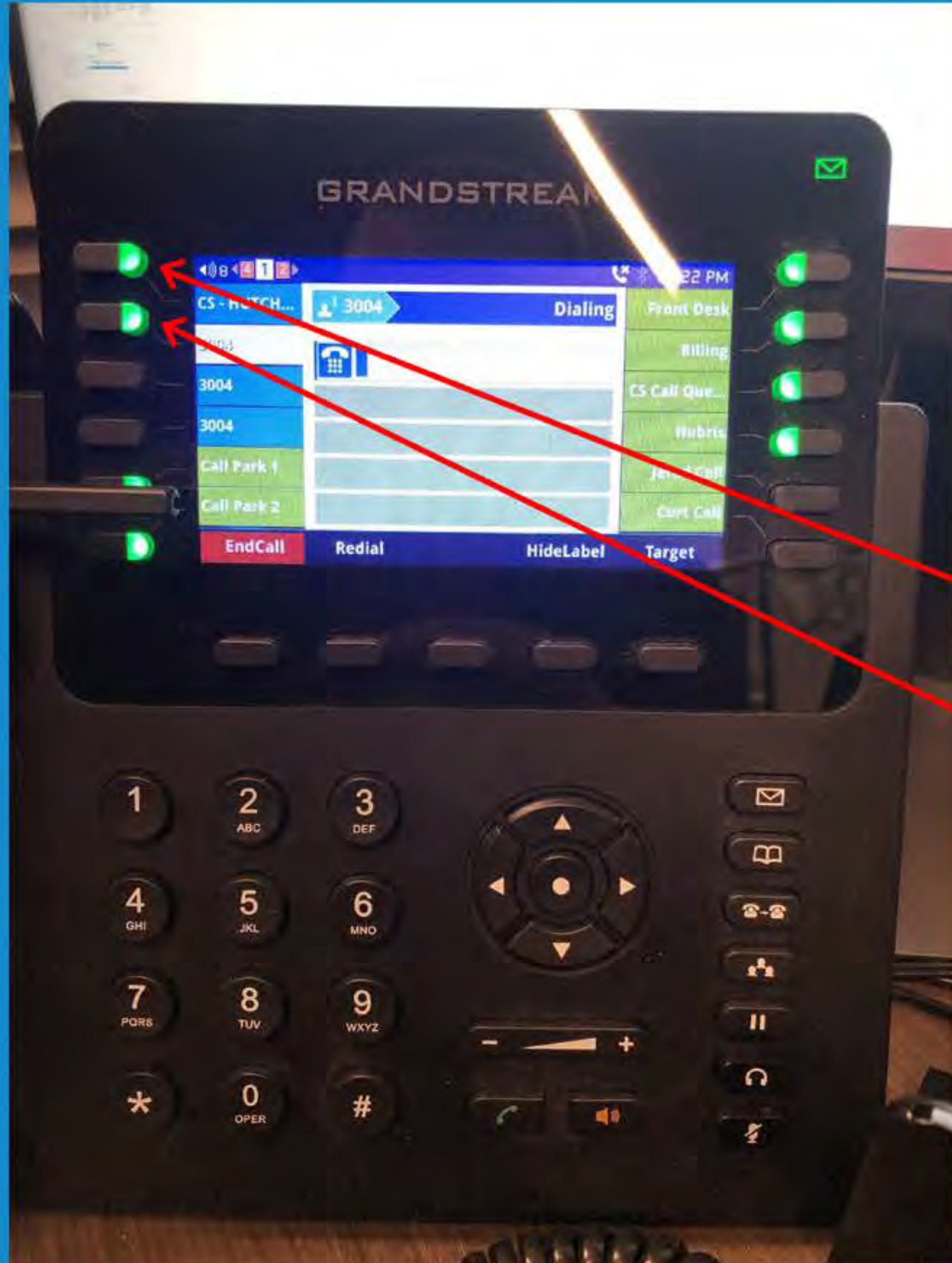
ATTENDED TRANSFERRING A CALL

An "Attended Transfer" is when you want to talk to the recipient FIRST before sending the call to that person/user.

First, put the customer on hold. When you do the green indicator will blink.

Next, pick up a 2nd available line so that you can call the intended user you wish to talk to first.

Last, if the intended user wants you to send the call to them, then press either one of the transfer buttons and then press the blinking call that is on hold to send that person to the intended user.

YOUR ONLINE PORTAL OVERVIEW

You should receive a "Welcome Email" from **phones@ideatek.com** during or before your install.
This email will walk you through setting up your online portal.

Here is what a "Basic User" will see for their main page when they set up their online portal.

Voicemail message overview of your current inbox.

Recent call history overview

BASIC USER BUTTONS OVERVIEW

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Attendant Console | Launch Web Phone | 👤 Phone 1 Lab (101) ▾

This indicator shows your current number of messages

You can access your User Profile here

7

Home | Messages | Contacts | Answering Rules | Time Frames | Phones | Music on Hold | Call History

Home

HOME BUTTON

Shows your overview of your VM's & Recent Calls etc.

MESSAGES BUTTON

This will show your VM's in detail where you can do what you want with them. Also, you can manage your VM recordings and settings under "Settings".

CONTACTS BUTTON

This is an interactive phone book you can use to click on someone's ext. and call them etc. You can add contacts here too.

ANSWERING RULES BUTTON

This is the section that you create how you want your phone calls to route. Ex: ring cell phone with desk phone or forward calls.

TIME FRAMES BUTTON

This is where you can create time frames for your calls to route during whatever times you choose.

PHONES BUTTON

This is where you can see all the phones that are registered to your account. Ex: Cell App, Cordless, etc.

MUSIC ON HOLD BUTTON

This is where you can add Music when you put someone on hold.

CALL HISTORY BUTTON

Here you can see your call history for your phone, as well as filter by date and time if you need to find a certain call.

VOICEMAIL SETTINGS

Here you will find your settings for your individual voicemail.

If you have already recorded your voicemail then here is where you will find the drop down to select which voicemail you would like to play.

This "manage recording" button is where you will go record new messages if you want multiple voicemails to choose from.

Here is where you can choose to turn on your "voicemail to Email" notification that will send you an email whenever you get a voicemail.

CONTACTS

Here you will find your own personal interactive contact book.

Everyone in your company will be in here already, but you can add more contacts as you wish here.

Everything in BLUE you can interact with. If you click on the BLUE extension number, or phone number it will ring your phone and you can then pick up and it will start calling that person.

ANSWERING RULES / CALL FORWARDING

Here is where you can forward your calls to a cell phone, or home phone, voicemail etc. if you like. This page is where you tell your phone what to do when it receives a call DIRECTLY.

These rules do not take place if you are part of a ring group, you will have to make those rules within the ring group

Here is the OVERALL ring time. This means that after this set time (15 seconds) the "forward when unanswered" rule will direct this call to whatever you set. In this case it will go to User 101.

Typically you set this to go to Voicemail if unanswered.

You can see that the "default" is Active. This just means that this ring rule will take effect all the time unless told otherwise by a time frame or different rule.

Here is where you will click to Edit the Default Answering Rule.

ANSWERING RULES / CALL FORWARDING

PART 2

Here is where you will set your time frame (if applicable) to this particular answering rule. In this case, Default will remain Default because it will remain active all the time, unless told otherwise by a new answering rule or time frame.

Here is where you set all of your calls to directly forward to your cell phone, home phone, voicemail, whatever you like.

Here is where you will set what you want your call to do if it rings for the set amount of seconds(15) and nobody answers.

If you want all of your calls forwarded to a cell phone or home phone, just click the ALWAYS box, and then enter your phone number area code first in the box to the right.

If you want to set a "fail proof" for if your system goes down for some reason and you need your own calls to go straight to somewhere else automatically, then here is where you enter that, just like you did for "Call Forwarding" top box.

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Attendant Console | Launch Web Phone | Test (3001)

Edit Answering Rule   ×

Time Frame   Default   This is when your answering rule will apply
              ☑ Enabled

              ☐ Do not disturb
              ☐ Call screening

Call Forwarding ☑ Always   Call Queue - 3001 (Test)
                 ☑ When busy   User - 101 (Lab Wall Top Left 21:
                 ☑ When unanswered   User - 101 (Lab Wall Top Left 21:
                 ☑ When offline   User - 101 (Lab Wall Top Left 21:

                 ☐ Simultaneous ring ☑ Include user's extension
                                      ☐ Ring all user's phones
                                      ☐ Answer confirmation for offnet numbers

                 ☐ Just ring user's extension

                                              Cancel   Save

Answering

Ring for 15

Time Fram
Default

Add Rule

Edit

ANSWERING RULES / CALL FORWARDING

PART 3

Uncheck the 'Always" button so that the calls are NOT always forwarded somewhere else.

Click Simultaneous Ring.

Here is where you will go to set multiple extensions to ring with yours if you want. You can also delay other extensions to ring with yours after a set amount of seconds.

To add multiple extensions to ring together with your extensions, just type the extension number here and click the green + to the right to add another if you wish.

PHONES / PHONE BUILDER / SPEED DIAL PROGRAMMING SETUP

Here is where you will go to set/change your Speed Dials on your phone if you wish to.

Here is your phone name (Grandstream GXP2130) which you will more than likely have another model 2140, or 2170.

The green checkmark beside it verifies that this phone is registered with the network.

All the way to the right of the screen you will see a faint "Settings or Gear looking button" called "Phone Builder". This is where you will go to adjust or add your speed dials on your desk phone.

Attendant Console | Launch Web Phone | 👤 Tyler Radi - 2.0 (3004)▾

ideatek

| Home | Users | Conferences | Auto Attendants | Call Queues | Time Frames | Music On Hold | Inventory | Call History |

Users / Lab Wall Top Left 2130 (101) New

Profile   Answering Rules   Voicemail   Phones   Advanced

Brightlink PBX App   Add Phone

Name	Device Type	IP Address	MAC Address	Line
✅ 101	Grandstream GXP2130 1.0.9.132	8.43.48.252:1312	00:0B:82:D2:65:D7	2

PHONE BUILDER / SPEED DIAL SETUP

Here you will see the layout of your phone. If you click on any of the numbers to the right it will show you on the corresponding button on your phone to the left, this way you know which button you are programming.

After you have set up your speed dials and BLF's the way you want them, click this triangle next to "Save" and choose "Save & Resync"

This will reboot the phone and pull down the new config.

"User BLF" option in the drop down is referring to other employees extensions in your company. Choose this option if you are wanting to add other employees extensions.

Here is where you enter the person's extension number, it will auto populate the person if they are indeed a good extension in the company. Click on that after it populates.

Here is where you can type out a "Custom Name or Label" for that extension if you wish. *(Optional)*

The "Speed Dial" option in the drop down is if you want to add an outside phone number and NOT an employees extension. Fill out the fields like above.

MUSIC ON HOLD

Here you can upload Music files (WAV) to YOUR phone ONLY, when you put a person on hold.

Pretty straight forward. Keep in mind this is for your phone only, the Admin will have an area to upload on hold music to the entire domain.
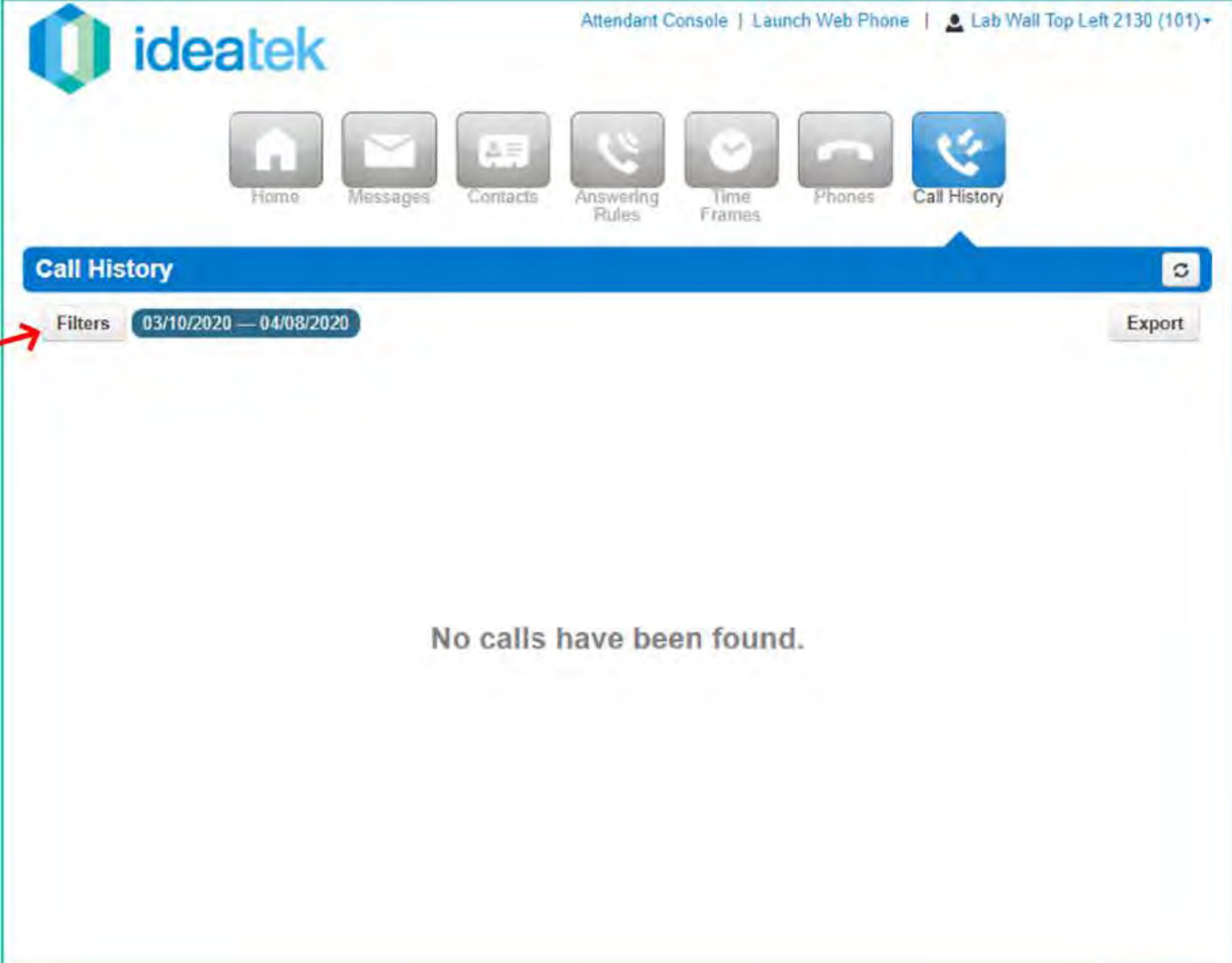
Note: *Be aware of Copyright Laws when uploading music*

CALL HISTORY

Here is where you will find all of your calls in and out of YOUR extension ONLY. Admins will have the ability to see all calls in and out of the entire company.

You can filter your call history by date and type of call in this "Filters" button. Your call history will only keep data up to 31 days.

ADMIN PORTAL

Users that have been assigned "Office Manager" duties will have a separate portal page where they can access the entire phone domain. This includes being able to change user names, emails, Time Frames, Auto Attendants etc.

You can tell you are in the Admin portal by the home button looking like an office building and you have more options to choose from.

As you can see, on the **home page** of the Admin page you can see current active calls across the entire domain, registered users, unregistered users and at the very bottom a graph of call volume.

ADMIN PORTAL

This button is the **Users menu**. In this menu you can access ALL the Users that are in your domain and make changes to any user you wish.

Anything that has the blue font color you can interact with by clicking on it.

To access a specific User's profile just click on their name.

ADMIN PORTAL

Once you click on a User it will open their **Profile Menu**.

Here you can make changes as needed per User.

Once you click on a User it will open their Profile Menu.
Here you can make changes as needed per User. To make changes to voicemail, answering rules etc, refer to the above slides.

ADMIN PORTAL

The **Conference Menu** is where we can assign a Conference Bridge DID so that you can host a conference where a designated number of callers can join in. You can set up a PIN to enter the
conference room as well as a leader PIN to set up. If this is an option you would like, please call us so we can get you a DID assigned and ready.

ADMIN PORTAL

This is the **Auto Attendant Menu**.

Here you can set up an Auto Attendant if you wish to have an automated message with a menu that callers can press to direct them to a certain extension or group.

ADMIN PORTAL

Setting up an Auto Attendant:
Click on Add Attendant

Here it will pop up this menu that you will have to:
Name the attendant whatever you wish.
Give it an extension that is not is use and select a time frame to apply to the attendant.
* see time frame set up above to create a time frame* click Add

ADMIN PORTAL

After you add the auto attendant it will bring you to this menu. Choose the manage recording button.

Here you will need to either Record, Upload or use the new feature "Text to Speech" where you can just type what you want your message to be and choose the voice you want to play. You can review it after you type it out. *see next slide*

ADMIN PORTAL
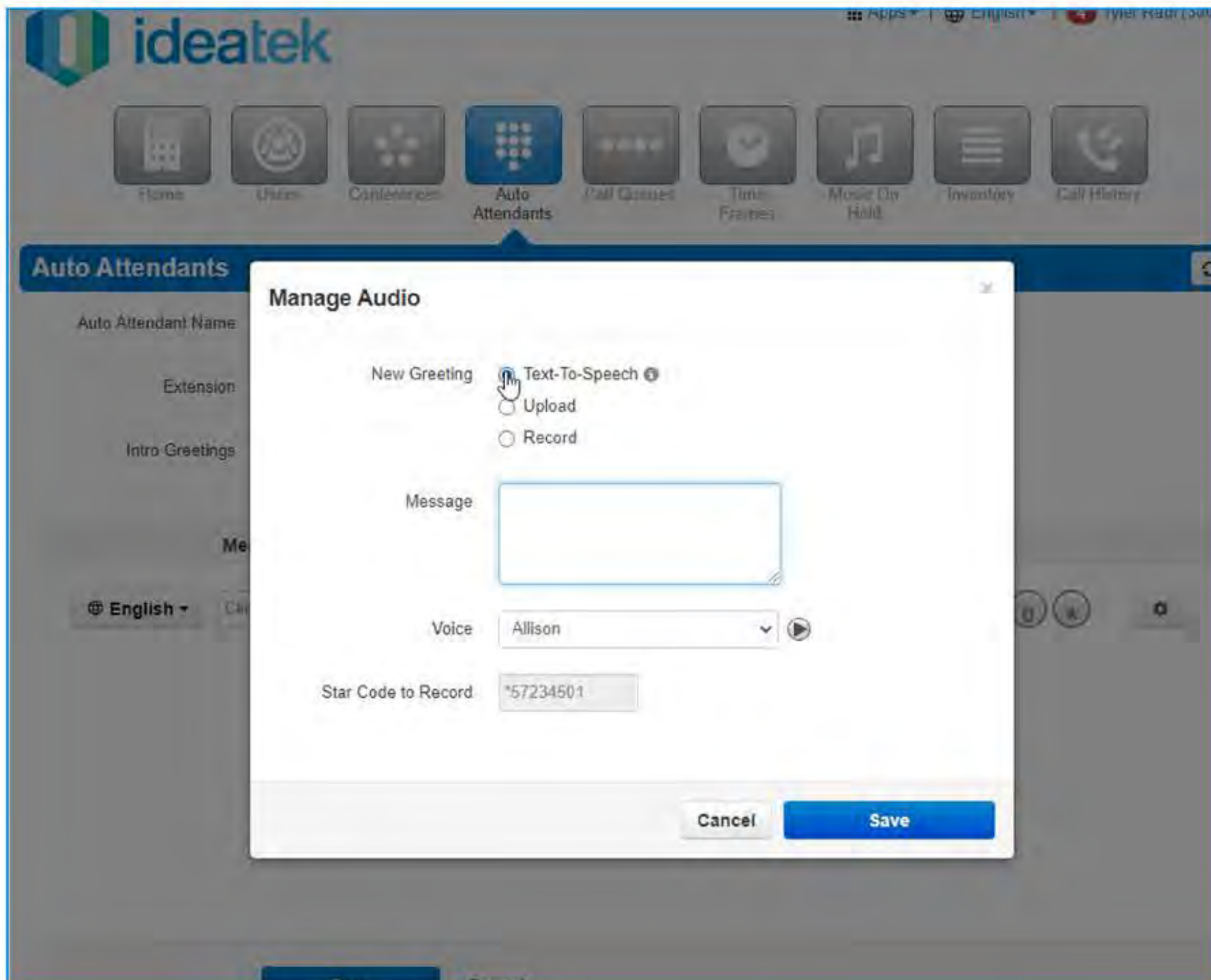
When you press the manage audio button, this menu will pop up.
Here you will choose to record, upload or text to speech option as previously stated. After you choose your option you will click Save.

ADMIN PORTAL

Here you will choose what to assign each button that a caller will press.

Click on the number you wish to program and then choose from the menu that pops up. Here we will choose USER to assign a specific Extension to ring when the number 1 is pressed.
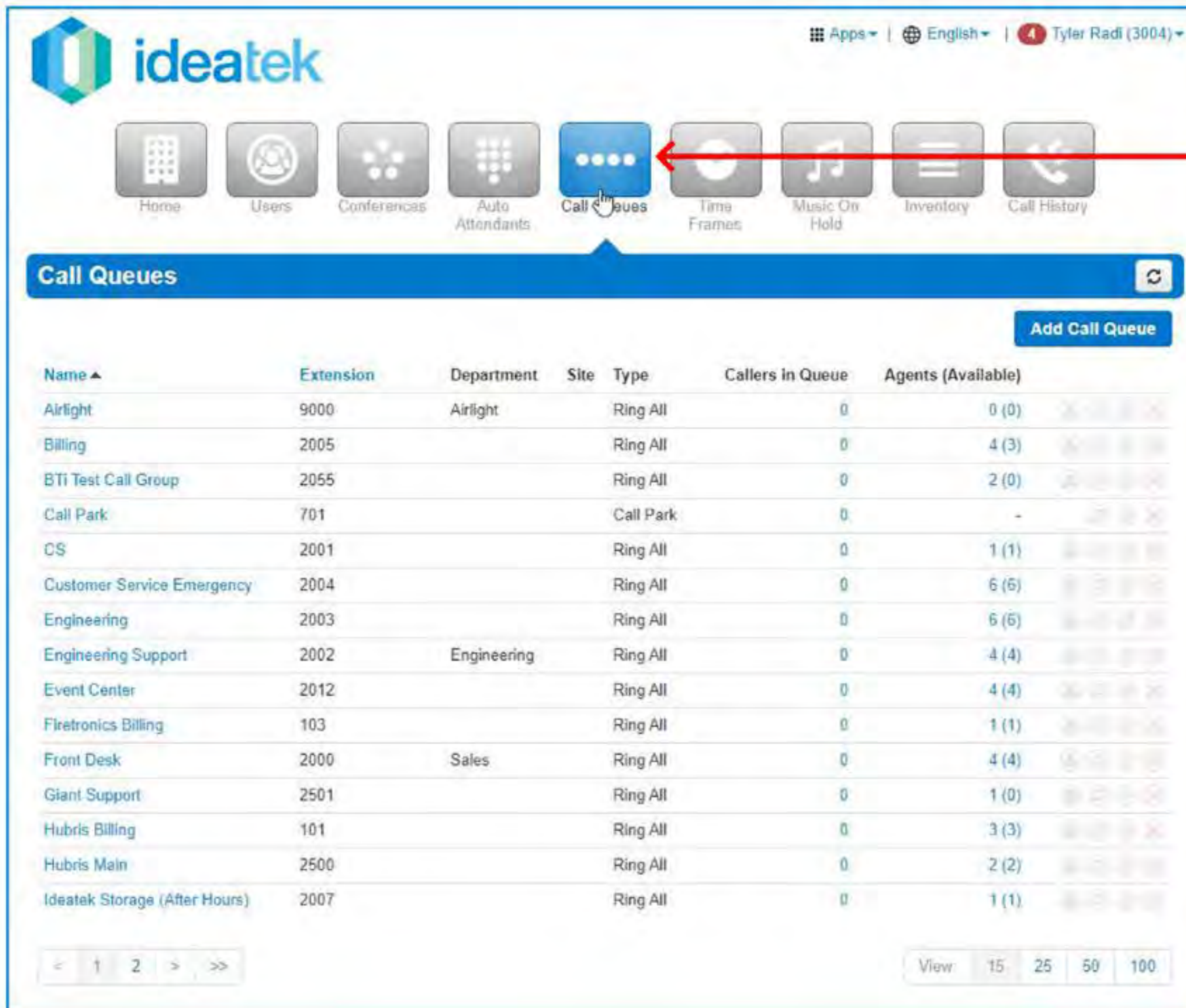
ADMIN PORTAL

Now that we chose USER to assign the button number 1 to this menu will pop up.

Here you will start typing the name or extension number of the person you want assigned to the button. Click save. Repeat for other assignments.

ADMIN PORTAL

Here is the **Call Queue Menu**.

In this menu you can create Call Queues or Call Groups that you can assign multiple extensions to that will ring all together. Keep in mind that if you use this option you cannot delay certain extensions to ring after a predertimed time. You will need to set those up under answering rules of a certain group or user.

ADMIN PORTAL

If you want to add a new Call Queue, click Add Call Queue and this menu will pop up. Name the Queue and give it an extension not in use.

You can choose what type of Queue you want by choosing one of the buttons. Here we will choose RING ALL.

ADMIN PORTAL

After you choose the Ring All button, it will bring up more options to choose from.

For now, just click the NEXT button twice until you can save it and it takes you back out to the Call Queue list.

ADMIN PORTAL

Ring Back	7110	Ring All	0	3 (3)	
Storage	2011	Ring All	0	4 (3)	
Storage Billing	100	Ring All	0	2 (1)	
Stupid Test Test	8000	Ring All	0	1 (1)	
test	5874	Ring All	0	0 (0)	
Weather Response	2010	Ring All	0	0 (0)	

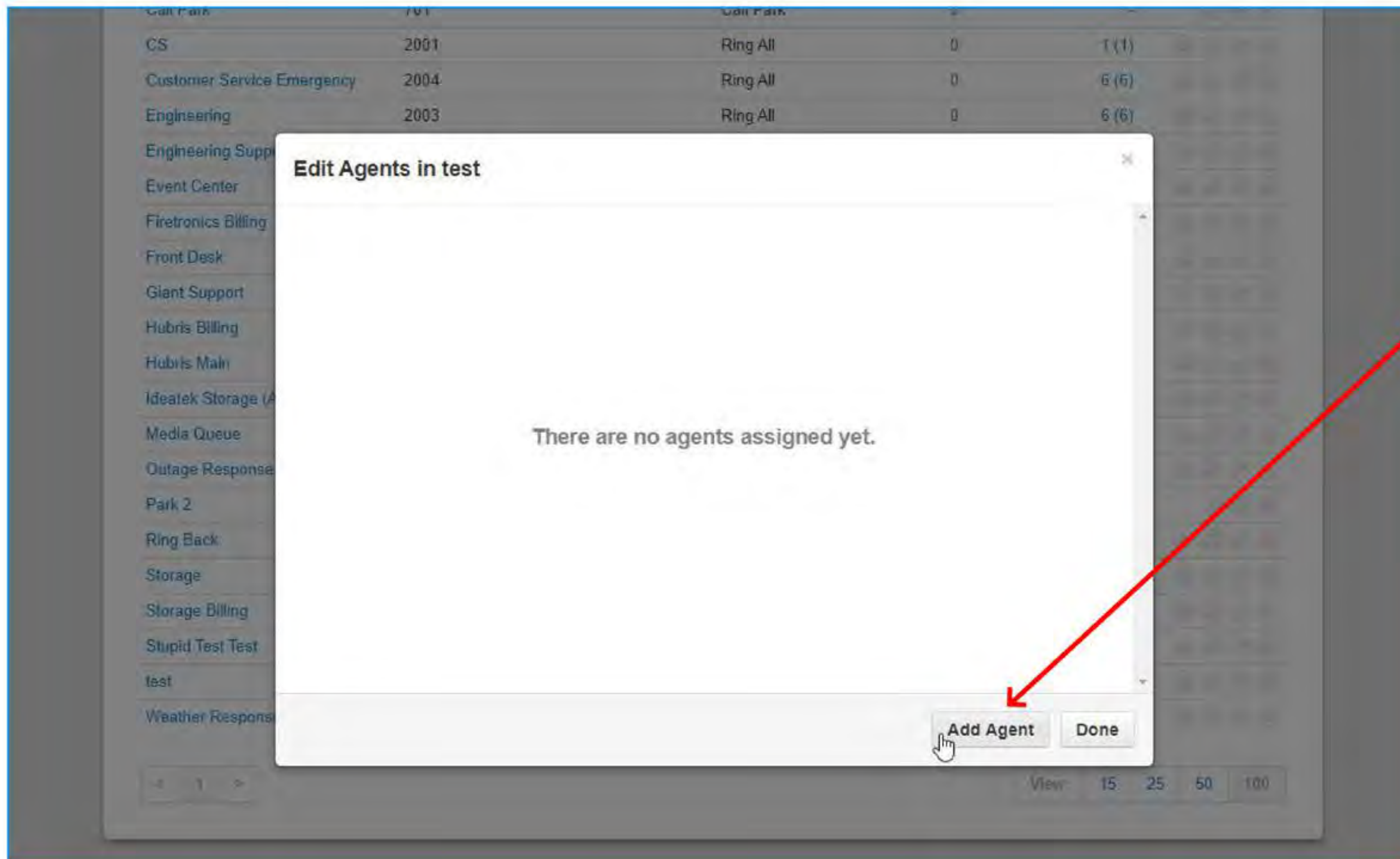| <	1	>		View	15	25	50	100

Back at the list of Call Queues you can click
on Agents number (in this instance it is 0 (0)
because we have not added any yet.) here
we can add all the users we want to be in
this Queue.

ADMIN PORTAL

After you click on the Agents this menu will pop up.

Here you will click Add Agent.

ADMIN PORTAL

Edit Agents in test

Agent Phone	3007
	3007 (Lori Willems (Front Desk))
Status	3007m (Lori Willems (Front Desk))
Wrap up time (sec)	
Max Simultaneous Calls	
Max SMS Sessions	
Queue priority for agent	1

☐ Request Confirmation

Cancel   **Save Agent**

There are no agents assigned yet.

Add Agent   Done

Type in the name or extension of the User you want to add. You can add multiple users if you wish.

Slide the box over to show 3 Max Simultaneous Calls.

Click SAVE AGENT.
Click ADD AGENT.

ADMIN PORTAL

Her you can add **Music On Hold** for your ENTIRE Domain whenever a caller is put on hold. Just click Add Music and upload. This needs to be a WAV or MP3 file.

ADMIN PORTAL

Inventory Tab will give you the list of DID's that you have in your domain to use as well as point them at any User, Call Queue, Auto Attendant that you want.
Click on the phone number and it will prompt you to choose the 'Treatment' which is where you will choose where you want to point the DID at.
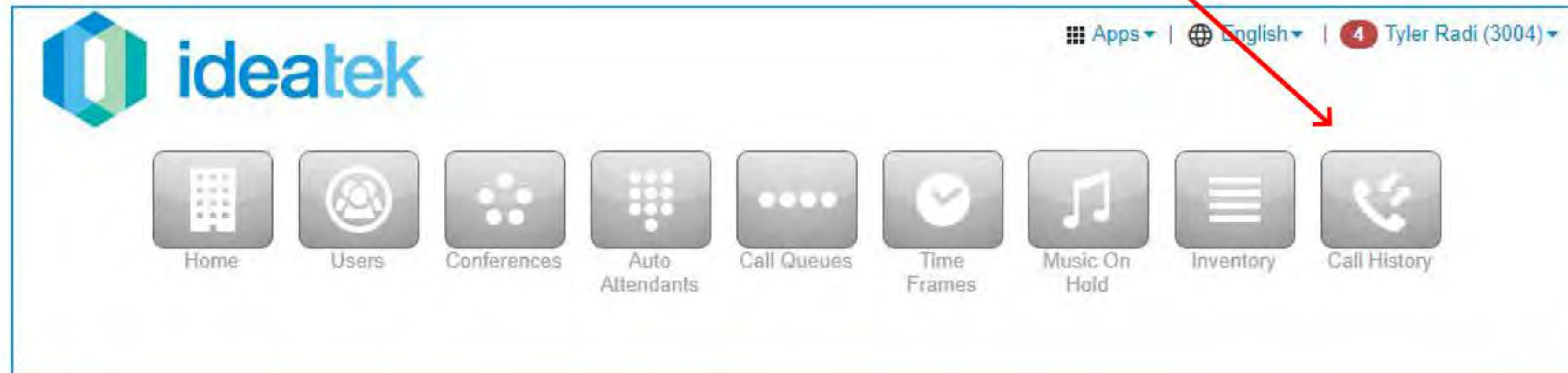
ADMIN PORTAL

The **Call History** button:

This Call History menu will give the Admin the
ability to see every call inbound and outbound
throughout the entire domain. You can filter
your search through the Filter button.

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WE WILL BE ADDING TO THIS DOCUMENTATION
AS WE GO SO WE MIGHT BE SENDING YOU
UPDATE VERSIONS PERIODICALLY.

AS ALWAYS, IF YOU HAVE ANY QUESTIONS
PLEASE EMAIL US AT HELP@IDEATEK.COM
OR CALL US AT 620-543-5555. THANKS!