Serviced Office

For Administrators using 4.3.1

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Version: 1.0

Serviced Office Administrator Guide

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1 Introduction

Serviced offices are cropping up in major cities all over the world because of the growing demand for office space that comes fully furnished and offer special services built into the lease such as front-desk services such as receptionists to answer calls and greet guests, utilities, secured WiFi, and around-the-clock security to name a few services.

Serviced Offices are especially popular with

- Pop-ups, which are companies that require space for a short time when they are in town to conduct business
- Companies experiencing growth who cannot accommodate their new employees in their present location.
- Companies that are in the process of moving from one space to another, but who are facing delays with their new office space.
- Startup companies and small businesses who do not want to make a financial commitment to a long-term lease

1.1 About the Administrator Guide

Embedding the Serviced Office module into your Serviced Office business enables you to help other companies build better relationships with their customers and potential customers.

The Service Office Administrator Guide gives you access to robust tools and features that are designed to help you configure and manage Serviced Office. Whenever possible, Deltapath also offers tips and best practice information to ensure your service office setup is successful. To successfully setup your Service Office environment, reference the frSIP Unified Communication System Administrator Guide regularly.

1.2 Modules You Need or Should Consider

There are a number of modules available to build a highly effective Serviced Office business. If you have questions or would like to learn more about the key features of each module, contact your Deltapath representative or your Deltapath reseller.

- **Call Accounting Module**: The Call Accounting module is required with the Service Office module. It is a multi-purpose call billing solution for organizations and businesses that offer phone services to customers such as Serviced Office operations and hotels.

- **Call Recording**: Monitor call recordings to meet customer service quality goals, sample recordings to build training programs, uncover trends, and manage compliance and corporate liability.

For more information about the modules Deltapath offers, visit www.Deltapath.com.

2 Customer

Create a customer to simplify the task of monitoring and managing groups of users. For more information, consult the section titled, **Group** in the frSIP UC Administrator Guide.

3 User Profile

Define a new user profile if needed or use an existing user profile. If you need assistance creating a new profile, consult the section titled, **User Profile** in the frSIP UC Administrator Guide.

4 Add Users

Each receptionist has a dedicated phone. As a result, each receptionist is a user and must be added in switchboard. If you need assistance creating a new profile, consult the section titled, **Add Users** in the frSIP UC Administrator Guide.

5 Short Message Service (SMS)

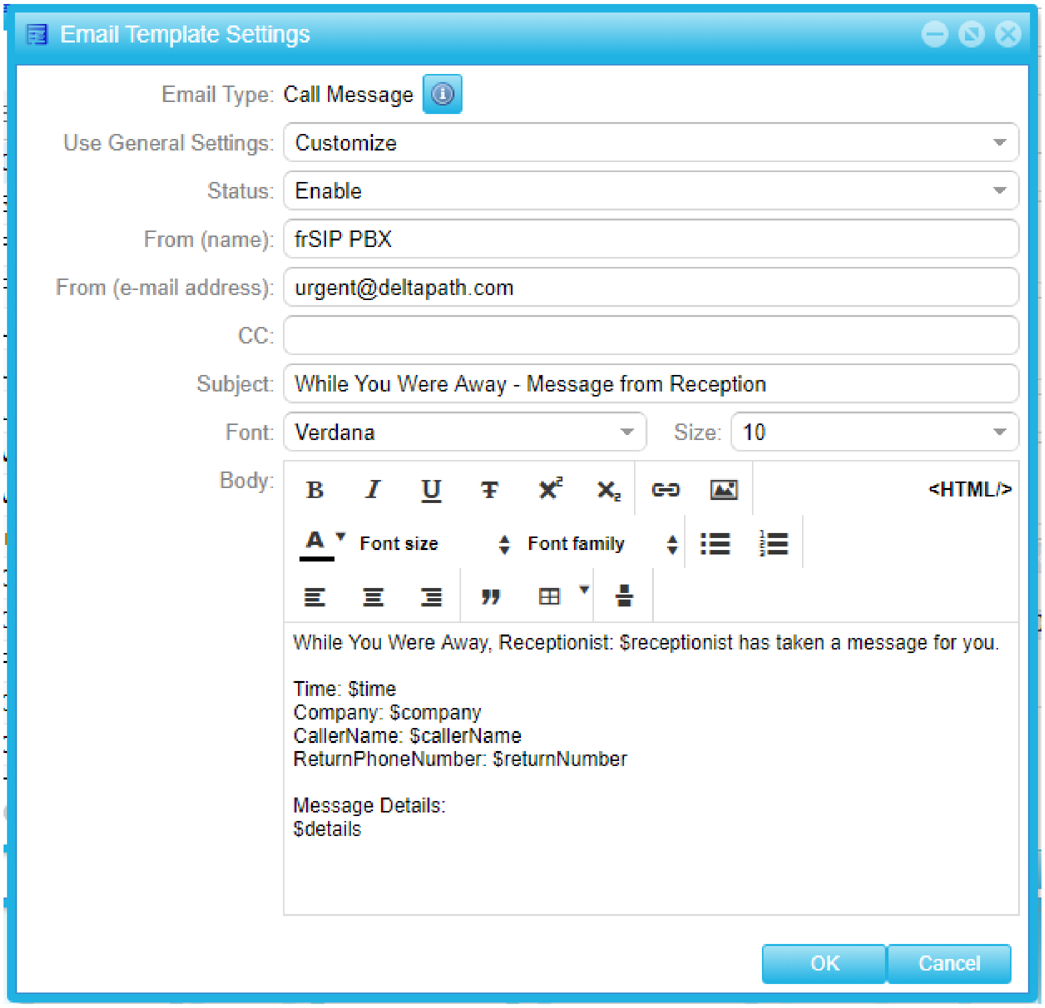
If you already have the SMS module, users can use SMS text messaging service to connect to others outside their organization. Users such as receptionists have to have SMS enabled in ACL Group. If you need assistance enabling SMS for users, consult the section titled, **Enable SMS in ACL User** in the frSIP UC Administrator Guide.

6 Email Template

When a receptionist takes a message, the message is emailed to the call recipient. You can customize the content in the email template. Any type of customization should be generic as a receptionist may be taking calls for several companies if operating in a serviced office business. As a result, the email should not list the company's name.

For detailed information about email templates, read the section titled, **Email Templates** in the frSIP UC Administrator Guide.

1. Click frSIP in switchboard.
2. Type Email Template in textbox.
3. Click **Email Template**.
4. Click on the **Call Message template**.



Personalize the template by rewording it, adding inspirational quotes, and more. In the screenshot below, the Call Message template has been customized.

Reply Reply All Forward

Thu 5/17/2018 4:32 PM

frSIP PBX <urgent@deltapath.com>

While You Were Away - Message from Reception

To Petrosi Peter

While You Were Away, seenarine shirmattie, the front desk assistant took a message for you.

Time: 2018-05-17 15:22:26
Company:
CallerName: Melanie Smart
ReturnPhoneNumber: 1-905-350-5400

Message Details:
Melanie called to let you know that she has secured the marketing brochure for the event on Tuesday and mentioned that the banners will be ready early Monday morning.
Melanie's extension is 2314

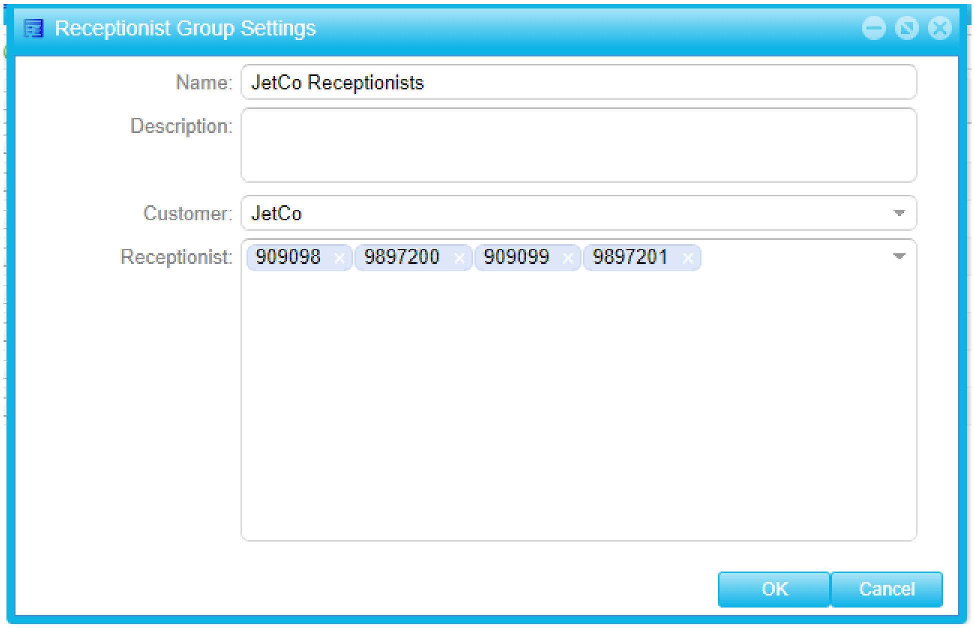
"There are no secrets to success. It is the result of preparation, hard-work, and learning from failure"

7 ACL Group for Receptionist

Decide what permissions are granted to receptionists. For more information, consult the section titled, **Access Control List (ACL) Group** in the frSIP UC Administrator Guide. Since receptionist carry out duties on behalf of others such as scheduling appointments in other peoples' calendars, or check the voicemail and emails of others, they typically have more privileges granted to them than regular users.

8 Receptionist Group

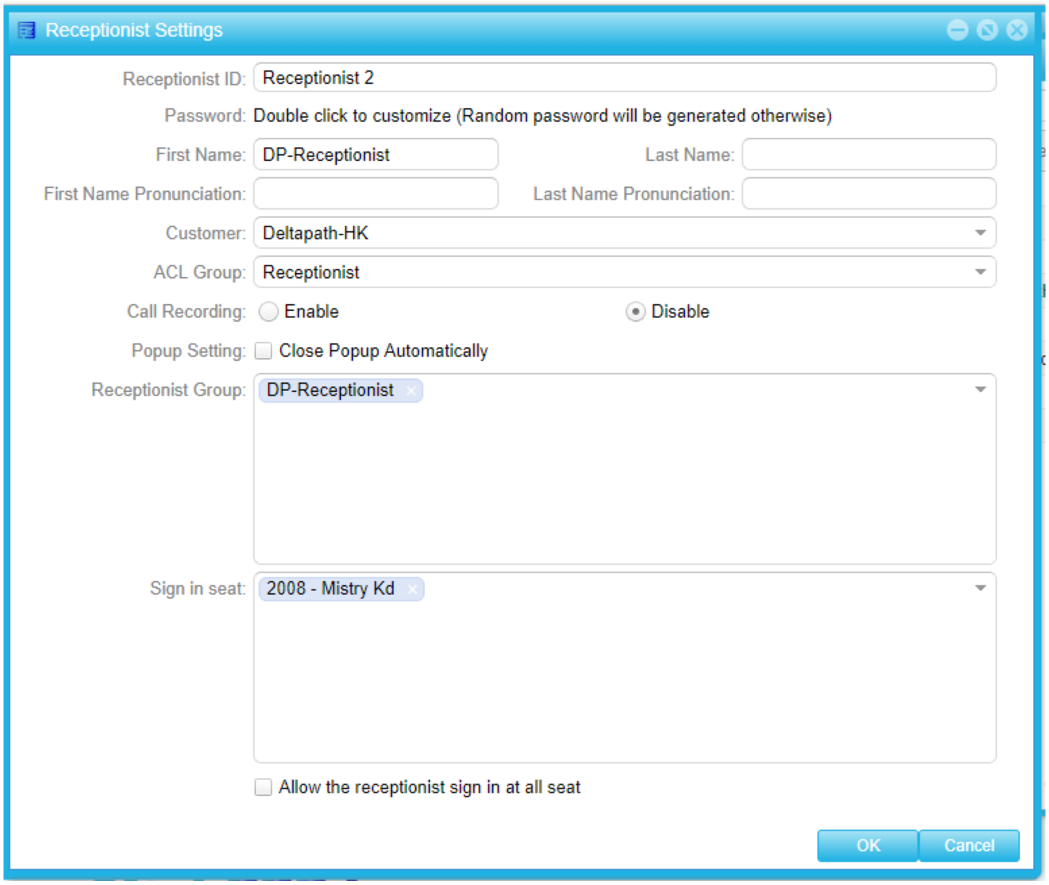
Setup a receptionist group if you will have more than one receptionist available to answer calls.



1. Click frSIP in switchboard.
2. Type Receptionist Group in the textbox.
3. Click **Receptionist Group**.
4. Click **Add Receptionist Group**.
5. **Name**: Enter a name. Example: Deltapath Receptionists
6. **Description**: Optional field for entering additional information.
7. **Customer**: Click the dropdown arrow and select a customer.
8. **Receptionist**: Receptionists added to the system and assigned to the receptionist group will be automatically added here.
9. Click OK.
10. Click OK.

9 Add Receptionists

Setup receptionists in frSIP Switchboard.



1. **Receptionist ID**: Enter receptionist ID. Receptionists can be identified by their names or they can be classified another way. Example: Receptionist 1
2. **Password**: Enter a password or leave the field blank and the system will generate a password for you.
3. **First Name**: Enter receptionist's first name.
4. **Last Name**: Enter receptionist's last name.
5. **First Name Pronunciation**: This field is used to help sort Japanese names in name lists such as a phonebook. The pronunciation field presents a Japanese name phonetically.
6. **Last Name Pronunciation**: This field is used to help sort Japanese names. The pronunciation field presents a Japanese name phonetically.
7. **Customer**: Click the dropdown arrow and select the customer.
8. **ACL Group**: Click the dropdown arrow and then select the ACL Group the receptionist will belong to.
9. **Call Recordings**: Click enable if you have the call recording module.
10. **Popup Settings**: Select **Close Popup Automatically** if you want the popup window with caller information to close as soon as you hang up the phone.
    Best Practice is to leave this box unchecked. You can select it at a later date if the receptionist makes a request.
11. **Receptionist Group**: Click the dropdown arrow and select a receptionist group.

12. **Sign in seat**: Click the dropdown arrow and select a seat so the receptionist can receive calls.
    Note**:** *A seat is synonymous with a telephone number*.
13. **Allow the receptionist to sign in at all seats**: Select this checkbox if you want to allow the receptionist to sign into any available extension.
    Note: If you select this box, do not select an extension in step 12.
14. Click OK.
15. Click OK.

10 Mailbox

The mailbox must be setup before configuring the phone line a receptionist will answer.

1. Click frSIP in switchboard.
2. Type Mailbox in the textbox.
3. Click **Mailbox**.
4. Click **Add Mailbox**.
5. **Number**: Enter the mailbox number such as the telephone number of the receptionist line.
6. **PIN**: Enter a customized PIN or the system will generate one for you.
7. **Name**: Enter the mailbox name. Example: Deltapath US Mailbox.
   Note: You do not have to enter a last name.
8. **Email Address**: Enter an email address.
9. **Customer**: Click the dropdown arrow and select the customer.
10. **Maximum number of messages:** Enter the maximum number of messages a user can receive.
11. **Maximum duration for a message:** Enter the maximum length of a message in seconds.
12. **Number of days to keep the unread message:** Enter the number of days that unread messages are kept on the server.
13. **Number of days to keep the old message:** Enter the number of days old messages are kept on the server.
14. Announce option before message playback:
15. **Envelope Information**: Click the dropdown arrow, and then Click Yes or No. If Yes is clicked, the system announces the time the video or voice message was received.
16. **Caller ID:** Click the dropdown arrow, and then Click **Yes** or **No**. If Yes is clicked, the system announces the Caller ID of the caller who left the voice or video message.
17. **Hide mailbox from directory:** Click the dropdown arrow, and then Click **Yes** or **No**. If Yes is clicked, callers are unable to search for users because they are hidden on the directory service.
18. When a caller pressed the following key during greeting, redirect call:

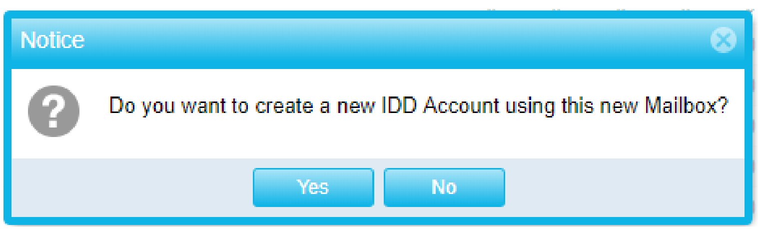
If extension 2330 is entered in the box, callers will be redirected to extension 2330 when they press 0.

Similarly, if extension 2330 was in the second box, callers will be redirected to extension 2330 *when they press the * key.*

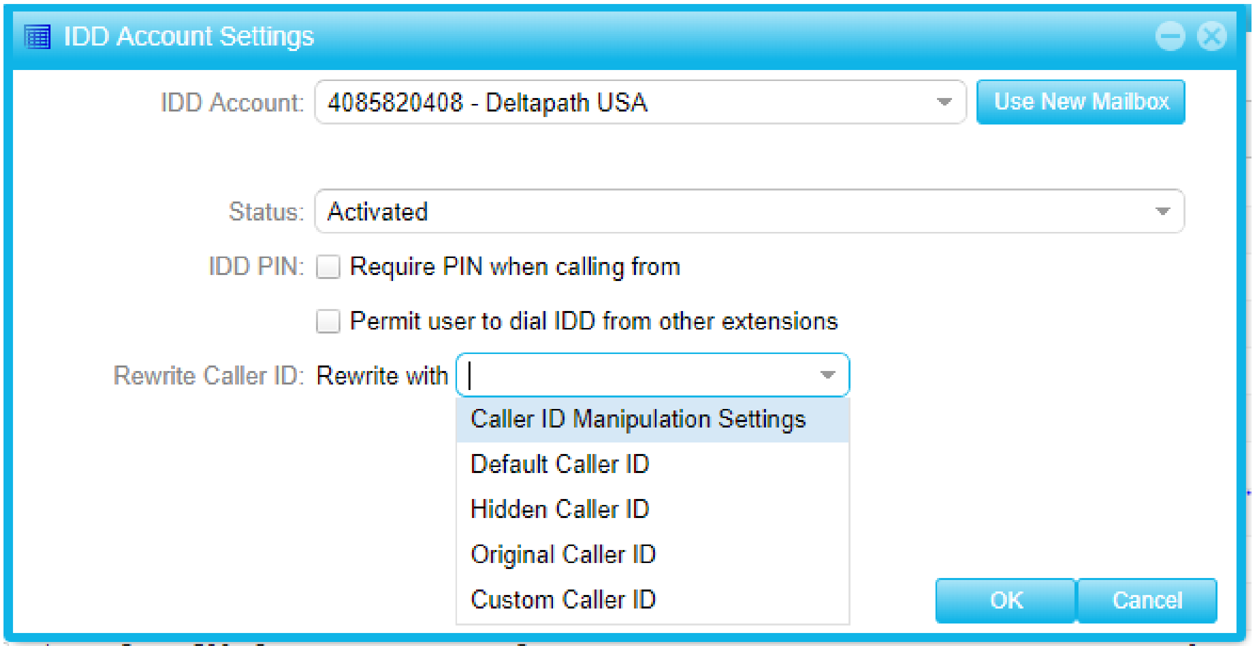
19. **Message delivery options:** Click the dropdown arrow, and then Click 1 of the 5 message delivery options.
    It is a best practice to select **Use System Default (Deliver to local Voicemail box and email)**
20. **Message waiting indication(MWI):** Click the dropdown arrow and then Click Enable or Disable. If enabled, the message waiting LED light on a Polycom phone indicates a user has unread messages in his or her mailbox.

21. **Switchboard voicemail management:** Click the dropdown arrow and then Click Enable or Disable. If Enable is selected, users can manage their voicemail from the switchboard.
    Message delete URL address: Click the dropdown arrow and then Click **Use Server IP** or **Custom.**
22. Click OK.
23. Click OK.

IDD Account



Do you want to create a new IDD Account using this new Mailbox? Click Yes. The IDD *Account Settings dialog box opens.*
Note: The system recognizes you have the Call Billing module and also assumes since you are creating a new number that you may need an IDD account to forward calls externally and charge calls to an account.



24. **IDD Account**: Information auto-populates
25. **Status:** Activated.
    Note: The status auto-populates.
26. **IDD PIN**: *Select one or both boxes.*
    - **Require PIN when call from**: Select this checkbox so you can link a call to a user back. This feature is very important if numerous users are allowed to use the same phone.
    - **Permit user to dial IDD from other extensions**: Select the checkbox, if you plan on permitting users to make calls from different phones.
27. **Rewrite Caller ID: Rewrite with**: Click the dropdown list and select an item.
    Note: The rewrite caller ID tells the system how to resolve the caller Id on Call Accounting calls. With the exception of the Default Caller ID which is setup in General Settings, the remainder of the settings are configured under Caller ID Manipulation.

    - **Caller ID Manipulation Settings:** Always try to Resolve the Caller ID Manipulation settings
    - **Default Caller ID:** Uses the default caller ID number and name set under General Settings.
    - **Hidden Caller ID:** Nothing is set in the caller ID settings
    - **Original Caller ID:** No manipulation is performed on the original caller ID.
    - **Custom Caller ID:** Use a custom string as the caller ID.
28. Click OK
29. Click OK

10.1 Record Mailbox Greetings

Record and upload your mailbox greetings on your phone. For a detailed explanation of the different greetings you can record, see the section titled, **Message Functions** in the frSIP UC User Guide. Similarly, consult the section titled, **Greetings Management** in the frSIP UC User Guide for instructions on recording a new greeting, adding prerecorded messages, and more.

11 Call Answering Services

A prestigious business address in a prime location can help businesses establish presence. A live receptionist can also represent your company and add a personal touch when your customers call. A receptionist can answer, screen, and transfer calls for employees, greet customers when they visit, plus handle other tasks.

A phone line must be created for a receptionist or receptionist group. Two types of phonelines are discussed, **general line** and **general line with extension**. Before setting up a phone line however, create the time slots.

11.1 Time Slot

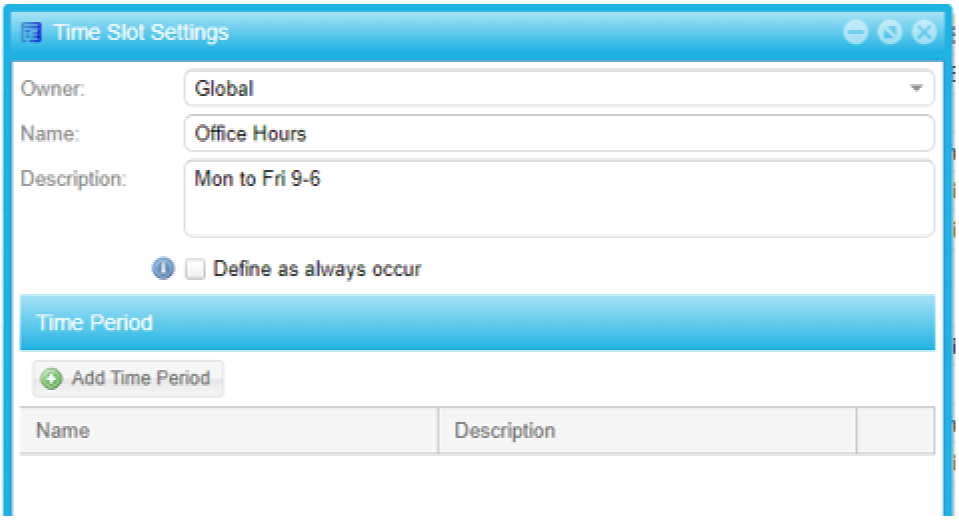
A timeslot is a period of time during which certain schedules run. You can create a global timeslot or a customized timeslot. Best practice is to create a global timeslot for typical business hours schedules and off hour schedules. Use customized timeslot when a user has a different schedule from others. For example, while everyone works a 9-6 pm schedule, one employee works a 12-4 pm schedule.

In this example, 2 global timeslots are created:

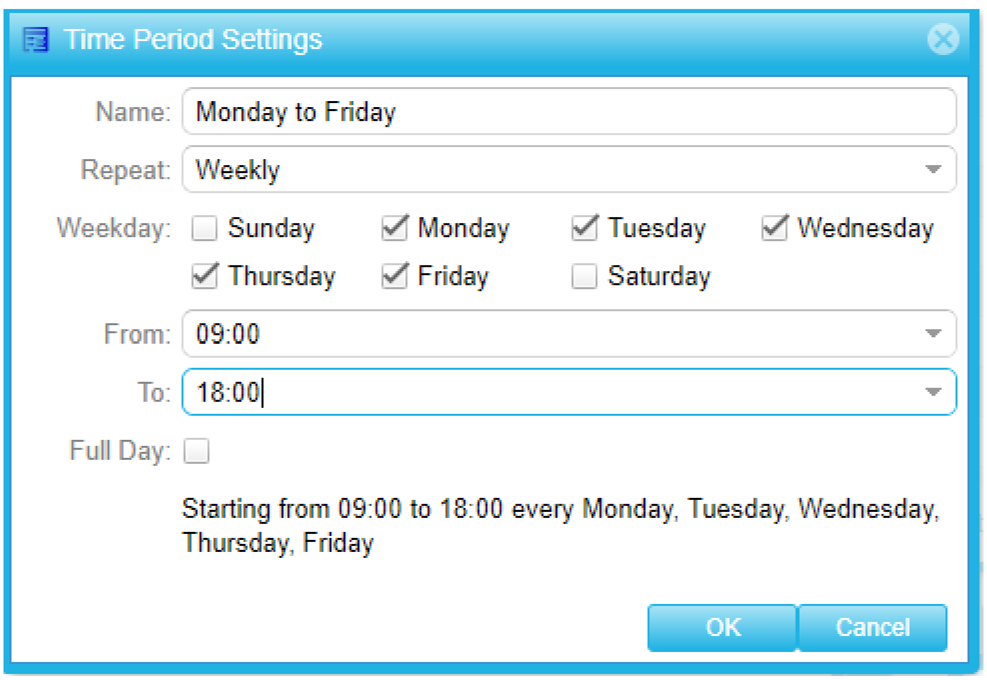
- **Timeslot for business office hours** – Example: Monday to Friday from 9-6 pm
- **Timeslot for non-business office hours** - Includes two schedules. Example: Monday to Friday from 6:00pm-9:00am and Saturday and Sunday 12:00am-11:59pm.

Business Office Hour Timeslot

1. Click frSIP in switchboard
2. Type **Time Slot** in the textbox.
3. Click Time Slot under **Numbering Plan.**
4. Click **Add Time Slot**. The time Slot Settings dialog box opens.



5. Click the dropdown arrow and select **Global**.
6. **Name:** Enter an informative name. Example: Business Office Hours
7. **Description:** Optional field where you can enter additional information.
8. Click **Add Time Period.**



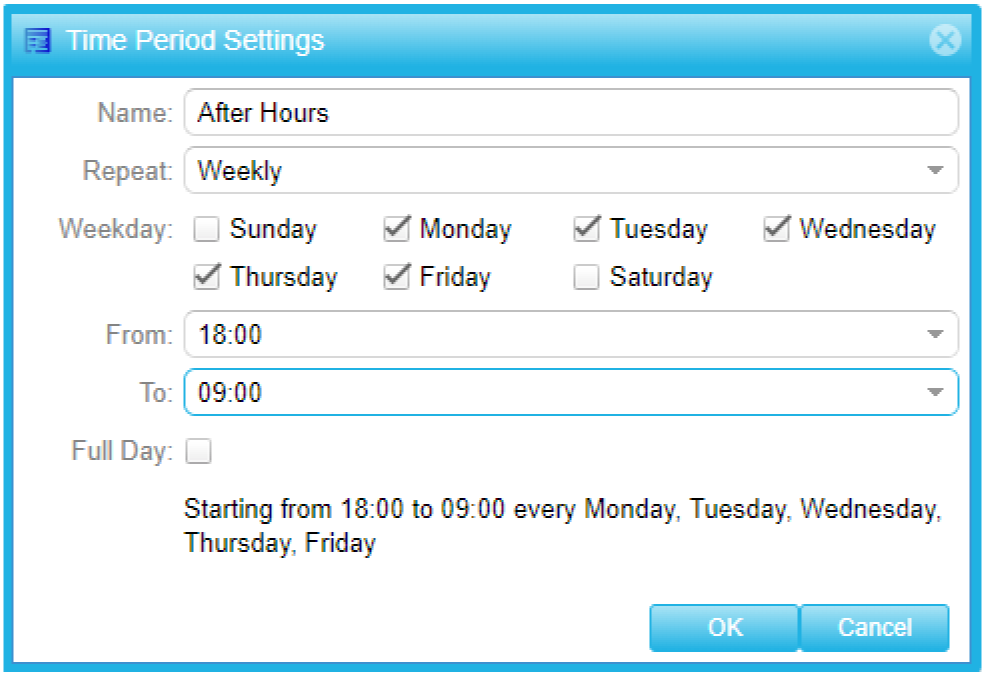
9. Click OK.
10. Click OK.

Non-Business Office Hours

11. Click **Add Time Slot.**
12. **Owner:** Click the dropdown arrow and Select **Global.**

13. **Name:** Enter an informative name. Example: Non-Office Hours
14. **Description:** Optional field where you can enter additional information.
15. Click **Add Time Period.**

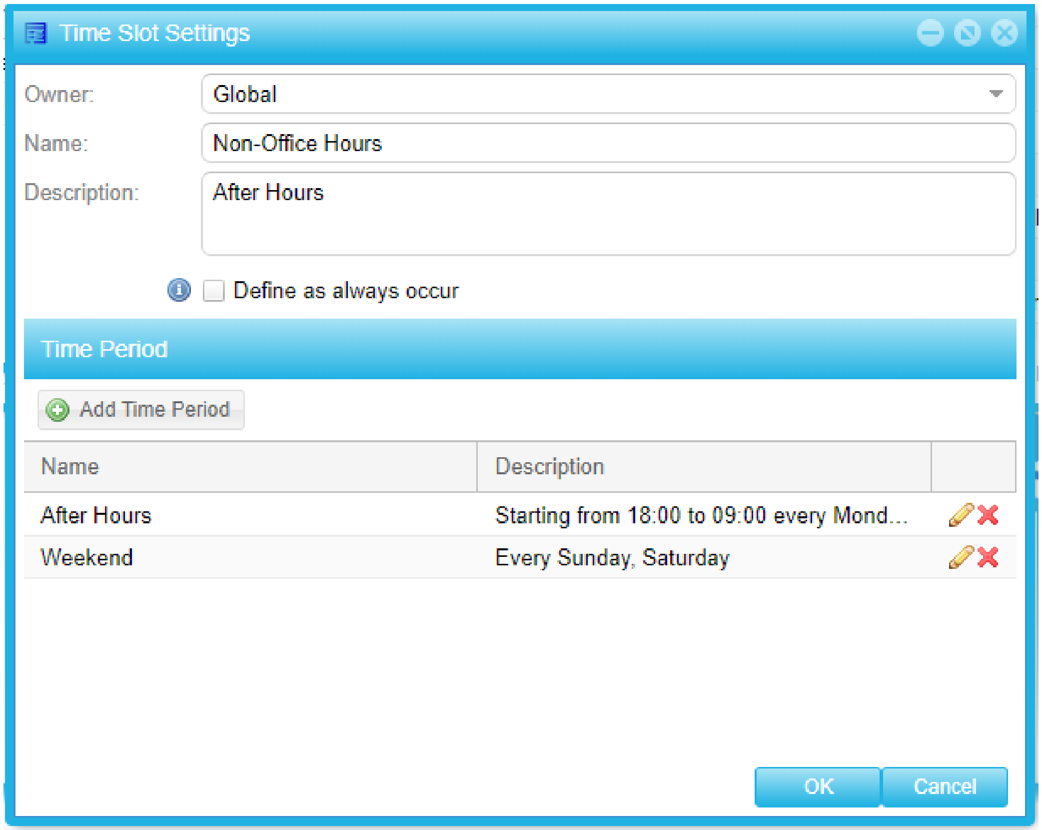
After Hours Weekday Schedule:



16. **Name**: Enter a name. Example: After Hours.
17. **Repeat**: Click the dropdown arrow and select how often the time period will run. Example: Weekly.
18. **Weekday**: Select the days of the week the timeslot will be in effect.
19. Click OK.
20. Click **Add Time Period.**

Weekend Schedule:

21. **Name**: Enter a name. Example: Weekend Schedule
22. **Repeat**: Click the dropdown arrow and select how often the time period will run. Example: Weekly.
23. **Weekday**: Select Saturday and Sunday.
24. **Full Day**: Select checkbox. There are no business hours on the weekend. *Note: Alternatively, you do not have to select Full Day. You can complete the From and To field you have business office hours on the weekend that are different from the business hours during the weekdays.*
25. Click OK.

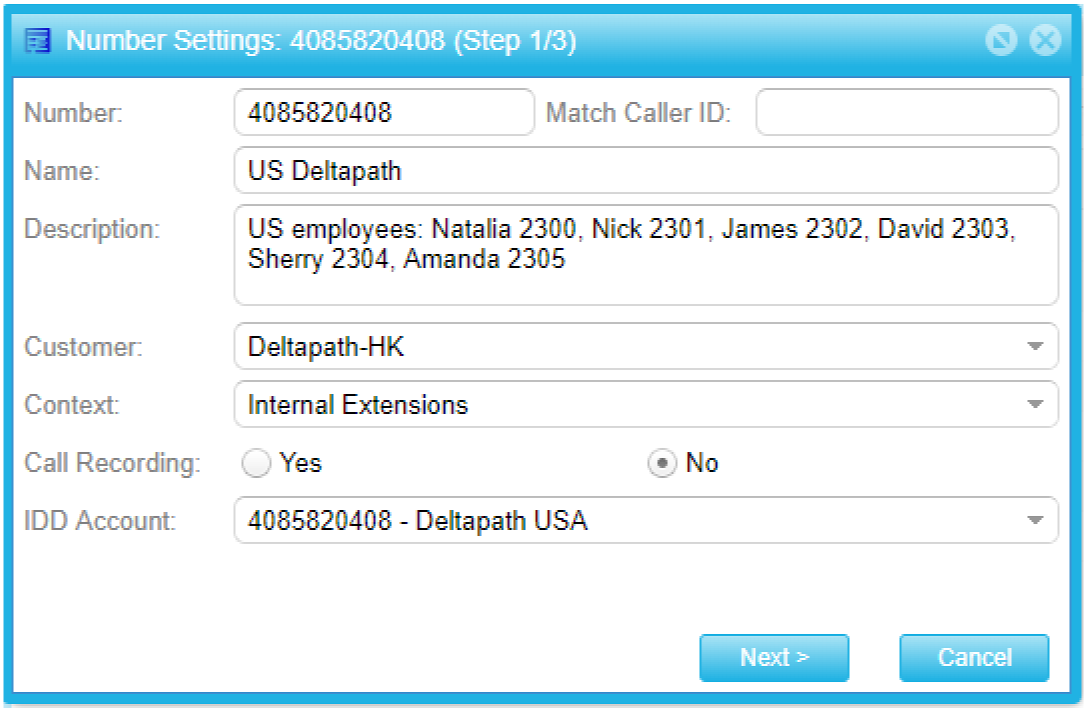


26. Click OK.
27. Click OK.

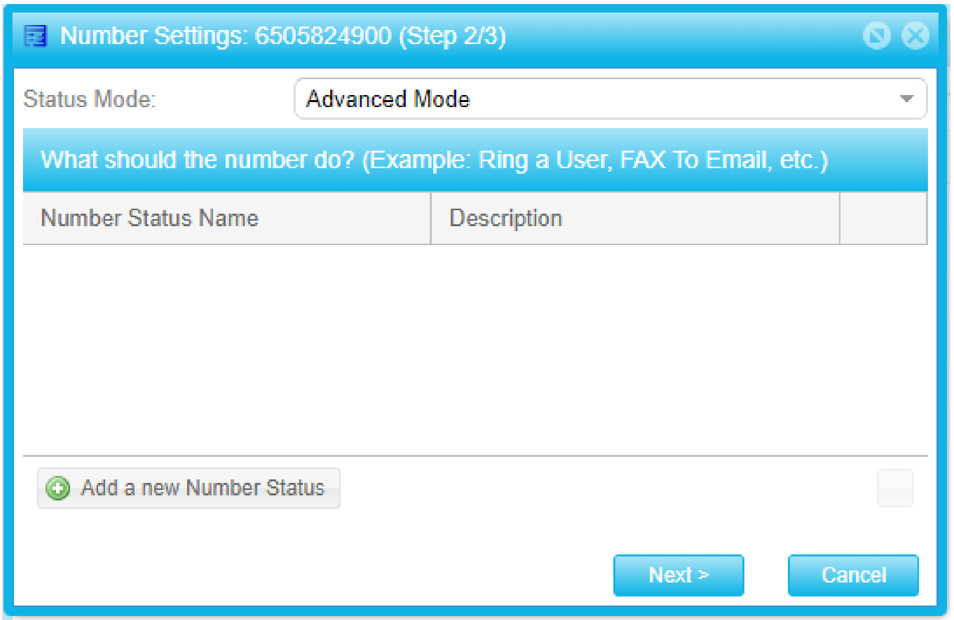
11.2 General Line

To ensure your customers can reach a live receptionist, setup a general line.

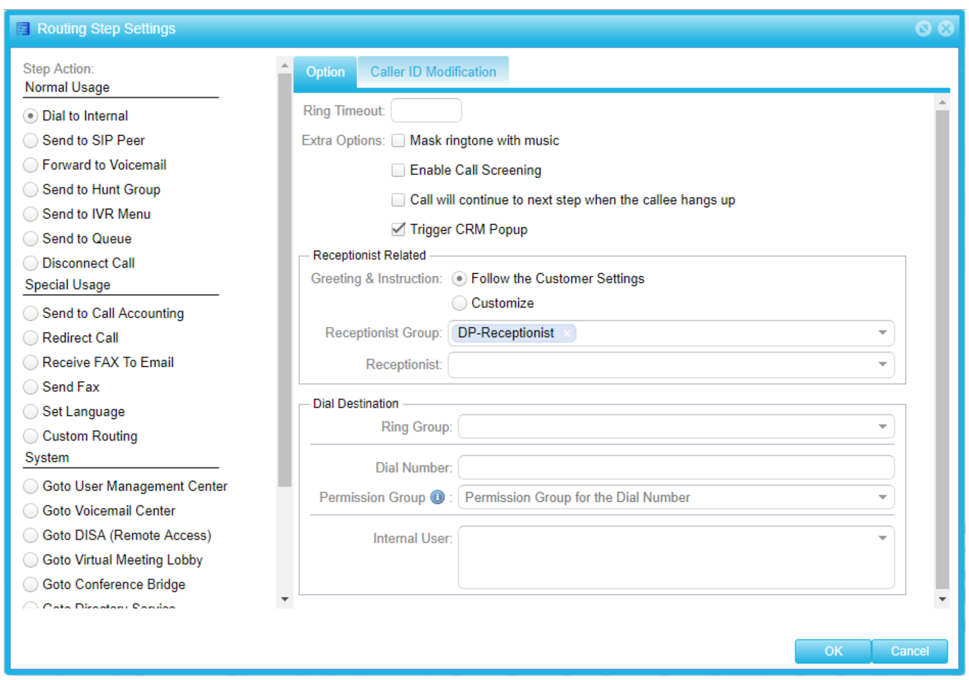
1. Click frSIP in switchboard.
2. Type General Line in the textbox.
3. Click **General Line**. The Number Settings dialog box opens.



4. **Number**: Enter a telephone number. Example: 6505825300
5. **Name**: Enter a name. Example: Deltapath US Operations.
6. **Description**: Optional field for additional information.
7. **Customer**: Click the dropdown arrow and select the customer that will be associated with the number.
8. **Context**: Select a context.
9. **Call Recording**: Select **Yes** or **No**.
   Note: You can only select Yes if you have the Call Recording module.
10. **IDD Account**: Click the dropdown arrow and select the IDD Account created when you setup the mailbox.
11. Click **Next**.
12. Click Ok.
13. **Status Mode**: Click the dropdown arrow and select **Advanced Mode** or **Simple Mode**. It is best practice to create an advanced schedule for the general line as a receptionist will not be available around the clock and typically won't be available 7 days a week.



14. Click **Add a new Number Status.**
15. **Name:** Enter a name. Example: Receptionist line or Ring Receptionist.
16. Click **Add Step.** The Routing Step Settings dialog box opens.
17. Select **Dial to Internal.**

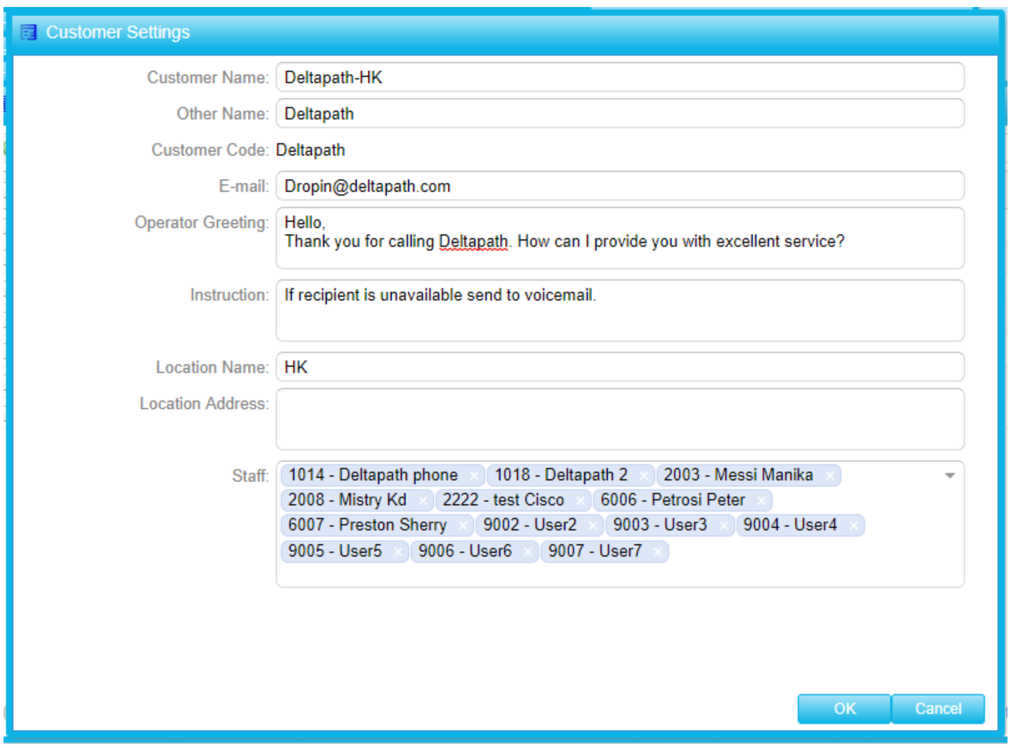


18. **Ring Timeout:** Enter a number in seconds. Example: 30
19. **Extra Option:** Select **Trigger CRM Popup**

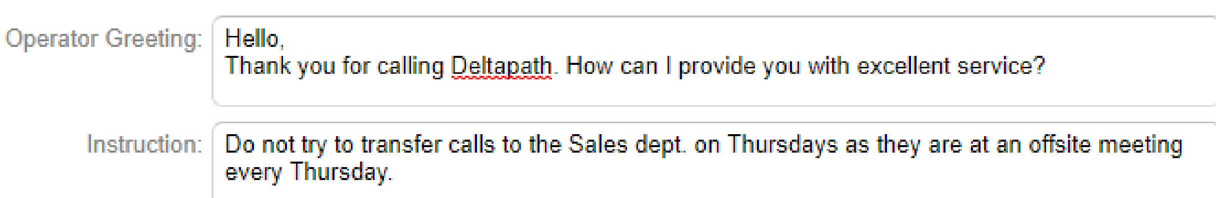
Note: A popup window opens in a receptionist's switchboard with every incoming call. This window allows receptionists to perform certain front desk operations like transferring calls and taking messages.

Receptionist Related

20. **Greeting & Instruction:** Select one
    - **Follow the Customer Settings:** Follow the customer's instructions that were created under **Customer** in the frSIP Switchboard. See the Customer settings dialog box below.
      Note: The Operator Greeting and instruction sections in Customer Settings is added to the receptionist dashboard when you select to follow the settings described under Customer.



- **Customize:** Customize Operator Greeting and add important notes as shown below.

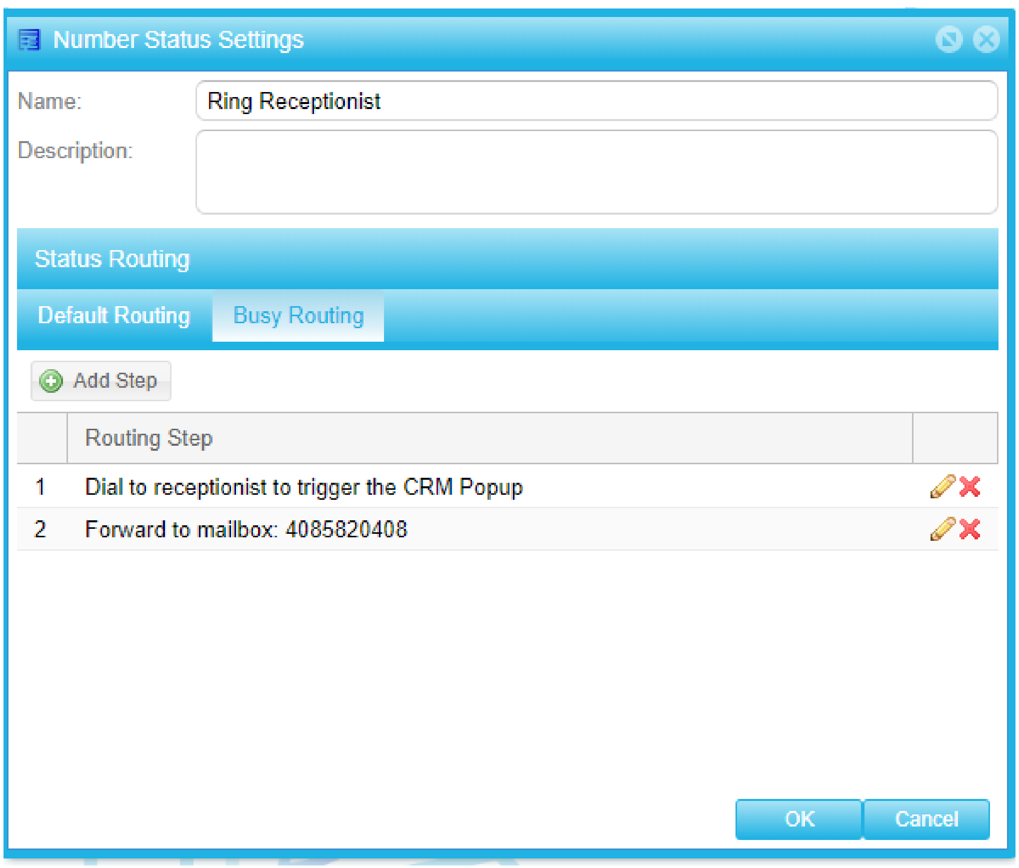


21. **Receptionist Group**: Click the dropdown arrow and select a receptionist group if you created one. See Receptionist Group.
22. **Receptionist**: Click the dropdown arrow and select the receptionist that calls will be routed to.
    Note: This is an alternative to choosing a receptionist group.
23. Click OK.

Add Another Routing Step

A receptionist may be on the phone when a call comes in or temporarily away from the phone. And, a receptionist may not be available on weekends to answer calls. As a result, it is best practice to add another routing step such as sending calls to voicemail.

24. Click **Add Step**. The Routing Step Settings dialog box opens.
25. Select **Forward to Voicemail.**
26. **Mailbox**: Click the dropdown arrow and select the mailbox you created to send calls to.
27. **Greetings**: Click the dropdown arrow and select a greeting.
    For more information on the different types of greetings, consult the section titled, **Greetings Management** in the frSIP UC User Guide.
28. Click OK.

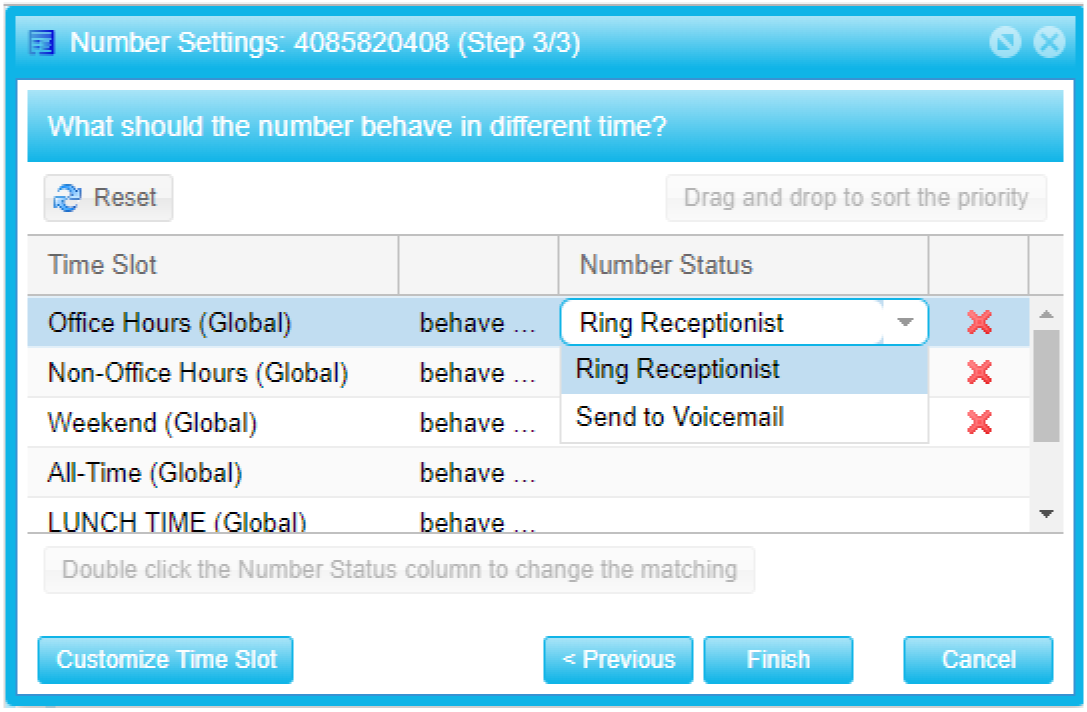


29. Click OK.
30. Click OK.

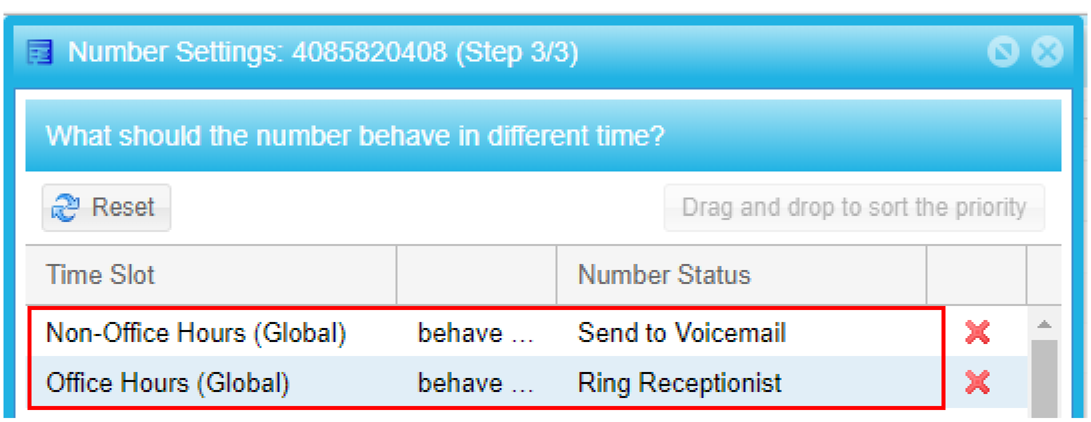
31. Click **Next**.

Organize the Priority of the Timeslots and arrange a Number Status

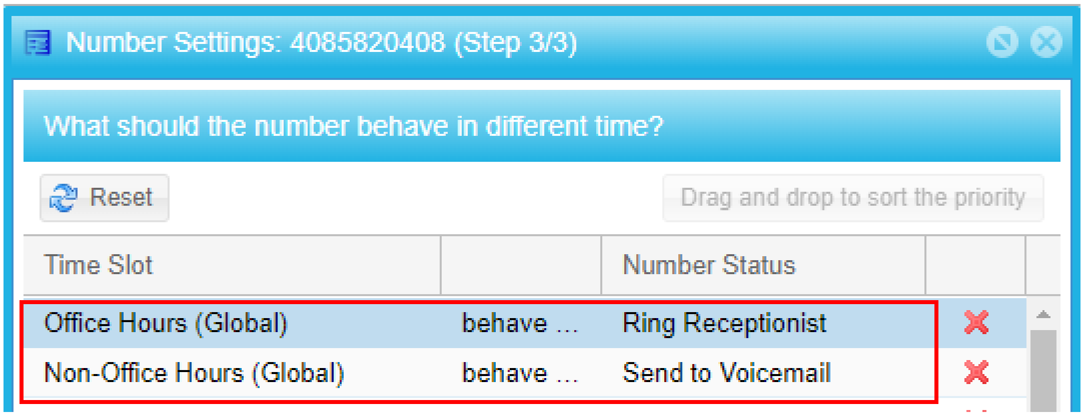
32. Click in the **Number Status** column in the row with the timeslot you want to use.
33. Select the Number Status you want to link with a timeslot.



34. Repeat step above until all number statuses and timeslots are linked.
35. Arrange the timeslots based on when they will operate by clicking on a timeslot and dragging and dropping it into place. For example, in the screenshot below you want the timeslot called Office Hours (Global) to appear before the timeslot called, Non-Office Hours (Global).



36. Click on a timeslot and drag up or down to reorganize.



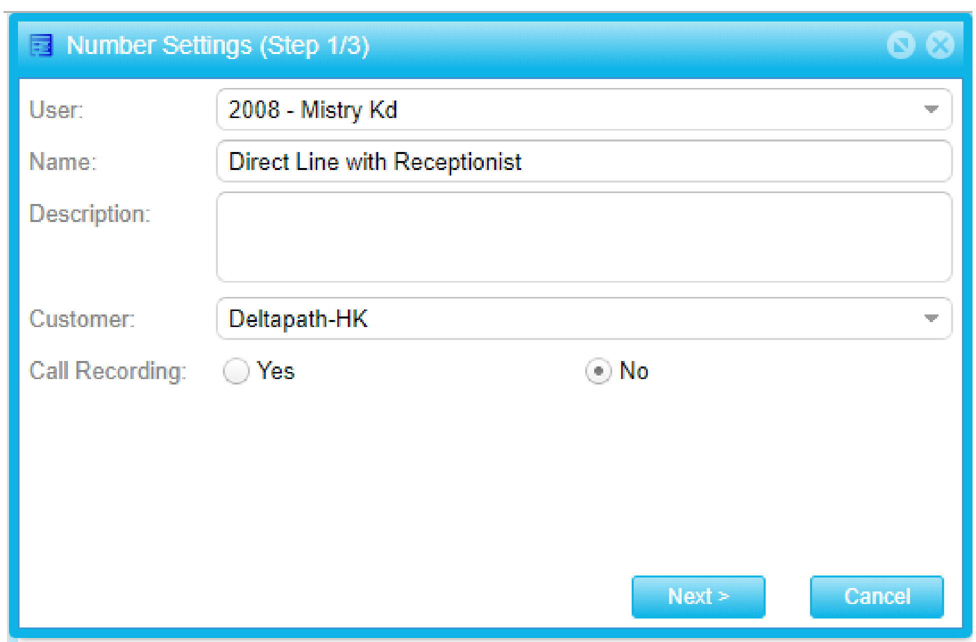
37. Click **Finish**.
38. Click OK.

12 General Line with Extension

Peter Petrosi is part of the Deltapath HK team. Peter wants his direct line to be answered by a receptionist during business hours. This is different from a general line where a receptionist or receptionist team answers calls for an entire company. Callers such as Peter's clients will first be greeted by a receptionist who has a customized greeting prepared such as the following: Deltapath, Mr. Petrosi's office. This is Jennifer speaking. How can I help you?

The steps to setup a general line with extension are the same as the steps for setting up a general line with the exception of the first number setting.

1. Click frSIP in switchboard.
2. Type General Line in the textbox.
3. Click **General Line**.
4. Click **Add General Line** and then select **Add General Line with Extension**.



5. **User**: Click the dropdown arrow and select the user.
   Note: If the user has not been created and you require assistance, see **Add Users** *in the frSIP UC Administrator Guide.*
6. **Name**: Enter a name. Example: Direct line between 2008 and Receptionist.
39. **Description**: Optional field for additional information.
7. **Customer**: Click the dropdown arrow and select a customer.
8. **Call Recording**: Select Yes or No.
9. Click **Next**.
10. Click OK. The number has been created successfully.
11. Repeat the steps in the General Line section beginning at step 13, Status Mode, to complete setup of a general line with extension.

13 Phonebook and Billing

Receptionists are often asked to perform a range of duties including making restaurant reservations, booking hotels, and ordering supplies. As a result, receptionists need to bill the companies for any call charges that may be incurred. This process has many advantages: o

1. The caller ID of the customer is shown instead of the Serviced Office company's Caller ID.
2. It allows receptionists to speak on their own phones, but conveniently charge the call to the customer.

In the example below, Scott Stoltey Ltd. asked the receptionist to call the High Line hotel in New York to confirm they received the changes to the menu for the company's upcoming event. The receptionist performs the following steps:

1. Click the **Phonebook** in the sidebar of the switchboard.
2. Enter the phone number for the High Line Hotel in the phonebook field. Example: 2129293888
3. Click the words, **Bill to…**
4. Click the dropdown arrow and scroll to the person you want to bill the phone charges to, such as Scott Stoltey.
5. Select the person from the list.

6. Click Enter.
7. Click the green phone icon to make a call.
   The call is billed to Scott Stoltey.