

# Incoming Call Manager (ICM) Quick Reference Guide



Call Manager is a service that monitors your incoming calls, and handles them according to your parameters. You can set it up to handle incoming calls differently based on the time of day, the date, and/or depending on who is calling.

You can select from a number of different options for how you want Call Manager to treat your calls. The following are just a couple of examples of the sort of things Call Manager can do for you.

## HOW DOES CALL MANAGER WORK?

You can configure Call Manager by defining "Rules", a "Weekly Schedule", and "Special Days".

Rules, which are always part of a "Set of Rules", tell Call Manager what to do when it receives a call. Examples of rules are:

"If you receive a call from someone on your contact list, make your phone ring in a distinct manner."

"If you receive a call from an anonymous number, send it to your voicemail."

To use a Call Manager rule, the phone numbers of your contacts must be full numbers including the area code.

You use the Weekly Schedule to divide your normal working week into distinct periods. For example, you could break your normal week into:

- + Normal working hours.
- + Lunchtime.
- + Evenings.
- + The weekend.

You can then configure Call Manager to apply a different "Set of Rules" during each of those periods.

Applying different Sets of Rules to your Weekly Schedule allows you to treat incoming calls differently depending on your schedule. Specifically this lets you apply different rules to the same callers depending on the time and day they call. For example, when setting up Call Manager to handle calls to your land line, you might want it to forward calls from your family to your mobile phone, but only during your working hours, not during evenings or on the weekend.

You can also designate Special Days on which Call Manager will not operate according to your normal Weekly Schedule. For example, you can add Public Holidays, vacations, or business trips and so on. Call Manager will then ignore your Weekly Schedule and you can select a different Set of Rules to apply on that day.

## GETTING STARTED

To begin, log into CommPortal using the ICM Subscriber Number provided by Northland Communications. If you do not know this number, check with your System Administrator or the Northland Communications Help Desk.

You will also need to know the password for this account.

## Phone Status

Summary	Rules	Weekly Schedule	Special Days
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>			
When I receive a call		Additional options	
<input checked="" type="radio"/> Ring my phone <input type="radio"/> Forward to <input type="text" value="enter a number"/>		<i>These options apply in all cases where you've chosen to have your phone ring.</i> If I don't answer:	
Call Manager lets you decide who, how and when callers can reach you. <a href="#">Learn more</a> Set up rules for more advanced control. Set a weekly schedule to apply different rules based on time, or day of the week.		<input type="checkbox"/> Forward to <input type="text" value="enter a number"/>	
		If I'm in a call:	
		<input type="checkbox"/> Forward to <input type="text" value="enter a number"/>	
		What audio should callers hear before their call is answered?	
		<input checked="" type="radio"/> Use default ringback <input type="radio"/> Use custom ringback <a href="#">record</a>	

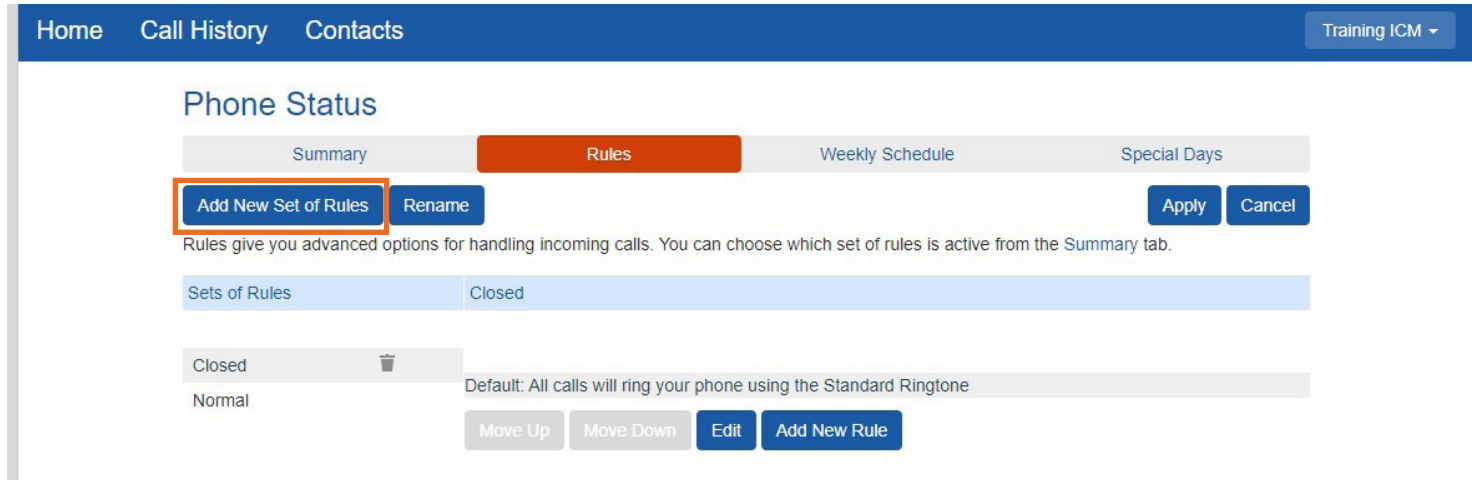
## SUMMARY TAB

You can configure Call Manager to perform one of the following actions by selecting its corresponding radio button.

- + **Ring your phone:** This will not apply any Rules to your incoming calls, and effectively turns off Call Manager. All incoming calls will make your phone ring.
- + **Send to voicemail:** This will divert all incoming calls to voicemail.
- + **Forward to another number:** This will direct all your calls to another phone without applying any rules.
- + **Set Up Rules:** Configure and use a Set of Rules. This ignores your Weekly Schedule and any Special Days.
- + **Set a Weekly Schedule:** Use different Sets of Rules depending on the time or day. This lets you choose which Set of Rules you want to apply during the periods defined in your Weekly Schedule, and on Special Days.

In cases where you have chosen to have the phone ring you have additional options.

- + **If I don't answer:** Chose to have your calls forward to another telephone number if you don't answer the call.
- + **If I'm in a call:** Chose to have your phone forward to another telephone number if you are already on a call.
- NOTE:** If you have multiple devices, all devices must be busy for this setting to work.
- + **What Audio should callers hear before their call is answered?** When you select Custom Ringback, this audio will be heard instead of the standard ringback and will stop as soon as the call is answered.



You can define different rules for different callers, grouping these within Sets of Rules. When combined with your Weekly Schedule and Special Days, these allow you to change which rules apply according to the time or day.

If the Set of Rules only contains one rule, that rule will be applied to all your incoming calls. More rules can be added to specify how Call Manager will treat different types of callers. When applying a Set of Rules to an incoming call, Call Manager works from the top of the list of rules to the bottom.

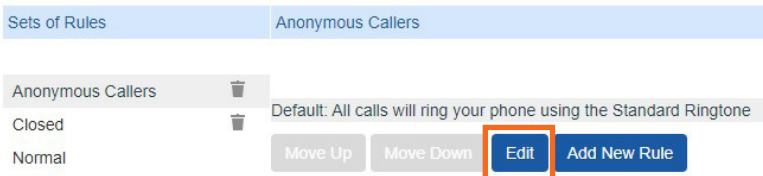
For example if you want to send anonymous calls directly to say their name before being answered, you can configure ICM to do this for you. First you need to add a new set of rules.

Choose a name for this new Set of Rules.

Pick a name which will help you remember what this Set of Rules does. For example, you might choose "Family Calls Only" or "Forward Urgent Calls".

Name:

- + Select **Add New Set of Rules**.
- + Enter a name for the rule, for example **"Anonymous Callers"**.
- + Click **OK**.
- + The new set of rules has been added and appears in the Rules list.
- + To edit the Rule, highlight it and select **Edit**. See below.



## Create The Rule

### When no rules apply in the "Anonymous Callers" set of rules

When no rules apply

- ring my phone using the Standard Ringtone ▼
- forward to enter a number ▼
- play a reject message and reject the call
- ask the caller to say their name before I accept the call
- ring more than one phone at the same time or in sequence
- ask the caller to say their name before ringing more than one phone at the same time or in sequence

< Back Next > Finish Cancel

- + From the Set of Rules pop up, select which rule you want to apply. See explanations below.
- + When you have finished setting up your rules, select **Finish**.

- + **Ring my phone using:** select either the standard ring tone or choose one of three distinctive ring tones from the dropdown.
- + **Forward to:** select and enter number(s) to forward calls to.
- + **Play a reject message and reject the call:** This plays a message stating this number is not accepting anonymous calls.
- + **Ask the caller to say their name before accepting the call:** Caller will need to say a name before the call rings through.
- + **Ring more than one phone at the same time or in sequence:** Add other telephone number(s) that you wish to ring and the number of seconds each should ring.  
The first number will always start ringing immediately. If a line is busy the next available line will start ringing immediately. All phones will stop ringing as soon as one phone is answered.
- + **Ask the caller to say their name before ringing more than one phone at the same time or in sequence:** This combines previous two options above. Caller will say their name before they start ringing a phone or series of phones. For the last two options, you will select **Next** to enter the telephone numbers and seconds between ringing the next phone.

### When no rules apply in the "Anonymous Callers" set of rules

Choose which phones you would like to ring when no rules apply

#### Enter the phone number you want to ring, and for how long.

The first phone will always start ringing immediately and you can have more than one phone ring at the same time. If a line is busy, the next available phone will start ringing immediately.

All phones will stop ringing as soon as one phone is answered.

If you don't answer or all lines are busy, the action selected here will be applied instead of any global configuration you may have configured on the Summary page.

Phone Number: enter a number ▼ Start: End: 60 ▼

If I don't answer or all lines are busy, forward to enter a number ▼

< Back Next > Finish Cancel

- + Enter the first phone number that you wish to ring and how long (in seconds) you want it to ring before taking the next action.
- + Enter a number you wish the call to forward to if the call is not answered or all lines are busy.

## WEEKLY SCHEDULE TAB

The Weekly Schedule tab lets you configure Call Manager based on what you do in a normal week. Call Manager can apply a different set of rules for each period you define in your **Weekly Schedule**, so you can treat the same type of call differently depending on what you would normally be doing at that time. You set that behavior from the **Summary tab**.

Home Call History Contacts

Phone Status

Summary Rules **Weekly Schedule** Special Days

Add New Period Rename Apply Cancel

Apply different rules to your calls based on the time, or day of the week.

To begin, you can start with:

- An example schedule that you can customize (recommended)
- A blank schedule

On the Weekly Schedule tab, choose either:

- + An example schedule that you can customize (this is the recommended option)
- + A blank schedule (one that you can create)

### Create the Schedule from an Example Schedule

Using your weekly schedule, you can apply different rules at different times of day.

Once you have set up your weekly schedule here, you can use the Summary tab to choose which rules apply during the periods you have defined.

Periods (max 3)	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

Zoom In

- + Select a period from the left-hand pane (Lunch, Weekend Working Hours).
- + In the right-hand pane, highlight the time ranges for that period.

A single click highlights an interval of 1 hour (zoomed out view) or 15 minutes (zoomed in view).

Click and drag to highlight a longer time range. You can also drag across multiple days.

The highlight is color-coded to match the period you have selected.

To delete an entry in the timetable, click (or click and drag) over the entry again.

You can overwrite an existing entry with a different period without needing to delete the entry first.

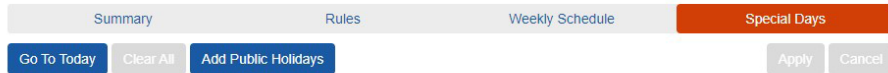
Be sure to click **Apply** to save your changes.

## SPECIAL DAYS TAB

The Special Days tab lets you define days on which you will not be following your normal weekly schedule. This can be used for vacations or holidays when you may want to handle calls in a different way. You can use a summary tab to choose a different rule which applies to these days.

To set a single date as a special day, click that date in the calendar. If you need to add a range of dates, you can click and drag on the calendar to highlight the necessary days.

### Phone Status



Special Days are exceptions to your normal weekly schedule.

For example, vacations or business trips are special days, when you may want to handle calls in a different way. You can use the Summary tab to choose a different rule which applies for the whole of these days.

Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.



+ To set a single date as a special day, click that date on the calendar.

+ To add a range of dates, click and drag on the calendar to highlight the applicable days.

+ Select **Add Public Holidays** to add all public holidays to the schedule.

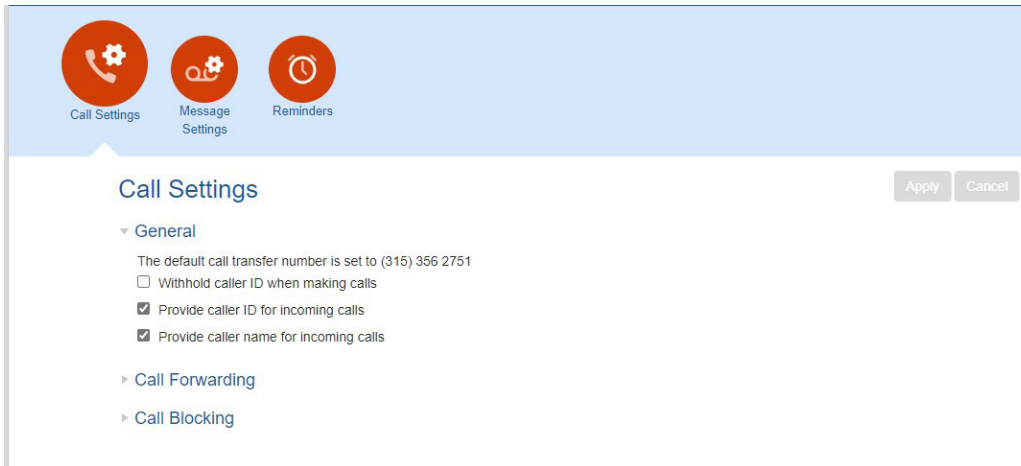
**NOTE:** When adding public holidays, select which country's holidays to use and click **OK**.

+ Click an existing special day to make it normal.

+ Click **Apply** when finished to save your changes.

## CALL SETTINGS WIDGET

### GENERAL



- + **Call transfer number:** When a caller is put through to voicemail, they are given the option of being transferred to the number set by your business group administrator and specified here. If no number has been assigned by the administrator it will state so.
- + **Withhold Caller ID when making calls:** Your Caller ID is presented by default when you make calls. If you would like to block Caller ID, check **Withhold caller ID when making calls**.
- + **Provide Caller ID for Incoming Calls:** Controls whether caller ID is delivered to your phone when it is available.
- + **Provide Caller Name for Incoming Calls:** Controls whether caller names are delivered to your phone when they are available. When you receive a call, you hear the MaX UC configured ringtone and a panel will appear on your desktop.

Be sure to click **Apply** to save your changes.

### CALL FORWARDING

#### Call Forwarding

Ask me for a forwarding number each time I turn on forwarding from my phone using an access code:

- Immediate Forwarding
- Busy Forwarding
- No Answer Forwarding

Unblock Remote Forwarding

The above forwarding options apply when configuring Call Forward via your telephone rather than through the web interface. By default, you will be prompted to enter a forward number each time you choose a forwarding option.

Remote forwarding is generally blocked by the System Administrator for security purposes and you cannot unblock it.

Be sure to click **Apply** to save your changes.

## CALL BLOCKING

### Call Blocking

Choose which types of phone numbers should be blocked.

- Local
- National and Mobile
- International
- Premium Rate
- Operator
- Directory
- Access Codes
- Access codes that change configuration

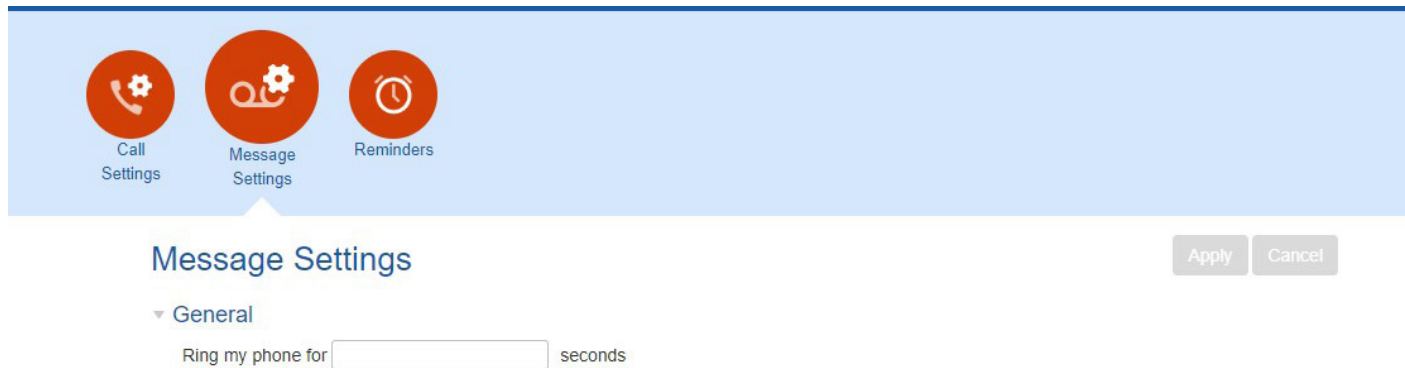
Call blocking will block outgoing calls to these options when checked.

If the Northland System Administrator has blocked calls, you will not be able to unblock them.

To request unblocking, contact Northland Communications.

Be sure to click **Apply** to save your changes.

## MESSAGE SETTING WIDGET



Message settings allows you to set the number of seconds your phone will ring before a caller will be sent to voicemail. Be sure to click **Apply** when finished to save your change.