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Welcome

# IVX Telephone System User Training

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Presented By:



**1-800-460-4100**

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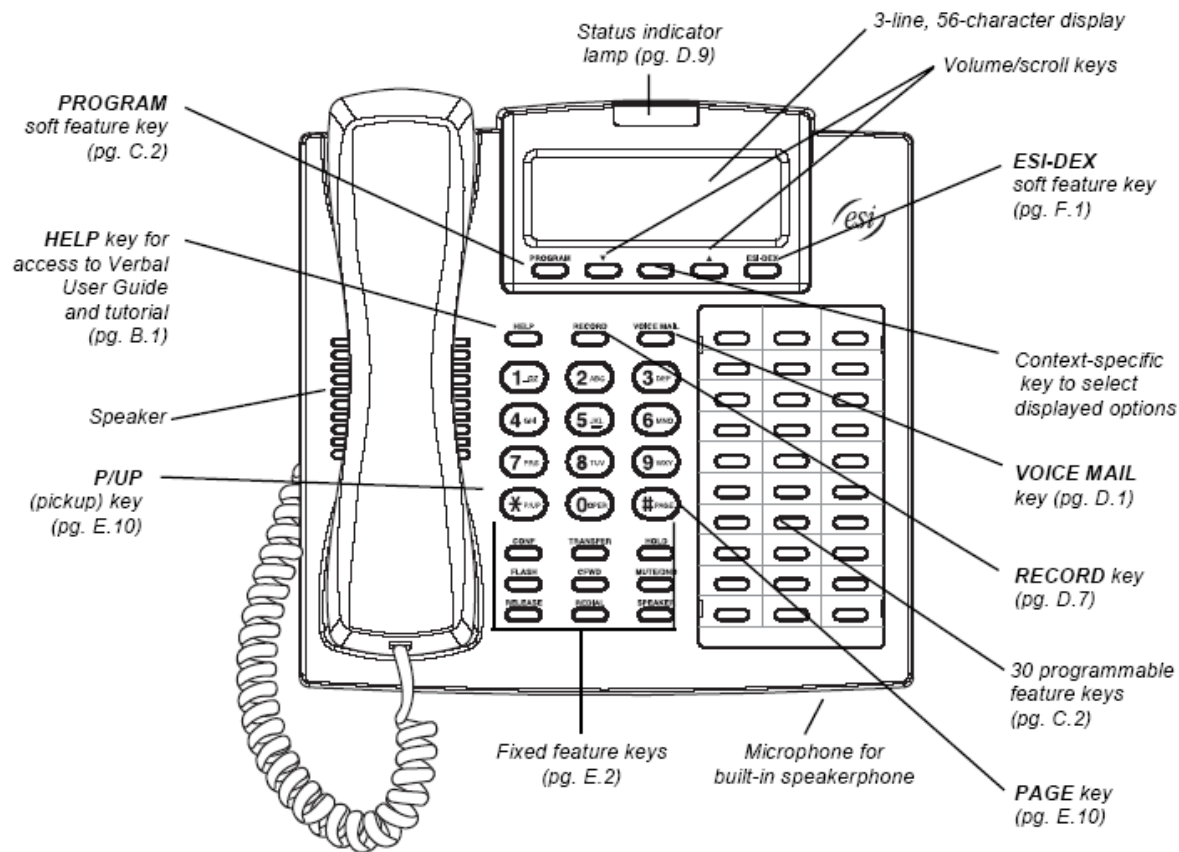


This presentation is narrated by  
Tom Cochran.

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## 48-Key Feature Phone

The **48-Key Feature Phone** has a variety of programmable and built-in features. It comes in four versions: Digital; TAPI; IP; and Remote IP. Additionally, it supports the optional 60-Key Expansion Console. All four versions of the 48-Key Feature Phone offer the same basic features which are described throughout this *User's Guide*. The 48-Key Feature Phone's built-in voice mail features and voice prompts make it easy to program and use.

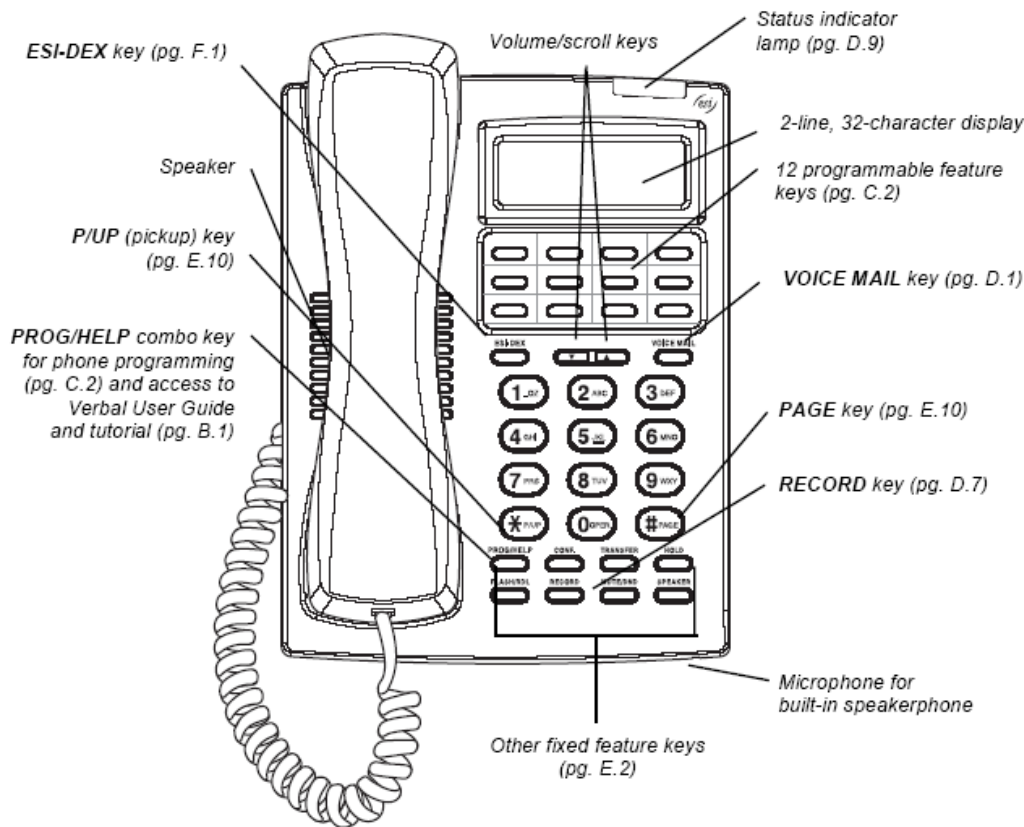


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## 24-Key Feature Phone

The **24-Key Feature Phone** has features similar to those of the 48-Key Feature Phone. However, the 24-Key Feature Phone is available only as a digital model and doesn't support TAPI, IP or the 60-Key Expansion Console. As is true for the 48-Key Feature Phone, the 24-Key Feature Phone's built-in voice mail features and voice prompts make it easy to program and use.



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# Fixed Keys

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## Fixed Keys

- **Voice Mail** - Enables retrieval of voice mail messages, memos, and recordings. Also enables sending memos to other extensions.
- **Record** - Enables recording of conversations, memos, and conference calls
- **Hold** - Places calls on hold and retrieves calls placed on hold.



# Fixed Keys

- **Mute/DND (Do not disturb)**
  - While engaged in a conversation pressing the **Mute** key disables the microphone in the handset or the speakerphone. The **Mute/DND** key blinks when mute is activated.
  - When the telephone set is not in use the **Mute/DND** places the extension into “do not disturb” mode, preventing the extension from ringing (outgoing calls are unaffected). Incoming calls will be immediately directed to Voice Mail. When in DND mode the **Mute/DND** key lights up solid amber and extension programmable key will light up amber on other extensions.
  - If **Mute/DND** is pressed while the extension is ringing, the call will be directed to Voice Mail and the extension will be placed in DND mode.

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## Fixed Keys

- **Speaker** - Activates and deactivates speakerphone.
- **Conf** - Enables conference calls. The maximum number in a conference call is four (me plus three).
- **Transfer** - Enables call transfer. Press **Transfer**, dial the desired user's three digit extension number, **Release**.



## Fixed Keys

- **Redial**  
When extension is idle, redials last number dialed.  
When listening to voice mail, redials Caller ID of party leaving voice mail.
- **Release**  
Terminates a call or other programming action.
- **CFWD**  
Call forward
- **Program key**  
Enters extension into programming mode for extension customization.



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# *Call Handling*

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# Making a call

- **Outside Calls**

Dial “9” then the number.

- **Intercom Calls**

Press the programmable extension key  
or dial the three digit extension number.

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## *To answer a call*

- *Lift the handset or*
- *Press the “Speaker” key.*

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## *To transfer a call*

- *Press the programmable soft key*  
*or*
- *Press “Transfer”, three digit extension number.*

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## To retrieve a call

- *To retrieve a call before the transfer is complete, press the “Flash” key.*

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- **To pick up a call**
- *To pick up a call ringing to another extension press \* followed by the programmable extension key.*

*(This could be helpful if you transferred a call to the wrong extension.)*



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## Voice Mail Transfer

- To transfer a call to voice mail press the “Voice Mail” key followed by the desired extension key or three digit extension number.

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## •Quiz

- How do you answer a call?*
- How do you transfer a call?*
- How do you pull a call back if the other extension cannot take the call?*
- If you hear another extension ringing, how can you answer it from your extension?*
  - How do you transfer a call directly to someone's voice mail?*



## Hold

- While on a call briefly press the **Hold** key
- Look at the display to see what line the call is holding on.



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## **Exclusive Hold**

While on a call continuously press the **Hold** key down until the display indicates the call is on exclusive hold.

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## To retrieve a call on hold

- Press the Hold key
- Dial the line number where the desired call is holding.

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## Paging

- All Phones and Speakers - #,0
- Zone Paging - #,1-9
- External Page Only  
Paging key or dial 199.



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## Quick Page

While on a call press the **Quick Page** key followed by the extension key.

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## •Quiz

- How do you place a call on hold?*
- When you put a call on hold where should your eyes be trained to look?*
- How do you take a call off of hold?*
  - How do you page someone?*
  - How do you quick page someone?*



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# Voice Mail Features

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# Personal Greetings

- Three personal greetings
- Record personal greetings by pressing the **Personal Greeting** key followed quickly by the **Record** key.
- Follow verbal instructions.



# Personal Greetings

- Use greetings any way you wish.
- Greeting two and three have special functions.
- Personal Greeting 1 - Generic
- Personal Greeting 2 - Find me - (4 Key)
- Personal Greeting 3 - Page me - (3 Key)

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# Personal Greetings

- Follow verbal instructions.
- Choose greeting for callers to hear by pressing the appropriate **Personal Greeting** key.
- The personal greeting you choose will light up green.

## **IMPORTANT:**

**Immediately after this training make it a point to record your personal greetings.**

**Record personal greetings by pressing the Personal Greeting key followed quickly by the Record key.**

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## Record

- While having a conversation press the **Record** key.

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# **Taking a message directly into another mailbox**

...While on a call

- **Press Record**
- **Press extension key(s)**

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## **Memo to self**

- **Press Record**

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## Memo to other extensions

- Press Voice Mail key
- Press extension keys
  - Wait for the beep

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## Retrieving voice mail, recordings, memos

- Press the Voice Mail key

### Transcription features (during playback)

- 1 - pause
- 4 - rewind
- 5 - fast forward
- 8 - skips to the end

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## Retrieving voice mail, recordings, memos

- Press the **Voice Mail** key

### Other functions (during playback)

- 7 - deletes message
- 9 - saves as an old message
- 99 - saves as a new message
- Redial - redials caller leaving voice mail
- EsiDex - stores Caller ID info into phone book

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## Retrieving voice mail, recordings, memos

- Press the **Voice Mail** key

### Other functions (after playback)

- 3 - reply to memo
- 4 - replays entire message
- 6 - moves message
- 7 - deletes message
- 9 - saves as old message
- 99 - saves as new message
- Redial - redials caller leaving voice mail
- EsiDex - stores Caller ID info into phone book

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- **Retrieving Voice Mail from outside the system**

Call into the system

- If the auto attendant answers, press the \* key followed by the mailbox number.
- If a person answers, ask the person to press the **Voice Mail** key and hang up. This will take you to the auto attendant greeting. Press the “\*” key followed by the mailbox number.
  - Enter password followed by the # key
    - Follow instructions.



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# Retrieving Voice Mail from any extension

- Press the Voice Mail key, \*, followed by the voice mail box number.

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# Message Monitor

Answering machine mode

- Press the **Message Monitor** programmable key to activate and deactivate message monitor.
- Opens telephone set speaker allowing you to hear callers as they leave voice mail.
  - Lift the handset or press the speaker key to intercept
    - Good way to screen calls

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## •Quiz

- How do you record your personal greetings?
- What is unique about each personal greeting?
  - How do you record a call?
- How do you record a message for someone else when on the phone?
  - How to you record a memo to yourself?
  - How do you send a memo to other people?
    - How do you listen to voicemail? memos?
    - How do you pause? Rewind? Fast forward?
- How do you delete? Save? Reply to a memo? Send a message to another mailbox?
- How do you check your voicemail from outside the system?

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# Extension Features

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## **EsiDex: Storing a number:**

While on a call press the  
**EsiDex** key.

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## EsiDex:

### Manually storing a phonebook entry:

- Press EsiDex key
- PER (program key)
- NEW (LCD soft key)
- Enter name using dialpad keys followed by the # key
- Enter number beginning with a “9” followed by the # key
- Enter another entry or press Release to end.

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# Conference calls

- Make a call
- Press Conference
  - Make a call
- Press Conference

**3 Party Conference is established  
(you plus two)**

- Press Conference
  - Make a call
- Press Conference

**4 party Conference is established  
(me plus three)**

Total of four parties possible

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## • Virtual Answer 1 and 2

- The extension user can virtually answer a second call without interrupting the first call by pressing the **Virtual Answer 1 or 2** key.
- The second caller will hear the pre-recorded virtual answer message followed by music/message on hold.
- Press Virtual Answer key quickly followed by the Record key to record a Virtual Answer greeting.
  - See suggested script page for ideas



## • Quiz

- *How do you store a number in your EsiDex when on a call?*
- *How do you perform a conference call?*
  - *How do you virtual answer a call?*



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## • Missed Call Log

- Press Missed Call key
- Use scroll keys to scroll through missed call log
  - Press the Redial key to call an entry

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# Call Forward

- Press CFWD key
- Press extension key or number

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# Headset operation

- Connect headset to the “headset” port on bottom of telephone.
  - Create a headset key.
  - Leave handset in cradle.
- Press the headset key to activate and deactivate the headset.

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## Headset operation

- If on a call and another call is presented, press the **Release** key to terminate the first call and simultaneously take the next call.
- To terminate a call when no calls are being presented, press the **Headset** programmable key to terminate the call and turn off the headset

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## Background Announce

- Dial the extension number of the remote busy extension.
- Press and hold the **Background Announce** key and make an announcement.
- Lift the **Background Announce** key when finished making the announcement.

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# Override Ring

As a call is ringing to an extension,

- press the **Override Ring** key
  - listen for dial tone
  - proceed with call.
- The ringing call will be routed to your normally forwarded destination (normally voice mail).

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# Extension Setup and Customization

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# Programmable soft keys

Press and hold a soft key until prompted with instructions. Then do one of the following.

- Speed dial - 9 then number  
Press the soft key a second time to store.
- Extension key - three digit number of extension  
Press the soft key a second time to store.
- Feature key - Press **EsiDex** twice, scroll to feature  
Press soft key a second time to store.

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## User programming menu

### Overview

#### 1 *Select personal greeting*

- 1 Record
- 2 Delete
- 3 Hear

#### 2 *Programmable feature keys*

(Station keys, line keys, speed-dial keys, other feature keys)

#### 3 *Station options*

- 1 Call waiting/background announce
- 2 Personal greeting reminder
- 4 Outside dial tone preference
- 5 Hands-free answer
- 6 Message monitor

#### 4 *Station audibles*

- 1 Station ring tone
- 2 Station ring volume
- 3 Message ring

#### 5 *Password*

- 1 Enter
- 2 Delete
- 3 Hear
- 4 Security level

#### 6 *External message notification*

- 1 Delivery options
- 2 Phone delivery
- 3 Pager notification
- 4 Urgent message

#### 9 *Un-delete*



# Call waiting

## Program key

3 - Extension Options

1 - Call Waiting and Background  
Announce

Call Waiting

1 - Enable

0 - Disable

# - Confirm

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# Background Announce permission

## Program key

3 - Extension Options

1 - Call Waiting and Background  
Announce

Background Announce

1 - Enable

0 - Disable

# - Confirm

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# Personal greeting reminder

## Program key

3 - Extension Options

2 - Personal Greeting Reminder

Enter the number of hours extension is to be idle, press the Pound (#) key to confirm.

Zero (0) turns feature off.

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# Hands free/Ring Intercom

## Program key

- 3 - Extension Options
- 5 - Hands Free Announce.
- 0 - Disable
- 1 - Enable.

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# Station ringing

## Program key

4 - Station Audibles

1 - Ring tones

Press the scroll keys to adjust the ring tone type followed by the “#” key.

2 - Ring volume

Press the scroll keys to adjust the ring volume followed by the “#” key.

3 - Ring notification of voice mail messages

1 - to enable

0 - to disable

# - to confirm



# Extension Password

## Program key

5 - Password

1 - To **enter** a new password

Enter 2-8 digits

2 - To **delete** the current password

3 - To **hear** the current password

4 - To **change** your password level

1 - Remote Only (“Remote only”  
password only applies to someone trying to  
check voice mail or change extension  
programming via calling into the system from  
an outside line.)

2 - All Calls



# Personal Greeting “2” telephone number

## Program key

- 6 - External message notification
- 2 - To program phone delivery options
- 1 - To enter a new phone number for message delivery

Enter the telephone number for message notification and press the pound (#) key to confirm.

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## Voice Mail Notification

Press the **Program** key

Press **6** - External Message Notification

### To notify telephone of messages

Press **2** To program phone delivery options

Press **1** To enter a new phone number for message delivery

Enter the telephone number for message notification and press the pound (#) key.

### To notify pager of messages

Press **3** For pager notification

Press **1** To enter a new pager number

Enter the pager number for message notification and press the pound (#) key.

### Delivery Options

Press **1** For delivery options

Press **1** To activate message delivery to your listed telephone number

Press **2** To notify your pager

Press **3** To call first and then page

Press **4** To call and page when a new message is taken

Press **0** To turn external notification off

### Urgent Delivery

Press **4** for Urgent delivery options

Your delivery is currently set to apply to \_\_\_\_\_. To be notified of emergency messages only press **1**.

Your delivery is currently set to apply to urgent messages only. To be notified of all new messages press **2**.

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# ACD

Automatic Call Distribution

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# ACD

Automatic Call Distribution

- Agents
- Queue display
  - Q : X
- Wait time display
  - Wait:XX:XX

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# ACD

Automatic Call Distribution

- Login

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**ACD**

Automatic Call Distribution

- **logout**

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# ACD

Automatic Call Distribution

- Wrap up

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- Recycle bin

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- **Help Mode**
- Press the Help key
  - Phone - press 1
  - Voice mail - press 2
- Keys and features - press 3
- User tutorial - press 4

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# Day/Night Mode

Calls are programmed to follow routes based on 5 timetables.

- Day
  - Night
  - Day 2
  - Night 2
  - Holiday
- Make certain the display of the extension with the Day/Night key indicates the appropriate mode.
    - “Auto” indicates the system is following pre-programmed time tables for routing
    - Holiday mode must be set manually

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*Don't forget to  
Record your  
personal greetings!*

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