

CTS Cloud Main Number Incoming Call Manager(ICM) Call Flow Rules & Schedule

Some Business Groups are programmed for the Main Number to have options in their call flow other than immediate Auto Attendant answering. This creates an additional schedule and how the calls are routed per those scheduled times. The following is a basic overview of managing this programming.

Accessing the System

- From your computer browser navigate to <https://ctscloud.uccommportal.com/bg>
- At CommPortal Web window enter your Admin Direct Phone Number with no dashes or spaces (example: 2484561234)
- Enter your password – (Password is case sensitive)
- Select “Log in”
- You have opened your Admin Portal as shown below

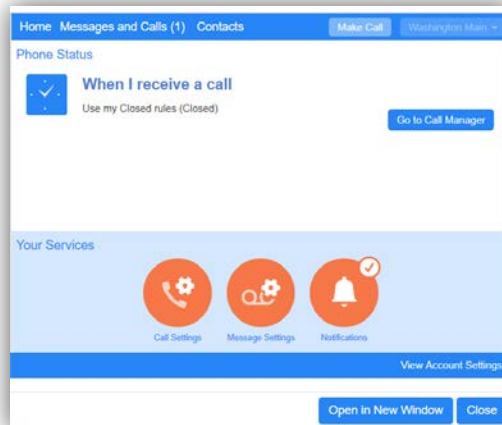
The screenshot displays the Business Group Admin Portal. The interface features a blue header with the title "Business Group Admin Portal" and a user profile dropdown labeled "Your Name". A left-hand navigation menu includes sections for Home, Groups (with sub-items: Hunt Groups (MLHGs), Call Pickup Groups, Supervisor Dashboard), All Lines (with sub-items: Users, Attendants, Group Access, Phones), and Services (with sub-items: Departments, Short Codes, Account Codes, Extensions, Call Analytics, Music on Hold, Auto-Attendant, Misc. Settings). The main content area is titled "Groups" and contains a descriptive paragraph, three circular icons for "Hunt Groups (MLHGs)", "Call Pickup Groups", and "Supervisor Dashboard", and a link to "All Lines". Below this is another descriptive paragraph and four circular icons for "Users", "Attendants", "Group Access", and "Phones". At the bottom, a "Services" section includes a descriptive paragraph and four circular icons for "Departments", "Short Codes", "Account Codes", and "Extensions".

For additional assistance please
contact our service Department at
248-451-1234

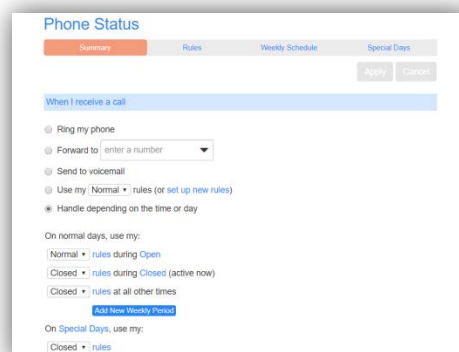


Navigate

1. Select Users in left column
2. In the Users screen, on the right of the Main Number select the Actions menu.
Choose - View Individual Settings
3. Select Go to Call Manager



4. This opens the Summary Page that follows
 - a. Ring my phone, Send to voicemail, and Use my Normal rules options are rarely used
 - b. Forward to - this is where you can forward your Main # temporarily to send your incoming calls to another number.
 - *Note, your programming should be preset for a number to forward to if No Internet Service – this # is designated by you at time of install*
 - c. Handle Depending on Time of Day is most common due to the 'rules' needed for your call flow during scheduled time periods – these can be changed, as all options, by selecting and clicking Apply



Weekly Schedule

Normally created at install based on your scheduled requirements, the grid can have up to three scheduled period times that can be named - Open, Closed, Lunch, etc.

When you need to change a time the Main Number rings you would adjust those times here.

5. Select Weekly Schedule Tab at the top
6. Select Period from the left (Open, Closed, etc.) that you want to change
7. Click the times for your desired period: in the below example if you wanted to stay open until 6pm on Wednesday you would select the Open period(blue) on the left and select the 5pm & 6pm time slots in the grid . They will turn Blue to let you know they have been selected. For 15 minute increments select Zoom In below the grid.
8. Select Apply when times are correct.

The screenshot shows the 'Weekly Schedule' tab in a software interface. At the top, there are tabs for 'Summary', 'Rules', 'Weekly Schedule' (selected), and 'Special Days'. Below the tabs are buttons for 'Add New Period', 'Rename', 'Apply', and 'Cancel'. A text block explains that users can apply different rules at different times of the day and that they can use the 'Summary' tab to choose which rules apply during the periods. Below this, there is a 'Periods (max 3)' section with two options: 'Closed' (green) and 'Open' (blue). The 'Open' option is selected. To the right is a grid with columns for the days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and rows for time slots from 1 am to 11 pm. The grid is mostly green, indicating the 'Closed' period. A blue shaded area covers the 10 am to 12 pm slots for Monday, Tuesday, and Wednesday, and the 1 pm to 3 pm slots for Monday, Tuesday, and Wednesday. The 5 pm and 6 pm slots for Wednesday are highlighted in blue, indicating they have been selected for the 'Open' period. At the bottom left of the grid, there is a 'Zoom In' button.

Call Flow Rules

This is normally advanced programming and a more detailed document will be available in the future. This is to provide you an understanding of how calls ring.

The Rules Tab is set up to compliment the Schedule created, an example follows. Rules are set up initially at install, but can be edited. The ICM is typically used when any calls are answered Live, not only an Auto Attendant. When and to where can be edited here, as well as Hunt Groups on the Admin main screen. Groups with only an Auto Attendant have their Main number continually forwarded to it.

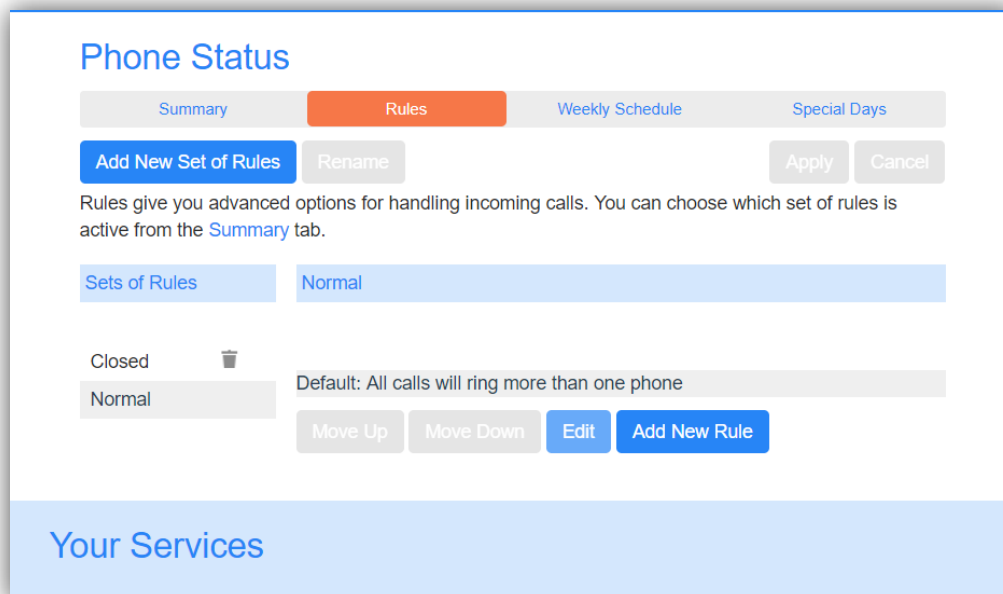
The example below shows

Open Hours

- Normal Rule ringing more than one phone – this is for a Group of phones where your Main # will ring (during Open time). There is a timer programed for how long calls ring before going to the Auto Attendant, which would follow the schedule for the Business Hours greeting.

Closed Hours

- Closed Rule is typically for the calls to switch immediately to the Auto Attendant, which would be the schedule for the closed/Non Business Hours greeting.



The screenshot shows the 'Phone Status' configuration page with the 'Rules' tab selected. At the top, there are four tabs: 'Summary', 'Rules' (highlighted in orange), 'Weekly Schedule', and 'Special Days'. Below the tabs are buttons for 'Add New Set of Rules', 'Rename', 'Apply', and 'Cancel'. A text block explains: 'Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.' Below this, there is a 'Sets of Rules' section with a dropdown menu currently set to 'Normal'. Underneath, there are two rule entries: 'Closed' with a trash icon and 'Normal' with a trash icon. The 'Normal' rule has a description: 'Default: All calls will ring more than one phone'. At the bottom of the rule list are buttons for 'Move Up', 'Move Down', 'Edit', and 'Add New Rule'. The bottom of the page features a blue banner with the text 'Your Services'.

Special Days

Special Days/Holidays, etc. can be preselected then specified in the Summary which rule will be used on these days. By default when a special day is selected it is treated as a closed day.

The screenshot shows a web interface for 'Phone Status'. At the top, there are navigation links: 'Home', 'Messages and Calls (1)', and 'Contacts'. On the right, there are buttons for 'Make Call' and a dropdown for 'Main Number'. Below the navigation is the 'Phone Status' title. There are four tabs: 'Summary', 'Rules', 'Weekly Schedule', and 'Special Days' (which is highlighted in orange). Below the tabs are buttons: 'Go To Today', 'Clear All', 'Add Public Holidays', 'Apply', and 'Cancel'. A text block explains that Special Days are exceptions to the weekly schedule and provides instructions on how to use the calendar to select or modify special days. At the bottom, there are three calendar views for January 2019, February 2019, and March 2019. In the January calendar, the 1st and 2nd are highlighted in blue.

- Select Special Days Tab
- To select what days you are closed select date – it will highlight blue to know it has been selected.
- Hit Apply

This can be scheduled as far as several years in advance if you wish.

Note: Please be aware that changes in your ICM Schedule that coincide with your calls going to an Auto Attendant, will NOT change the times the Business or Non Business Auto Attendant Greetings occur. Changes to your Attendant schedule may be needed. See Auto Attendant Schedule Change instructions.