

# HPBX Basic User Guide



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### Getting Started

Welcome to your new HPBX Hosted Phone System. Your Cloud PBX combines the best of traditional phone system features with modern Internet Protocol (IP) capabilities. Your account on this system will allow you to make calls, receive voicemails, chat with other users in the organization and much more.

In this guide, you will learn how to perform many common tasks on your phone, as well as make full use of your web portal.

## Using your Desk Phone

### ▶ Making Calls

Making a call with your phone does not require a leading 9. You can dial on-hook or off-hook.

To dial on-hook

1. Dial the phone number.
2. Pick up the handset, headset, or speaker.

To dial off-hook

1. Pick up the handset, headset, or speaker.
2. Dial the phone number.

Calls to the US and Canada are all dialed using 10 or 11 digits. Most local calls also now require 10 digits.

### **Making International Calls**

To dial an international call

1. Dial the international call code 011.
2. Dial the country code.
3. Dial the local number.

International calling is commonly disallowed to prevent toll fraud.

### **Extension Dialing**

Extensions on your system can be dialed using the 4-digit extension or by pressing the button on your phone corresponding to the desired extension.

### **Intercom**

VoIP phones provide an intercom feature that allows you to instantly connect to other phones within your office. Intercom functionality is ideal for announcing visitors or asking a quick question.

When one phone intercoms another extension, it does not ring the other phone. Instead, the other phone will beep, and then its microphone and speaker turn on.

To intercom

1. Dial 08 + Extension. For example, to intercom extension 1000, dial 081000.

### ▶ Receiving Calls

When a call comes in, you can answer it via a headset, speakerphone, or handset.

To answer a call using a handset

1. Lift the handset off-hook.

To answer a call using a speakerphone

1. Press the **SPEAKER** button.

To answer a call using a headset

1. Usage will depend on how the headset is connected. Often, you'll press the button on the headset or press the headset button on the phone.

### ▶ Voicemail

#### Accessing Voicemail

To access voicemail

1. Press the ENVELOPE button on your phone to access your voicemail box or dial \*5001 if you cannot identify the voicemail button.
2. If you subscribe to multiple mailboxes, a list of mailboxes may appear. Select the mailbox you want to access.
3. When prompted, enter your voicemail password, and then press #.

To access another person's mailbox

1. Dial \*5001.
2. When prompted, enter the other person's extension number.
3. Enter the voicemail password of the other person's mailbox, followed by #.

#### Setting Up Your Mailbox

The first time you log in to your mailbox you are walked through recording your name for the directory and recording your personal greeting.

The name recording is for the dial-by-name directory, so when someone enters the first three letters of your last name, it will play back your name recording.

The greeting plays when your mailbox is reached. It is very important to make a custom message, as many callers will not leave messages in mailboxes that have generic greetings.

## Alternate Greeting

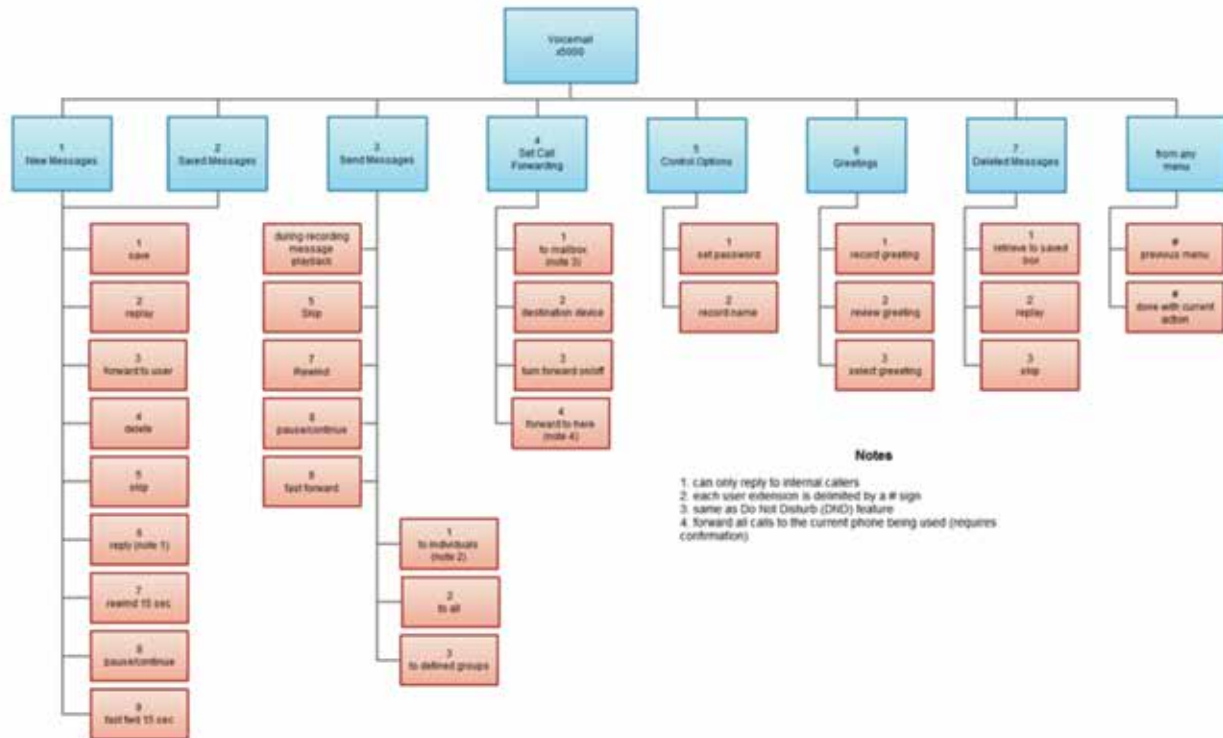
Your mailbox supports multiple greetings for different scenarios like business trips and holidays.

To record an alternate greeting

1. From your mailbox, press **6** for greetings, and then press **1** to record an alternate greeting.
2. When prompted for the greeting number, press **2** for your next alternate greeting (1 is your default greeting).
3. After your recording is completed, select the active greening by selecting option **3** in the greetings menu.

## Voicemail Tree

Below, you'll find a voicemail tree showing what to dial for each option in your mailbox.



## ▶ Handling Calls

Your cloud PBX features various ways to move calls around, including attended transfer, cold (blind) transfer, warm (assisted) transfer, voicemail transfer, park and more. In this section, references to BLFs are the 1-touch buttons to extensions common at front-desk phones.

### Warm (Assisted) Transfer

Warm transfer allows you to speak to the transfer recipient prior to completing the transfer while the caller is on hold.

To perform a warm transfer using Polycom and Yealink phones

1. Press the **TRANSFER** key/softkey on your phone.
2. Dial the recipient's extension or press their BLF (extension button).
3. Speak to the recipient, and then either press **TRANSFER** again to complete or cancel if the recipient cannot take the call.

### Cold (Blind) Transfer

Cold Transfer goes straight to the recipient.

To cold transfer using Polycom or Yealink phones

1. Press **TRANSFER**.
2. Dial the extension of the recipient.
3. Press **TRANSFER**.

### Transfer to External Numbers

A transfer can also go to an external number such as a cell phone. Follow the transfer directions above but instead of dialing an extension, dial a 10-digit phone number.

### Voicemail Transfer

Voicemail transfer goes straight to the recipient's voicemail box without ringing the recipient's phone.

To perform a voicemail transfer

1. Perform a cold transfer with a 03 prefix before the extension. For extension 1000's voicemail, for example, cold transfer to 031000.



### Park and Hold

On your phone system, hold is a local function. This means a call held on your phone cannot be picked up at another station. Park is a system-wide function. This means a call parked at one phone may be picked up by any phone.

To park a call

1. While on an Active Call, press the **PARK** button on your phone.
2. The call will announce what Park they are in.
3. Hang up.

To retrieve a parked call

1. Press the **PARK** button that the call is on.

### Directed Call Pickup

Directed call pickup (DCP) allows you to answer a call ringing at another station.

To perform a directed call pickup

1. Dial **07** prefix before the extension. If 1000 is ringing, for example, dial **071000** to pick up that call.

Phones with BLFs (extension buttons) to the ringing station can also press the corresponding BLF.

### 3-Way Conference

To make a 3-way conference

1. Call or be called by the first participant in the conference.
2. Press the **CONFERENCE** key/softkey, and then dial the second participant.
3. After the second participant picks up, press **CONFERENCE** again to connect everyone.

## Using the User Web Portal

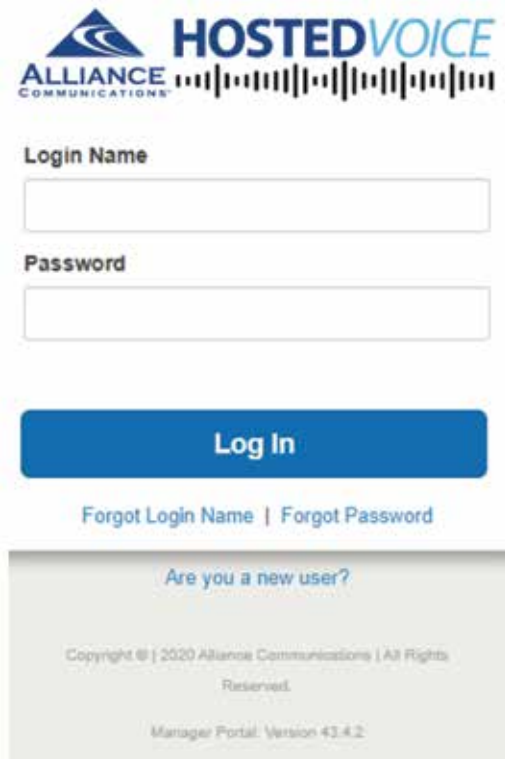
Each extension of your Cloud PBX system has access to a powerful web portal for managing voicemail, call routing and more.

### ▶ Accessing the Portal

To access the web portal

1. Open a web browser.
2. Go to <https://portal.alliance-hpbx.com/portal/>
3. At the log in page
  - a. Click in the **Login** name field and type *ext@customerdomainhpbx*, where *customerdomain* is typically similar to your email address domain.
  - b. Click in the **Password** field and enter your user password.

Please contact Alliance Communications at [hpbxsupport@alliance.coop](mailto:hpbxsupport@alliance.coop) if you need your login and/or password information.



**ALLIANCE COMMUNICATIONS** **HOSTED VOICE**

Login Name

Password

**Log In**

[Forgot Login Name](#) | [Forgot Password](#)

[Are you a new user?](#)

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Manager Portal: Version 43.4.2

## Desktop Call Control

Desktop call controls appear when making or receiving a call. These controls allow you to see who is calling and manage a current call.

### Incoming Calls

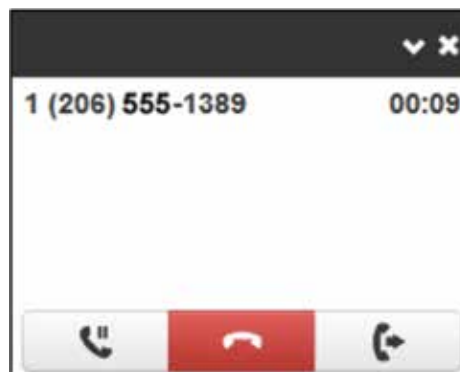
Incoming calls appear in a window in the portal. This window shows the caller ID name and number, along with **Reject** and **Answer** buttons.

Selecting **Reject** sends the call to voicemail if available. The **Answer** button may not be available, depending on your handset model.



### Active Calls

The active call window will display the caller ID and call time. The three controls at the bottom of the window let you hold, hang up, or transfer the call. If you select transfer, a field appears for entering the extension of the recipient. If you prefix the recipient's extension number with 03, the call goes straight to voicemail.



## Home

The Home page of your portal provides an at-a-glance view of everything going on with your extension.



Field	Description
New Messages	Shows new messages. You can play messages, click to call back, download, save and delete. To see all the controls, hover over the message.
Recent Call History	Color-coded icons show your recent calls. <ul style="list-style-type: none"> <li>• Green icon = outbound call.</li> <li>• Red icon = missed inbound call.</li> <li>• Blue icon = inbound received calls.</li> </ul> To call back a number, click the phone number.
Status Message	Allows you to enter a status message that appears to other users of the portal.
Active Answering Rule	Your extension can have multiple answering rules. For example, you might ring your phone in one mode or forward to your cell in another mode. In this field, you can determine which answering rule is the active rule.
Active Phones	Your extension may have multiple phones (for example, one in the office and one at home). This field shows which handsets are currently online.

▶ Voicemail

You configure voicemail using the messages page. This page has two tabs for handling voicemail.

1. **Messages** – see “Messages” below
2. **Settings** – see “Voicemail Settings” on the next page.

To display the Messages page, click the **Messages** icon at the top of the page:



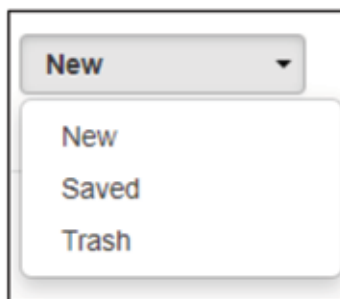
**Messages**

The **Messages** tab allows you to manage your new, saved, and deleted voicemail, as well as greetings and other settings.



Like the Home page, you can play messages, click a number to call it back, and download, save, forward, and delete messages. To see all the controls available, hover the mouse pointer over a message.

The **New** drop-down list allows you to review New, Saved, and Trash (recently deleted) messages.



## Voicemail Settings

Clicking the **Settings** tab displays options for controlling your voicemail order, timestamps, greetings, and voicemail to email.

Voicemail
Chat
Settings

**Enable Voicemail**

### Inbox

Options

- Sort voicemail inbox by latest first
- Announce voicemail received time
- Announce incoming call ID

### Greetings

Voicemail Greeting 1 - New Recording ▼ ▶ ⬇️ 🔊

Recorded Name ▶ ⬇️ 🔊

### Notifications

Email Notifications  Receive an email for new voicemail

Email Type Send with attachment ▼

After Email Notification Leave as new ▼

Save
Cancel

Field	Description
Enable Voicemail check box	Enables (check) or disables (uncheck) voicemail.
Inbox	<p>These options affect audio voicemail (calling in) but not in the portal.</p> <ul style="list-style-type: none"> <li>• Sort Voicemail inbox by latest first = plays your newest messages first.</li> <li>• Announce voicemail received time = plays the timestamp of the message.</li> <li>• Announce incoming call ID = plays the caller ID number if available.</li> <li>• Operator Forward = option to press 0 in a mailbox greeting and be directed elsewhere.</li> </ul>
Greetings	<p>Allows you to select an active voicemail greeting, listen to it, and record a new greeting.</p> <ul style="list-style-type: none"> <li>• To select the active voicemail greeting, click it from the pull-down menu and click Save.</li> <li>• To listen to a selected greeting on your PC, click the play button.</li> <li>• To record a greeting, see "Recording a Greeting".</li> </ul>
Unified Messaging	<p>Provides the following selections for adjusting your voicemail to email settings.</p> <ul style="list-style-type: none"> <li>• None = no email is sent when voicemail is left.</li> <li>• Send w/ hyperlink = a link to the voicemail is emailed to you.</li> <li>• Send w/ attachment (storage option) = an email is sent to you with the audio file of the message attached. The storage option allows you to leave messages in your inbox as new, move to saved, or move to trash.</li> <li>• Send w/ brief attachment (storage option) = an email sent to you in plain text with the audio file of the message attached. The storage option allows you to leave messages in your inbox as new, move to saved, or move to trash.</li> </ul>

## Recording a Greeting

To record a greeting

1. From the **Settings** tab of the Messages page, click the speaker icon.

*A Manage Greetings page like below will appear.*

**Manage Greetings**

New Greeting  Upload  
 Record

Greeting Name

Index	Greeting Name	Duration
<input type="button" value="Play"/> 1	New Recording	0:08

2. Next to **New Greeting**, click **Record**.

The **Browse** button changes to a **Call me at** field.

**Manage Greetings**

New Greeting  Upload  
 Record

**Call me at field**  **Call me at**

Greeting Name

- In the **Call me at** field, enter the number to call. This can be an extension or a telephone number such as your cell phone.
- In the **Greeting name** field, enter a name for this greeting.
- Click the **Call** button.
- At the prompt, record the new greeting. When you finish the greeting, press **#**.
- Click **Add Greeting** at the bottom of the Manage Greetings page, and then click **Done** to close the page.



## Uploading a Greeting

To upload a greeting

1. From the **Settings** tab of the Messages page, click the speaker icon.  
*A Manage Greetings page like the one on the below will appear.*

The screenshot shows a 'Manage Greetings' dialog box. At the top, there's a title bar with the text 'Manage Greetings' and a close button. Below the title bar, there are two radio buttons: 'Upload' (which is selected) and 'Record'. To the right of these radio buttons is a 'Browse' button and a file input field. Below that is a text input field labeled 'Greeting Name' with the placeholder text 'Name for this greeting'. A blue 'Upload' button is centered below the input fields. The main area of the dialog is empty, with the text 'No greetings have been added yet.' centered. At the bottom right, there are two buttons: 'Add Greeting' and 'Done'.

2. Hover over a greeting. Options appear for editing, deleting, or renaming the greeting.
3. Next to **New Greeting**, click **Upload**.
4. Click the **Browse** button.
5. In the Choose File to Upload dialog box, select a WAVE or MP3 recording from your PC, and then click **Open**.

6. Click **Upload**.
7. Click **Add Greeting** at the bottom of the Manage Greetings page, and then click **Done** to close the page.

## Recorded Name

If your company has a dial-by-name directory, you must record your name for the directory to be found.

## ▶ Answering Rules and Time Frames

Though Answering Rules and Time Frames are separate tabs, they are so interconnected that describing them together makes sense.

### Time Frames

Time frames allow you to control the scheduling of the system. You can configure time frames using the Time Frames page. To display this page, click the **Time Frames** icon at the top of the page:



Three common time frames are:

- Open Hours (for example, M-F 8am-5pm)
- Holidays (Independence Day, Thanksgiving, New Year's Day)
- Closed Hours (all other times)

Time frames can be both shared (system-wide and set by the administrator) or personal to your extension. You can add a time frame to your extension by clicking the **Add Time Frame**.

Name	Description	Owner
[Redacted]	Days and Times Ⓞ	Shared Ⓞ
[Redacted]	Days and Times Ⓞ	Shared Ⓞ
[Redacted]	Specific Dates Ⓞ	Shared Ⓞ
[Redacted]	Days and Times Ⓞ	Shared Ⓞ
[Redacted]	Days and Times Ⓞ	Shared Ⓞ
[Redacted]	Days and Times Ⓞ	Shared Ⓞ
[Redacted]	Days and Times Ⓞ	Shared Ⓞ
[Redacted]	Specific Dates Ⓞ	Shared Ⓞ

To add time frames

1. From the Time Frames page, click **Add Time Frame**.

*The Add a Timeframe page appears.*

2. In the **Name** field, enter a name for this time frame.
3. Next to **When**, select the time period when the time frame will be applied.:
  - a. **Always** = select this option if the time frame will always be applied. Click **Save** to complete the procedure.
  - b. **Days of the week and times** = select this option to select days and times when the time frame will be applied. Proceed to “if you select Days of the week and times” on the next page.
  - c. **Specific dates or ranges** = select this option to specify a specific date or range of dates. Proceed to “If you select Specific dates or ranges” on page XXXX.

**If you select Days of the week and times**

Options appear for selecting days and times when the time frame will be applied. See below.

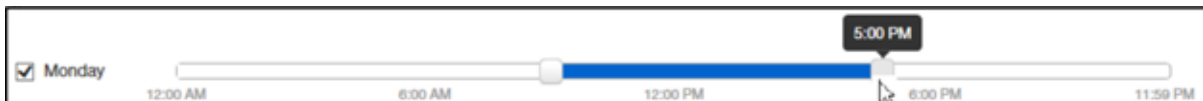
1. Using the check boxes next to the name of each day of the week, check the days when the time frame will be applied. A blue line to the right of checked day shows the default hours for this time frame (9:00 AM through 5:00 PM).

Default operating hours

- To change the start time, drag the button on the left side of the blue car either to the left to begin the start time earlier or to the right to begin the start time later.



- To change the end time, drag the button on the right side of the blue bar either to the left to begin the start time earlier or to the right to begin the start time later.



**Hint:** To fine-tune start and end times, click start time or end time button, and then use the left and right arrow keys on your keyboard to change the time in 5-minute increments.

- By default, each day is made up of one time period. However, you can use the + icon to define two time periods per day. For example, the figure on the next page shows a setup for an office that answers calls in the morning and afternoon, and then transfers calls to an answering service over lunch, on Monday through Friday. By doing this, you would create two time frames (for example, one from 8:00 AM to 12:00 PM and another from 1:00 PM to 5:00 PM).

**Add a Timeframe**

Name:  **Note: Name cannot be changed**

When:  Always  Days of the week and times  Specific dates or ranges

Sunday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Monday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Tuesday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Wednesday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Thursday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Friday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Saturday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

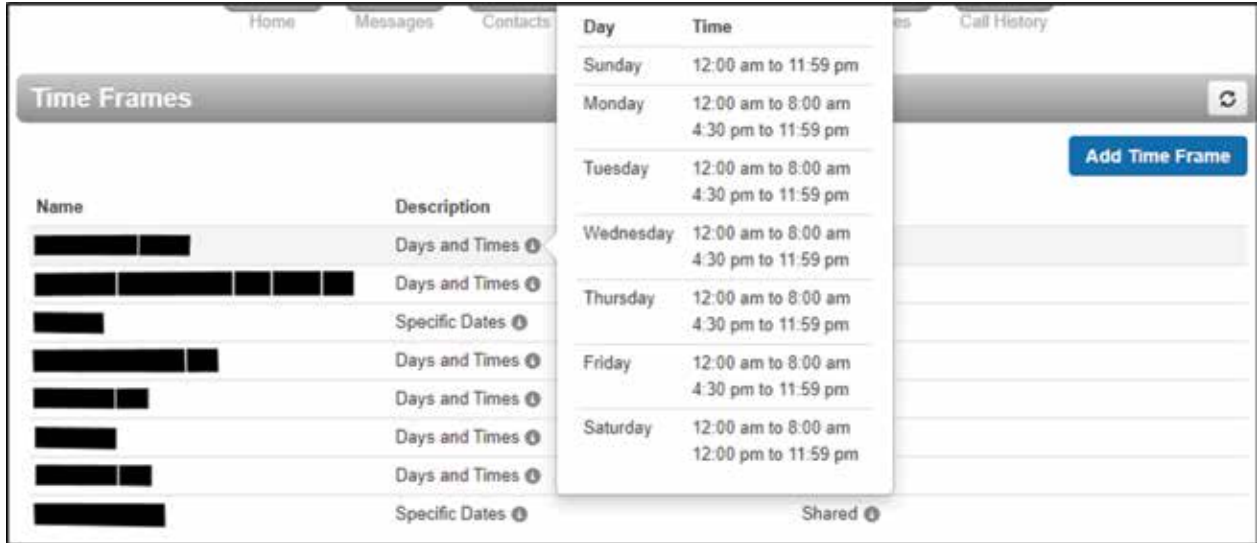
5. Click **Save** to save your selections.

*The time frame appears as a row on the Time Frames page.*

Time Frames		
Name	Description	Owner
██████████	Days and Times ⓘ	Shared ⓘ

**Hint:** Moving the pointer over the blue text in the Description column shows the settings for that timeframe.

# HPBX BASIC USER GUIDE





## If you select Specific dates or ranges

Fields appear for entering dates or ranges. See below.

**Add a Timeframe**

Name  Note: Name cannot be changed

When  Always  Days of the week and times  Specific dates or ranges



Specific dates or ranges  to   

1. Click in the left field, and then select a starting date and time from the pop-up calendar.

**Add a Timeframe**

Name  Note: Name cannot be changed

When  Always  Days of the week and times  Specific dates or ranges

Specific dates or ranges  to   

**November 2023**

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Time 12:00 am

Hour

Minute

2. Click in the right field, and then select an ending date and time from the pop-up calendar.



- To specify additional ranges, click the + icon to display another row of fields, and then repeat steps 1 and 2 in the new fields. Repeat this step for each additional date or range you want to specify. To delete a date or range, click X icon next to the appropriate row.

**Add a Timeframe**
✕

Name  Note: Name cannot be changed

When  Always  Days of the week and times  Specific dates or ranges

Specific dates or ranges

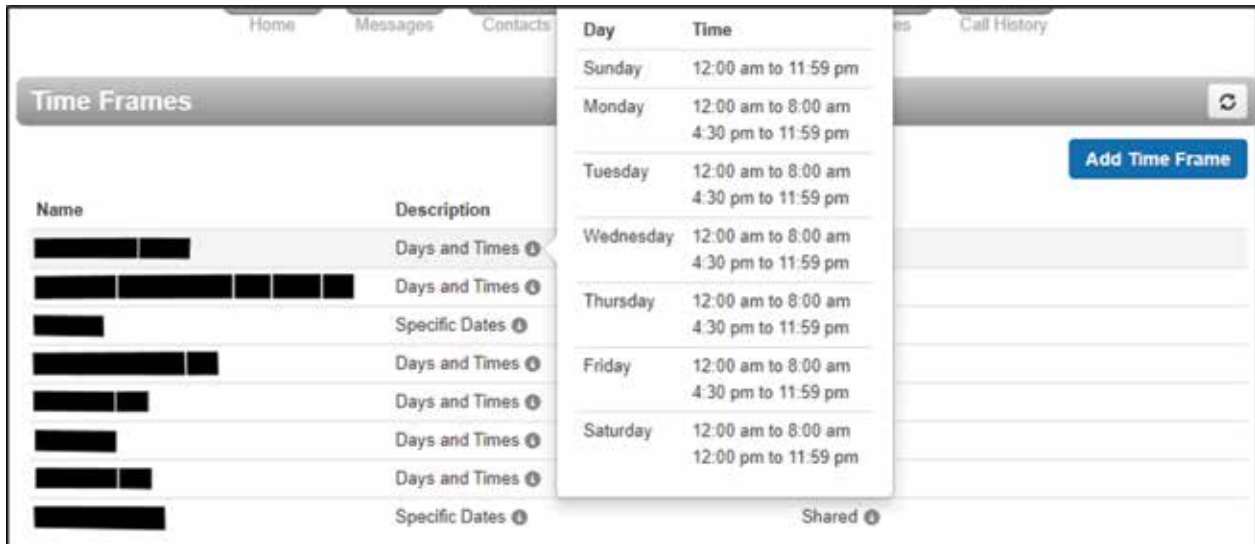
- Click **Save** to save your selections.

*The time frame appears as a row on the Time Frames page.*

**Time Frames**
↻

Name	Description	Owner
██████████	██████ ██████ ⓘ	██████ ⓘ
██████████ ██████	██████████ ⓘ	██████ ⓘ
Holidays	Specific Dates ⓘ	Shared ⓘ

**Hint:** Moving the pointer over the blue text in the **Description** shows the settings for that timeframe.



## Answering Rules

After you set up your time frames, you can create different answering rules for your time frames. You configure answering rules using the Answering Rules page. To display this page, click the **Answering Rules** icon at the top of the page:



The left side of the Answering page is a **Rings for n seconds** drop-down list that allows you to specify the maximum ring time (one ring is generally 5 seconds). When that time expires, the caller will be forwarded to the **Call Forward when Unanswered** rule if defined; otherwise, the caller will be forwarded to voicemail if enabled. The right side of the Answering Rules page has buttons for adding answering rules and specifying allowed and blocked numbers.

The image below shows examples of answering rules. In this image:

- The extension has a rule to simultaneously ring many desk phones during open hours.
- **Call Forward** rings many desk phones and a cell phone simultaneously.
- Holiday and closed hour rules go straight to voicemail.

The active rule is the topmost rule that matches the conditions in the corresponding time frame. In the image below, for example, the time is around 1:00 PM on Friday, so both **Open Hours** and **Cell Forward** rule match the time/day condition, but **Open Hours** is active because it is the topmost rule. You can change the order by using the arrows at left of each rule to drag the rules.



## To add an answering rule

1. From the Answering Rules page, click **Add Rule**.

The Add an Answering Rule page appears. From this page, you can create rules to screen callers, forward calls, and ring multiple numbers simultaneously.

2. Complete the fields in the Add an Answering Rule page.
3. Click **Save**.

Field	Description
Time Frame	Select the time frame when this answering rule will apply.
Do not Disturb	No phone rings, goes straight to voicemail if available.
Call Screening	Prompts caller to say their name, lets you screen the call before accepting.
Call Forwarding Always	Immediately forwards the number specified. See "Call Forward Drop-down Options" below.
Call Forwarding on Active	Forward calls to the number specified when you have one or more calls active. See "Call Forward Drop-down Options" below.
Call Forwarding When Busy	Forward calls to the number specified when your extension has used all available call paths. See "Call Forward Drop-down Options" below.
Call Forwarding When Unanswered	Forward calls to the number specified if the call is not answered after the specified ring timeout. See "Call Forward Drop-down Options" below.
Call Forwarding When Offline	Automatically forwards if your desk phone loses communication (such as during a power outage). See "Call Forward Drop-down Options" below.
Simultaneous ring	<p>Rings many phones at once. Check box options allow you to:</p> <ul style="list-style-type: none"> <li>• Include the user's extension.</li> <li>• Ring all your user's phones.</li> <li>• Use the option "Answer confirmation for offnet numbers: to ensure that a person – and not a voicemail – answers simrings to a cell/landline by prompting the answering party to press 1 to accept the call. An icon to the right of this option allows you to specify a ring delay.</li> </ul> <p>Note: A simring rings handsets, not users. So, for example, if 1000 is listed, the simring will ring handset 1000. If user 1000 has a call forward set to their cell phone, however, the simring will not occur at the cell phone since simring rings handsets, not users.</p>
Just ring user's extension	Rings just your phone.

## Call Forward Drop-down Options

When entering an extension as a call forward option, a drop-down list allows you to forward the call to specific resources associated with that extension. The table below describes the options. Some options may not appear, depending on the features associated with the extension.

Field	Description
Handset	Bypasses the user answering rules and forwards to the handset associated with the specified user.
User	Forwards to the user at that extension and follows the user's answering rules.
Voicemail	Forwards to voicemail at the specified extension.
Queue	Forwards to the queue associated with that user.
Auto Attendant	Forwards to the auto attendant associated with that user.
Conference	Forwards to a Conference bridge.

## Ring Timeout

At the top of the page is the ring timeout selection. This option specifies the number of seconds that your phones will ring or forwarding rule before going to voicemail (when available).

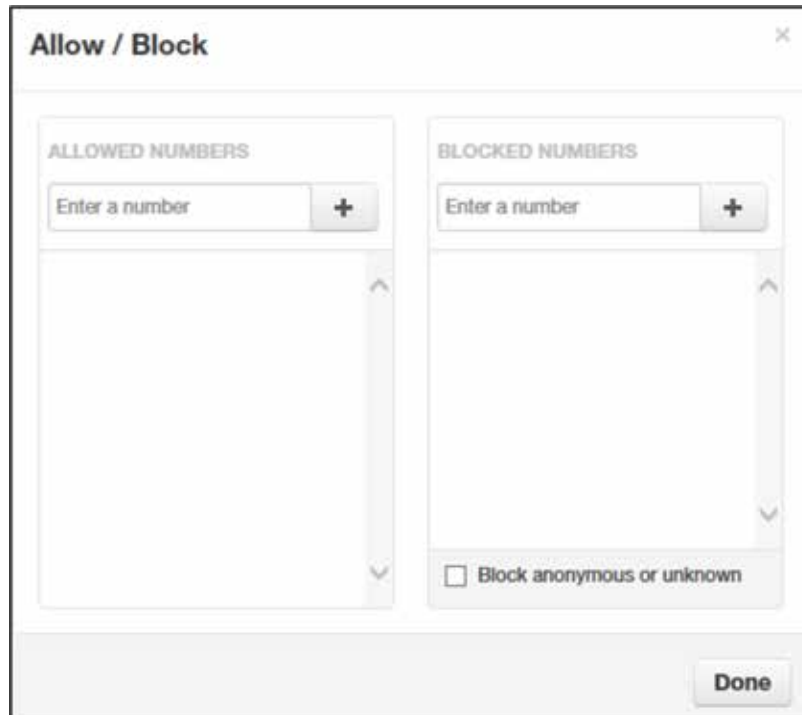
## Allowing or Blocking Callers

The Answering Rules page has an **Allow/Block** button that allows you to permit or block calls from certain numbers. Using this feature, you can block unwanted calls to your phone, as well as calls from anonymous and unwanted numbers. Allowed numbers bypass user Do Not Disturb and Call Screening rules to ring through immediately.

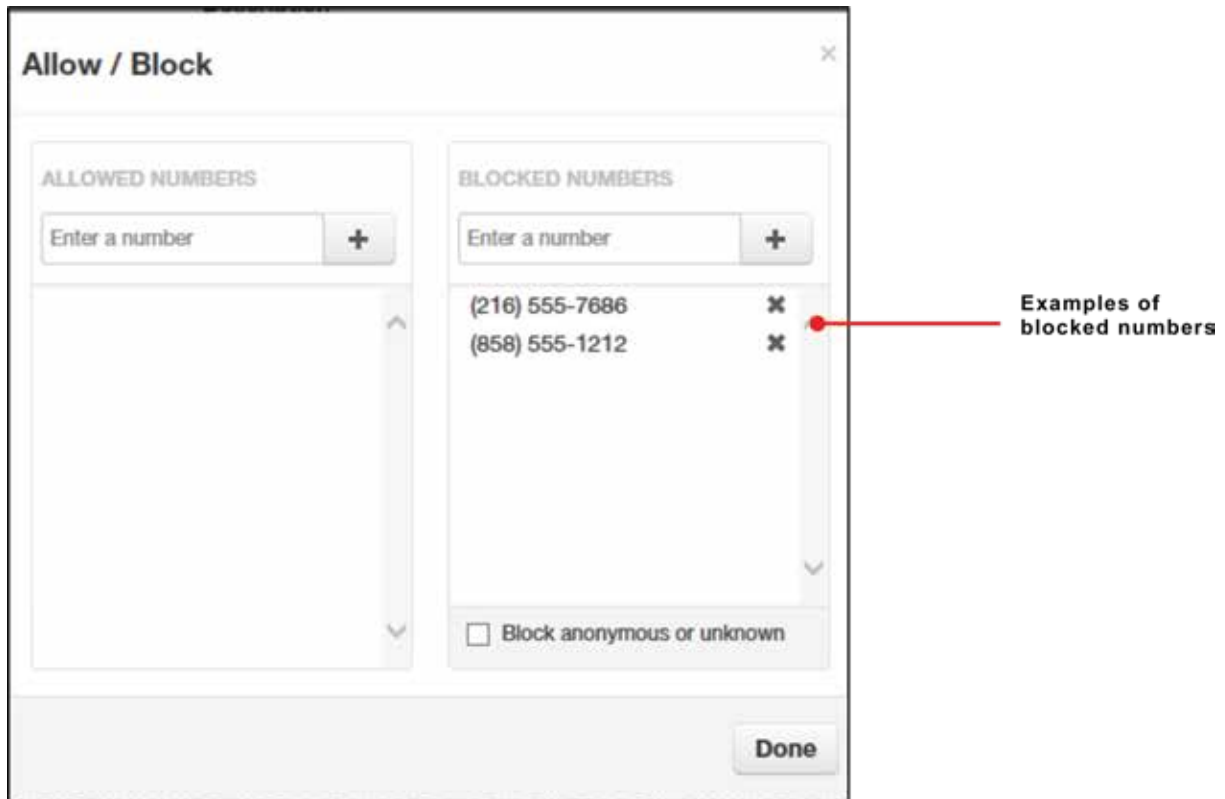
1. From the Answering Rules page, click **Allow/Block**.

*The Allow/Block page appears. This page has two lists, one for allowed phone numbers (on the left) and another for blocked phone numbers (on the right).*

2. To allow phone numbers, perform the following steps under **ALLOWED NUMBERS**:
  - a. Click in the **Enter a number** field.
  - b. Enter the number you want to allow.
  - c. Click the + button. The number appears in the **ALLOWED NUMBERS** list and a brief message tells you the allowed number was added.
  - d. To add more numbers, repeat steps.
  - e. To remove a number, click the X button next to that number.



3. To block phone numbers, perform the following steps under **BLOCKED NUMBERS**:
  - a. Click in the **Enter a number** field.
  - b. Enter the numbers you want to block.
  - c. Click the + button. The number appears in the **BLOCKED NUMBERS** list and a brief message tells you the blocked number was added.
  - d. To add more numbers, repeat steps.
  - e. To remove a number, click the X button next to that number.
4. To block anonymous calls and calls from unknown numbers, check **Block anonymous or unknown**.



5. When you are finished, click **Done**.

## ▶ Contacts

By default, contacts contain all the extensions on your system. However, you can add contacts to enable easier access to everyone you need to reach.

You configure contacts using the Contacts page. To display this page, click the **Contacts** icon at the top of the page.



The following image shows an example of a Contacts page. The sections following the image describe the key areas on the page.



### Filter and Search

The **All** pull-down list allows you to search contacts by group. Using this list, you can select groups to search for such as Favorites, Departments, Available, Busy, and more. Selecting a group filters the contacts on that page to show only the ones that match your entry. Click the X in this field to delete your entry and redisplay all contacts.

### Add and Import Contacts

The **Add Contact** button allows you to add a contact one at a time. These are for external contacts only. Your contact list will automatically update with your internal extensions.

Import will allow you to select a file from your PC, the import can accept CSVs from Microsoft Outlook and Gmail as well as vCards.



## Adding a Contact

### To add a contact

1. From the Contacts page, click **Add Contact**.

*The Add Contact page appears.*

2. Complete the fields in the Add Contact page.
3. Click **Save**.

*The contact appears on the Contacts page.*

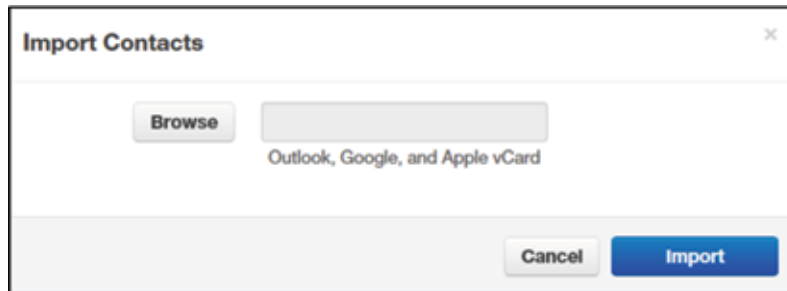
Field	Description
First Name	Contact's first name.
Last Name	Contact's last name (surname).
Work Number	Contact's work phone number.
Mobile Number	Contact's mobile phone number.
Home Number	Contact's home phone number.
Email	Contact's email address.

## Importing Contacts

### To import contacts

1. From the Contacts page, click **Import**.

*The Import Contacts pop-up window appears.*



2. Click the **Browse** button.
3. In the Choose File to Upload dialog box, go to the location where the file you want to import is located. Click the file, and then click **Open**.

*The path and file appear in the **Browse** field.*

4. Click **Import**.

*The imported contacts appear on the Contacts page.*

## Selecting Favorites

When hovering over a contact, a light gray star appears next to the contact's name. Clicking the star selects the contact as a favorite and changes the color of the star to yellow.

## Editing Contacts

When hovering over a contact you'll see an edit button on the far right, click that button edit the contact.

## ▶ Phones

The Phones page allows you to manage your phones. To display the Phones page, click the **Phones** icon at the top of the page.



Each row shows a phone that has been added to the system, along with:

- Whether the phone is registered.

- The phone name and device type. The hyperlink below the **Name** column allows you to edit the phone information. You can also edit or delete phones using icons on the right side of the row.

- Your phone's IP address, MAC address, and the line number on the phone associated with your extension.

Clicking the Refresh button updates the information shown on the page.

The page has an **Add** Phone button that adds phones to your system. This task usually is performed by administrators and is not described in this guide.

The Phones page also has a **SNAPmobile** button that allows you to access SNAPmobile. SNAPmobile is a mobile app that turns your cell phone into an extension of your Cloud PBX. Make and receive calls with the same identity as being in the office along with managing your voicemail, answering rules, and contacts. To start using SNAPmobile, see "Using SNAPmobile".

Name	Device Type	IP Address	MAC Address	Line
✓ [Redacted]	Yealink SIP-T48S 96.96.0.15	[Redacted]	[Redacted]	1
○ [Redacted]	[Redacted]	[Redacted]	-	-
○ [Redacted]	[Redacted]	[Redacted]	-	-

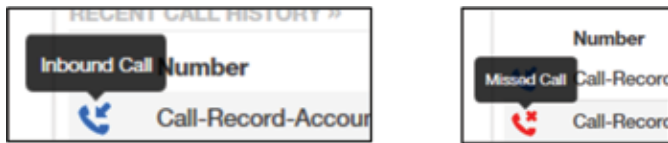
## ▶ Call History

The Call History page shows a log of all your extensions calls. It also provides tools to filter and export data.

The left side uses color-coded icons to represent call status:

- Green = outbound calls
- Blue = inbound received calls
- Red = missed calls

Moving your screen pointer over an icon displays a tooltip with that call status. For example:



You can click a number in the **Number** column to dial back the number. Clicking the Refresh button updates the information shown on the page.

To display the Call History page, click the **Call History** icon at the top of the page.



The following image shows an example of the Call History page. The sections following the image describe the **Filters** and **Export** buttons.

Call History				
Filters		11/03/2023 — 11/06/2023		Export
Number	Name	Date	Duration	
[Redacted]	[Redacted]	Today, 9:52 am	9:02	
[Redacted]	[Redacted]	Today, 8:56 am	0:00	
[Redacted]	[Redacted]	Today, 8:06 am	0:38	
[Redacted]	[Redacted]	Today, 8:06 am	0:16	

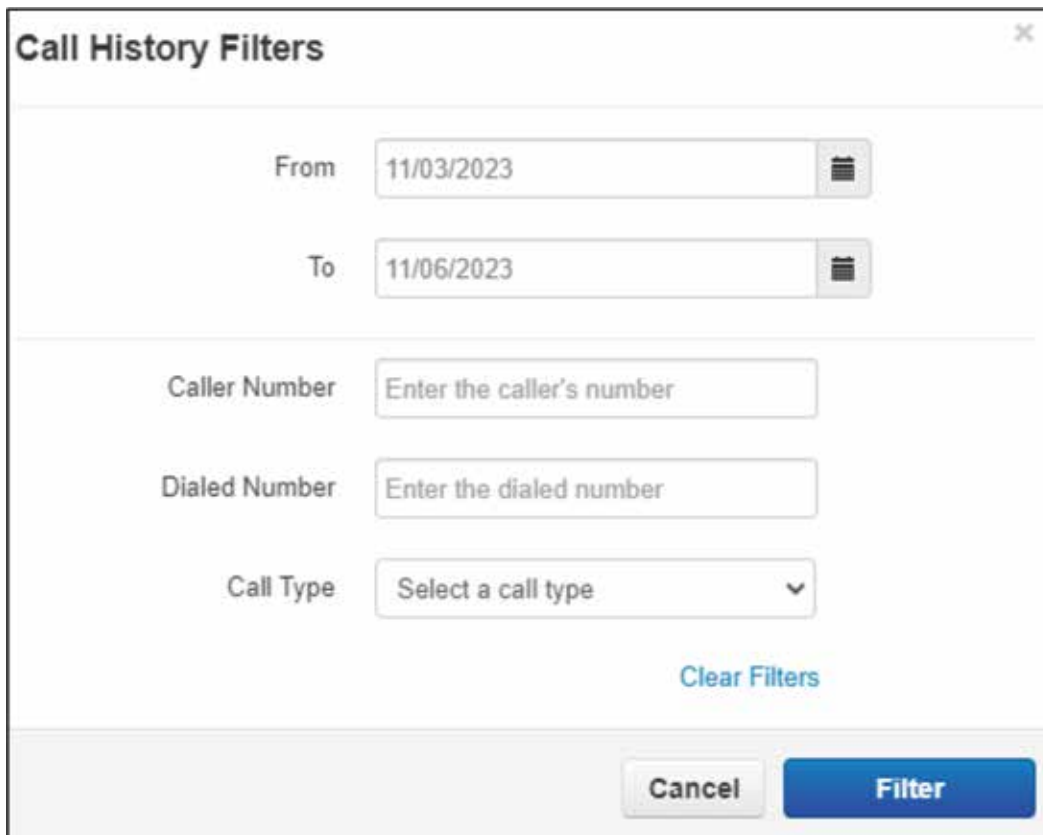
## Filtering the Call History

The **Filters** button allows you to filter the information displayed in the Call History page, so you can view only the information that you need.

### To filter the call history

1. From the Call History page, click **Filters**.

*The Call History Filters page appears.*



The screenshot shows a dialog box titled "Call History Filters" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- From:** A date input field containing "11/03/2023" with a calendar icon to its right.
- To:** A date input field containing "11/06/2023" with a calendar icon to its right.
- Caller Number:** A text input field with the placeholder text "Enter the caller's number".
- Dialed Number:** A text input field with the placeholder text "Enter the dialed number".
- Call Type:** A dropdown menu with the text "Select a call type" and a downward arrow.
- Clear Filters:** A blue text link located below the Call Type dropdown.
- Buttons:** At the bottom right, there are two buttons: a "Cancel" button and a blue "Filter" button.

2. Complete the fields in the Add Contact page.
3. Click **Set Filters**.

*The Call History page appears, with only the items that match your criteria.*

Field	Description
Date Range	To filter by a specified date range, click in the left field, and then select a starting date and time from the pop-up calendar (see image below). Click in the right field, and then select an ending date and time from the pop-up calendar.
Caller Number	To filter by a call number, enter the caller's number.
Dialed Number	To filter by a dialed number, enter the dialed number.
Call Type	To filter by type of call, select call type.

The screenshot shows a 'Call History Filters' dialog box. The 'From' field is set to '11/03/2023'. The 'To' field has a calendar pop-up for 'November 2023' with the 3rd selected. The other filter fields are empty. At the bottom, there are 'Clear Filters', 'Cancel', and 'Filter' buttons.

## Exporting the Call History Log

### To export the call history log

- From the Call History page, click **Export**.  
*Depending on your browser, the history log is downloaded to your computer, or you are prompted to save the log. The log is in comma-separated-value (CSV) format.*
- After downloading the log, you can open it using Microsoft Excel, Google Docs, and other spreadsheet applications.

▶ Profile

Clicking the **Profile** link at the top-right of the page displays the Profile Page. From this page, you can configure profile settings.

**Profile**


First Name

Last Name

Login Name

Department

Timezone

Email Address(es)  

Directory Options

- Announce in Audio Directory
- List in Directory

**Caller ID Information**

Area Code

Caller ID  You cannot edit your Caller ID

911 Caller ID  You cannot edit your 911 Caller ID

**Change Password**

New Password

**Note:** Password must be numbers only.

Confirm New Password

## HPBX BASIC USER GUIDE

Field	Description
First Name	The first name and last name will be shown in contacts and used in the dial by name directory.
Last Name	
Time Zone	Your local Time Zone.
Email Address (es)	Address used for email, password resets, etc. To add email addresses, click the + button to add fields for entering more email addresses.
Record User's Calls	Select whether the calls for this user will be recorded (yes) or not recorded (No).
Directory Options	<p>Enables or disables announcement in auto directory and list in directory features.</p> <ul style="list-style-type: none"> <li>Announce in Audio Directory = check to include the user in the dial-by-name directory</li> <li>List in Directory = check to add user to the internal extensions list (contacts).</li> </ul>
Caller ID information	
Area Code	Local area code for 7-digit dialing associated with user
Caller ID	For outbound calls, this is the number the recipient will see.
911 Caller ID	For calls to 911, this is the e911-enabled number the 911 agent will see.
Change Password	
New Password	Password for voicemail and the portal. Avoid using common codes like 0000 or 1234. For security, each typed password character is masked by a dot. Please keep this number secure. We will never call you to request your passcode.
Confirm New Password	