

Thirdlane User Portal 2.1

Users Guide

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Introduction

Thirdlane User Portal is a web interface which enables you to specify how the calls to your extension are handled, configure call forwarding, call screening, call blocking, call recording, manage your voice mail messages and recorded calls, dial using personal contacts and company directory, and view calls history.

Thirdlane User Portal also allows to manage conferences in real-time, and provides integration with web based CRMs or search engines to find information about people calling you.

User Portal is integrated with Thirdlane Dialer which is an Outlook add-in and a system tray application that allows you to dial the phone numbers of your Outlook contacts, or the phone numbers contained in your email and also provides screen-pop capabilities. Thirdlane Dialer can be downloaded from Third Lane Technologies web site at <http://www.thirdlane.com>

User Portal includes the following screens:

Voicemail Settings gives you an ability to set your preferences for handling of voice mail messages.

Call Forwarding allows you to configure call forwarding rules.

Call Screening allows you configure the rules for screening inbound calls.

Call Blocking allows you to block calls from certain numbers and specify what to do when caller id is not known.

Call Recording (if enabled) allows you to set rules for call recording.

Conferences allows you configure your personal conference room and manage it in real-time.

Contact & Directory allows you to make calls by selecting phone numbers from the company directory and create and manage your own personal contacts.

CRM Screen Pops allows you to query your CRM for information

about people calling you, or find the information about callers in public search engines such as Google, White Pages, etc.

Voice Mail gives you the ability to access and manage voice mail messages.

Recorded Calls (if enabled) allows you to access and manage recorded calls.

Call History allows to view all the calls to and from your extension.

Preferences allows you to change your personal settings and web interface preferences.

Voicemail Settings

PIN. Personal identification number for accessing voice mail.

Notify by email. Check this if you would like to be notified about new voice mail messages via email. If this is checked, then Email address is also required.

Email address. Your email address.

Attach messages to email. Check this if you would like the voice mail messages to be attached to the e-mail notifications.

Delete after delivery. Check this if you would like voice mail messages to be deleted after they are delivered via email.

Notify by pager. Check this if you would like to be notified about new voice mail messages via pager. If this is checked, then Pager is also required.

Pager. Pager address.

Call Forwarding

This screen allows you to specify call forwarding rules and enable call forwarding.

Note that you can enter the information you use frequently (for example a list of numbers for Find Me / Follow Me) and then “Enable” or “Disable” it as needed by using radio buttons.

Vicemail – specify whether incoming calls should be forwarded to voice mail and how long your phone is going to ring before the caller is sent to voice mail.

Call Forwarding Always allows you to forward all your incoming calls to a different phone number, such as your home office or cell phone. Note that if Call Forwarding Always is enabled it will take precedence over Find Me / Follow Me.

You can also set the phone number to forward using by dialing feature codes. *72 – Activation *73 - Deactivation

Call Forwarding Busy allows you to forward all your incoming calls to a different phone number if your phone is currently busy. Use this when you would rather have a co-worker receive the call instead of the caller being sent to your voice messaging box.

You can also set the phone number to forward using by dialing feature access code. *90 – Activation *91 - Deactivation

Find Me / Follow Me allows you to forward your incoming calls to a different phone numbers. You can specify up to 5 phone numbers which can be either dialed at the same time or sequentially.

You can specify whether the phone associated with your extension will be called or not, and whether the numbers will be called simultaneously or one after another.

You can enable Find Me /Follow Me for all callers or that calls only from certain callers be forwarded and enter caller ids of these callers.

You can also set one phone number to forward using by dialing feature access code. *92 – Activation *93 – Deactivation

Call Screening

This screen allows you to specify call screening rules and enable call screening.

You can specify call screening options for calls with or without a caller id.

For calls with caller id you can request that the callers announce themselves. You can also enter a list of caller ids for the callers you would like to exclude from screening.

For calls without caller id you can request that the callers announce themselves and/or enter their caller id.

You can combine Call Screening with Find Me / Follow Me. If you would like to hear callers' announcements while receiving a forwarded call you should check “Play caller announcement while in follow-me mode “.

Note that you can enter the information once and then “Enable” / “Disable” call screening as needed.

Call Blocking

This screen allows you to specify call blocking rules and enable call blocking.

You can specify call blocking options for calls with or without a caller id.

For calls with caller id the options are “Block” or “Allow”.

If you are blocking calls, you can enter caller ids of callers to be excluded from blocking.

If are not blocking all the calls you can enter caller ids of callers that you would like to block.

For calls without caller id the options are simply “Block” or “Allow”.

You can specify how the blocked calls are to be handled by choosing from the list of “When blocking calls” options.

Note that you can enter the information once and then “Enable” / “Disable” call blocking as needed.

Call Recording

This screen (if enabled) allows you to specify whether the calls to and from your extension will be recorded. Note that this option may be disabled by your system administrator and this screen will not be available.

The options are to record all calls, not record calls or record calls selectively by pressing a key sequence. By default this key sequence is #9.

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Edit Conference

Your administrator may configure your extension with access rights to one or more conference rooms in which case the Conferences screen will be available.

Clicking on a conference number will present Edit Conference screen where you could configure the options for a conference.

Maximum number of participants. Maximum number of participants that are allowed to join the conference.

Wait until the marked user enters the conference. If set will make users to wait for a marked user (In PBX Manager a user who enters administrators password is considered to be the marked user).

Enable music on hold when single caller. If set will enable music-on-hold even when conference has a single caller.

Music-on-Hold. Music-on-hold associated with the conference which plays when users are waiting for a marked user.

Present menu (user or admin) when '*' is received. If set will allow a voice menu to play to a user who presses an * key. The options presented are dependent on whether it is a regular user or an administrator who presses the key and include muting and unmuting, increasing or decreasing volume, etc

Announce user(s) count on joining a conference. If set will play an announcement on a user count to users joining the conference.

Announce user join/leave. If set will play an announcement every time someone joins or leaves the conference.

Set talker detection. If set will send information about the current talkers to the Asterisk Manager Interface (required if you would like to see who is talking in the PBX Manager -> Manage Conference screens)

Set talker optimization. Improves conference quality and reduces transcoding overhead by muting participants who are not currently speaking .

Record conference. If set then the conference will be recorded. Use this with caution as the recordings can be quite large.

Other options . Other options for Asterisk MeetMe application.
See Asterisk MeetMe application
documentation for details.

To access **Conference Manager** screen to manage a conference in progress click **Manage Conference** link.

Conference Manager

Conference Manager screen allows you to manage the conference in real-time.

Each conference participant is displayed on the screen with the indicators of the status and whether the participant is talking.

Commands are available to mute/unmute participants, raise and lower volume, lock the conference (so that no more participants can join), and “kick” participants off the conference.

Contacts & Directory

This screen gives you access to contacts stored in the office directory and personal contacts and allows you to initiate calls from your phone using “click-to-call” feature.

Selection Filter allows you to quickly find directory entries based on Last Name, First Name or Department. For each of these fields you can specify whether you are looking for an exact match or entries starting with or containing the specified string. If multiple fields are specified all of them are combined in the filter.

You can switch between your Personal Contacts and Company Directory by checking an appropriate option and clicking Select.

To call a contact, select one of his/her phone numbers from the drop down list in the Phone column, and click Call. Your phone will ring and when you pick it up you will hear it ringing your contact's phone.

While in Personal Contacts you can create additional Contact records by clicking Create Contact button.

To delete a Personal Contact select it using the check box on the left and click on Delete Selected.

Voice Mail

This screen allows you to manage your voice mail messages.

To listen to a voice mail message click PLAY, and the message be downloaded and played (provided that you have an appropriate player software).

To delete a voice mail message, select it using the check box on the left and click on Delete Selected.

Voice mail messages can be organized into folders. To create a new folder you can enter its name and click Create button. To move or copy voice mail message(s) to a folder, select it using the check box on the left, select the target folder from the drop down list and click on either Move to folder or Copy to folder button.

You can also send your messages to other people via email. To send message(s) select them using the check box on the left, enter email address into Send to field (or choose it from a list by clicking ... button), enter Subject and (optional) email text, and click Send email button.

Recorded Calls

This screen allows you to manage recorded calls associated with your extension.

To listen to a recorded call click on PLAY, and the recorded call will be downloaded and played (provided that you have an appropriate player software).

To delete a recorded call, select it using the check box on the left and click on Delete Selected.

You can also send your recorded calls to other people via email. To send recorded call(s) select them using the check box on the left, enter email address into Send to field (or choose it from a list by clicking ... button), enter Subject and (optional) email text, and click Send email button.

Calls History

This screen shows you the calls you made as well as the calls to your extension.

You can specify a selection filter to be applied. You can filter by a range of dates, caller id, and source and destination.

You can sort records by clicking on the headers of any column; clicking on the same header again reverses the sort order.

Preferences

Language. Your preferred language for the User Portal web interface.

Color scheme. Your preferred color scheme for the User Portal web interface.

Password. Your password for accessing User Portal web interface.