

ADMINISTRATOR MANUAL AND USER GUIDES

Especially for

Our Valued Customer

*How to
make the
most of
your new
iPath
Hosted
PBX
System*





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Introduction

Thank you for choosing iPath Cloud Solutions as your internet telephony service provider. This guide provides information on how you can change and modify your iPath Cloud Hosted PBX and user privileges. It supplies all the information you need regarding system features and functionality, and how they can be programmed and used.

System Administrator Functions

As the system administrator, you can choose to make changes and modifications. Using this guide, you can make the following changes:

- Enable or Disable System Wide Features
- Program Extension Detail and Names
- Program Voicemail and Reset Passwords
- Redirect Your Phone Numbers
- Modify Your Auto Attendant Options and Greetings
- Program Your Time Frame Schedules
- Setup Holiday Schedules for Your Organization
- Create Conference Bridges
- Upload Customized Music On Hold
- Configure Ring Groups for Multiple Phones
- Block Callers from Calling Your Phone Numbers



Telephone User Guide

Blind Transfer: Transferring a caller to another extension without announcing the caller first.

- ☎ Press *Transfer*
- ☎ Press *Blind*
- ☎ Enter the Extension Number
- ☎ Press *Send* or *Dial*
- ☎ Hang Up

Announced Transfer: Allows you to identify the caller to the person you transfer them to before they are connected to the caller.

- ☎ Press *Transfer*
- ☎ Enter the Extension Number
- ☎ Press *Send* or *Dial* and wait for party to answer
- ☎ Announce the caller, and hang-up (or press *Cancel* “soft key” to cancel the transfer and pull the caller back)

Intercom Call: Enter *0 + Extension Number of the person you wish to call and press *Send* or *Dial*. Call will automatically come thru the person’s speaker.

Transfer to Voicemail: *Transfer* + ** + Extension Number *Send* or *Dial*.

Call Park: Placing a caller in a “Parking Spot” so the caller can be picked up from a different phone.

Press *Transfer*, then dial *4+ *Send* or *Dial* and wait for the system to give you a parking spot number.

Call Pickup or Un-Park: Dial *3 + <Parking Spot Number> + *Send* or *Dial*.

Conference Calling: While on your first call, press the *Conference* soft key, place your 2nd call and when answered, press the *Conference* key again. You will connect the other 2 callers and yourself.



Voicemail User Guide

iPath Cloud Hosted PBX provides you with a full-featured, easy to use voice mail system. Users can send and receive messages when they are unavailable or on the telephone. Messages can be stored in your voicemail inbox, or you can choose to receive messages as a .wav email attachment. Users can also receive a notification that an email is pending on SMS capable devices such as smart phones.

HOW TO SET UP YOUR VOICE MAIL BOX

- ☎ Press the **Message** key on your phone *or* dial ** followed by your extension number.
- ☎ The system will guide you through the first-time set-up procedures. Simply follow the system prompts to record your name and greeting
- ☎ The name you record will be heard by all callers when they access the company directory
- ☎ Be sure to choose a password that is easy for you to remember, but make it something that can't be easily hacked. Also, you can't set the password to your extension number, or you will hear the set up wizard every time you access your mailbox.

CHECKING YOUR VOICEMAIL FROM YOUR PHONE






- ☎ Press the **Message** key or dial **+extension number
- ☎ Enter your password followed by the # key
- ☎ Follow the prompts.

CHECKING YOUR VOICEMAIL FROM ANY OTHER PHONE

- ☎ Dial ***97, at the prompt** enter your extension or mailbox number
- ☎ Enter your password followed by the # key
- ☎ Follow the prompts.



CHECKING VOICEMAIL FROM OUTSIDE YOUR SYSTEM <<APPLICABLE ONLY IF AUTOMATED ATTENDANT IS IN USE>>

-  Dial your company number
-  At the menu, dial the option assigned for *Check Voicemail*
-  At the prompt enter your extension or mailbox number
-  Enter your password followed by the # key
-  Follow the prompts.

MAIN MENU OPTIONS

Press:

- 1** New (* = Rewind # = Fast Forward)
- 2** Saved Messages
- 5** Advanced Options

Press:

- 1** Record your unavailable greeting
- 2** Record or re-record your name
- 3** Change Password
- 0** Return to Main Menu

* **Goodbye**

Repeat Message



iPath Cloud Hosted Portal

The iPath Cloud Hosted Portal is accessed from the internet at the following address:

<https://Atlas.ipathcloudsolutions.com>

The default username is the customer contact's email address that you supplied to us, and the default password assigned by iPath Cloud Solutions is sent to that email with a link that is active for 24 hours. You must log in and change your password.

HOME PAGE

When you first login to the iPath Cloud Portal, there are system wide options. You can **manage system settings (VOIP)**, **check your payment details (FINANCE)**, see your recent **call history (REPORTS)** or **manage users (SETTINGS)**. There is also **Help & Resources** that is always available at the upper right hand side of the web portal. This will help you with the terminology and/or feature interaction.

Home Page



VOIP



FINANCE



REPORTS



SETTINGS

- 🔗 **VOIP** – Takes you to the page to manage your system.
- 🔗 **FINANCE** – This tab allows you access to your Account Details, Orders that have been placed, Invoices, and Payment Status.
- 🔗 **REPORTS** – Allows you to see the reports for your system.
- 🔗 **SETTINGS** – Allows you to add users



VOIP Tab

This is where you make all of the changes to your system for all users on the system. These are the global settings that affect everyone on your system.

Account Settings

Defaults

- 🔄 **Time Zone** – Sets the time zone you are located in
- 🔄 **Caller ID Name** – Default outbound caller id name
- 🔄 **Caller ID Number** – Default caller id number
- 🔄 **Music On Hold** – Default music on hold for your system
- 🔄 **Media Category** – Select the category for your hold media
- 🔄 **Select Media** – Select the file you want to use for your hold media

Feature Codes

- 🔄 **Available in the quick user guide above**

PHONE NUMBERS

Phone Numbers that are assigned to your account are visible in the Phone Numbers section of the Portal. Here, you have the ability to modify the call routing and behavior of incoming calls, as well as your Caller ID Name.

To modify the behavior or details of a phone number, click ***Phone Numbers***, find the phone number you would like to review or change, and then click ***the phone number***.



- ⊞ **Outbound Caller Id:** The value of this field will be displayed on the called party's Caller ID display when you make outgoing calls from this phone number. This field is limited to 15 characters including spaces, commas and periods. No other punctuation should be used. Please allow between 7-10 days for changes to this field to take effect.
- ⊞ **Caller ID Prepend:** If you have a need for the Caller ID name for incoming calls to be presented differently than the caller has supplied, the settings can be changed here. If any text is entered into the text box, it will be pre-pended to the beginning of the Caller ID name that the caller has presented, and displayed to the called party. If this field is left blank the incoming caller ID will display as sent by remote provider.
 - ⊞ **Call Routing:** Select where calls will route to normally and during holidays.
 - ⊞ **Holiday:** You have the option to configure specific dates to be holidays, using the Holidays module. If a call comes in on a day that is configured as a holiday, the call will be routed based on the rule defined in this field.
 - ⊞ **Route To:** All incoming calls to this number are routed based on the rule defined by this field. Calls can be routed to a:
 - Time of Day Routing
 - Menu
 - Group
 - Device User
 - Conference
 - Conference Service
 - Voicemail
 - Check Voicemail
 - Outside Phone Number
 - Virtual Extension
 - Company Directory

E911

To meet Federal regulations, each phone must have the ability to dial 9-1-1 and be connected to a Public Safety Answering Point (PSAP). When 9-1-1 is dialed, the PSAP must be presented with a callback phone number, and a physical street address. Therefore, each extension entered into the Customer Portal must have an associated E911 address. To associate an E911 address with extensions, first you must enter E911 locations in the E911 module.



Click on the “Phone Number” from the E911 list screen. On the E911 Location screen, you will be asked to enter an address. Enter the geographical street address of your office. If you have multiple locations, you will need to add multiple E911 Locations. Make sure the street address entered is valid. It will be verified by the national E911 system before being accepted. If you enter your address, and receive an error about not being able to verify the address, go to the United States Postal Service's [Find a Zip Code](#) utility, enter your address and click Submit. The USPS website will present you with a properly formatted version of the address you entered. Copy and paste that address into the form in the iPath Cloud Hosted Portal.

After filling in the street address, you must select which phone number to associate this address with. This phone number will be the callback number presented to the emergency personnel when someone dials 9-1-1 from this location. Note that each of your phone numbers can only be used for a single E911 location.

After selecting the phone number, you may optionally associate this new E911 location with any existing extensions, or none if you choose. Click the checkbox next to each extension that will be located at this address.

Before you create this E911 location, you must agree to the E911 Terms of Service in the text box at the bottom of the screen. Click the "I agree to the Terms and Conditions" checkbox, then click "Save". After the E911 Location is added, it will be available in the select menu for "E911 Location" on the Extension screen. You may use this address for any existing extensions or new extensions.

iPath Cloud Solutions strongly recommends that you make no changes to your e911 service without consulting with our Help Desk. iPath Cloud Solutions is not responsible for any issues arising from customer modifications of their e911 service.

PBX Connector

Not applicable to a hosted system.



DEVICE USERS

The Device User Configuration screen shows the settings of any device users. You can set up a device user by clicking “+ ADD DEVICE USER” at the upper right hand side of the screen.

- 🔄 **Name:** Presented to all users in your organization when you make calls within the PBX system.
- 🔄 **Email Address:** the users email address to receive voicemail to email
- 🔄 **Time zone:** time zone the device user is located in
- 🔄 **Extension Number:** Select the new users extension number
- 🔄 **Voicemail Number:** Turn on or off depending if you want the user to have a voicemail box. If on select create new or select an existing mailbox to send the caller to if you are unable to answer your phone
- 🔄 **Voicemail to Email:** Enable this to allow the user to receive voicemails through the email you listed earlier
- 🔄 **Add to Company Directory:** Enable this so people can access the extension from the company directory
- 🔄 **Reset Caller ID:** Clear caller id before sending a call
- 🔄 **Prepend Caller ID:** Place text in front of normal incoming caller id information
- 🔄 **Find Me Follow Me:** Default is Off. Click to Enable, if enabled user must have multiple devices assigned to select which devices to ring and also to select the order in which they ring
- 🔄 **Seconds to ring:** The time the phone will ring before going to No Answer Routing
- 🔄 **Not Registered:** Outside line to route calls to call if the phone is down
- 🔄 **Busy Route:** Where to route the call if you are currently on the phone
- 🔄 **No Answer:** Where to route the call if you do not answer
- 🔄 **On Net Caller ID Name:** Internal Caller Id Name
- 🔄 **On Net Caller ID Number:** Internal Caller Id Number
- 🔄 **Off Net Caller ID Number:** Outbound Caller ID Number
- 🔄 **Devices:** Devices associated with this user
- 🔄 **Dashboard Access:** Link to portal user. Options to add a new account or link to an existing.
- 🔄 **Restrictions:** Inherited from global account settings or denied per device



DEVICES - Manage your endpoints here

- 🔄 **Name:** Name of the device
- 🔄 **Device Type:** VoIP Phone or Outside Phone
- 🔄 **Assigned To:** Select the device user to assign this endpoint to
- 🔄 **Select E911:** Select the E911 location this phone is at
- 🔄 **Manufacturer:** Select the phones manufacturer
- 🔄 **Model:** Select the model of phone you are using
- 🔄 **Config Template:** Select the appropriate configuration template
- 🔄 **Mac Address:** The Mac Address of the device
- 🔄 **Use T38 Carriers:** For faxing only
- 🔄 **Line keys:** Enables 3 lines by default
- 🔄 **SIP:** No need to edit this information
- 🔄 **Music On Hold:** Add New or Use Existing. This media is specific to the phone.
- 🔄 **Media Category:** Select a category
- 🔄 **Select Media:** Select from the available files

Virtual Extensions

- 🔄 Used to route calls to VoIP features by dialing an extension.

VOICEMAIL BOXES

You have the ability to create as many voice mailboxes as needed for your Hosted System. A voice mailbox can have any number and be assigned to any user, or accessed via an auto attendant or other means. To create a new voice mailbox, click Add Voicemail Box.

- 🔄 **Name (for Directory):** This field, combined with the Mailbox Number field, is used to populate the company directory.
- 🔄 **Assigned To:** Leave unassigned or assign to a user using the dropdown menu
- 🔄 **Voicemail Number:** The number to be used for this mailbox. Commonly, this should be the same as the extension number of the user.
- 🔄 **Timezone:** Timezone of the voicemail box
- 🔄 **Emails to Notify:** If an email address is entered into this box, a message will be sent to the address each time a voicemail is received. The audio file will be attached in .wav format.



- ⦿ **Reset PIN:** By default, 1111. Users should immediately change their password to something different once they have recorded their greetings. For security reasons, we recommend that you change your voicemail PIN number. This field allows you to select YES to set a new pin for the mailbox. You should not use any of the following:
 - *Default Pin Number*
 - *Extension Number*
 - *Last 4 of your own phone number*
 - *0000, 1234, etc.*
- ⦿ **Already setup:** When this field indicates YES, the user has already setup their PIN and greeting message. Select NO to reactivate the user tutorial.
- ⦿ **Skip Greeting:** Enable this to make caller go right to the MESSAGE INSTRUCTIONS without hearing the greeting.
- ⦿ **Skip Voicemail Instructions:** If you want to skip playing the instructions for leaving a message after your unavailable message, check this box.
- ⦿ **Delete After Notification:** If this box is set to YES and a valid email address is entered for notification then upon successful delivery, the message will automatically be deleted from the box.

TIME OF DAY ROUTING

Timeframe's can be configured to have the system route calls differently based on the day of the week and time of day. Click "+ Add Time of Day Routing" button to create a new route.

- ⦿ **Time of Day Name:** Enter a unique title to identify the Time Frame.
- ⦿ **Timezone:** Select the correct timezone for your location.
- ⦿ **Inside Timeframe Route To:** This is your During Business Hours Route. Choose the destination where calls should be routed to when your business is open.
- ⦿ **Outside Timeframe Route To:** This is your After Business Hours Route. Choose the destination where you want the caller to be routed to when your business is closed. Note: If the day is selected *Outside*, it is indicating that it will be classified as *After Hours* that entire day.



MENUS

Menu or Auto Attendant is a recorded greeting and associated menu at which the caller has the ability to select from multiple options to choose how their call is routed. The caller can dial any extension defined for the PBX, as well as a set of options that map to the digits on a phone dial pad. Customers of the PBX are not limited to a given number of auto attendants. There can be as many as the customer wishes.

To create an auto attendant, click *Add Menu*.

- 🔄 **Name:** A short name given to each auto attendant, just for something to refer to the attendant by within the iPath Cloud Hosted Portal.
- 🔄 **Allow Extension Dialing:** Selecting YES will allow a caller to dial any extension in addition to single digit selections. If set to NO only single digit selections are valid.
- 🔄 **Greeting Message:**
 - Add New: Name and choose the .WAV or .MP3 file
 - Use Existing: Select from previously uploaded or recorded media.
 - Record Over Phone:
- 🔄 **No. of Retries On Misdial:** The number of attempts to make a valid selection before being disconnected.
- 🔄 **Timeout For Dialing:** The amount of time in seconds the system will wait for digits. At the expiration of this timer if selection is valid call will go thru, If no digits are dialed the TIMEOUT field under BUTTON CONFIGURATION applies..

To configure the options for the attendant, use the table on the screen to determine what each key of the phone dial pad does. If you wish for any given key to have no function, just leave it in the default ROUTE TO setting of “None”. Keys 0 to 9, * (star) and # (pound) refer to the keys on a phone dial pad. The Timeout option is executed if the caller does not press any keys in the time defined in the *Timeout For Dialing* field above.



RECORDING YOUR AUTO ATTENDANT GREETING

There are several methods available to record the announcement that will play for the automated attendant.

Record Over Phone: Once selected, you call into your auto attendant by calling the number that routes to it. Once you hear the prompt enter your “*Prompt Record PIN:” and it will allow you to record a new message.

Add New: You may upload a file with your announcement in .mp3 or .wav format. The maximum file size is 4 MB.

Use Existing: Allows you to select an already recorded message or media file

GROUPS

A Group is a collection of extensions which are to be rung at the same time by the same call. For example, you may have a customer support department with 4 support representatives, and you might want all support phones to ring simultaneously when a caller presses digit 2 in your auto attendant. To achieve this, create a Group. To create a new Group, click on **Groups**, and then click on **Add Group**.

- 🔄 **Name:** Enter a short name given to each group to distinguish the group within the iPath Cloud Hosted Portal.
- 🔄 **Reset Caller ID:** Enable or Disable if you want to clear the caller id before sending the call.
- 🔄 **Prepend Caller ID:** Text to place in front of Caller ID
- 🔄 **Ring Strategy:** If *At the same time* is selected, then all extensions will ring simultaneously. If *In Order* is selected, then each extension will ring for *Seconds to Ring*, then the call will be sent to the next extension.
- 🔄 **Seconds to Ring:** The number of seconds to ring before the timeout option is executed.
- 🔄 **Group Type:**
 - Device Users – Select from device users to select which users will be in the group
 - Devices – Select from devices to select which phones will be in the group



- ⊞ **After ringing Group forward call:** If none of the extensions answer the call in the time defined in the Seconds to Ring field, the call is routed in the manner defined by this field.
- ⊞ **Play media while ringing:** Toggle to select to play media while the call is ringing instead of a standard ring.

MEDIA

You have the ability to customize the media you use throughout the portal.

To customize your media selection including, Hold Music, Voicemail Greetings and Menu Greetings ,click **Add Media**.

- ⊞ **Name:** Give each media track a unique name for identification.
- ⊞ **Media Category:** So that you may easily find the file in the future, select the correct category in which you intend to use the media file.
- ⊞ **Choose File:** Select an .mp3 or .wav file from your local computer to be uploaded to the PBX server. The file must be in .mp3 or .wav format and no larger than 4MB.

When finished, click **Save**. It may take a few minutes for the file to upload, so *do not leave the screen until you receive confirmation that the file upload was successful*. Also note that newly uploaded tracks may not take effect for up to 30 minutes.


After the file is uploaded go to the correct spot to assign that media track where you desire.

CONFERENCE BRIDGE

To create a new Conference Bridge room, click on **conferences**, then click **Add Conference**. Your Conference Bridge is limited to the number of voice paths you have purchased as indicated on your contract. Note: There is a cost incurred per minute for each party that joins the conference. Check with your service plan for the billing rate.

- ⊞ **Name:** Give the conference a name
- ⊞ **Number:** Assign a number to the conference



 **Pin:** Assign a PIN number to the conference to restrict access

HOLIDAYS

You may define any day of the year to be a company observed holiday. Once a day has been declared a holiday, then all calls into any of your phone numbers will be routed based on the *If Holiday* field on the *Phone Number* screen. To define a new Holiday, click on *Holidays Routing*, then *Add Holiday Route*. Enter a name for the holiday, select the date, and then click *Add Holiday*.

Select *Change Holiday Routes* to select disable or enable certain holidays.

BLACKLIST

Add numbers to block inbound and outbound traffic.



Finance Tab

ORDERS

Here you can view all of the orders you have with iPath Cloud Network. It will show you the terms including pricing and the activation date of the services you have been provisioned for Subscriptions (Monthly Billing) as well as Labor and Products (one time charges. It also displays the term of your contract.

INVOICES

Invoices

You can see the status of all invoices that have been received and the date for each invoice. If you click on an invoice, you can also download a .pdf copy of the invoice.

Payments

You can view the payment status and method of payment. You can also download a .pdf copy of the payment.

Credits

You can view any credits that were applied to your account

PAYMENT PROFILES

View the credit card information applied to your account. You may add a new credit card when applicable. If you are set up for credit card pay, you must have this complete and up to date at all times.



Reports Tab

REGISTRATIONS

This screen shows which extensions are registered and the details such as date and time they last registered. You can view or print a .pdf file by clicking the icon in the upper right hand corner.

CALL HISTORY REPORT

This screen allows you to view calls that take place on your PBX within a designated time frame. You can also filter the calls based on a Search, or Date Range. You can view or print a pdf file by clicking the icon in the upper right hand corner.

EXTENSIONS

This screen allows you to view a list of the extensions, their type and name. You can view or print a .pdf file by clicking the icon in the upper right hand corner.

FEATURE CODES

This screen allows you to view a list of the Feature Codes available on your account. You can view or print a .pdf file by clicking the icon in the upper right hand corner.

ACCOUNT METRICS

This screen allows you to view a graph of the number of items on your account. You can view or print a .pdf file or image file by clicking the icon in the upper right hand corner.



Settings Tab

USER MANAGER

The iPath Cloud Hosted Portal has its own user access system. It is important to note that a user of the Portal is not the same as a phone user. It is a user who is granted access to the Portal via the web. As an administrator, you have the ability to grant access to the Customer Portal to other users within your organization.

Roles

There are two different types of users in the Customer Portal:

- 🔗 **Administrator:** A user who has the ability to administrate all aspects of their assigned PBX. Can create other users who will have access to the Customer Portal, modify phone number and extension settings, create and modify all other PBX settings.
- 🔗 **Simple Device User:** A user who only has permissions to administer their assigned extension. An employee can only modify services specifically related to their extension and voice mailbox.



Troubleshooting

- 🔄 Phone displays **No Service** – Verify that your internet service is working properly. Your telephones connect to a SIP Server that is accessed via the internet. If your internet service is unavailable, your phones will not work.

- 🔄 If your internet service seems to be working properly and your phones are still not working, try rebooting the phone by disconnecting the power supply or if connected to a PoE switch, disconnect the Ethernet cable from the back of the phone.

- 🔄 If it still does not work, try moving your phone to a location where another phone is working properly. If this still does not resolve your issue, contact iPath Cloud Network NOC for further assistance.

CONTACT TECHNICAL SUPPORT

If you have an issue that you are unable to resolve on your own and need technical assistance, contact iPath Cloud Solutions Help Desk via email during regular business hours at helpdesk@ipathcloud.com or call:

484-913-1134
or
1-800-853-VOIP (8647)

Choose the option for Service (2). Please have your account information ready when you call.

Our normal hours of operation are Monday through Friday 8:30 AM – 5:00 PM Eastern Time. However, iPath Cloud Network support is available 24x7 for service impacting issues.

For non-service related issues or MAC (Move, Add, Change) work, you may alternatively send an email to helpdesk@ipathcloud.com.



- ❏ **Screen for Privacy:** One feature of the PBX System is to have incoming calls screened for telemarketers or other automatic dialer programs. If “**Yes**” is selected, then all callers who do not present a Caller ID will hear a greeting asking them to enter a Caller ID number using the dial pad of their phone. If they do not enter a number, they are disconnected.

