AGILITY VOICE

USER GUIDE

V2.2023

This document is meant to help users familiarize themselves with the use of The AgilityVOICE web portal and the AgilityVOICE provided Yealink phones. As always, Agility is readily available to assist with issues relating to the use or configuration of AgilityVOICE services. Feel free to call (217) 391-9290, option 1 or email support@agcomtech.com with any support needs, and a technician will be happy to assist you.

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AgilityVOICE Portal

The AgilityVOICE portal is a web-based resource that allows you to manage your phone directly from your computer. This is a completely optional feature, and most features present on the AgilityVOICE portal can also be managed with dial codes on the phone, which will be covered later in the document. So, if you are the type of person who just wants their phone to work and not have to login to a website to use it then that is absolutely fine, and your experience with AgilityVOICE will not be negatively affected. That being said, we at Agility feel it important to inform all of our customers of the options they have available to them.

Login

To login to the AgilityVOICE web portal you will navigate to your company's unique domain which will be formatted as https://<company-code>.hostedtelecom.net. Your technician should have provided this on the day of install to their point of contact. Once you have loaded the web page, you will see the AgilityVOICE login page.

From here, you will need to enter your login which for all new users, will be their extensions and the password provided to them by Agility. We will cover how to change your password later in this guide. If you have lost your password, please email support@agcomtech.com, and we will be happy to assist you in resetting your password.

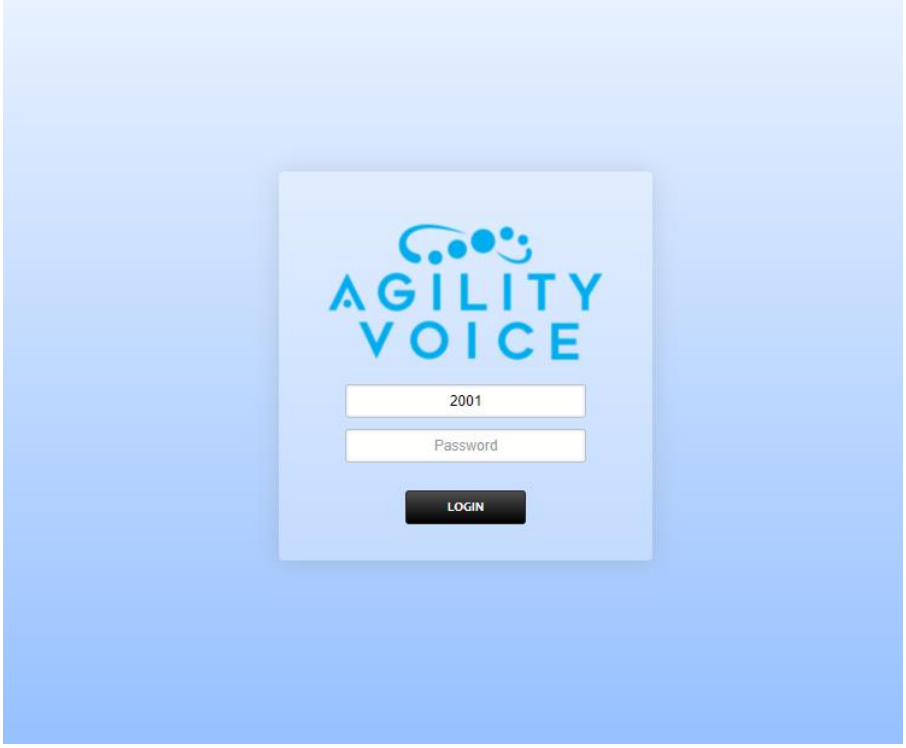


Fig 1.1

The Dashboard

Once logged in to your AgilityVOICE portal, you will be greeted with the dashboard. From here, you will be able to view all your missed calls, recent calls, and voicemails as well as manage call routing for your extension.

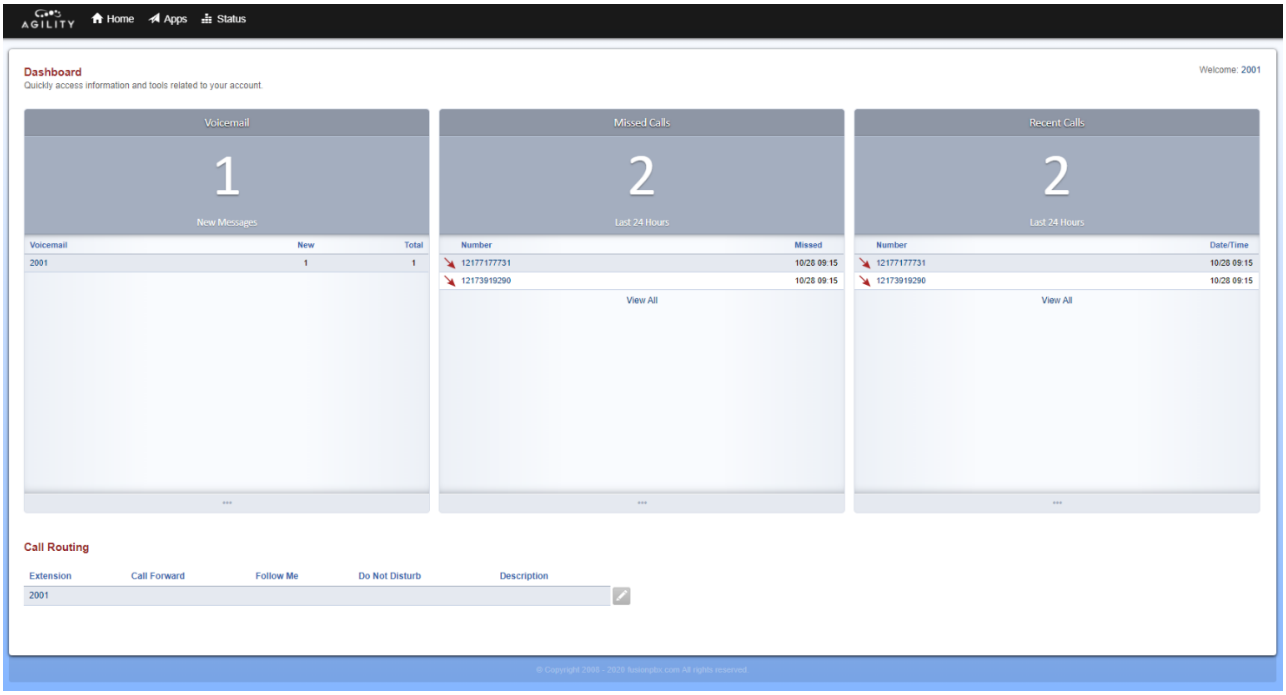


Fig 2.1

Voicemail

The *Voicemail* module lists any voicemail boxes to which your user account is attached. In this example, user 2001 only has their own mailbox and no others. The module is also showing one new voicemail and the total voicemails you have. Voicemails will be saved in the system for 90 days and then will be automatically deleted.

Missed Calls and Recent Calls

From the *Missed Calls* and *Recent Calls* modules, you can view all your missed calls, and if you click the phone number here it will place the call on your phone.

This symbol is an answered inbound call

This symbol is and outbound call you placed

This symbol is a missed inbound call

Call Routing

The *Call Routing* module allows you to see what your current routing settings are for your extension and clicking this will take you to the *Call Routing* page.

Account Settings

Under Home > Account Settings along the top menu bar you can edit you user account.

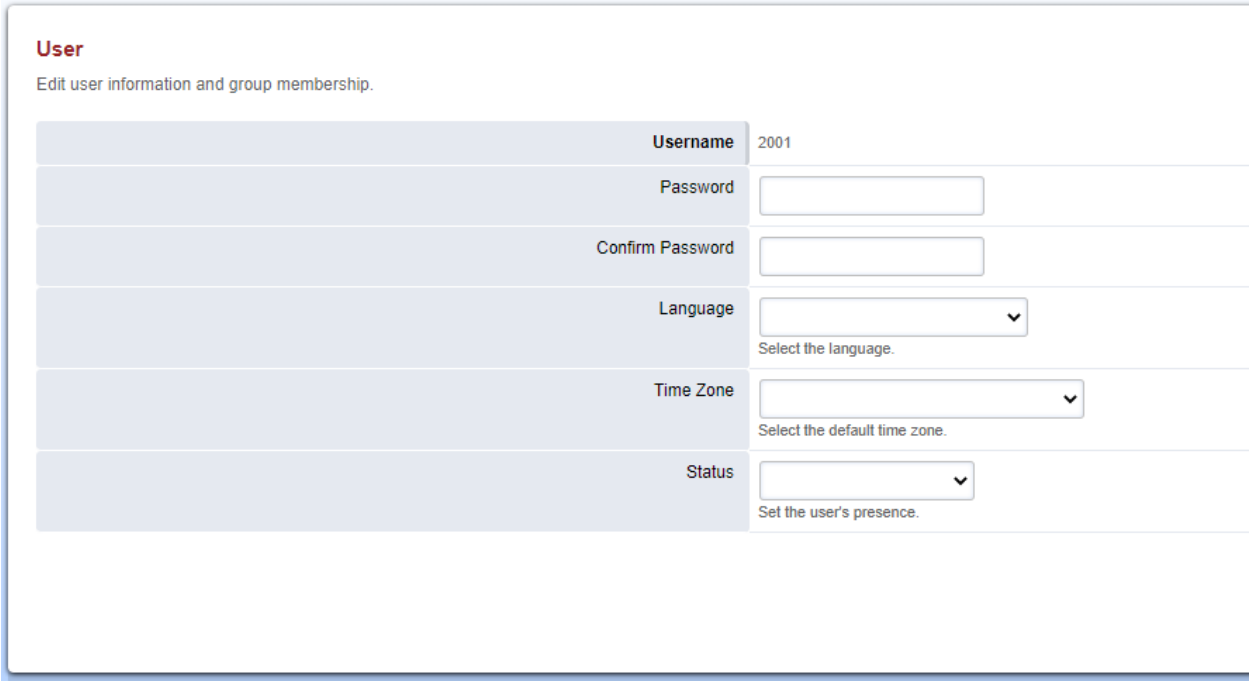


Fig 3.1

The two settings of note here are the *Password* fields where you can change your password. Note that passwords requires at least one number, one capital, one lower case, one special character, and must be at least ten characters long. The second field of note is *Status* where you can manage your status for call queues if your company is utilizing that feature.

Voicemail Box

To get to your voicemail box, click your extension from the dashboard.

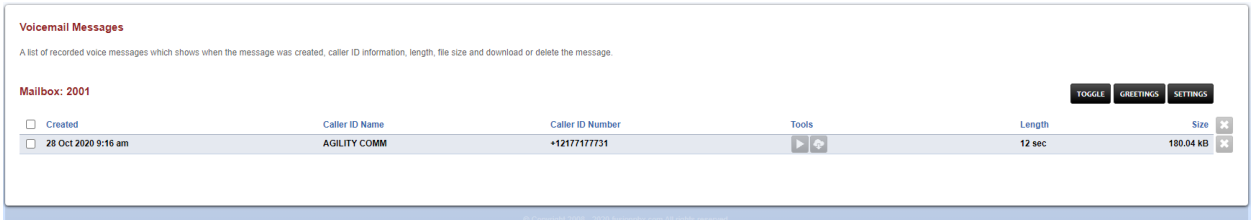


Fig 4.1

From here, messages can be played, downloaded, and deleted. Messages that have not yet been listened to will appear bold, whereas saved messages will not. You can toggle the status of a message by checking the checkbox next to that message and then clicking the *Toggle* button.

Greetings

Pressing the *Greetings* button will take you to the *Greeting* page where you can manage your voicemail greetings.

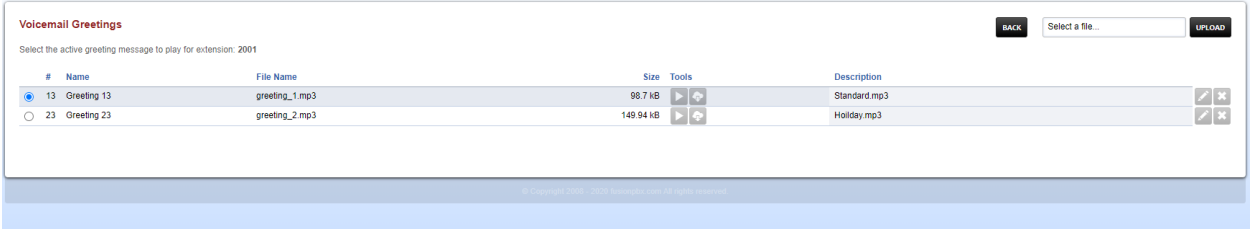


Fig 4.2

Voicemail greetings are the messages the caller hears when they get your voicemail. Here you can see I have two different greetings for my voicemail, one for a standard “sorry I missed your call” and one for holidays or perhaps vacation. These can be toggled by clicking the radial button. In the case of *fig 4.2,* the standard voicemail greeting is active. Greetings can either be recorded and uploaded to this page from your computer by clicking the select file field and then clicking upload, or they can be recorded on the phone itself. Clicking will allow you to change the name and the description of the greeting. Clicking back will take you back to the *Voicemail* screen.

Voicemail Settings

Now back in voicemails, we will click *Settings* which will allow us to edit settings of our voicemail box.

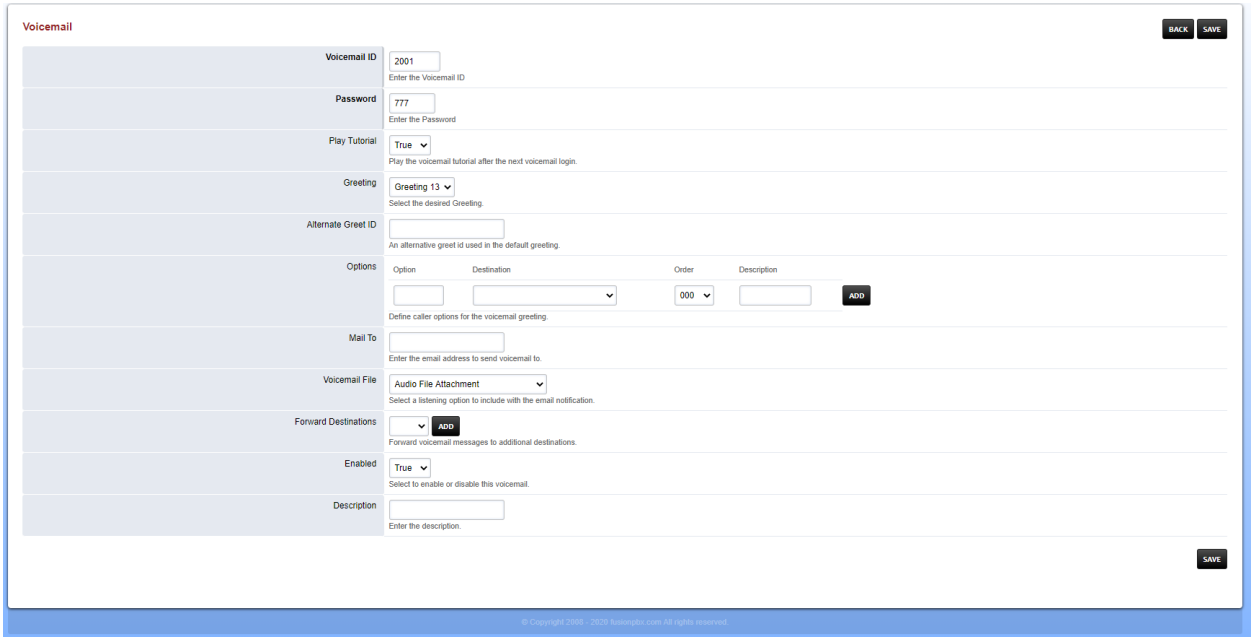


Fig 4.3

Voicemail ID, to avoid confusion should be left alone. The *Password* field allows you to set a passcode to your voicemail box which should be utilized. The *Play Tutorial* field, if set to true, will take you through setting up your name for The Dial by Directory feature, as well as setting up your first voicemail greeting. This should be done to ensure these features get configured. Additionally, you can toggle your current greeting from this page. The *Options* field allows you to setup dial options in your voicemail box. An example of this would be if you are leaving for vacation, and you want Bob to be available for your clients while you are gone, you can record a greeting saying something like "Sorry I missed your call. I am away on vacation. To talk to someone immediately press 1 now, otherwise leave a message after the beep, and I will return your call as soon as I can." Then you can put 1 in the *Option* Field, select Bob's extension from the *Destination* drop down, and finally click *ADD*. Doing this has added the ability to press 1 while your voicemail greeting is playing to be transferred to Bob's extension.

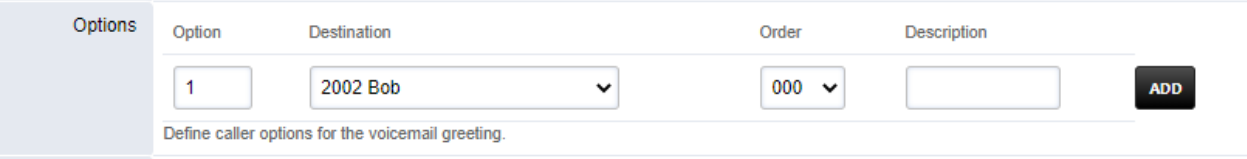


fig 4.4

Mail To allows you to define an email address to send voicemails to. The *Voicemail File* field works in conjunction with the *Mail To* field. It defines in what format the voicemail will be emailed to you.

Each of these options has their benefits. The Audio File Attachment will send an attached audio file to your email. This is the method that requires the least effort, however, it will not clear the

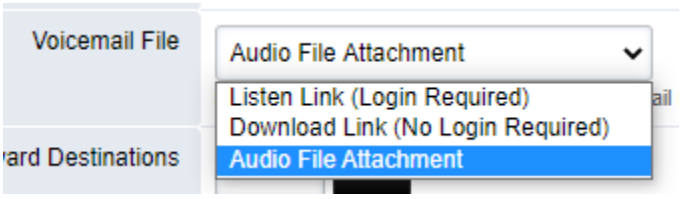


Fig 4.5

voicemail pop up and flashing LED on your phone. The Download Link will let you download the file from your web browser, and this will allow you to save your voicemails somewhere on your PC. This will also remove the voicemail pop up from your phone. The Listen Link takes you to the AgilityVOICE portal and asks you to login. You can then listen to it without having to download it, and it will also clear the voicemail pop up on your phone. *Forward Destinations* will allow you to forward your voicemail to another extension.

Call Detail Records

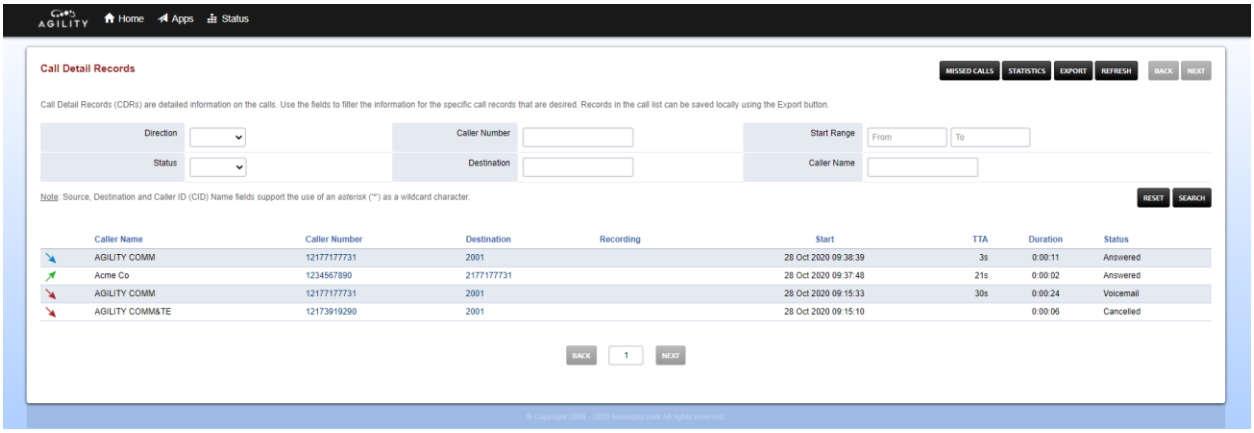


Fig 5.1

This page will show you all the calls for your extension. Like the Recent and Missed Calls module on the dashboard, if you click the telephone number, a call will be placed on your phone to that number. You can sort by missed calls by clicking the *Missed Calls* button, or you can define a search in the search fields. Press the *Reset* button to clear the filters. Export will allow you to export your current list of calls to a .csv or a .pdf file.

Call Routing

The *Call Routing* page will give you options on where to send your call and when to do so.

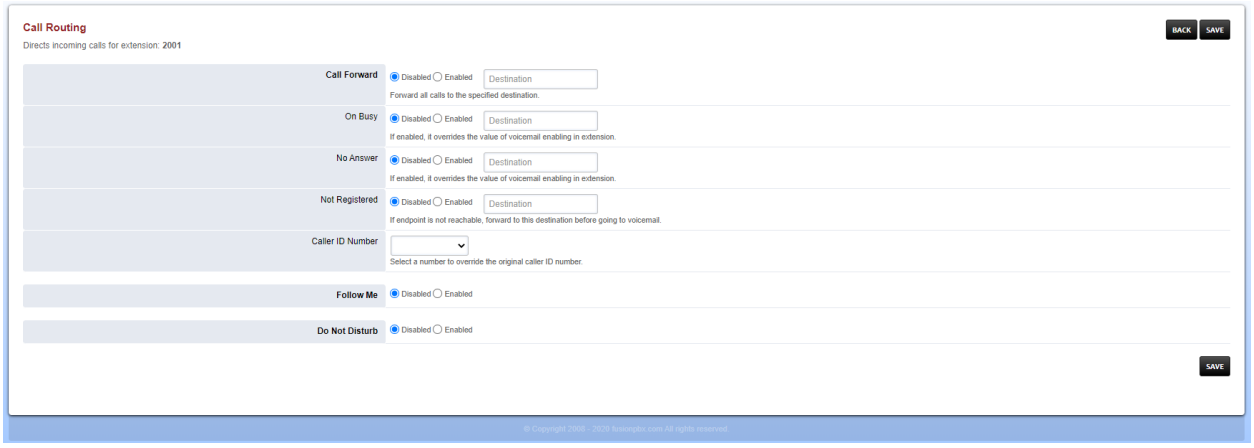


Fig 6.1

Call Forwarding

This option will forward all your calls to the destination specified. This could be another extension like Bob's 2002 or an external phone number like your cell phone.

On Busy

On Busy will only forward a call if your phone is busy.

No Answer

This will override your voicemail option and forward your calls if you do not answer the phone.

Not Registered

This defines the behavior if your phone is not registered to the AgilityVOICE servers. An example would be if your office lost internet connection, your phone would not be able to connect with our servers, and the calls would be routed to the destination specified.

Follow Me

Follow Me will ring any extension listed as well as your phone. You can use the delay and timeout feature to control when each phone will ring.

Do Not Disturb

This option sets your phone to do not disturb.

Fax Servers

The *Fax Servers* page is from where you will send digital faxes. You will also be able to view your inbound and sent faxes from this page.

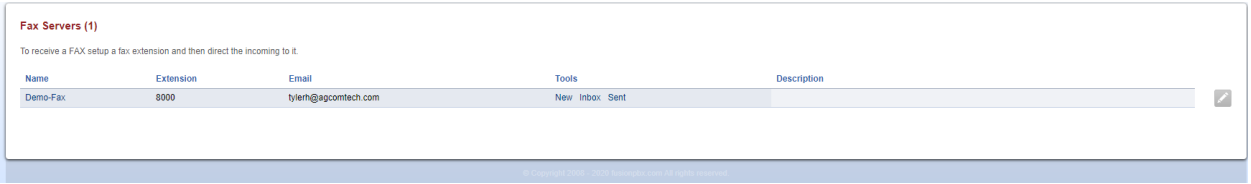
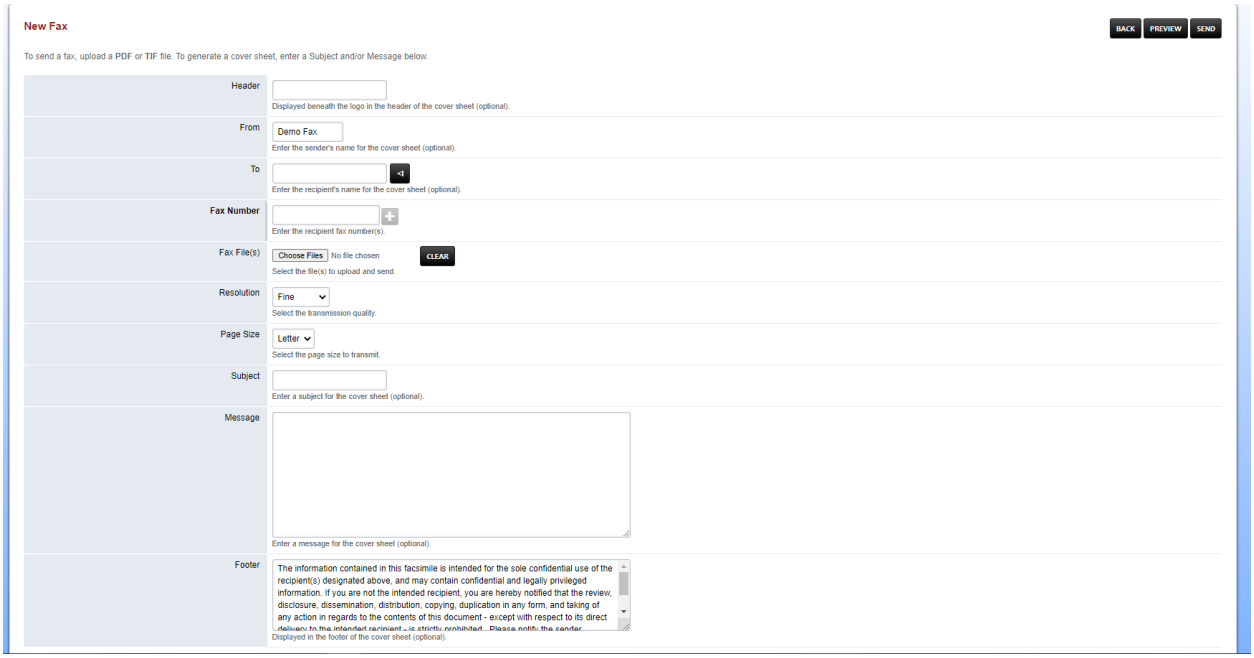


Fig 7.1

Clicking on *Sent* allows you to view all your sent faxes. From here, you can view or download the fax from the webpage. The *Inbox* page is the same as the *Sent* page. On both pages, you can also delete faxe. Please note the faxes will only be stored in the system for 180 days so for long term storage, please download the fax to your computer. The fax server can also be configured to send all inbound faxes to one or multiple email addresses.

New Faxes

Clicking *New* will take you to the *New Fax* page. Here, you can upload a PDF or a TIF file to be sent as a fax. There are two required fields to send a fax. First is the *Fax Number*, which is the number you are sending the fax to. The second is *Fax File(s)*, which is where you upload the PDF or TIF file to be faxed. Entering a Subject or a Message will generate a fax cover page which will display all the optional fields. Once your fields are filled in you can press the *Preview* button to download a copy of the fax to review before sending, or just click *Send*. You will see the fax appear in sent once it sends successfully, as well as a success email will be sent to email addresses set in the fax server. This can take up to 5 minutes depending on the receiving parties fax machine.


New Fax
BACK
PREVIEW
SEND
To send a fax, upload a PDF or TIF file. To generate a cover sheet, enter a Subject and/or Message below.
Header
Displayed beneath the logo in the header of the cover sheet (optional).
From
Demo Fax
Enter the sender's name for the cover sheet (optional).
To
Enter the recipient's name for the cover sheet (optional).
Fax Number
Enter the recipient fax number(s).
Fax File(s)
Choose Files
No file chosen
CLEAR
Select the file(s) to upload and send.
Resolution
Fine
Select the transmission quality.
Page Size
Letter
Select the page size to transmit.
Subject
Enter a subject for the cover sheet (optional).
Message
Enter a message for the cover sheet (optional).
Footer
The information contained in this facsimile is intended for the sole confidential use of the recipient(s) designated above, and may contain confidential and legally privileged information. If you are not the intended recipient, you are hereby notified that the review, disclosure, dissemination, distribution, copying, duplication in any form, and taking of any action in regards to the contents of this document - except with respect to its direct
Displayed in the footer of the cover sheet (optional).

Yealink Phone Operation

AgilityVOICE officially supports Yealink T2, T4, and T5 series desktop phones, as well as the Yealink CP960 conference phones and the Yealink W60P cordless base. We will be reviewing the operation of the desk phones in this guide. Here is a link to the user guides of the desk phones if you would like more detail on things not covered here. However, we will cover the most common uses in this guide.

https://agcomtech.com/agility-how-to/

Answering a Call

There are two ways to answer an incoming call: either by picking up the handset or by pressing the button. Additionally, if you are using a headset press the to answer the call on your headset.

Placing a Call

Simply dialing your phone and pressing send will initiate a call. Note that there is a dialing timeout which will also initiate the call.

Voicemail

Pressing the will call into your voicemail box. You will be asked for a voicemail pin followed by # (Default PIN is 777). You can also access your voicemail box by dialing *97. Once inside your voicemail box, you will be told how many new and saved messages you have. The voicemail box will explain the options for each menu inside your voicemail.

Voicemail Greetings

Creating your voicemail greeting is done by pressing 5 and then following the instructions. You will be asked to select a number 1 – 9 before recording your greeting. This allows you to record up to 9 different voicemail greetings which can be selected from the voicemail box advanced menu.

Checking Other Voicemail Box

If you need to check a different voicemail box, you can dial *98. You will be prompted to enter the voicemail ID which is the extension of the voicemail you want to check and then the passcode for the voicemail box.

Call Forwarding

Dialing *72 will place your phone on forward. If you have previously set a destination in the AgilityVOICE portal under *Call Routing*, seen in *Fig 8.1*,

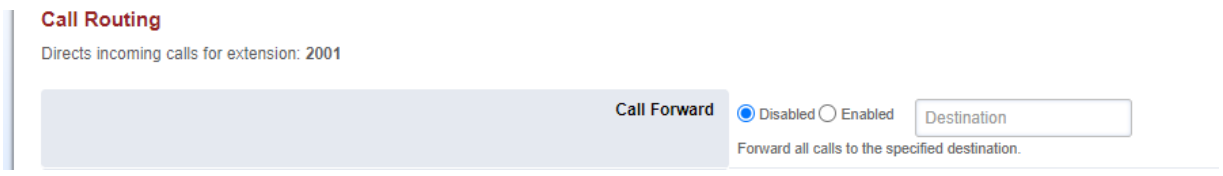


Fig 8.1

your calls will be automatically forwarded to whatever destination is in that field. If that field is empty the phone will ask you to dial the number to which you would like to forward your calls. Dialing *73 will disable call forwarding.

Transferring Calls

To transfer, first press the transfer button while in a call.

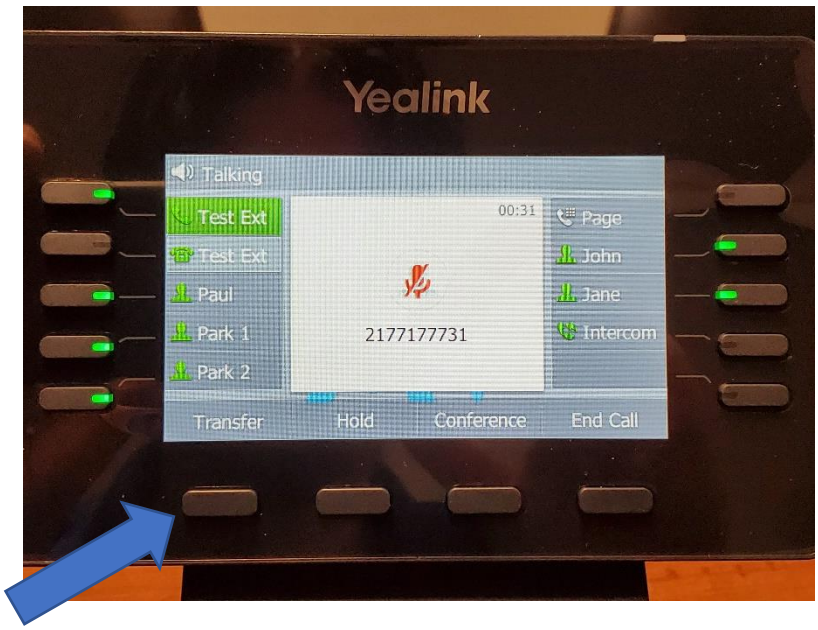


Fig 9.1

Note the bottom row of buttons changes depending on the context of the phone, meaning the buttons on *Fig 9.1* will not be present unless in a call. After pressing the transfer button, you should dial the number of where you want to transfer the call to.

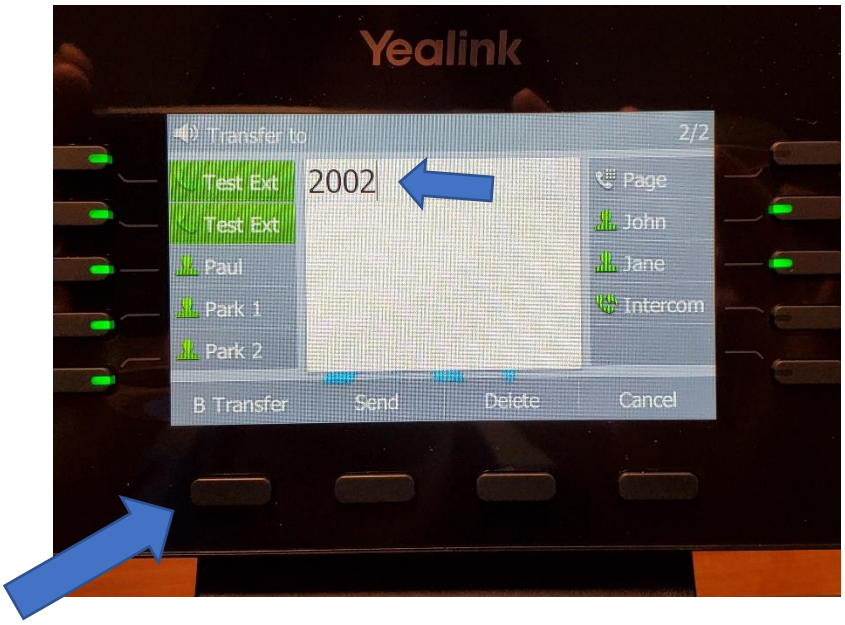


Fig 9.2

Once you have dialed the destination number, press B. Transfer. After this is done, your call will end, and the call will be transferred.

Transfer to Someone's Voicemail

To transfer to someone's voicemail, you will transfer as illustrated above and use *99[Ext]. An example would be hit transfer then dial *992002 then press B. Transfer. This will transfer the call to extension 2002's voicemail.

BLFs (Presence)

BLF stands for Busy Lamp Field; these are the buttons that have a green light next to a person's name. The light will remain green while the user is not on a call. It will flash red if their phone is ringing, and it will be solid red if they are on the phone.

Fig 10.1

Intercept Call

To intercept a call that is ringing on another extension, dial **[ext]. You can also use you BLF keys. An example would be dial ** and then press the name of the person's phone who is ringing.

Dial by Directory

Use *411 to enter the dial by directory menu. This can also be setup as part of your call flow for people calling in from the outside.

Park a Call

To park a call simply press the Park button while on a call. This will cause the park button to flash red for the entire office allowing anyone to answer the call. This is like a global hold that the entire office can see.