

Title: Introduction to Clarity Voice Phone Service Portal

Hello and welcome to Clarity's Support Portal training.

At Clarity Voice, we want to help you use your phones to make more sales and improve your company efficiency.

Today we'll be demonstrating

Clarity's web portal where you can access all the features of Clarity's Phone System.

To access the Clarity portal, go to the clarityvoice website -- Clarity-Voice-dot-com. In the upper right-hand corner click "login". This will launch Clarity's portal dashboard in a separate window.

Your user name is your office extension, followed by your company's domain name.

Your password will be a complex password of at least eight characters. Enter your information, then click "login". (If you haven't set up your password follow the new user instructions by clicking the blue link below the login box)

This demo will show the highest-level permissions associated with our "Business Essentials" calling plan.

The Business Essentials plan has two separate Portal views: one view for your personal extension and one view for the entire company. When you first log in, the system takes you to your personal extension page. You will see all your voicemail messages.

To listen to a voicemail, click the play button to the left of the message.

You also have the option to:

- Click the handset icon to call your phone. When it rings, pick up your handset and you will hear the message play.
- Forward your voicemail message to someone else within your company.
- Download the message.

- Click transcription to have all your messages transcribed for you.
- Finally, you can save or delete your message.

Below the New Message area is your “Recent Call History.

The green handset icon indicates it was an outbound call and the blue handset indicates it was an inbound call.

If you see a red handset it indicates a missed call.

All the phone numbers listed here are “click-to-call” enabled.

Simply click on the number you want to call, your phone will ring, when you pick up your desk phone handset, it will connect you to the party selected.

[long Pause]

Messages

Next is the Messages button. A red circle with a number next to the messages button indicates the number of new messages waiting to be reviewed.

There are three ways to receive a Message: voicemail, internal office chat or mobile SMS text. Select the tab of the type of message you want to review.

Selecting the voicemail tab, you can see all your new voicemails. Click on the drop-down to go to any Saved or deleted voicemail messages. If you do delete a voicemail message, the system will save them in the trash for up to forty-eight hours.

The next tab is for Chat and SMS text messages. These are two distinctly different features. Chat is an internal feature where you can instant message anyone else on your company's account.

To use Chat, click on New Conversation. Then type in the name of the person you would like to Chat with. Type your message and press enter on your keyboard.

If the party you sent a chat message to has their Clarity Communication system portal open, a message window will pop-up and they can respond immediately.

SMS allows you to send a text message externally to a cell phone. For example, if you would like to send a message to a customer to confirm an appointment, click on New Conversation, then type the eleven-digit cell phone number you would like to message.

Type your message and hit enter on your keyboard.

The customer will receive the message on their cell phone and they can respond.

Finally, the "Settings Tab" allows you to configure all your voicemail settings.

First make sure your voicemail is enabled.

The "Operator Forward Field" activates a "voicemail escape" feature.

For example, if a caller rings your extension and you don't answer, they will hear your voicemail greeting. At any time during or after your message if the caller presses zero it will forward (or escape) out of your voicemail. The caller routes elsewhere instead of being required to leave a message.

You can record up to nine separate greetings for your voicemail. For instance, you may want a daytime greeting versus an after-hours greeting for everyday use and different greetings when you're traveling on businesses or closed for a national holiday.

All your greetings can be recorded through this portal or on your phone. To record a greeting through the portal, hover your mouse over the speaker icon and click the "Manage" button.

A new pop-up window will appear. Click "Add Greeting" at the bottom. You now have the option to upload a pre-recorded greeting.

Pre-recorded greetings must be in an M-P-3 or W-A-V file format.

The second option allows you to Record the greeting.

When you click record, a new field appears asking our system to call you on your phone. Enter your phone extension or ten-digit cellphone number, enter a greeting name, then click call.

When your phone rings, answer the call and record your new greeting. When you're done recording your greeting, simply hang up.

Don't forget to click Done and Save Voicemail.

The "Unified Messaging" section is a way to send your voicemails to yourself via email, mobile SMS text message and indicate if you want your message transcribed.

In the email notification section, always make sure to check "Send with attachment". Send with attachment means that Clarity will send the entire voicemail audio file as an attachment to your email.

If you clicked "Send with attachment, leave as new", you will have a red flashing light or message-waiting-indicator light on your desk phone.

If you click "Send with attachment, move to saved", you will receive that voicemail to your email and the voicemail message will be saved on your desk phone, but the red light will not illuminate.

By choosing "Send with attachment, move to trash", sends the voicemail message to your email but deletes the message off your phone.

The "Options" category allows you to receive an email when your mailbox is full.

It is important to note the maximum size for each voicemail box is 25 megabytes. Because the duration of each voicemail message varies, so does the size of each file, typically 25-50 messages can be saved in your voicemail box.

Once you've reached the maximum size allowed, our system will send you an email indicating you need to clean out your voicemail box.

When you choose "Send an email after a missed call", our system will send you an email each time your extension has a Missed Call. This will allow you to call that party back right away and not lose the sale.

To add your email address to receive voicemails to email, scroll-up to the top of the page, click on your extension then click profile.

Now, scroll to the bottom and add your email address.

You can add up to four additional email addresses by clicking the "green plus button". This is typically used when sales teams share leads or when managers work with assistants. Any email address you add will receive your voicemails.

Lastly, you can use this area to change your voicemail password. As with updating any feature, don't forget to click "Save".

[Long Pause]

User Contacts

Next, we will cover the Contacts button in Portal. The contacts button is your personal address book. All the names in here are all the people that work at your company. You can sort by favorites, my contacts, co-workers, and departments. To choose favorite contacts, hover your mouse over a name and click the star to the right of their name. When the star turns yellow, they are now added to your Favorites list. You have the option to import or export your contacts using Outlook, Google, or Apple. You can also add individual contacts with the orange Add Contact button.

Click the right arrow icon to pop-out your contacts, which gives you a separate floating application on your desktop to monitor the status of everyone in the company. If an employee has a green dot by their name, it means that they are available and ready to take a call. If they have a red dot, it means they are on a call. The grey dot indicates the employee's phone is offline. Click the X at the top right corner to collapse the pop-out.

[Long Pause]

User Answering Rules

The Answering Rules button displays the call routing for your extension. For this example, we have both a separate daytime and after-hours rule in place. The daytime rule has a blue active sign. When the answering rule is active, calls are routing according to that rule. This routing is set to ring extension 201 for 30 seconds. If the call is not answered, it will forward to the voicemail of extension 201. If you would like calls to ring your cell phone, you can edit the answering rule by hovering your mouse over the rule and clicking the pencil icon.

Check simultaneous ring and add your cell phone number.

Be sure to always add a "1" in front of your phone number.

You'll also want to check the box "answer confirmation for offnet numbers".

When you receive a call that rings your cell phone, the system will tell you to press "1" to connect the call. If you don't check this box, the call will ring both your desk phone and cell phone. If the cell phone is turned off or out of the service area, the call will go to the cell phone voicemail. Once you've added your cell phone number, click Save.

As you can see, inbound calls will simultaneously ring your extension, as well as your cell phone.

To add a new rule, you first need to create a new time frame. Click on the Time Frames button on the top menu. Click on add timeframe. Here you can create a unique name for the type of timeframe you're creating.

In this example, we're creating a Vacation Timeframe.

Scroll to the bottom and select the date and time for which you want calls to route differently. Choose the beginning date and time and the ending date and time. You can add multiple dates and times by clicking the green "+" button to add another row. Click Save.

Once you've created the new time frame, go back to the Answering Rules button and click Add Rule.

Click the drop-down arrow under Time Frame to locate the new rule. You can now choose where or who to send calls to.

Calls can be sent to a user, a voicemail, an answering service, or an external number. In this example, we chose to send all calls directly to the support queue. When you've made your selection, click Save.

To prioritize this new rule, left click on the time frame and drag the rule to the top. Be sure to click Save to keep your new time frame in place.

Now, when calls ring into your extension, it will look at the first rule to see if it's active. If it's not active, the call will move to the next Time Frame and follow the set of rules configured to ring your phone.

Another feature Clarity offers is "Call Flip".

If you answered a call on your cell phone, and you would like to continue that call on your desk phone, dial star 51 on your desk phone and the call will automatically change over. Simply pick up the handset and continue the call. There is no interruption or audible indication that the call was transferred.

Similarly, if you answer a call on your cell phone and need to transfer that call to someone in another department, simply press star 11 and enter the extension of the party you wish to transfer the call to. The call will immediately transfer off your cell phone, to that employee's extension.

[Long Pause]

Music on Hold

The Music on Hold button is where you can add hold music so when callers are placed on hold, they will hear music or a message on hold. By default, Clarity provides a jazz music on hold audio file for all customers. Additionally, we can upload an audio file to play when calls are ringing in the queue. Instead of hearing ring-back, callers hear music or a message on hold, all while phones in the office are ringing.

[Long Pause]

SmartRouting

Next is the SmartRouting button. SmartRouting is a quick way for customers to forward their calls. Only users with direct dial numbers will appear on this page. SmartRouting was developed for customers that have minimal or light call routing. It allows users to automatically and intelligently transfer callers to a live person plus adjust for holiday, office hours, travel time, and more. Depending on the complexity of the call routing, this page may take up to a minute or more to load.

For example, in the Service Demo Answering Rule, the green dot indicates the current active routing.

To change where the call routes when it's not answered for this answering rule, hover your cursor over the gear.

Under the Call Forwarding options, click the gear to the right for "When Unanswered".

At this point, you can type in a new telephone number for where you want calls to route. Click "Save".

The system will now verify that you want to save the changes in our system. Clarity will also place a test call to that new phone number to ensure calls are routing exactly as you wish.

[Long Pause]

Analytics

Through Clarity's communication portal, call reports can be customized for call stats by day, week or month with our Analytics button. This page provides call data for inbound, outbound, missed calls, and calls redirecting to a voicemail box. To build a new dashboard, click on the plus sign in the right-hand corner. For this example, we'll name the dashboard "customer demo". Click "Next" to create. To add a reporting tool, hover your cursor over the wrench and click "Add Widget".

If you'd like to know how many inbound calls were answered by a support agent yesterday, choose the pie chart labeled "Call Summary" and click "Next". Choose "Yesterday" for the time frame and click "Next" again. Scroll up to choose "Department", then on the left, scroll down to choose "Support". When you click "Next" at this point, you will be able to choose the type of calls you want in your report. Because we want to know Inbound call stats, select "Inbound".

You now have a choice of "On-Net" vs. "Off-Net". On-Net is an internal call made within the same company. Off-Net refers to calls from outside the company. For this example, we will only be looking at inbound calls from outside the company.

Click "Next" and give your widget a friendly name. Click "Next" again to see a summary of your widget. To load your new widget, click "Finish". In the upper right corner of your new widget, you'll see an eyeglass. Clicking the eyeglass will pop out your new report so you can see all the data collected. The information for each support person can be seen to the right or, you can click on a specific piece of the pie. The pie piece will then pop out the data. As with any of these widgets, you can either download or print them.

For this next example, we'll create a widget for outbound calls made by our sales department.

Click "Summary by Day of Week", "Next", and choose "Last Week". As in our last example, choose "Department", scroll to the left and down to choose "Sales", and click "Next". Choose, "Outbound" calls and "Off-Net" for calls received from outside the company.

Click "Next" to give your report a friendly name.

Click "Next" again to see a summary of your widget and "Finish" to load the report. Once again, you can click on the eyeglass to pop out the widget and load the data. For this report, you can see the graphs or the line items.

Finally, we'll create another widget that shows us voicemails received but not returned within the past 24 hours. To create this widget, click on "Voicemail Stats", "Next", "This Week", and finally "Next" again. For this example, choose "Department", "Billing" and "Sales".

Click "Next" again. Choose "Inbound" calls received and "Off-Net". Click "Next" and name your widget. Click "Finish" to load. You'll now be able to see how many calls were returned within 24 hours. As with the other reports, you can click on the eyeglass to pop it out. The green bar indicates how many calls were returned and the red indicates how many calls were not returned.

If you would like to view your reports for a specific date or date range, click the calendar icon. Enter your specific start date and end date, then click "Refresh". All of your reports will change to show data for that date. If you click the "X", your widgets will go back to their original dates.

[Long Pause]

Scheduled Reports

The Scheduled Reports button allows us to set-up an emailed report for inbound calls to a queue, an agent, or user each night at midnight. It's important to note that emailed reports can only be set up by an office manager level permission. Customers who do not have this level must contact the support department to set up the reports.

To set up the reports simply click on "Add Report" in the right corner. Choose either a Daily Queue or Daily Agent Report. For this example, we will choose a "Daily Queue".

Click "Next" to choose the queues that you would like to receive information from. Choose "Next" again and enter in your email address. Click the Add button and Finish. Each night you will begin receiving a report of the number of calls into that specific queue.

[Long Pause]

User Call History

The last button in the Clarity portal is the Call History button. This tab will show the call detail for all calls to and from your extension, including access to call recordings. The green handset indicates an outbound call that was placed.

The blue handset indicates an inbound call that was received.

And the red handset shows any calls that went unanswered.

When looking for a call recording, locate the call, hover your cursor over the icons to the right and click "Download" or "Listen" to hear that call recording. Any call detail can be exported to a C-S-V file.

Finally, you can filter by day, time, caller number, dialed number, or call Type.

[Long Pause]

Office Anywhere Web

Included with both the Business Basics and Business Essentials plans is a softphone, called Office Anywhere Web. To access and launch the Office Anywhere web soft phone, click the link at the top of the page. When you first launch your phone, the system will ask for permission to use the microphone and speakers on your laptop. Make sure you always click "allow". Next, make sure the soft phone has been registered with the system. To verify registration, click on the handset in the upper right hand corner. If the softphone is not registered, please contact a support team member for assistance. Once the phone has been registered you will be able to view contacts, voicemail messages, call history or Chat and SMS messages linked to your extension. To place a

call, click the orange “Plus” button at the bottom, choose the dialpad and type in either an internal extension or an external ten-digit number. Be sure to always include a “1” in the phone number for external calls. Finally, click the green handset to place your call. Click the “X” in the upper right corner to close the softphone app.

[Long Pause]

Manage Organization Home Page

After reviewing the “personal extension” view within the portal, it’s now time to look at a high-level view for the whole organization. To do this, click on the blue “manage organization” link at the top of the page.

The first thing to note is the home page. The home page shows all current inbound and outbound calls. If you hover over one of the calls, a Listen-in button will appear to the right side of the call. When clicked, your desk phone will ring. Pick up the handset and you can now listen live to the call-in progress. There will be no audible indication to either party that the call is being listened to. This tool allows calls to be monitored in real-time. A pop-up window will also appear at the bottom of the page to give you other options, such as whisper to the employee or join into the call, when a situation merits immediate assistance.

Below the current active calls is the Peak Active Calls graph. This graph will show calls by day, hour, or minute. There is also an option to choose “all calls” or “off-net” calls. Because these are real-time stats, there is an ability to zoom in by hour, day or week.

On the right side of the screen you’ll be able to see how many registered devices, call queues and phone numbers are active on an account. Below that are the usage stats. These stats indicate how many inbound and outbound phone calls were placed and received today, as well as how many SMS messages were placed or received.

Hovering your cursor over the information icon will further explain each of these stats. Finally, you can also see stats for this month and the previous month.

[Long Pause]

Users Tab

Next to the Home button is the User's button. This button allows you to manage each extension, such as changing names or email addresses. To edit the extension, click the link and it will bring you to the Profile page where you can change the first name, last name, department, caller ID, or email address of the extension. Once the changes are complete, be sure to click save.

The Answering Rules tab is where you would change call routing for that extension. For example, to forward calls to another person, hover over the answering rule and click the pencil icon on the right. To forward all calls to this extension to another extension, check the box next to "Always", then enter an extension number or "one plus a ten-digit telephone number". Click Save.

Click on the Voicemail tab to set up "voicemail escape" or change the "voicemail greeting" for an extension. By default, we recommend setting up the following features in this tab: Voicemail Escape, voicemail to email, voicemail transcription and missed call notifications.

To setup "Voicemail Escape", enter an extension into the "Operator Forward" box. In the Unified Messaging section, click the dropdown for Email Notification and choose "Send with attachment, leave as new". This will send the voicemail to your email and keep the voicemail on your phone as a new message.

When voicemail to email is enabled, a voicemail Transcription box will appear. Choose "enabled". It is suggested that both the "Send emails when mailbox is full" and "Send

email after missed call" features are marked. Choose "Save voicemail" when you've completed your changes.

The final tab is the "Advanced" tab. This tab allows you to completely reset a user.

This is useful in the case of an employee who has left the company. Resetting a user wipes out all voicemails and passwords. After doing so, you can then set up a new user with a new email address and send a welcome email that includes a link to set up their password and voicemail Access Code.

If a user ever forgets their password, simply check "Automatically send recovery email after password reset" and the user can reset their password.

[Long Pause]

Auto Attendants

The next button on the Clarity Portal is the Auto Attendants button. Only a Clarity Support Team Member can create an Auto Attendant. Once the Auto Attendant is created, you can then manage the auto attendant greetings and options. For our first example, click on the "Edit" button to the right of the Auto Attendant's name.

Eleven different options will appear to program your call routing. Click on any of the options to route the calls to an individual extension or queue, a conference bridge, the Company Directory, voicemail box, a voicemail management system, an external number such as a cell phone or answering service, play a message such as hours of operation or directions to the business, repeat the prompts of the entire menu or add another tier to the Auto Attendant.

To record an Auto Attendant greeting, click the speaker icon next to the Menu Prompt field. When the "Manage Audio" box appears, type in a description for the recording, then either upload or record a new greeting.

If uploading a greeting, a "Browse" button appears and a pre-recorded M-P-3 or "wave" file can be chosen. Click "Upload" and the Auto Attendant greeting will be loaded. If you're recording the greeting, the screen will change and prompt a "Call me at" field. Enter either an extension or a cell phone number and click the blue "Call" button.

The Clarity system will then call the number entered and the greeting can be recorded. Be sure to click "Save" in the Manage Audio box, as well as the Auto Attendant page.

[Long Pause]

Call Queues

The Call Queues button on the home screen of the Clarity Portal is a great way to set up call routing for incoming calls to a specific group of people such as sales or support.

For example, to add an agent to the "Service demo" queue, hover over the queue and click the "Edit Agents" icon. Then click "Add Agent", enter the extension of the agent, set their status to "online" and click "Save Agent". If that agent is already in the queue, click on the name, change the "Status" at the top to "Online", and click "Save".

The agent's icon has now changed from grey to green. To remove an agent completely from the queue, hover over the agent and click the red X. As a note, if an agent's icon is grey, it means they are offline, if the icon is green they are online and if it's red it means they're on a call.

Advanced call queuing such as Linear Cascade and Longest Idle is available with Clarity's Call Center Complement option.

[Long Pause]

Inventory

The Inventory button on the home screen of the Clarity Portal lists all of the phone numbers assigned to the account. You can quickly reassign any of the phone numbers to another user by clicking the "Edit" button next to the phone number and enter a new extension. Or, you can add a note identifying that phone number as a marketing number. When all changes have been completed, be sure to click "Save". Finally, you can filter by phone number, treatment or destination, as well as export the list of numbers.

[Long Pause]

Company Call History

The Call History button on the home screen of the Clarity Portal shows all inbound and outbound calls for the entire account.

The Business Essentials plan includes Call Recording. All call recordings can be downloaded or played by hovering over the call and clicking the icons to the right of the call.

For those users such as a CEO that may not want their calls recorded, Clarity can disable call recording at the User level. CEOs who wish to record a call can use the "On-Demand" feature by pressing star 8,9 to start the call recording. Then, either hang up the call or press star 8,8 to stop the recording.

Call recordings remain in the Clarity system for thirty days unless additional storage has been purchased.

All call detail records are saved for one year. To filter call history, click the “Filters” button below the Call History bar. Choose either a time frame date in the “From” and “To” field, a “User” name, “Caller Number”, “Dialed Number” or “Call Type”. Once the call detail has been filtered, data can be exported to a CSV file for further analysis.

[Long Pause]

Thank you for watching!

[Long Pause]

Remember, if this all seems overwhelming, you don't have to go it alone.

At Clarity, our support team is an extension of your team and we know our long-term success is tied to yours.

If you want to learn about more features to drive sales, improve call handling, expand your new employee training or gain insights with advanced managerial tools, just give us a call at 1-800-676-3995, send us an email or chat with us online.