

Inbound/Outbound Calling Plans

Feature Overview

BroadCloud provides an interface to manage the customer inbound and outbound calling plans for each site and specific user/phone numbers. Outbound Calling regulates behavior for calls placed to various destination types:

- Internal (intra-company) – These are calls within your own company. It includes calls to others within your own site and to users at other locations as well.
- Local – These are calls placed to your local calling area that do not require a leading 1.
- Long Distance – 1+ calls placed to North America, Canada, or extended Caribbean locations.
- Toll Free – Calls using the 800, 888, 877, 866, 855 or 844 prefixes.
- International – Calls to locations outside the Long Distance areas that require an international calling code before the number is dialed.
- Operator Assistance – Any call starting requiring Operator Assistance. Both “0” and “0+” calls are included.
- Chargeable Directory Assistance – Calls to the 411 prefix.
- Special Services I – Calls to the 700 prefix.
- Special Services II – not used at this time
- Premium Services I – Calls to the 900 prefix.
- Premium Services II – Calls to the 976 prefix.

Note: This document describes only the North American Calling Plan. For other market calling plans, see the Outbound Calling Plan Definitions – All Regions document on the BroadCloud Knowledge Base.

Rules for calls originating or forwarded/transferred from a site or number are as follows:

- Allow – Calls may be placed to destination type.
- Allow with Authorization code – User must enter a predefined code to place the call to destination type.
- Block – Calls are blocked to the destination type.
- Transfer to a Number. Calls attempted to the destination type are transferred to a specified number.

Inbound calling plans control call flows originating from internal sources as well as calls forwarded/transferred from external sources. Rule options for inbound calls are as follows:

- Allow or Block inbound calls originating internally.
- Allow or Block all inbound calls from external sources.
- Allow transferred external calls only.

Feature Prerequisites

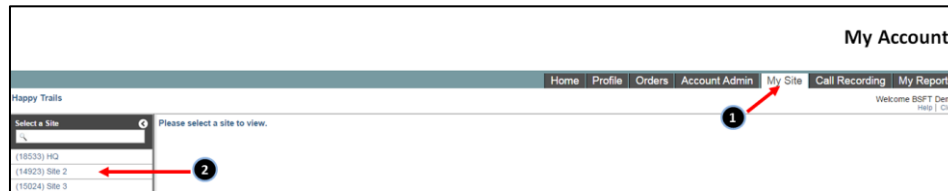
Inbound and outbound Calling apply to users/numbers configured in the My Site tab of the My Account Dashboard.

Outbound Calling Setup

The Site administrator must set up the Calling Plan. Once logged in to My Account, simply follow the steps detailed below.

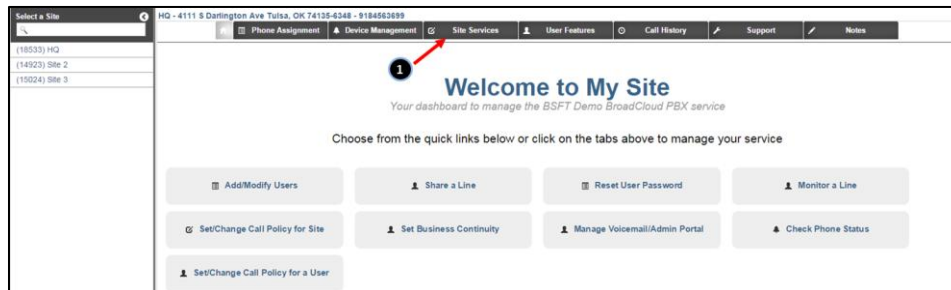
Step 1: Go to My Site

1. Access the My Account dashboard and select My Site.
2. Then select the specific site for configuration of Calling Plans.



Step 2: Go to Site Services

1. Select the Site Services tab



Step 3: Go to Outbound Calling

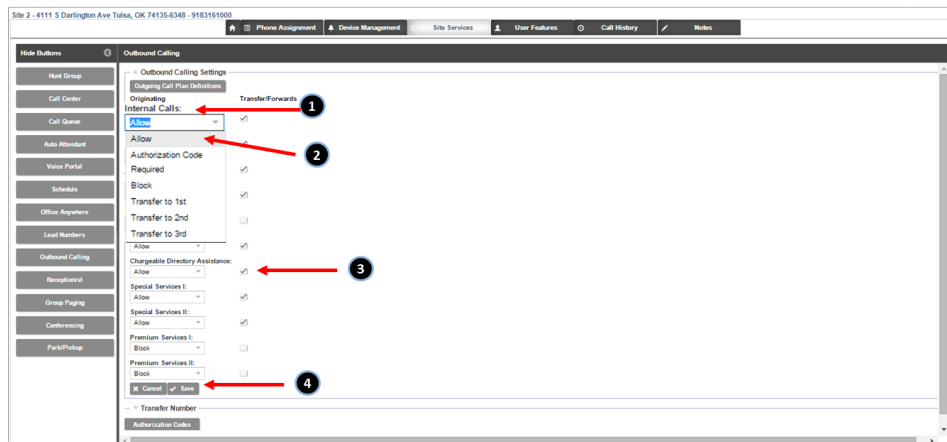
Click Outbound Calling to view/edit rules for the selected site.

Note: International calling is blocked by default.

Step 4: Configure Originating Rules for the Site

Configure calls originating from the site based on the destination type.

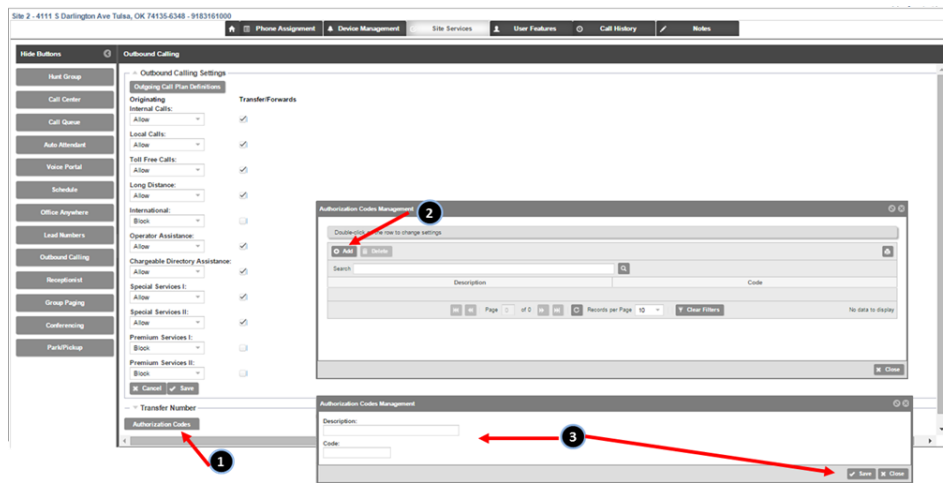
1. Select the drop-down box for destination type to modify.
2. Select the action required:
 - Allow – Calls of this type are permitted.
 - Authorization Code Required – Calls of this type require an authorization code to be entered by the user before it will be permitted. Authorization codes must be added to the section below which defines the allowed codes.
 - Block – This type of call will not be allowed and will receive an announcement.
 - Transfer to 1st – Calls to any number will be transferred to the Transfer Number 1 defined in the Transfer Number section below.
 - Transfer to 2nd – Calls to any number will be transferred to the Transfer Number 2 defined in the Transfer Number section below.
 - Transfer to 3rd – Calls to any number will be transferred to the Transfer Number 3 defined in the Transfer Number section below.
3. Choose if the specific call types are allowed to be Transferred or Forwarded to another number by clicking the checkbox under Transfer/Forwards. If enabled, users are able to transfer or forward the call type to another number.
4. Click Save.



Step 4a: Configure Authorization Codes (Optional)

If an outbound calling rule uses Authorization codes, the codes need to be defined. Codes must be numeric and between 2 and 14 digits long. Once established, the customer administrator will need to share the appropriate Authorization Codes with approved Users.

1. Click the Authorization Codes button.
2. Click the Add button in the Authorization Codes pop-up window.
3. Enter the Description and the Code and then hit enter.



Step 4b: Configure Transfer to Numbers (Optional)

If calls attempted to a specific destination type are to be transferred, the numbers must be specified.

1. Select the caret (^) symbol to open the Transfer Number sub tab.
2. Enter the transfer-to number in the appropriate 1, 2, or 3 fields.

Outbound Calling

Allow

Toll Free Calls: Allow

Long Distance: Allow

International: Block

Operator Assistance: Allow

Chargeable Directory Assistance: Allow

Special Services I: Allow

Special Services II: Allow

Premium Services I: Block

Premium Services II: Block

Cancel Save

Transfer Number

Transfer Number 1:

Transfer Number 2:

Transfer Number 3:

Save

Step 5a: View/Edit Outbound Call Rules for a User/Number

To configure rules for a specific user/phone number, edit Outbound Calling under the User Feature tab.

1. Select the User Features tab.

Select a Site HQ - 4111 S Darlington Ave Tulsa, OK 74135-6348 - 9184562699

Phone Assignment Device Management Site Services **User Features** Call History Support Notes

Welcome to My Site
Your dashboard to manage the BSFT Demo BroadCloud PBX service

Choose from the quick links below or click on the tabs above to manage your service

Add/Modify Users Share a Line Reset User Password Monitor a Line

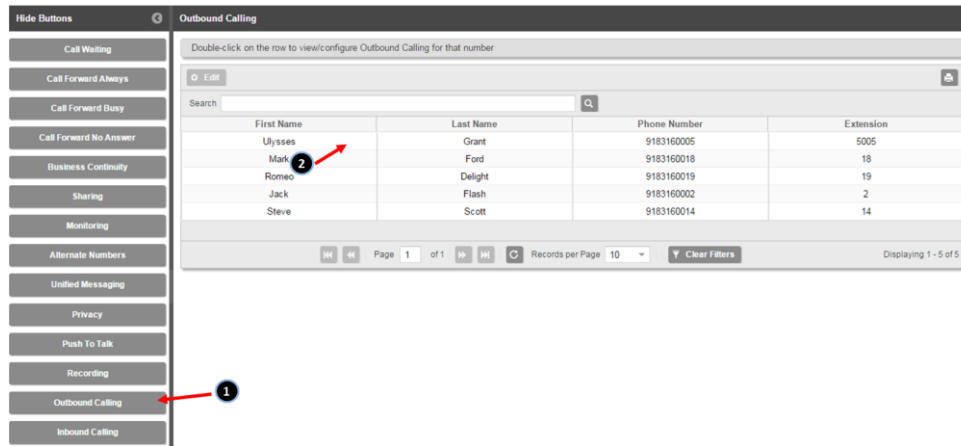
Set/Change Call Policy for Site Set Business Continuity Manage Voicemail/Admin Portal Check Phone Status

Set/Change Call Policy for a User

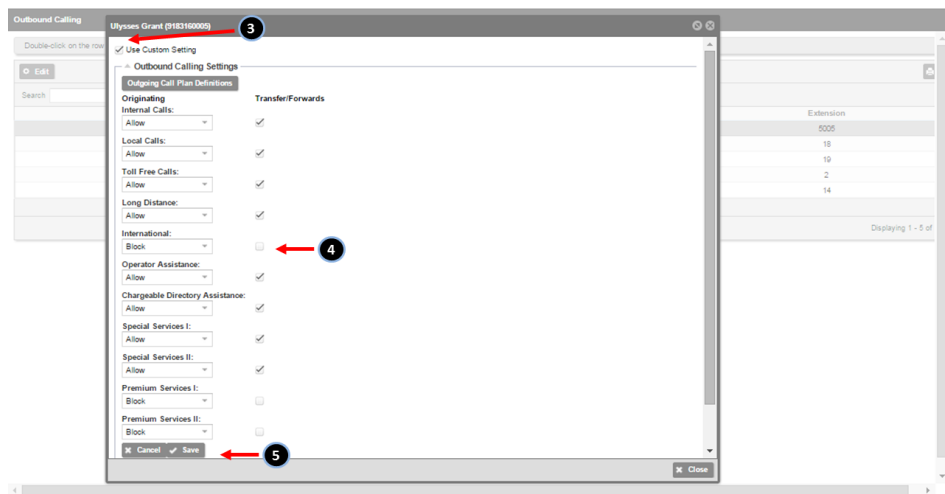
Step 5b: Select and Modify Outbound Calling Rules for specific User/Number

By default, all users have the same settings as defined under Site Services/Outbound Calling. If desired, users may have custom rules.

1. Click on the Outbound Calling button.
2. Select the user to change their outbound calling rules. Either double-click the user or select the user and then hit the Edit button.



3. Settings are grayed if the name/number is configured with the standard outbound calling rules established above for the site. To modify the rules for a specific user, click the Use Custom Setting checkbox.
4. Modify Outbound Calling Settings for each call type as necessary. If an Authorization Code or Transfer number is required, modify these settings as described in Step 4 above.
5. Hit Save.

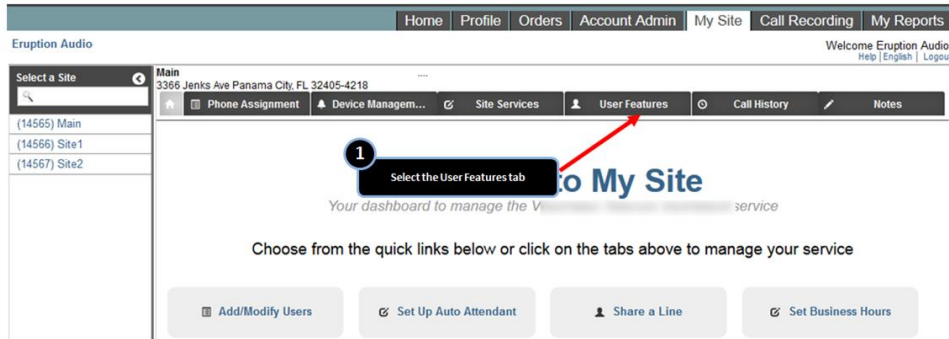


Inbound Calling Setup

The default settings for Inbound Call allow all calls originating from internal or external numbers. In order to customize these settings per user, the Site administrator sets up the Inbound Calling Plan. Once logged in to My Account and the My Site tab, simply follow the steps detailed below.

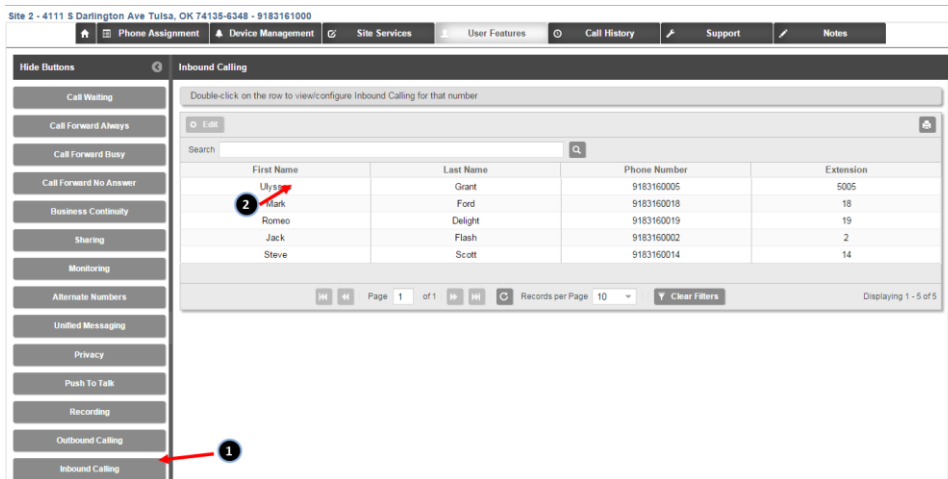
Step 1: Go to User Features, Inbound Calls

1. Select the User Features tab



Step 2: View/Edit Inbound Rules for a User/Number

1. Select the Inbound Calling tab from the left hand column.
2. Select the user to modify. You can double-click the user or select the user and then hit the Edit button.



3. Settings are grayed if the name/number is configured with the standard inbound calling rules established above for the site. To modify the rules for a specific user, click the Use Custom Setting checkbox.

4. Change the settings as desired for a specific user.
 - Originating–Allow internal calls: Check the box to allow the user to receive internal calls.
 - Originating–Allow collect calls: Check the box to allow the user to receive collect calls.
 - Transfer/Forwards–Allow all external calls: Hit radio button to allow user to receive all external calls.
 - Transfer/Forwards–Allow transferred external calls only: Hit radio button to allow user to receive only transferred and forwarded external calls.
 - Transfer/Forwards–Block external calls: Hit radio button to not allow user to receive any external calls.
5. Hit Save.

