

Virtual Office User Guide

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HOW TO USE THIS DOCUMENT

This document is designed to provide instructions on how to use most of the basic features on the **VIRTUAL OFFICE** User Portal. It is recommended that you review this material before using the portal. It is important to read this document from start to finish, since many concepts will be introduced early in the text, and referred to later on.

IMPORTANT! *The images presented in this guide are provided for guidance only!* This document contains a large number of images and screenshots to help you along. The site is constantly changing as we add new features and improvements. Therefore, do not be discouraged if what you see in this guide is slightly different from what you see on the screen.

If *you have thoroughly read this guide* and still have questions, please contact your administrator for assistance.

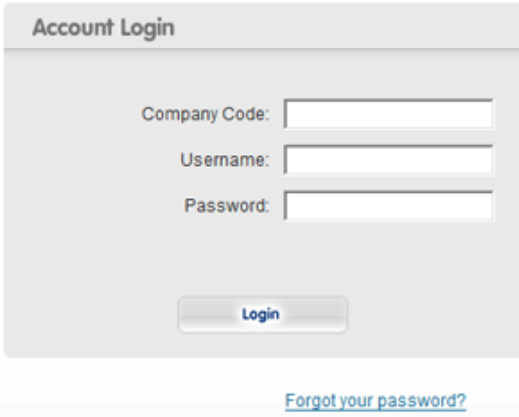
WHAT IS VIRTUAL OFFICE?

Virtual Office is an internet-based corporate phone system. With this type of phone service, each user (extension owner) has the ability to change settings for their own extension, listen to email, view call history, and other features.

LOG IN

To log in to the **My Extension** dashboard, go to home page of your Virtual Office provider provided by your Administrator. If a login form is not visible on the screen, find the "**Login**" button to load the login form.

Once you see the login form, you will need to enter the Company ID, Username, and Password provided to you by your administrator.



The image shows a screenshot of a web form titled "Account Login". It contains three input fields: "Company Code:", "Username:", and "Password:". Below these fields is a "Login" button and a link that says "Forgot your password?".

1. Login Form

1. In the **Company Code** (or **Company ID**) field, enter the **Company ID** provided by your administrator. All users in a company will share the same Company Code/ID.
2. Enter the case-sensitive username and password provided by your administrator. The first 3 digits of the user name are the same for everyone in your company. The last 3 digits are your extension number.

3. Click the “**GO**” button.

If your login fails, please double-check your *Caps Lock* key. Remember, your username and password is case-sensitive.

If you forget your password, click on the “*Forgot your password?*” link. Your password will be reset and sent to the email address associated with your username.

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YOUR USER PORTAL

The *My Extension Portal* provides the tools you need manage your phone extension. You can forward calls, set your hold music, and manage voice mail without installing software.

Navigation

When you are on the Dashboard screen, the *My Extension* tab is selected on the *Tab Menu*.

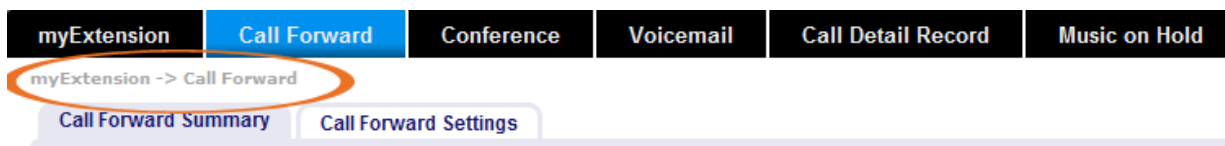


2. Tab Menu

The *currently selected tab* is displayed in blue, while *inactive tabs* remain black.¹ When you move your mouse over a non-selected black tab, it will also change color until you move away from it.

Breadcrumbs Menu

When you click on one of the black tabs, the *Breadcrumbs Menu* (circled in orange below), is updated to reflect the current location.



3. Breadcrumbs Menu

The Breadcrumbs menu is used throughout the Admin Portal to denote your current location on the site. Each item in the breadcrumb list is hyperlink for easy, backward navigation.

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MY EXTENSION

The first screen you see after logging in to the User Portal the *Dashboard*. The Dashboard contains an overview of your extension configuration.

myExtension -> myExtension

The screenshot shows a user dashboard with the following sections:

- 1 Welcome:** Displays user information: Local Extension, Login ID: 102105, E-Mail, Mobile, SIP Server: localhost, SIP User ID: 102105, and Voice Mail Password. Includes an "Update my Profile" button.
- 2 Call Forward Settings:** Shows "All Calls" with icons for mobile and desktop, and a "Call Forward" icon.
- 3 Advisories:** States "There are currently no advisories".
- 4 Voice Mail:** States "You have 0 voice messages" and includes a "Check Now!" button.
- 5 Conference Alerts:** Shows "Conference No. 8909" with "START: 2008-10-31 12:10:00" and "END: 2008-10-31 15:10:00".
- 6 Directory Listing:** A table listing extensions and their details.

Extension	Name	Mobile No.	E-Mail	Status
100	Admin	+6592445555	thatguy@hisdomain.zz	✘
101	francis	+6588882222	thatguyagain@hisdomain.zz	✘
102	hajie	+6588883333	thatguy@hisdomain.zz	✘
103	jimmy	+6588884444	thatguyagain@hisdomain.zz	✘

4. User Dashboard on the myExtension tab

The **MY EXTENSION** screen displays several boxes of information with an overview of your extension and configuration.

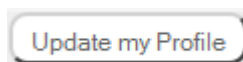
- 1. User Information**—Basic information about your identity and extension. From here, you can click the "Update My Profile" button to change your password and other personal information.
- 2. Call Forward Settings**—If you have set up call forwarding, a brief overview of the settings will be displayed here.
- 3. Advisories**—Important announcements about the phone system, status, and other important notifications.
- 4. Voicemail Count**—Shows the current number of new voice messages and provides access to listen to your messages.
- 5. Conference Alerts**—Status & notifications for scheduled conference calls.
- 6. Directory Listing**—Lists all assigned extensions and associated information. This provides an easy way to look up the extension for anyone in the company.

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EDIT YOUR PROFILE

Your profile contains personal information associated with your extension. Several elements of your profile can be changed.

To update your profile, click the "Update My Profile" button in the *User Information* box on the *myExtension* tab.



5. The "Update My Profile" button in the *User Information* box

The *Edit Profile* screen loads an editable view of your profile.

The screenshot shows a web interface titled "Edit Profile" with a sub-header "Details for extension 124". Below this, there are several input fields with their current values: "Display Name" is "Debbi", "Extension Password" is "*****", "Mobile" is "(+65) 88889999", "E-Mail" is "dwperrin@yahoo.com", "Voicemail Password" is "3568", and "IDD Credit Limit" is "5.00". At the bottom of the form is a button labeled "Update Extension >>".

6. Edit Profile

- The **Display Name** is the name other users see in the extension list and on Caller ID. This can be changed to make it easier for others to identify you.
- Your **Extension Password** is used to log in to the Virtual Office User Portal. It is recommended that you change your password immediately on your first login. Your password is case-sensitive and may not begin with a number.
Caution! If you type your new password incorrectly, you will not be able to log in!
- If your **Mobile phone number** changes, you can update it here. Currently, only local Singapore numbers are supported.
- Your **E-mail address** is used to confirm changes in your account and for conference and other notifications.
- The **Voicemail Password** is used to check messages via your softphone or an IP phone. You can use any 4 digits you like.
- Your **IDD Credit Limit** is assigned by the administrator. Your IDD Credit is used to access premium features, such as long distance calling.

When you are done updating your information, click "*Update Extension*" to commit the changes.

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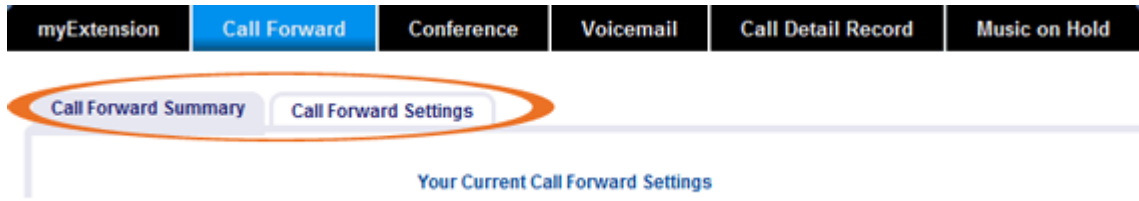
NAVIGATION

To access different features, use the *Portal Tab Menu* bar (Fig. 7).



7. Voice Mail tab

Some features have more than one *page tab*.

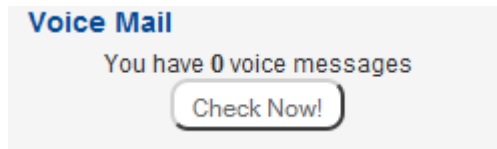


8. Page Tabs in the Call Forward feature

In Figure 8, the "Call Forward Summary" page tab is selected. Additional options are accessible by clicking the "Call Forward Settings" page tab.

VOICEMAIL

To access your voicemail, click "**Check Now!**" on the myExtension screen, or click the "**Voicemail**" tab.



9. "Check Now" button

The **Voicemail** tab (Figure 7) allows you to view a list of received messages, listen to voice mail and delete items from the voice mailbox.

The **Voice Mail Summary**, below, displays the list of voice messages you have received. If no items are listed here, there are no voice messages.

FROM	DATE RECEIVED	TIME RECEIVED	DURATION	PLAY	DELETE
July 02 2008	06:04:22 PM	"999" <102999>	0		<input type="checkbox"/>
July 02 2008	06:02:31 PM	"999" <102999>	0		<input type="checkbox"/>
July 02 2008	06:02:17 PM	"999" <102999>	0		<input checked="" type="checkbox"/>
July 02 2008	06:01:57 PM	"999" <102999>	0		<input type="checkbox"/>

1

10. Voicemail Summary

To listen to a message, click the **Play** icon.

To delete a message, select its **Delete** checkbox, as shown below.



11. Delete voice mail item

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CALL FORWARDING

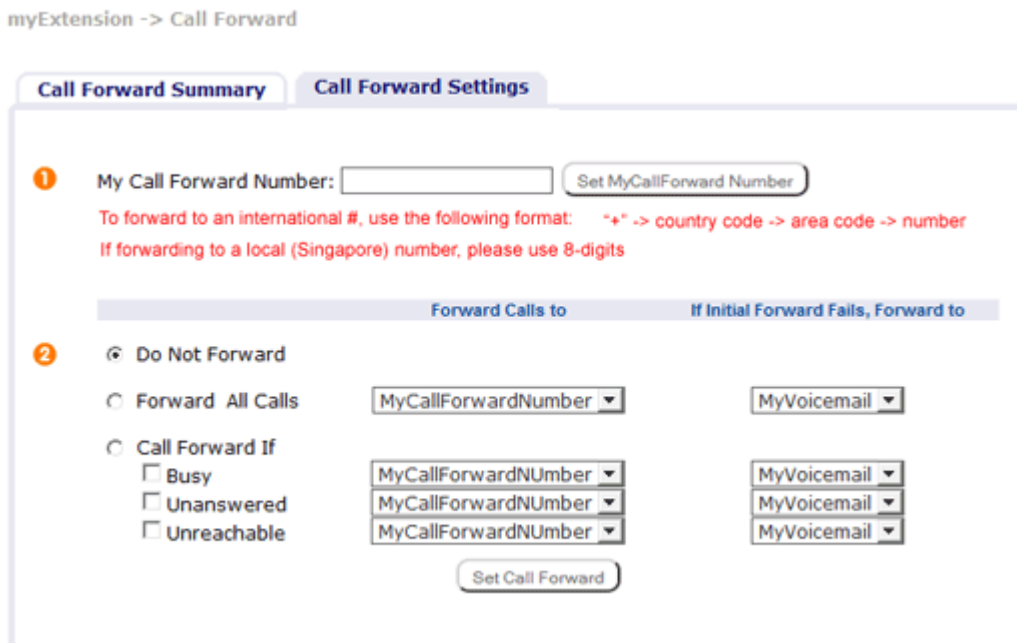
To change your Call Forwarding options, click the "*Call Forward*" tab.



12. Call Forward tab

To enable call forwarding:

On the *Call Forward Settings* page tab, select the *Forward All* Calls option to enable call forwarding.



13. Call Forward Settings

In section **1**, enter the number where calls will be forwarded to.

Calls can be forward to:

- **any local number**

- **an internal 3-digit extension**
- **an in-network 6-digit extension** - forward call to another company who also uses Virtual Office by entering the 3-digit company ID, followed by the 3-digit extension
- **an international number** – enter a plus “+” sign in front of the international number

In section 2, in the first drop down list, select where you want your calls to be forwarded.

Calls can be forwarded to your forward number (entered in Section 1) or your voice mail.

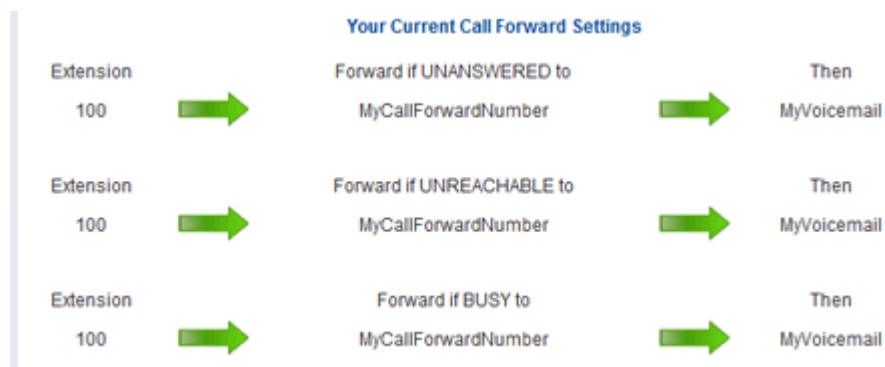
In the right-hand column, select how you want calls to be handled if the initial forwarding attempt fails. These options include Voicemail or simply hanging up.

If you only want calls forward in certain situations, select the *Call Forward If* option button. You can choose to forward calls when any or all of the follow conditions apply:

- the line is busy
- call is unanswered
- your extension unreachable

Don't forget to click *Set Call Forward* to apply your settings.

Once you have enabled call forwarding for your extension, the information is displayed on the *Call Forward Summary* page tab.



14. Call Forward Summary

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USAGE REPORT

To view you call history, click the *Call Detail Record* tab.

The *Call Detail Record* is a complete history of your calling activity.

Call Detail Record

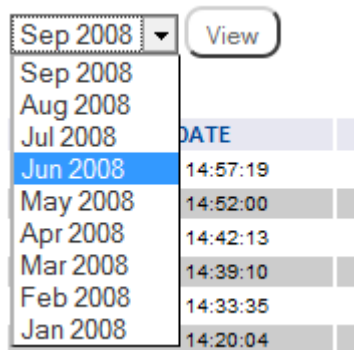
1

Sep 2008 View

CALL DATE	FROM	TO	COUNTRY	DURATION (in mins)	CALL COST
2008-09-03 14:57:19	100100	100200	Local Extension	1	0
2008-09-03 14:52:00	100100	200	Local Extension	0	0
2008-09-03 14:42:13	100100	200	Local Extension	1	0
2008-09-03 14:39:10	100100	100200	Local Extension	1	0
2008-09-03 14:33:35	100100	200	Local Extension	1	0
2008-09-03 14:20:04	100100	100200	Local Extension	1	0

155. Call Detail Record

By default, the previous month is displayed. To view your call history for a different month, select a month from the drop down list and click "View".



16. Select a month to view the call history

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CONFERENCE

From the "Conference" tab, you can schedule phone conference and send email invitations.



17. Conference tab


The *Conference Summary* page tab displays the list of your conferences.

Conference Summary Add New Conference

CONFERENCE NAME	NUMBER	START DATE	START TIME	END DATE	END TIME	TIME ZONE	PARTICIPANT	EDIT	DELETE	NOTIFY
test2	8900	2008-08-07	14:00:00	2008-08-08	14:00:00	Asia/Singapore	3			
Costume Luncheon	8901	2008-10-31	12:00:00	2008-10-31	15:00:00	Asia/Singapore	3			
Halloween All Hands	8915	2008-10-31	12:00:00	2008-10-31	15:00:00	Asia/Singapore	32			
test	8909	2008-10-31	12:10:00	2008-10-31	15:10:00	Asia/Singapore	4			


18. Conference Summary

From here, you can edit a conference, delete a conference, and send notifications to attendees.

To **change details of a conference**, click the "Edit"  icon. See "[Add a New Conference](#)" for more info.



19. Edit icon

To **delete a conference**, click its "Delete"  icon (circled below).



20. Delete icon

CAUTION! Once the  icon is clicked, your conference will be deleted!

To notify conference participants, click the "Notify"  icon. (See also "[Add a New Conference](#)").



21. Notify icon

Add a New Conference

To create a new conference, click the "[Add New Conference](#)" tab.

Admin Portal -> Conference

Conference Summary | **Add New Conference**

Conference Name	<input type="text" value="Training Seminar"/>
Conference Number	<input type="text" value="225"/>
Conference Description	<input type="text" value="Annual staff training conference"/>
Conference Pin	<input type="text" value="6421"/>
Date/Time Start:	Month <input type="text" value="Jun"/> - Date <input type="text" value="26"/> - Year <input type="text" value="2008"/> - <input type="text" value="14"/> - <input type="text" value="00"/>
Date/Time End:	Month <input type="text" value="Jun"/> - Date <input type="text" value="26"/> - Year <input type="text" value="2008"/> - <input type="text" value="16"/> - <input type="text" value="00"/>
Timezone	<input type="text" value="Asia/Singapore"/>
Number of Participant	<input type="text" value="25"/>

22. Add a conference

When you click "[Next](#)", you will enter the name and email address of each participant.

Please Enter name and E-mail of participants:

Recipient Name:	<input type="text" value="Julia Gonzalez"/>	E-mail:	<input type="text" value="juliag@nobody.com"/>
Recipient Name:	<input type="text" value="Debbi Walker"/>	E-mail:	<input type="text" value="dwperrin@yahoo.com"/>
Recipient Name:	<input type="text"/>	E-mail:	<input type="text"/>
Recipient Name:	<input type="text"/>	E-mail:	<input type="text"/>
Recipient Name:	<input type="text"/>	E-mail:	<input type="text"/>

23. Select conference participants

Verify that the email addresses are correct before clicking "**Notify**".

24. Send notifications

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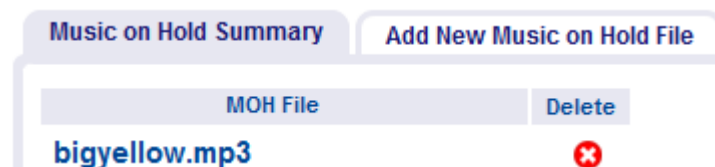
MUSIC ON HOLD

As the name implies, this is the music callers hear when they are placed on hold. Click the **Music on Hold** tab to get started.




25. Music on Hold tab

Each user can have his or her own hold music. Use this feature to manage your hold music files.



26. Music on Hold summary

Note that you also delete music by clicking the  icon. Once clicked, *your music will be immediately deleted!*

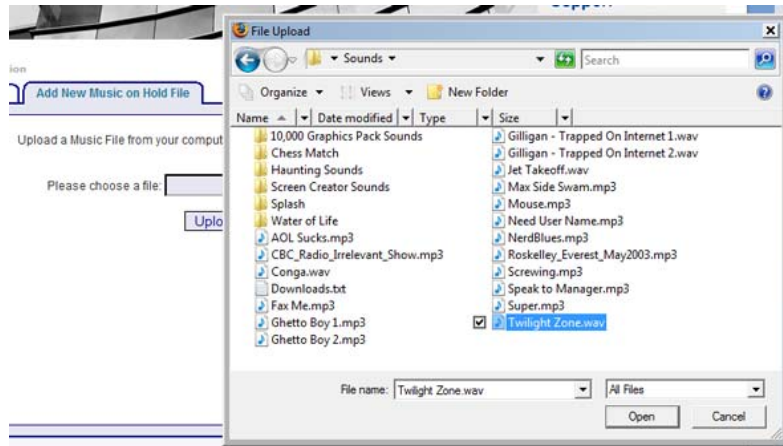
Upload Hold Music

Click the "Add New Music on Hold File" page tab to upload audio files.

Music files must be in the *.wav* or *.mp3* file format. The maximum file size allowed 4 megabytes.

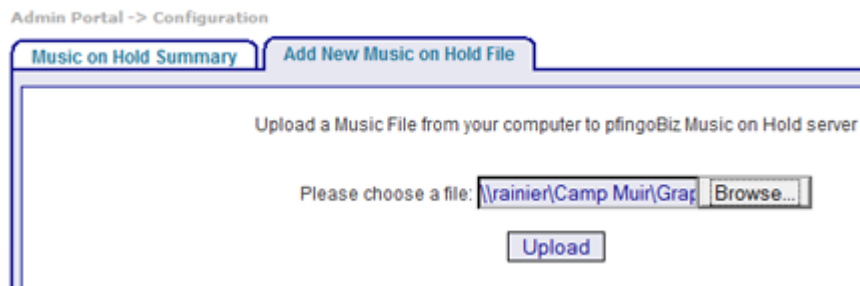
Only one music file is allowed per user.

To select a music file, click "**Browse . . .**".



27. Browse to select music file

Browse, select the file you wish to upload, and click "Open".



28. Music on Hold Upload

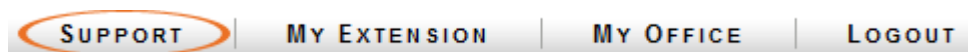
Click "Upload" to upload the file.

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GETTING HELP

The **Support Center** contains a complete library of resources. If you have questions, documentation is available on a variety of hardware, software, and other devices. In the Support section, you can find answers to common questions and learn how to configure your particular system.

To access the Support center, click on the "Support" button at the top of your screen.



29. Support Center link

If you have pored over the documentation, FAQs and other support materials on the site, and still need immediate assistance, the exclusive **Click 2 Call** service is available.

With **Click 2 Call**, there is no need to phone our support center and no waiting on hold. Instead, our support staff will call you! That's right! We'll call you!

The "Click 2 Call" button is available from the Support Center.



30. Click 2 Call button

You will be greeted with a pop-up window:

Click 2 Call

Please choose department you wish to speak to:

Support Sales

Please enter your number where we can contact you:

[Close Window](#)

31. Click 2 Call form

Enter the phone number where you can be reached and click “**Call Me!**”

Stay near the phone, and a support specialist will call you momentarily.

NOTE: To enable our support specialist to assist you efficiently, please have the feature you are troubleshooting open in your browser.

BEFORE YOU CLICK 2 CALL! Our support staff is working hard to assist many customers. Before taking advantage of Click 2 Call, please scan the materials available on our support website. There is a good chance your question(s) will be answered here.

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IMPORTANT SECURITY MEASURES

When you are finished using the User Portal, it is very important that you **Log Out** of the system and close the browser window. **Failure to log out will compromise the security of your extension.** Anyone with (potential) access to your computer can listen to voicemail, or change your password and other settings if you fail to log out.

Additional Security Measures

Never leave your computer with an active, logged in session. Anyone who approaches your computer will be able to administer your phone system.

Do not write down your password where others can find it. If you must write it down, store it in a password-protected file.

Do not give your password to anyone else. If you need a backup administrator, assign the necessary privileges to their account.

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ⁱ Your user interface may have a different appearance (layout, style & color scheme) than the example.