

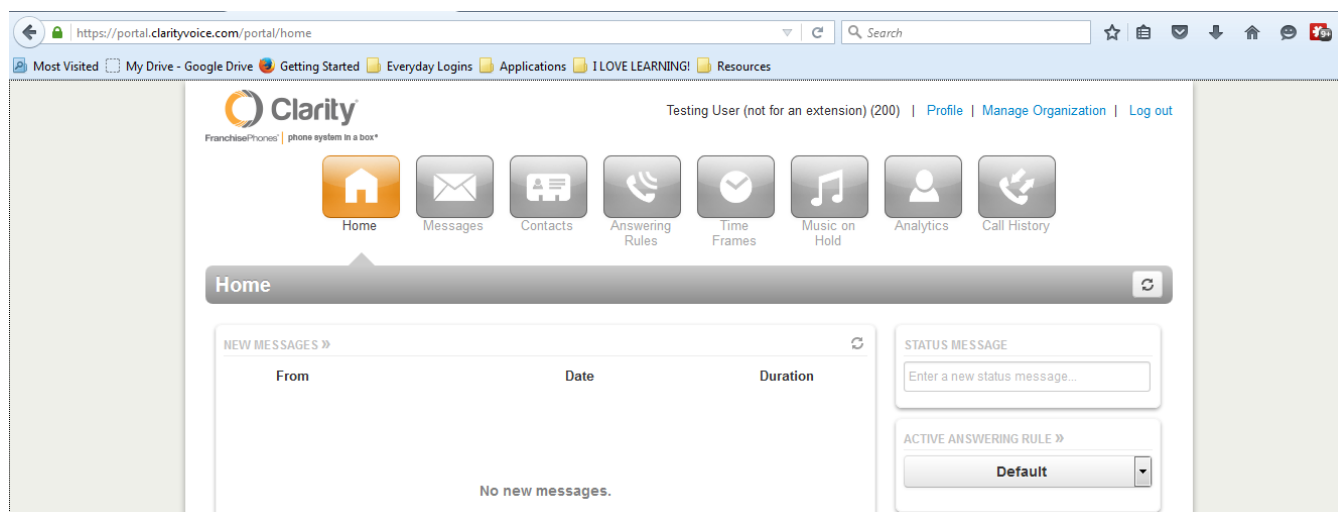
Administrator Dashboard Guide

This guide includes information on the following:

- Logging into the portal
- Changing login/voicemail pin
- Personal portal vs Administrative Portal
- Accessing Voicemails
- Viewing Call History
- Setting up Answering Rules (simultaneously ring)
- Adding contacts in the portal
- Using “Click-to-Call” for outbound calls
- Recording Auto Attendant Greeting

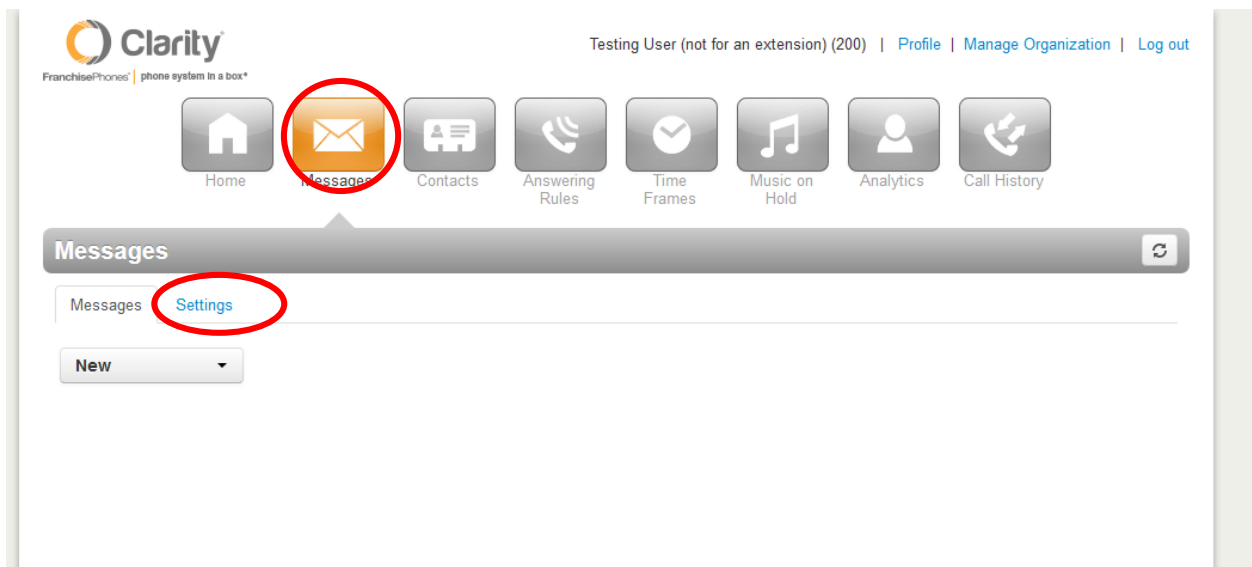
Logging into the Portal

1. Navigate to portal.clarityvoice.com
2. **Login name:** xxx@domainnamegoeshere (use your extension #)
3. **Password:** 4321 (unless you've changed it)



Personal Extension

1. When you first log in, you are viewing your “personal” extension and not the information for the entire company.
2. Messages tab: This is where you will be able to record your greeting, as well as play, delete, and transfer voicemails.
 - a. To record your voicemail from the portal:
 - b. Select the “**Messages**” button at the top of the screen
 - c. Click on “**Settings**” tab
 - d. In the Greetings section, hover over the icon of a speaker, you will see the word “**Manage**” appear (a new window will open)
 - e. Select the “**Record**” option
 - f. Your extension will populate in the “call me at” field (NOTE: you can also have the portal call you at your cell phone or other 10-digit number such as your cell)
 - g. Enter a Greeting Name and click “**Call**”
 - h. Your phone will ring, and you will answer and record.



Greetings

Voicemail Greeting



Recorded Name



Manage Greetings



New Greeting

☐ Upload

☒ Record

Call me at

200

Greeting Name

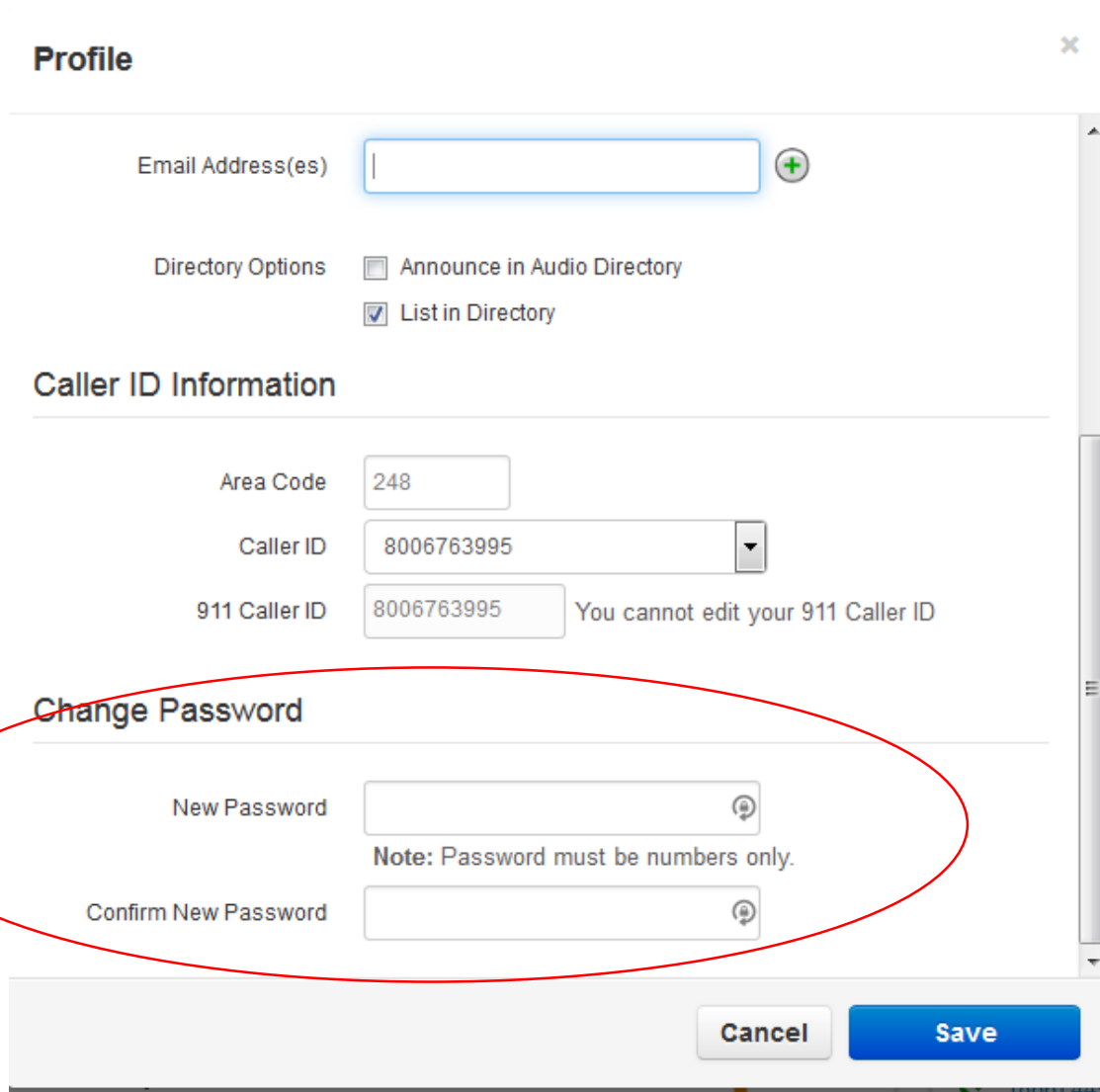
personal voicemail

Call

3. To record your voicemail from the physical phone:
 - a. Press the **envelope** button on the phone or dial *97
 - b. You will be prompted to enter your access code. The default is 4321, but feel free to change the code.
 - c. You will choose options 3 and 4 in order to record your name and greeting.

Changing Voicemail/Login Pin

1. Once you've logged in, click on "Profile" in the top right corner
2. A box will pop up such as the one below



Profile [X]

Email Address(es) [] (+)

Directory Options
☐ Announce in Audio Directory
☒ List in Directory

Caller ID Information

Area Code [248]
Caller ID [8006763995]
911 Caller ID [8006763995] You cannot edit your 911 Caller ID

Change Password

New Password [] ⓘ
Note: Password must be numbers only.
Confirm New Password [] ⓘ

[Cancel] [Save]

3. Enter in the new four-digit pin
4. Save

5. Logout, then log back in using new pin

Adding Contacts to Portal

1. Click on **"Contacts"**
2. Select the red button labeled **"Add Contact"**
3. Enter in the contact information and for the number, make sure it's in the following format: 1xxxxxxxxxx (no dashes, no spaces)
4. If you have a contact list you prefer to upload, the directions are attached to the email.
5. The contact list in portal does not sync to your phone. If you'd like to add specific contacts to the phone, do the following:
 - a) Click on the Home button
 - b) Scroll to the Directories icon
 - c) Press the center button to press enter
 - d) Click on **"Contact Directory"**
 - e) Click **"Add"**
 - f) Enter in contact information and press save

Add Contact



First Name

Last Name

Work number

Mobile number

Home number

Email

Cancel

Save

Using “Click-to-Call” for outbound calls

- You have the ability to make outbound calls from your contact list, dial pad, or even your call history.
1. To make outbound calls from your contact list:
 - a. Click on the “Contacts” tab on the top of your screen
 - b. Next to each contact, is the link with their telephone number. Press on the number and a small box will pop up with the words “Call” and “Cancel”
 - c. Press “Call” and your office phone will begin to ring.
 - d. Answer your phone and the call will immediately begin ringing to your contact.

● Rachel Irene	217	n/a
● Helene Victor	225	n/a
● Franchise support virtual vm	581	
● Franchise development virtual vm	582	
● Clayton Wise		n/a
Clarity Support		

(800) 676-3995

Call

Cancel

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2. To make outbound calls from your call logs (inbound, outbound, or missed calls)
 - a. Click on the “Call History” tab on the top of your screen
 - b. In this list, you will see all of your recent calls in general. To sort by the type of call, click on the “Filters” button
 - c. Choose the date range you’re interested in, or leave it as is for today’s date
 - d. Select the drop down next to “Call Type” and choose one of the following:
 - Inbound (incoming calls)
 - Outbound (outgoing calls that you’ve made)
 - Missed (Calls that were missed/you did not answer the phone)
 - e. If you would like to call any of the numbers, just click on the blue link with the telephone number and press the green “Call” button
 - f. Your office phone will begin to ring.
 - g. Answer your phone and the call will immediately begin ringing to the chosen number.



2 Corporate Drive
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Southfield, MI 48076

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+1 248.327.4420 Fax

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Call Center Messages Answering Rules Analytics Contacts Time Frames Music on Hold Call History

Call History

Filters 2014-09-08 00:00 to 2014-09-11 23:00 Call Type: Inbound x Export

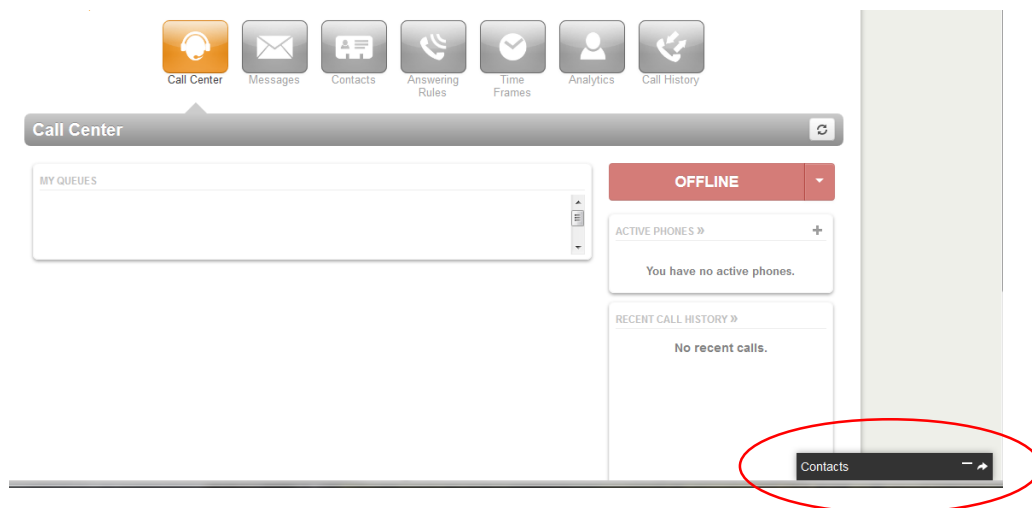
Number	Name	Date	Duration	Disposition	Reason
23	Abi Togunde	Today, 08:15	0:00		
(800) 676-3995		Today, 08:15	0:00		
(800) 676-3995		Today, 08:15	0:00		
Prompt-Retrieve	Abi Togunde	Today, 08:15	0:00		
(800) 676-3995		Today, 08:14	0:00		
(800) 676-3995		Today, 08:14	0:12		

(800) 676-3995

Call Cancel

To make outbound calls from the dial pad

- On the bottom of the screen you should see the black pop up “contact” list
- Click on the “Contacts” pop up list
- At the top of your list you will see your name. To the right of your name there is an icon of a phone
- Click on the phone icon
- A dial pad will pop up to the left of the contact list. Here you can type, paste, or dial any number and press “Call” afterwards.
- Once you press “Call”, the phone will ring your extension and you will need to answer. Once you answer, the call will be connected with the number you entered in the dial pad.





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Suite 250
Southfield, MI 48076

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☎ Make a Call

5555555555

✕

1

2
ABC

3
DEF

4
GHI

5
JKL

6
MNO

7
PQRS

8
TUV

9
WXYZ

*

0

#

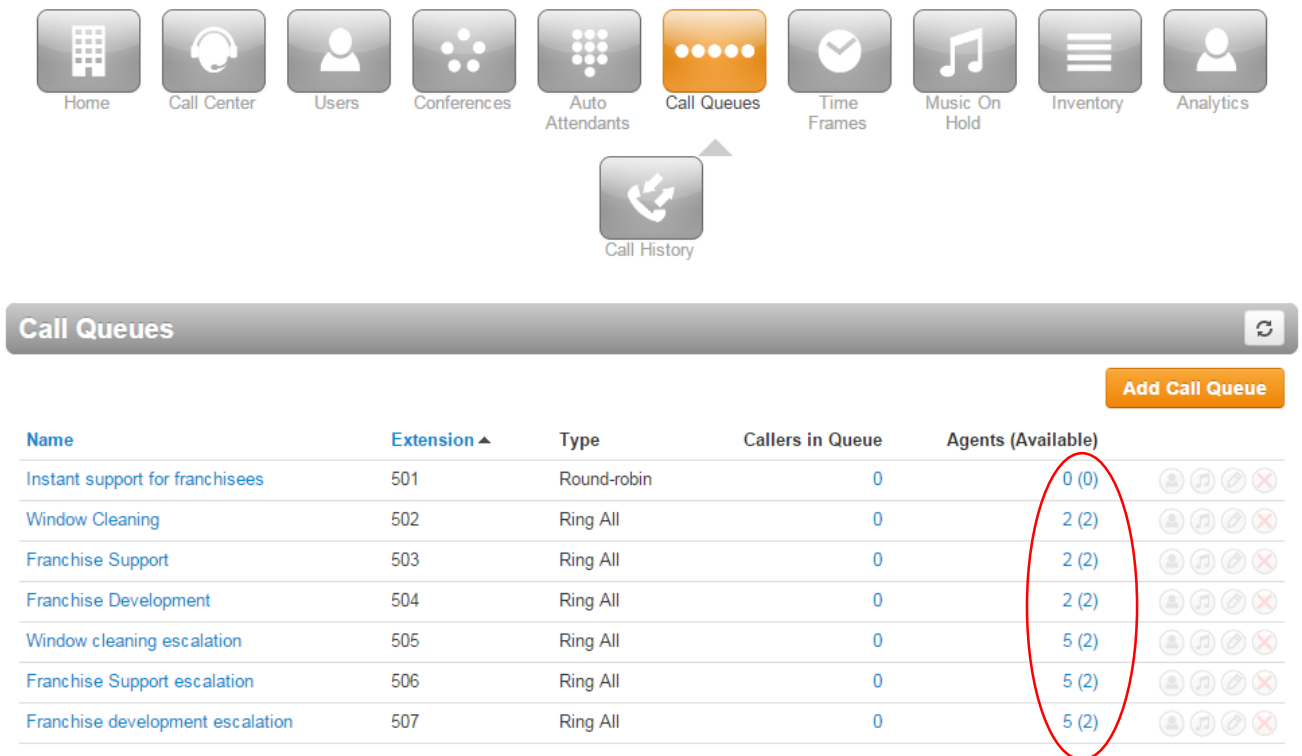
☎ Call

▼

Call queues

You can add/remove agents from call queues if certain agents do/do not need to receive phone calls.

- Click on the “Call queues”
- Hover to the right of the call queue you wish to make changes too.
- Click on the blue link under “Agents (Available”, and you will be able add/remove or edit an extension.



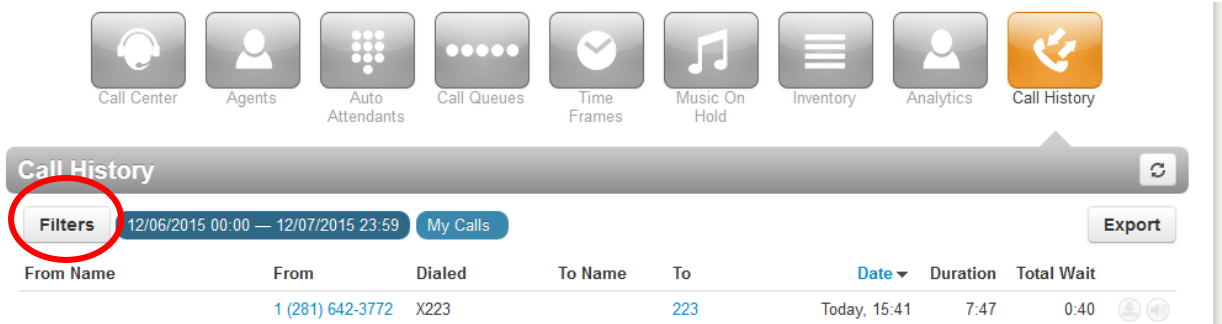
Name	Extension ▲	Type	Callers in Queue	Agents (Available)
Instant support for franchisees	501	Round-robin	0	0 (0)
Window Cleaning	502	Ring All	0	2 (2)
Franchise Support	503	Ring All	0	2 (2)
Franchise Development	504	Ring All	0	2 (2)
Window cleaning escalation	505	Ring All	0	5 (2)
Franchise Support escalation	506	Ring All	0	5 (2)
Franchise development escalation	507	Ring All	0	5 (2)

Auto Attendant Greeting

1. If you ever need to re-record your auto attendant, here are the directions:
2. Navigate to <https://portal.clarityvoice.com>
 - a. Login name: xxx@domainnamegoeshere
 - b. Password: 4321 (or whatever you may have changes your voicemail access code to)
3. Click on “Manage organization” in the top right corner
4. Click on the “Auto Attendants” button
5. Click on one of the following Auto Attendants:
6. Main AA
7. Home Office Daytime AA
8. Home Office After Hours AA
9. Under “Menu Prompt”, hover over the small button that looks to be a speaker. Click on it (“Manage audio”)
10. In the “Manage Audio” section, enter a description (e.g., “Main Greeting”)
11. Click the circle for “Record”
12. Enter your extension number (or you may enter a 10-digit cell phone number) and press the “Call” button at the bottom.
13. Your extension in the office will now ring (or your cell phone). Answer the call then proceed to record the greeting.
14. When you are finished recording, you can hang up the phone after following any prompts it gives you, then listen to the recording.

Call History

1. To view call logs, you can use the “filters” button to sort by date, type of call, dialed number, or called number.



From Name	From	Dialed	To Name	To	Date	Duration	Total Wait
	1 (281) 642-3772	X223		223	Today, 15:41	7:47	0:40



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Technical Assistance

- Please give our technical support department a call at 800-676-3995 with any questions, comments, or concerns regarding the phone system.
- Also, feel free to send us an email at: support@clarityvoice.com
- Our hours are Monday-Friday from 8 am – 9 pm EST.
- Thank you for being a valued customer!