



# JT Cloud PBX

Customer Portal Guide

[www.jtglobal.com/CloudPBX](http://www.jtglobal.com/CloudPBX)

 JT Group Limited  @JT\_Business

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# Introduction

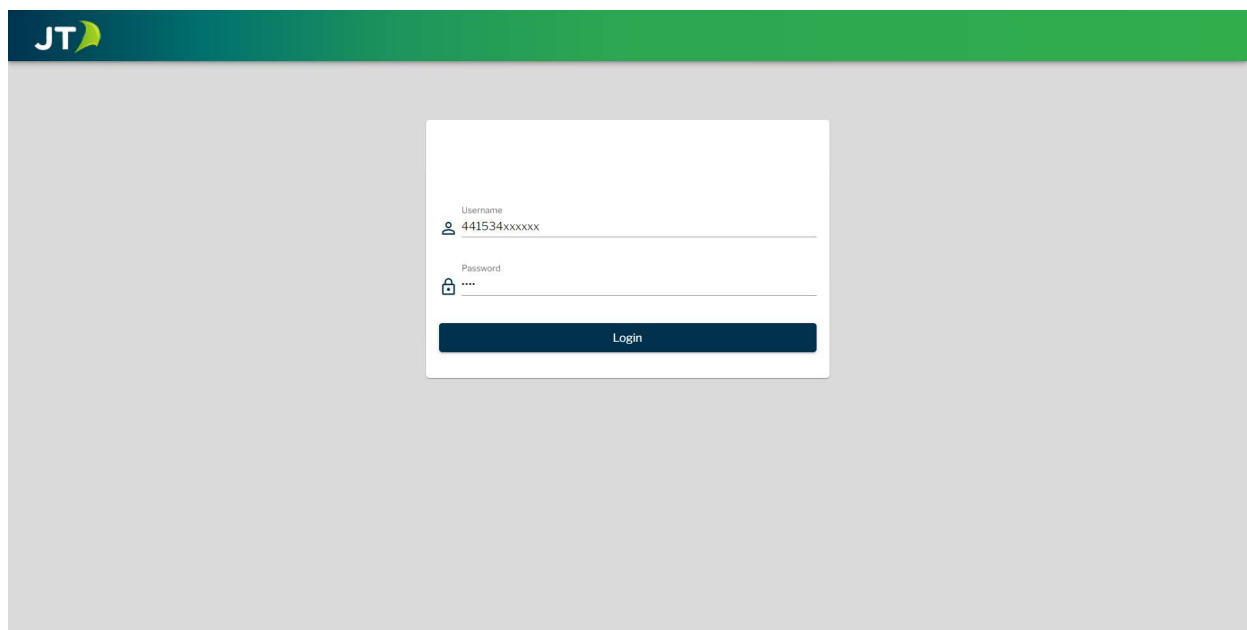
The JT Cloud PBX Customer Portal is used by a company administrator to configure the call flow of your main number(s). It enables you to control what happens when someone calls your company's main number and decide how you would like it to be routed, both inside and outside of office hours.

Your login credentials were given to you during your systems installation and demonstration. The username will be your phone number in the format starting "441534".

If you do not understand any terms used, please refer to the glossary at the end of the guide. If you still require help, feel free to contact customer support by phone: 01534882345 or by email: [business.solutions@jtglobal.com](mailto:business.solutions@jtglobal.com)

To login, navigate to <http://cloudpbx.jtglobal.com/login> and enter your login details, the browser will then take you to the Switchboard. To enter the admin area click the "Triple-bar" menu in to upper right and select Admin from the revealed menu.

Note: Only users with admin privileges can navigate to the admin panel.



# Introduction

The screenshot displays the main interface of the JT Customer Portal. At the top, there is a green header with the JT logo on the left and navigation links for 'Switchboard' and 'Statistics and log' on the right. The main content area is divided into three sections: 'ACTIVE CALL', 'IN QUEUE', and 'MY ANSWER GROUPS'. The 'ACTIVE CALL' and 'IN QUEUE' sections both show 'No active calls' and 'No calls in queue' respectively. The 'MY ANSWER GROUPS' section shows a 'Logged in' status and two answer groups: 'Answergroup 2' with 2/2 members and 'Answergroup 1 (Everyone)' with 4/4 members. To the right, the 'CONTACTS' section features a search bar and a table of contacts. The table has columns for Status, Name, Number, Short number, and E-mail. The contacts listed include 'Main Number', '01534 679412', 'Answergroup 2', 'Answergroup 1 (Everyone)', and several individual staff members with their status (Available), names, numbers, and email addresses.

| Status    | Name                     | Number            | Short number | E-mail   |
|-----------|--------------------------|-------------------|--------------|--|
|           | Main Number              | 01534 679411      |              |  |
|           | 01534 679412             | 01534 679412      |              |  |
| 2/2       | Answergroup 2            |                   |              |  |
| 4/4       | Answergroup 1 (Everyone) |                   |              |  |
| Available | Robert Walpole           | 01534 679451 4451 |              | <a href="mailto:rwalpole@tj.com">rwalpole@tj.com</a>           |
| Available | Spencer Compton          | 01534 679452 4452 |              | <a href="mailto:scompton@tj.com">scompton@tj.com</a>           |
| Available | Henry Pelham             | 01534 679453 4453 |              | <a href="mailto:h.pelham@tj.com">h.pelham@tj.com</a>           |
| Available | Thomas Pelham-Holles     | 01534 679450 4450 |              | <a href="mailto:tpelhamholles@tj.com">tpelhamholles@tj.com</a> |

This screenshot shows the same JT Customer Portal interface as above, but with a user profile sidebar open on the right side. The sidebar is dark blue and contains the user's name 'Walpole' and phone number '01534 679451'. Below this, there is a 'Logout' button. The sidebar also lists several navigation options: 'Switchboard', 'SMS', 'Admin', 'Statistics', 'Wallboard', 'Conference', and 'My settings'. At the bottom of the sidebar, there is a 'Languages' section with 'English' selected.

# Administration

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To enter the admin area simply click Admin in the triple-bar menu. You can then use the 5 tabs to select one of the following sections, each section is described in more detail in the following pages of this guide:

- Main numbers
- Answer groups
- Dial menus
- Announcements
- Employees

One of the first tasks you will need to do to configure your system is to record and upload your announcements. These messages and music are used throughout the portal.

# Administration

## Announcements Tab

The Announcements tab is where you upload new files to be used for announcements. You can also upload music to use for the call queue. We recommend recording your voice message in a quiet place to ensure the highest quality playback. Please ensure that your file is in .mp3 or .wav format before uploading. Once you are satisfied with your announcements and have saved them to a suitable location, press the "+Upload new announcement" link, then choose a file, find the file on your computer using the dialogue box, and click upload. Your message should appear within a few minutes.

- To play the announcement click the play icon
- To download a copy of the announcement, click the download icon
- To rename the message and add a description click the pen icon, make sure not to change the file name
- To delete an announcement, click the trash icon

You can also record an announcement using your phone. From your Cloud PBX phone, dial 01534 733010. Follow the instructions and read out your announcement. The announcement will appear in the system in a few minutes.

A set of standard messages has been provided with every solution.

**Announcements**

Here you can record announcements, upload your own or administrate existing announcements.  
Do you want to record a new announcement? Press [here](#).

**YOUR ANNOUNCEMENTS**

| Name            | Description     |           |
|-----------------|-----------------|-----------|
| National Anthem | National Anthem | ▶ ⬇️ ✎ 🗑️ |
| Tidalwave       | Tidalwave       | ▶ ⬇️ ✎ 🗑️ |
| Menu            | Menu            | ▶ ⬇️ ✎ 🗑️ |
| Busy            | Busy            | ▶ ⬇️ ✎ 🗑️ |
| Closed          | Closed          | ▶ ⬇️ ✎ 🗑️ |

Items per page: 10 | 1: 5 of 5 | < >

[+ Upload new announcement](#)

**STANDARD ANNOUNCEMENTS**

| Name               | Description                       |      |
|--------------------|-----------------------------------|------|
| Voicemail          | Standard voicemail message        | ▶ ⬇️ |
| Menu               | Standard message for menu         | ▶ ⬇️ |
| Closed             | Standard closed message           | ▶ ⬇️ |
| No answer          | Standard message for missed calls | ▶ ⬇️ |
| Periodical message | Standard periodical message       | ▶ ⬇️ |
| Queue music        | Standard queue music              | ▶ ⬇️ |
| Ringtone           | Standard ringtone                 | ▶ ⬇️ |
| Ringtone 60sec     | Ringtone 60 seconds               | ▶ ⬇️ |
| Welcome            | Standard welcome message          | ▶ ⬇️ |

Items per page: 10 | 1: 9 of 9 | < >

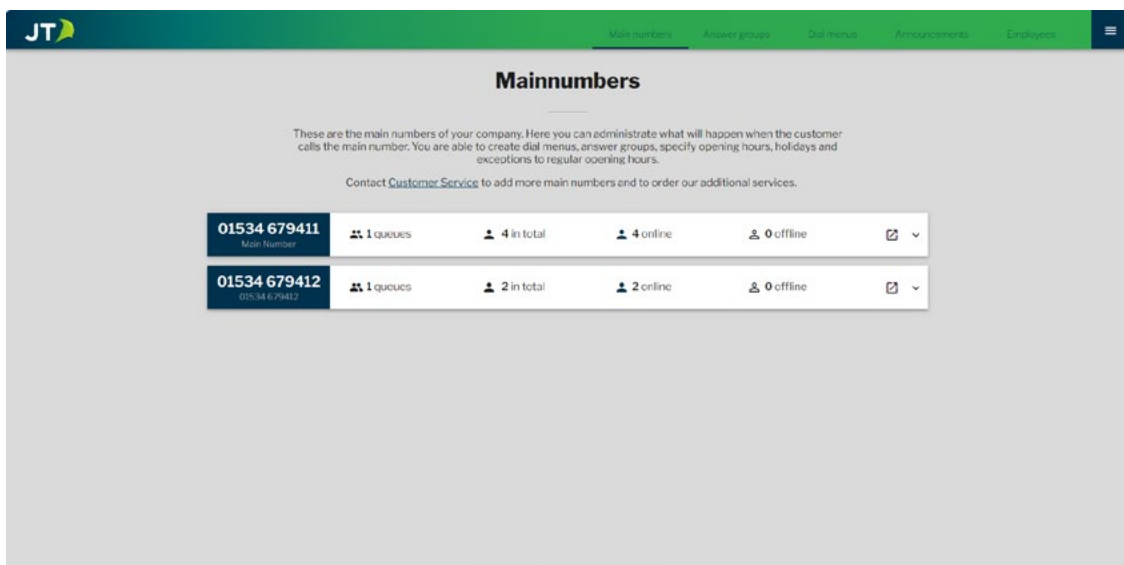
<https://cloudpbx.jtglobal.com>

# Administration

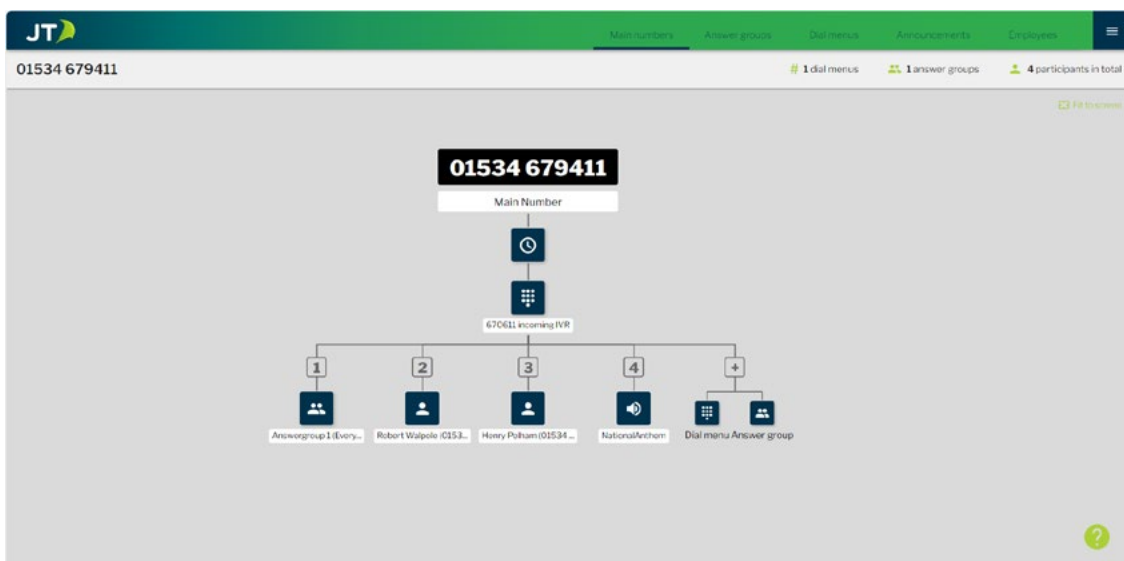
## Main Numbers

The Main Number tab is a breakdown of your solution showing which features you are using. It will show your main number(s), together with a few additional stats, the number of call queues, the number of employees and how many are online and offline.

On the right of each Main Number will be an edit button and a drop down that shows more details, such as the Answer Groups on that Main Number.



Clicking the Edit button will take you to the Main Number configuration page for this number. Here you can change Main Number configurations like **Open Hours** and **Dial Choices**.



# Administration

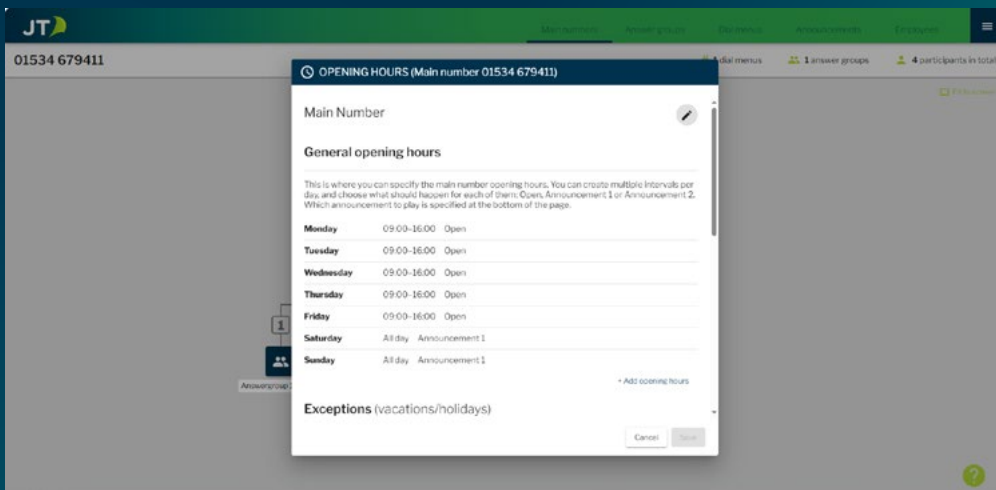
## Opening Hours

Once a Main Number has been selected, you can set the opening hours by clicking the clock icon. This will open a new window.



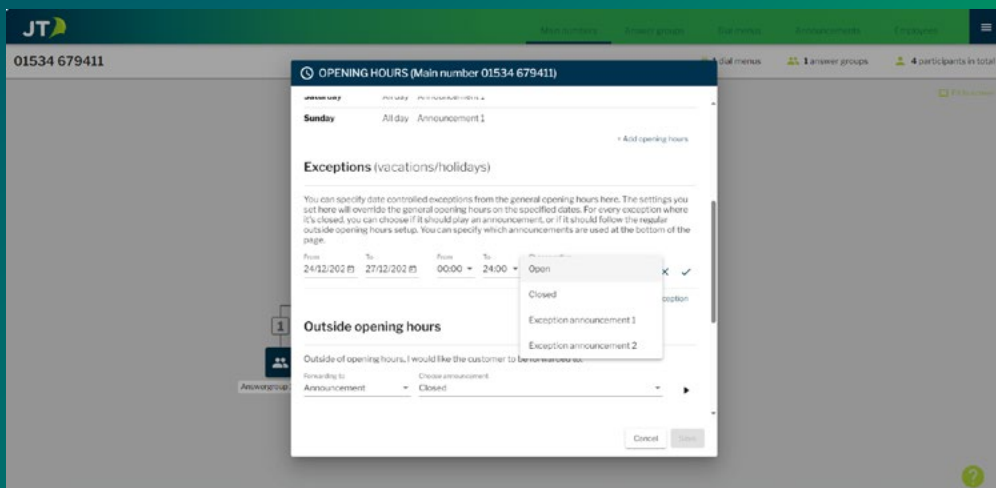
### General opening hours

For each day, set your opening hours by clicking the edit (pen) icon. To add a second set of hours in the same day, press the +Add opening hours link and set the desired day and time.



### Exceptions

Scroll down to view the Exceptions section. Using the “+Add exception” button you can add any company holidays to the system, any calls received during this time will be routed directly to the selected announcement. Note: Hours set here will affect the whole main number set up, though an employee’s personal working hours (set up in the My Settings section on page 43) will take precedence when someone calls them directly.





# Administration

## Outside opening hours

Scroll down more to see this section. Here you can select how a call is forwarded outside of the set opening hours. Use the drop down list to select one of the following options, and then use the additional drop-downs to select individual options:

- Announcement
- Dial menu
- Answer group
- Employee
- Company voice-mail
- Other number

## Extra announcements

Scroll down to the bottom of the window. Here you can select the announcements that are associated with each menu item. Simply select it from the drop-down list, you can also preview the announcement by clicking the play button.

The screenshot displays the 'OPENING HOURS (Main number 01534 679411)' configuration window. At the top, there is a table for exceptions with columns for 'From', 'To', 'From', 'To', and 'Choose action'. The first row shows dates 24/12/2022 to 27/12/2022, times 00:00 to 24:00, and the action 'Exception announcement 1'. Below this is an '+ Add exception' button. The 'Outside opening hours' section contains the text 'Outside of opening hours, I would like the customer to be forwarded to:' followed by a 'Forwarding to' dropdown menu set to 'Announcement' and a 'Choose announcement' dropdown menu set to 'Closed'. The 'Extra announcements' section is titled 'Choose which announcements to use for the different choices.' and contains three rows, each with a dropdown menu and a play button: 'Announcement 1' set to 'Closed', 'Announcement 2' set to 'Busy', and 'Exception announcement 1' set to 'Busy'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

# Administration

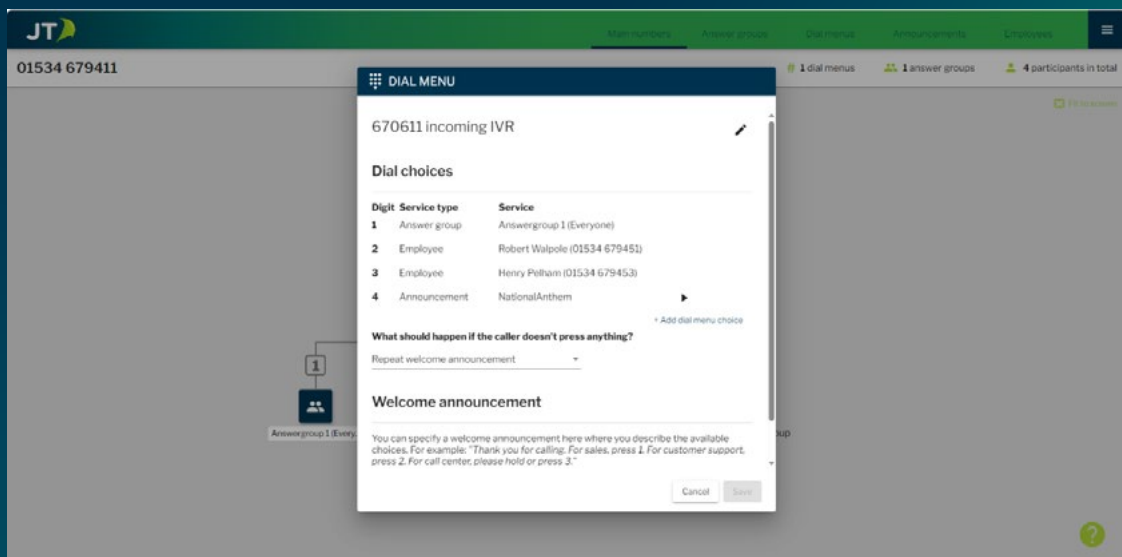
## Dial Menu (Auto Attendant)

The Dial Menu page allows you to change the order, add Announcements, and add Answer Groups.

Clicking the pen icon will allow you to rename the Dial Menu.

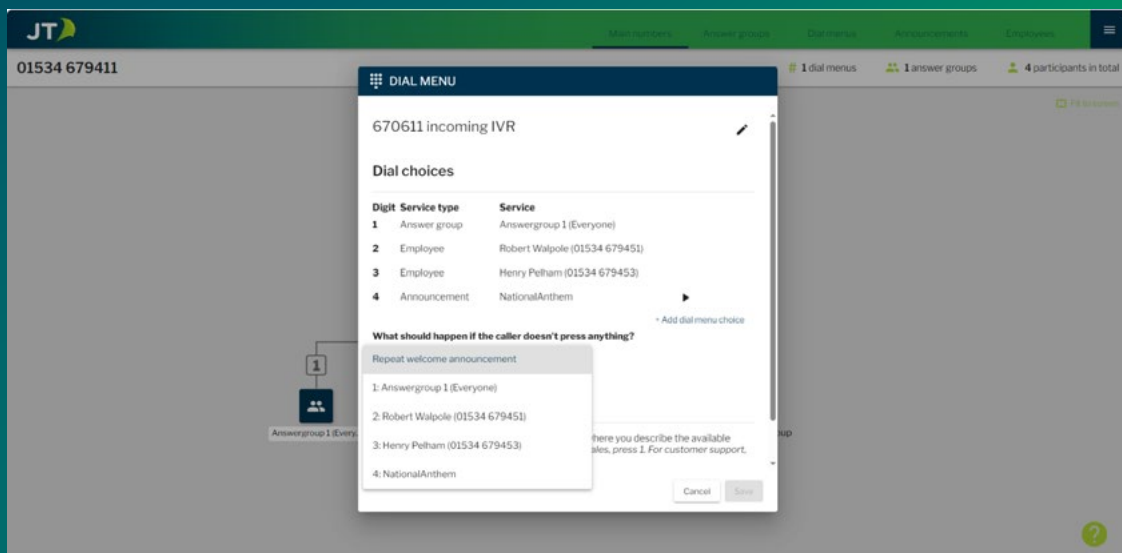
Clicking the play icon will play the corresponding announcement.

Clicking the “+Add Dial Menu choice” button will add an additional line at the end of the list, you can then use the drop-down menus to select the service type and service as required.



### What should happen if the caller doesn't press anything?

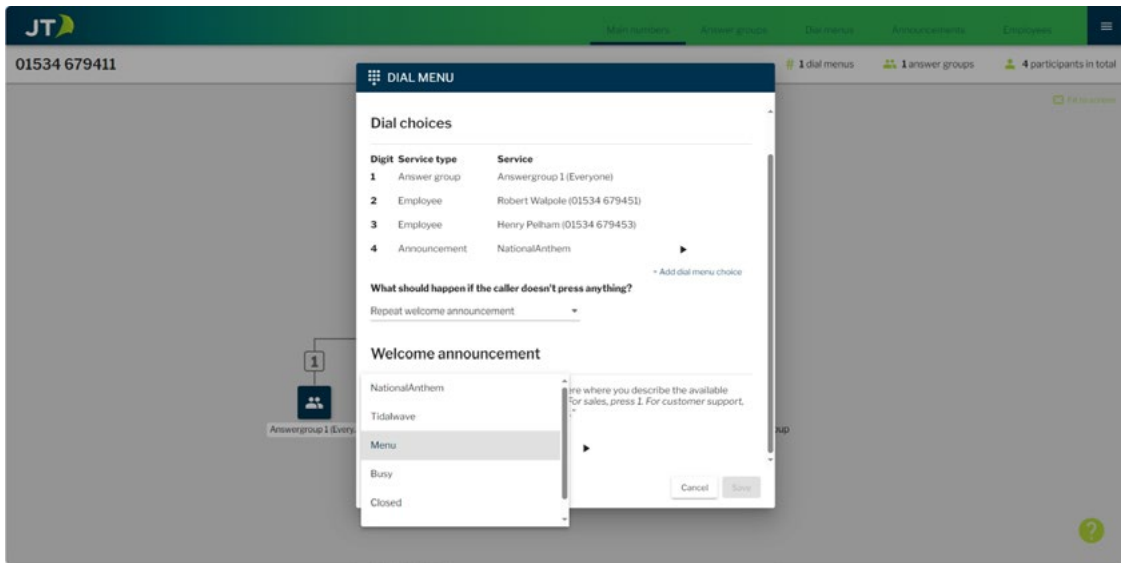
Here you can change the what happens when a caller does not select a menu option, use the drop-down to select the desired feature.



# Administration

## Welcome announcement

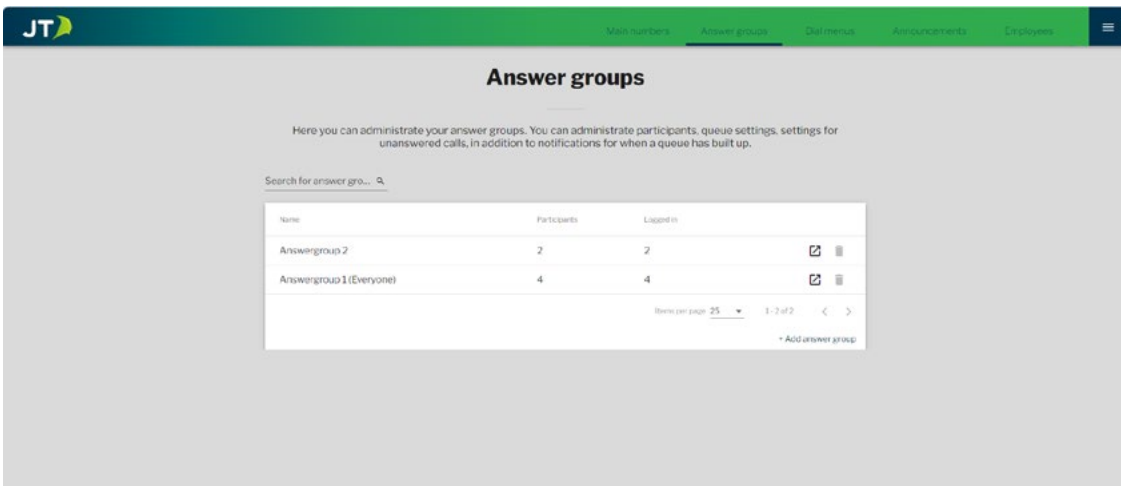
Here, you can set the announcement that plays when a call is received on the Main Number. This could be a simple welcome message or directions to select an option to reach specific employees or Answer Groups. Use the drop-down menu to select the announcement. You can use the play button to listen to the selected announcement. Follow the instructions on page 6 to record and add new announcements and music.



## Answer Groups

In this tab, you can create and configure your answer groups. An Answer Group is a list of employees that calls are routed to, according to your configured settings.

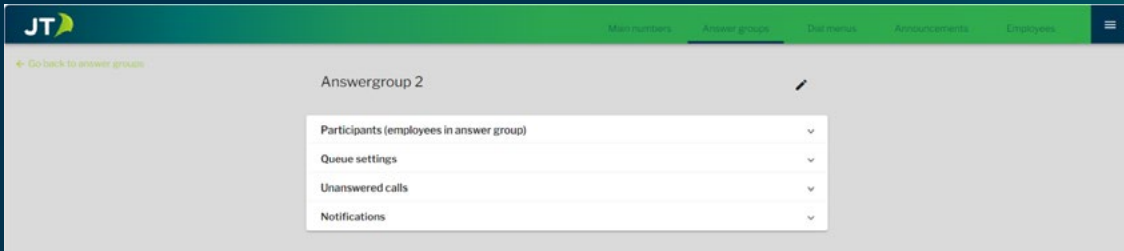
On the right side of the interface you have an Edit button and a Delete button, the Delete button will be greyed out for now.



# Administration

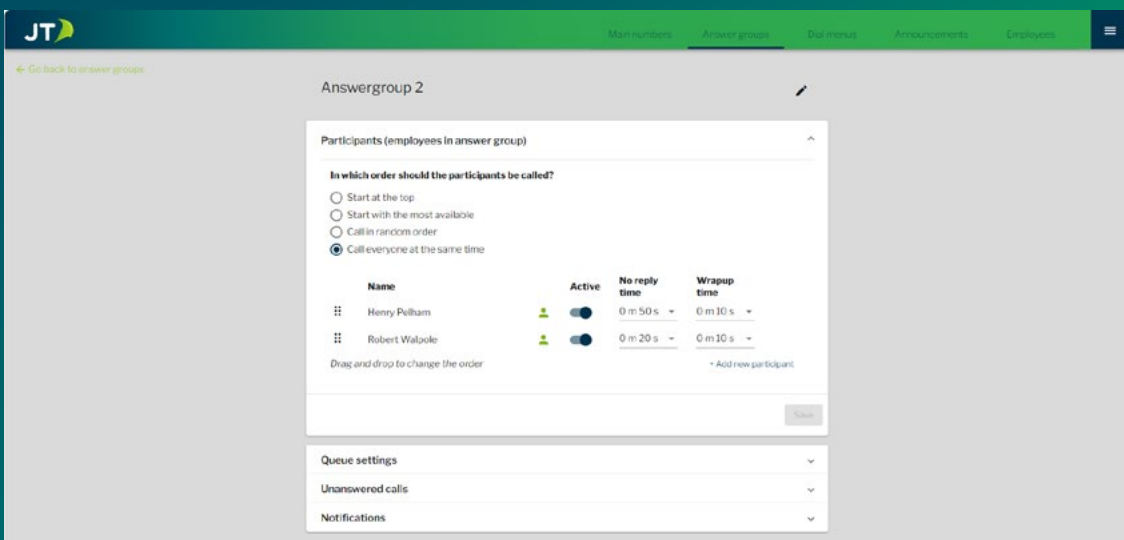
## Answer Groups

Clicking an Edit button will take you to a new page:



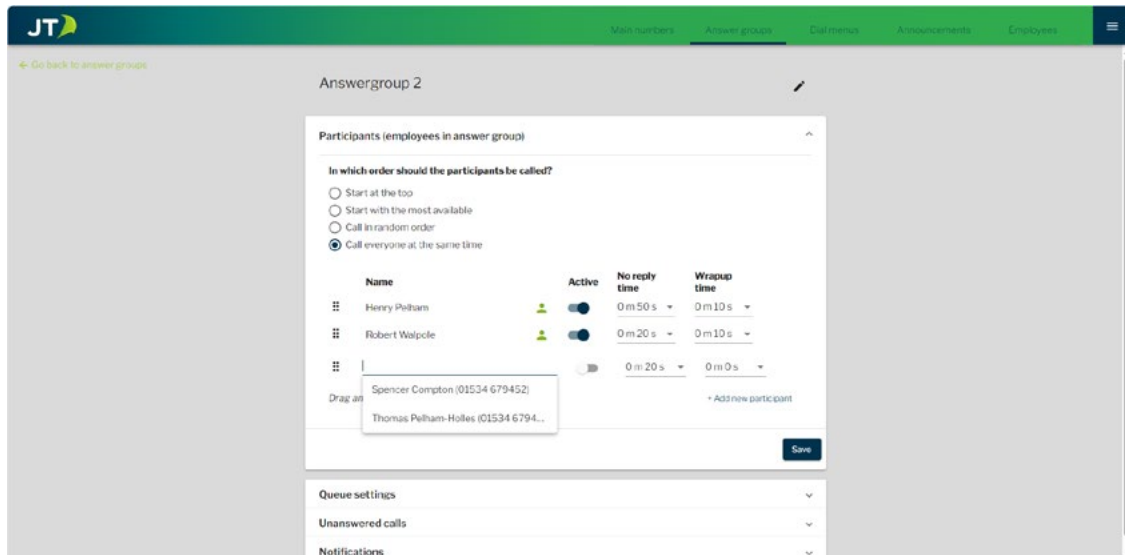
The Pen icon will allow you to rename the Answer Group. Clicking an arrow will expand or minimise the corresponding section.

- **Participants (employees in answer group)**  
By selecting a tick box from these four options, you can decide in which manner the answer groups' participants should be contacted:
  - **Always start on top** – When selected, calls routed to the answer group will go through the list sequentially.
  - **Start with the longest idle member** – The first participant to be contacted is the one that has had an idle status for the longest time. The system will then select the next longest idle participant and so on.
  - **Call users in a random order** – Available users are contacted in a random order.
  - **Call all in parallel** – All participants will be rung simultaneously until one of them answers or the configured overflow settings are activated.



To add a participant, click the “Add new participant” button below the table, this will bring up a drop-down menu in which you can choose a participant from a list of configured users.

# Administration

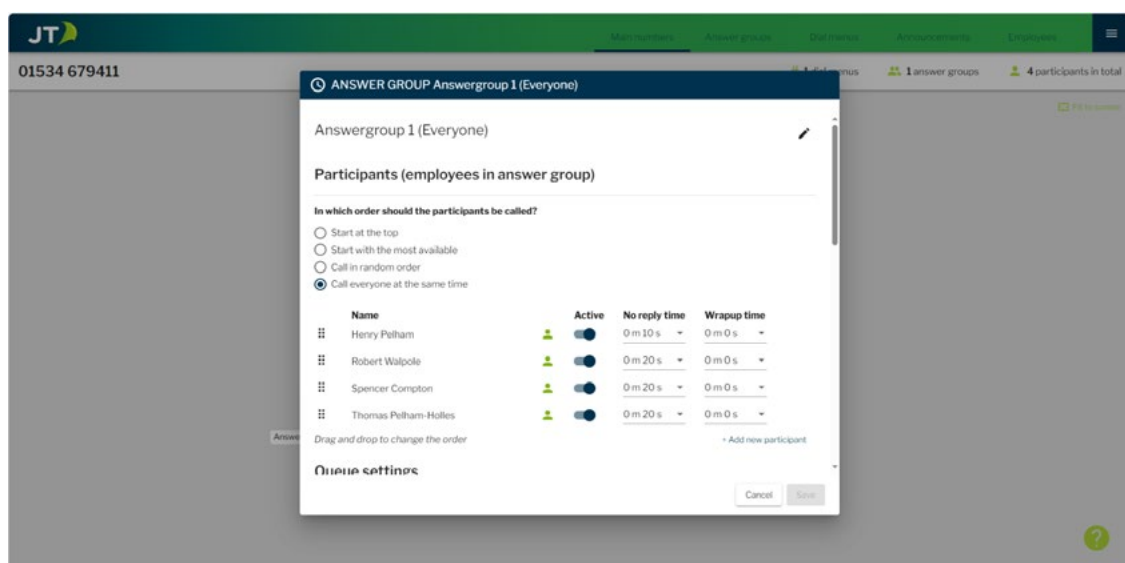


To reorder the list, drag and drop the employee using the 6 dots.

If you wish to deactivate a user in an answer group without removing them, use the “Active” toggle switch (a user may only be toggled on if they are currently logged in).

The “No reply time” will set how long the user’s phone will ring before moving to the next if not picked up. The “Wrap up time” dictates how much time a participant has before a new call can be routed to them. This is useful for ensuring users have enough time after a call to process any relevant information. You can set this on an individual user basis.

*Note: You can also access this menu by clicking the Answer Group in the Main Number overview diagram.*

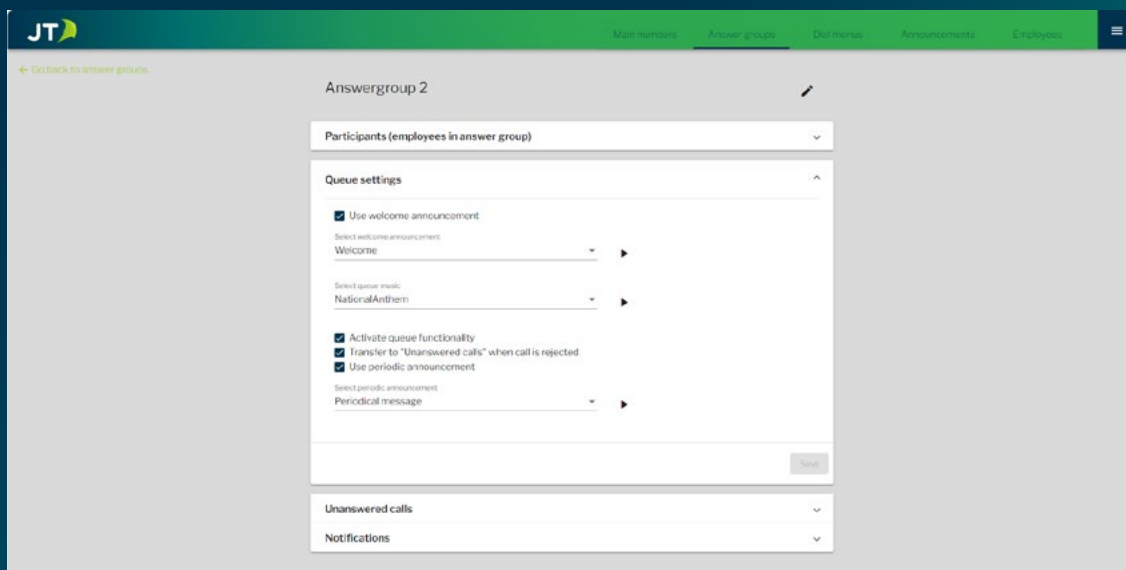


# Administration

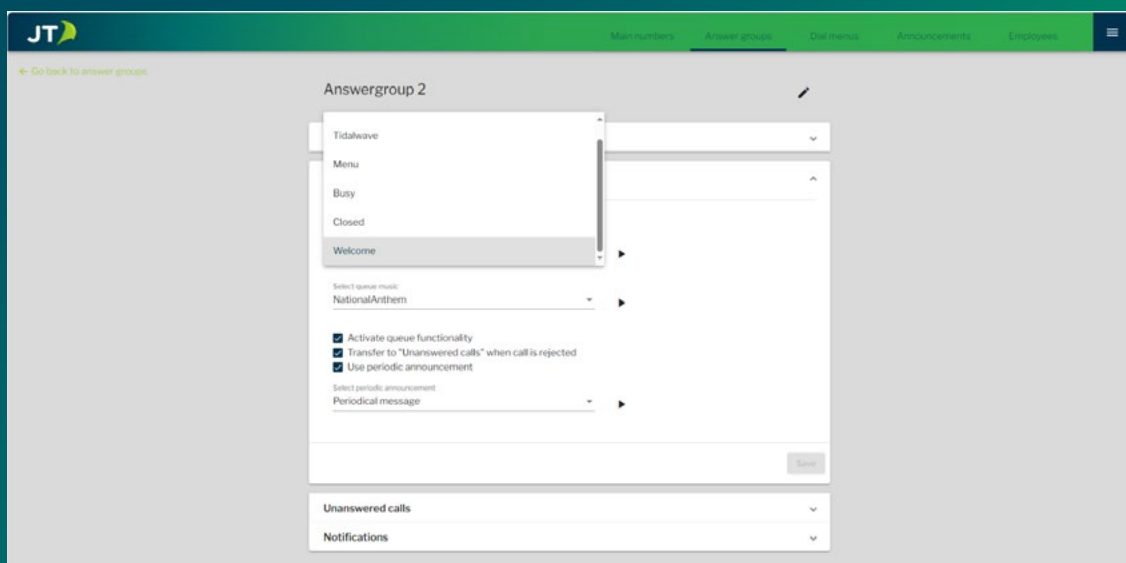
## Queue settings

This is where you can select and change the Answer Group’s announcements and queue music.

Once you have uploaded your announcements in the announcement tab, (see page 6) you can assign them to the relevant answer groups.



Ensure “Use welcome announcement” is ticked. To select the announcement, use the drop-down menu.



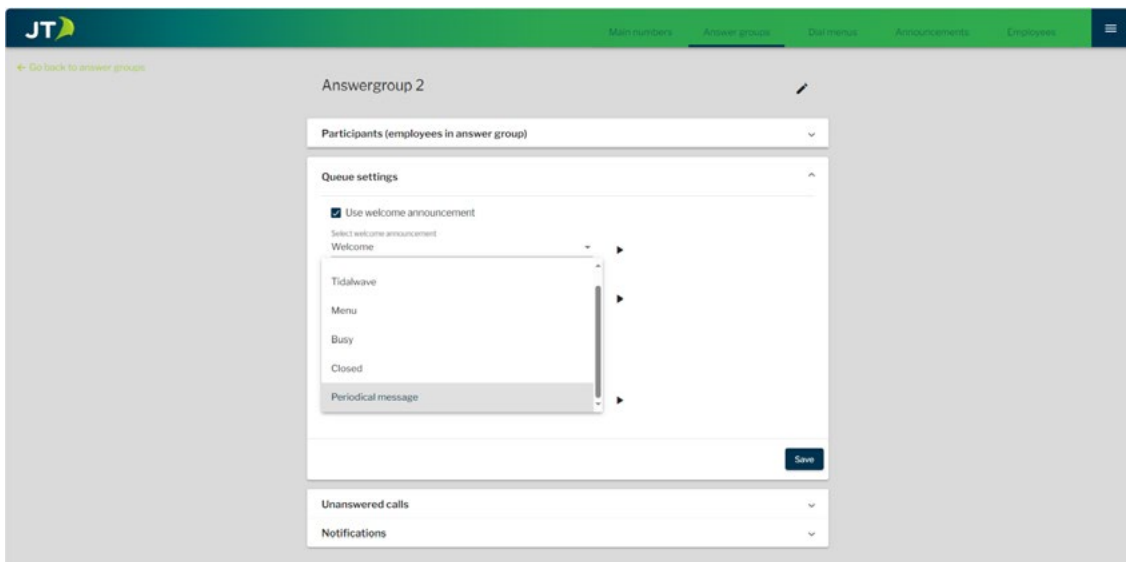
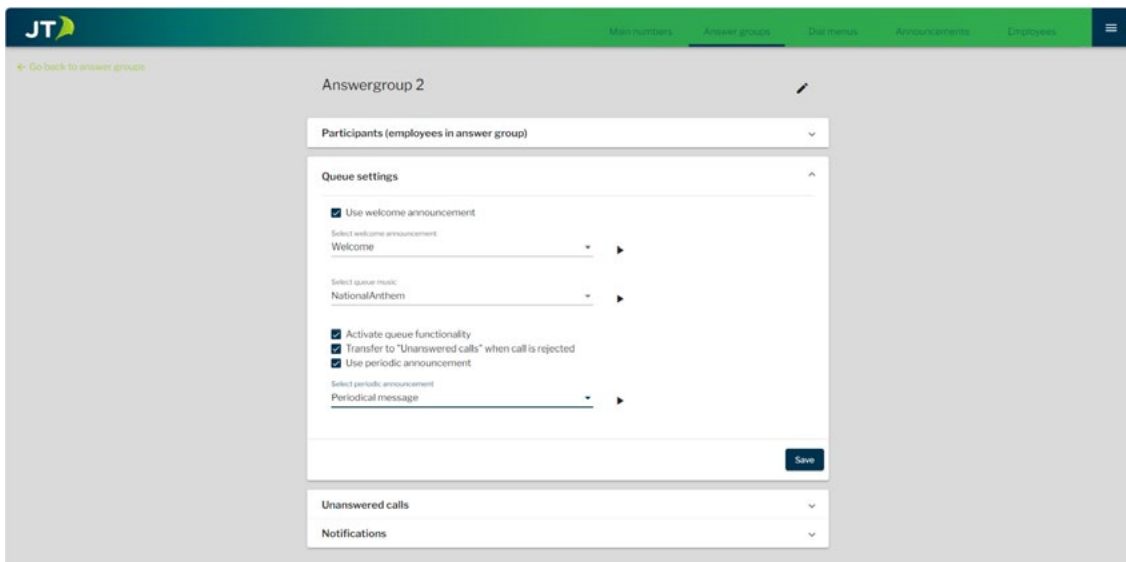
You can also choose the music a caller hears while waiting for an available user to answer. To upload your announcements and music follow the instructions on page 6 of this guide, they will then be selectable in the drop-down “Select queue music”.

# Administration

The following tick boxes provide options for your queue functionality. If ticked, the feature is enabled. Available features are:

- Activate queue functionality – This allows you to select whether the answer group has a queue. If the queue is not enabled, calls received when participants are busy will be forwarded straight to the Unanswered calls destination.
- Transfer to “Unanswered calls” when call is rejected – If enabled, when an attendant rejects or declines a call then it will not be forwarded to other attendants. Instead, the call will be routed to the Unanswered calls destination.
- Periodic announcement – This option toggles a periodic announcement for callers waiting in the queue. This will be played every 60 seconds, or at the end of each play of any on hold music you have uploaded and selected.

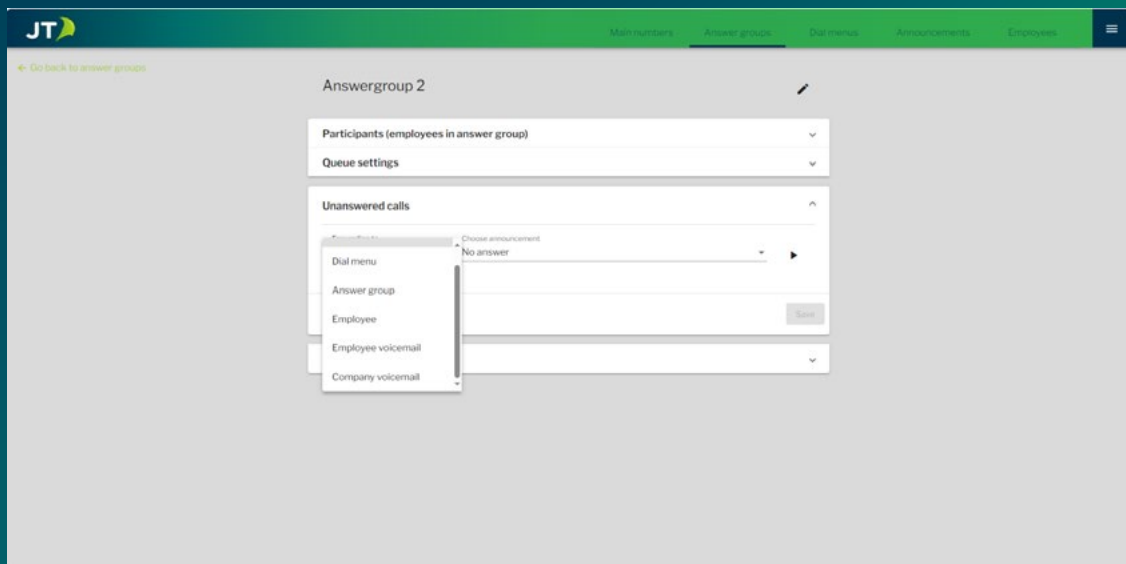
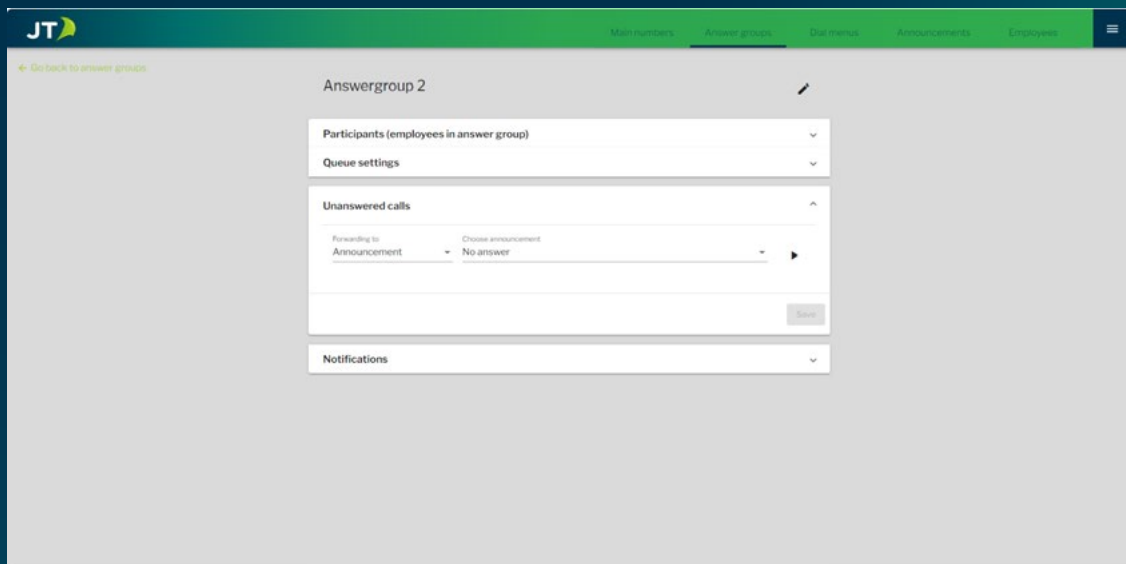
Once you’re happy with the settings, ensure you press save!



# Administration

## Unanswered calls

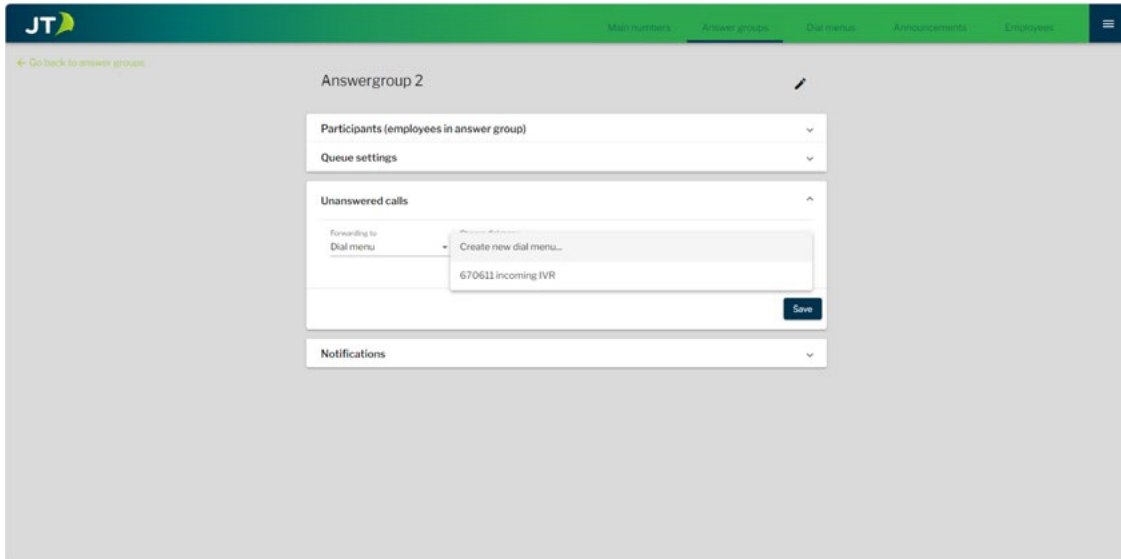
These settings dictate the handling of calls that have not been answered by any participants of the answer group.



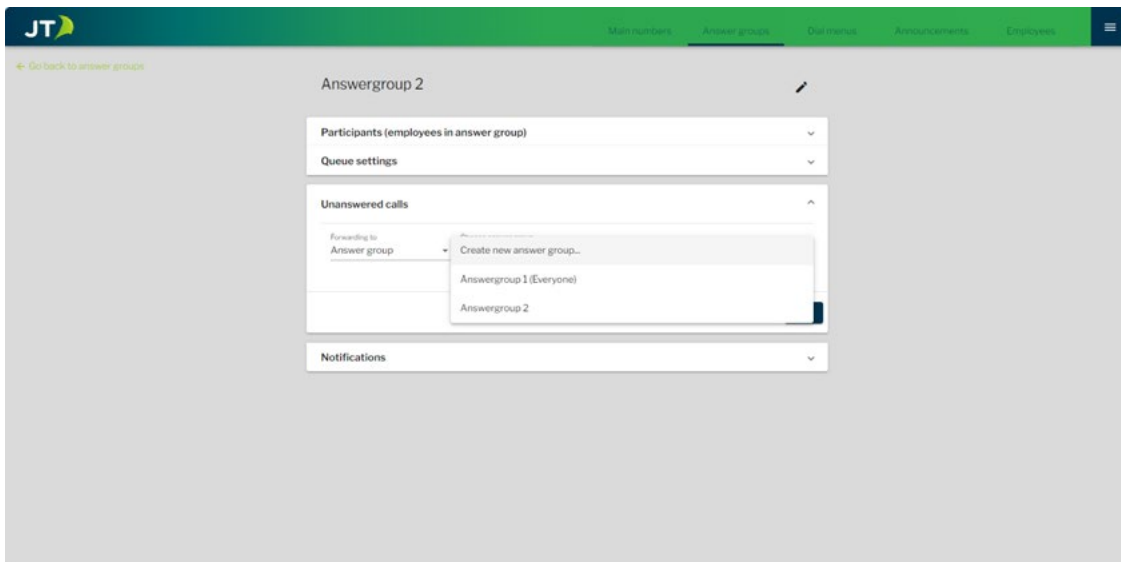
- **Announcement** – This option will play an announcement to the caller, you can select from a standard overflow announcement that is pre-installed, or any of your custom announcements. A typical message will ask a caller to call back at a later time due to the high call volume.



# Administration

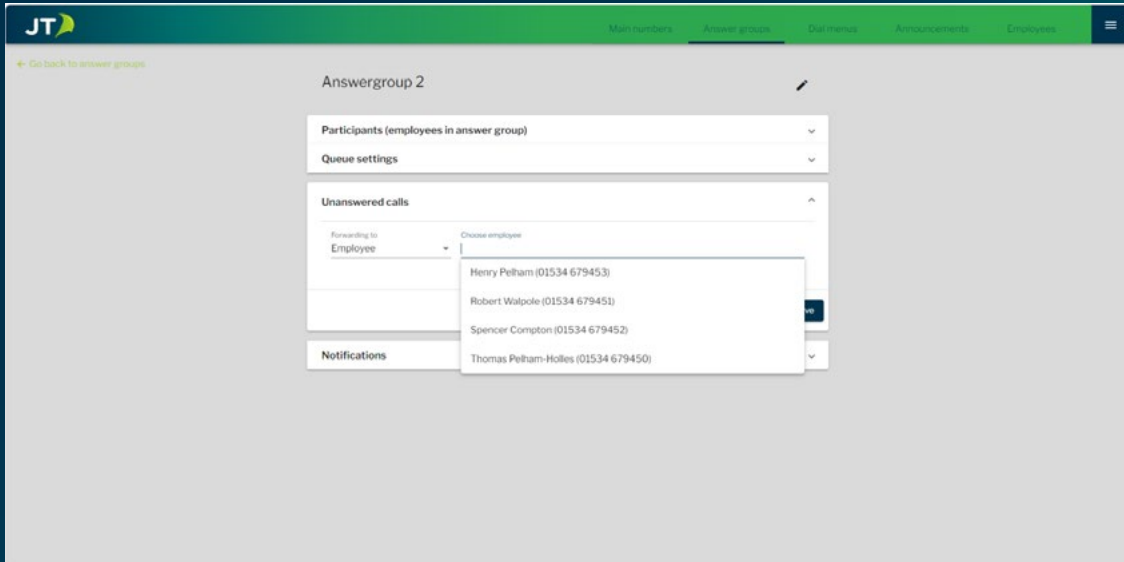


- **Dial menu** – This option will allow you to route the overflow to an Auto Attendant menu system. Use the drop-down menu to select which Auto Attendant you would like to use.

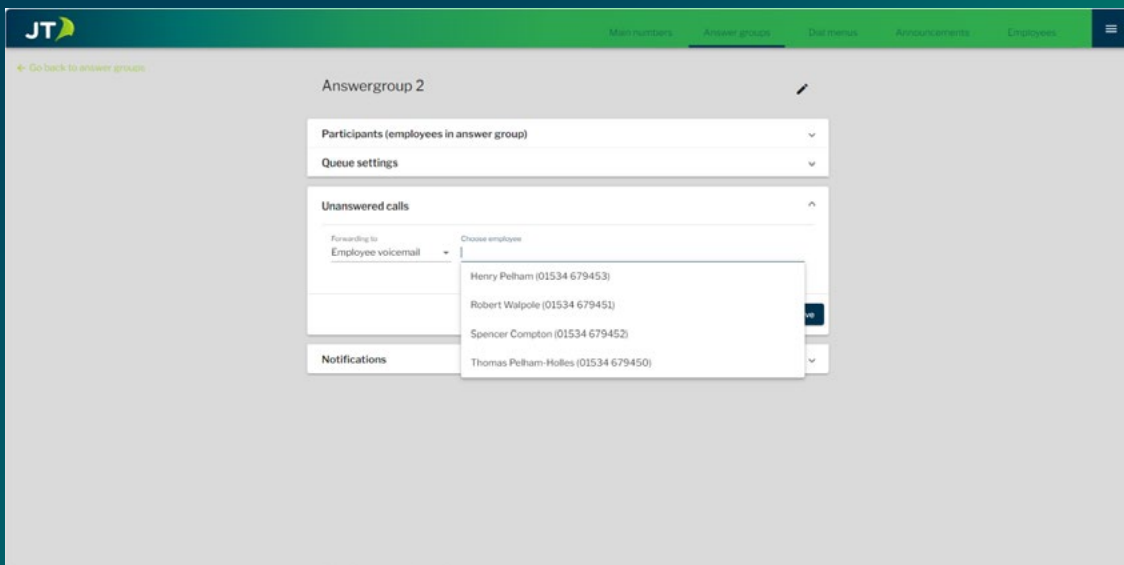


- **Answer group** – Using the drop-down menu you can select which of your other answer groups should receive the forwarded call from the current group when all participants are engaged.

# Administration

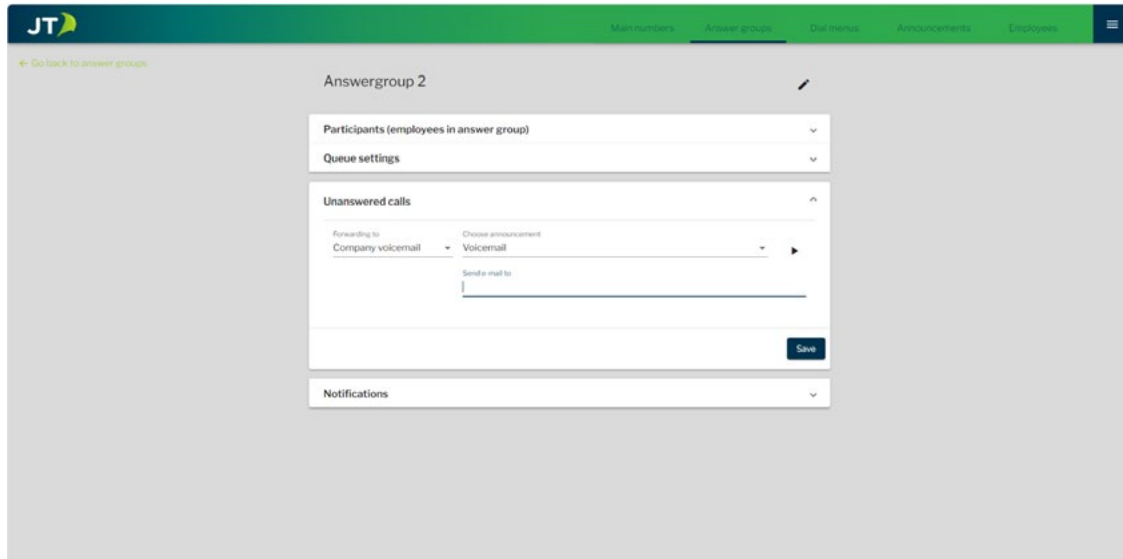


- **Employee** – This drop-down menu contains a list of your users. The selected person will be forwarded all unanswered calls.



- **Employee's voice-mail** – This option allows you to send the calls directly to an employee's voice-mail. The drop-down menu will display a list of all your users.

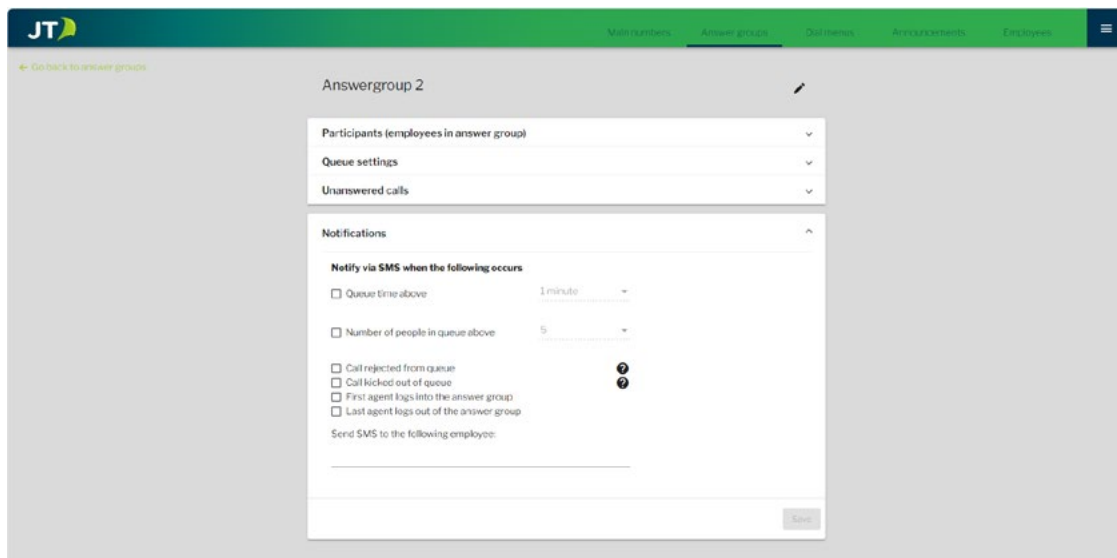
# Administration



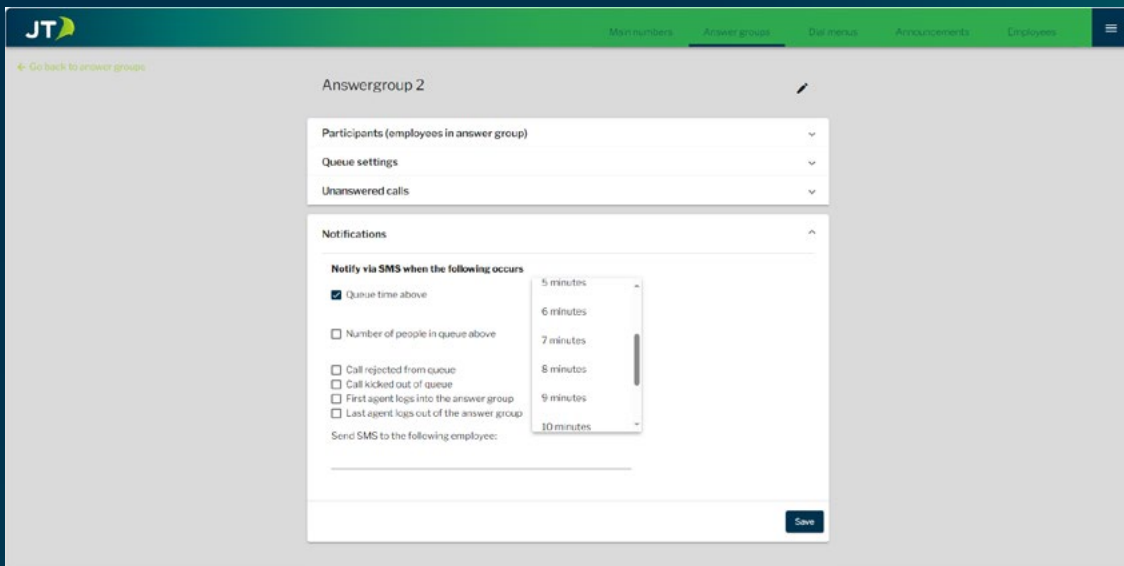
- Company voice-mail** – This feature routes the call to a company voice-mail. Utilise the drop-down menu to choose the specific message to be played to the caller prior to the recording of their voice message. You can also specify an email address to receive notifications upon the receipt of a new voice-mail.

## Notifications

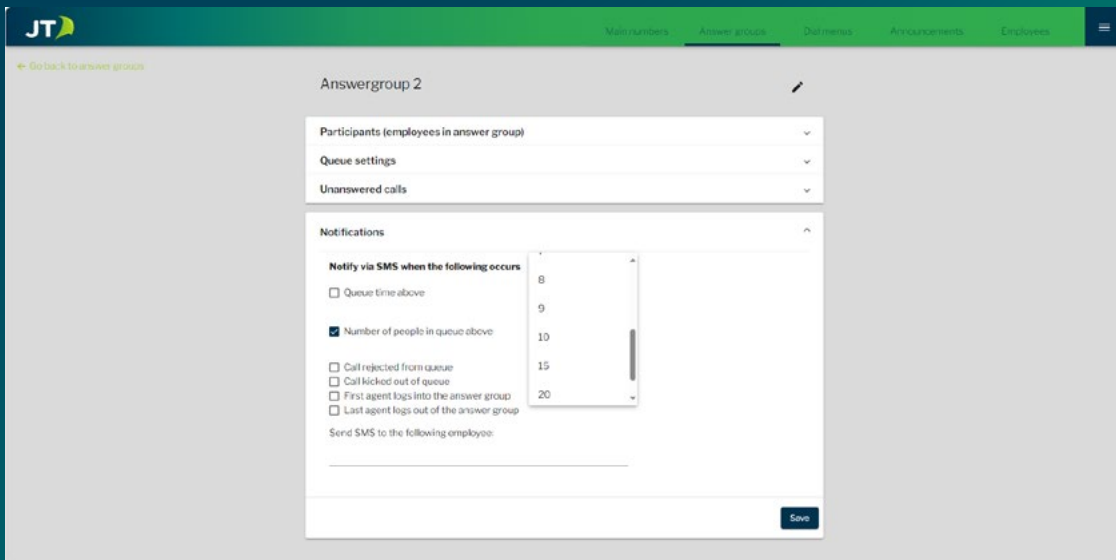
The Notifications section enables an automatic SMS messages based on various parameters.



# Administration



- Queue time above, if ticked, this will send an SMS to the selected employee if the answer group's queue time exceeds the selected duration, which can be set from 1 min to 30 mins.



- Number of people in queue above, if ticked, this will send an SMS if the number of callers in the queue exceeds the selected amount, from 1 to 30.

# Administration

The screenshot shows the 'Answergroup 2' configuration page. The 'Notifications' section is active, displaying the following options:

- Queue time above: 1 minute
- Number of people in queue above: 5
- Call rejected from queue (with a tooltip: "New notifications are triggered from the queue if there are more than 10 calls in the queue or call has waited longer than 5 minutes. These settings can be changed by customer service.")
- Call kicked out of queue
- First agent logs into the answer group
- Last agent logs out of the answer group

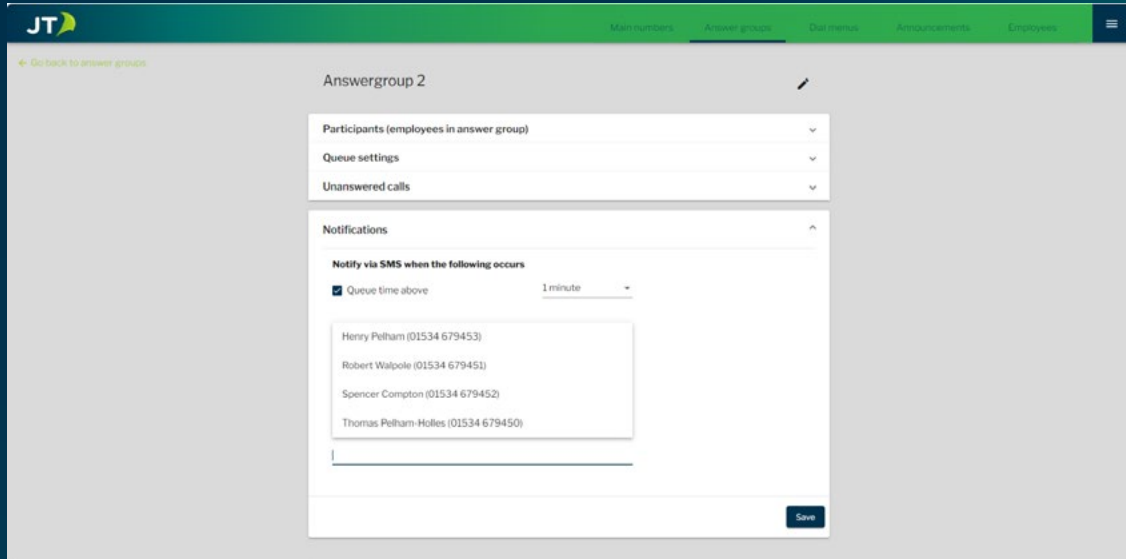
Below these options is a text input field labeled "Send SMS to the following employee:" and a "Save" button.

- Call rejected from queue, will send an SMS if a call is rejected, hover over the icon for more information on rejected calls.

This screenshot is identical to the previous one, but the checkbox for "Call rejected from queue" is now checked.

- Call kicked out of queue, will send an SMS if a call is kicked out, hover. over the icon for more information on kicked calls.
- First agent logs into the answer group, if ticked, this will send an SMS when the first agent logs in to receive calls.
- Last agent logs out of the answer group, if ticked this will send an SMS when the last agent logs out and can no longer receive calls.
- Send SMS to the following employee, here you can select the mobile number for the employee you wish to receive the notifications.

# Administration



Be sure to save once you have finished!

# Administration

## Employees Tab

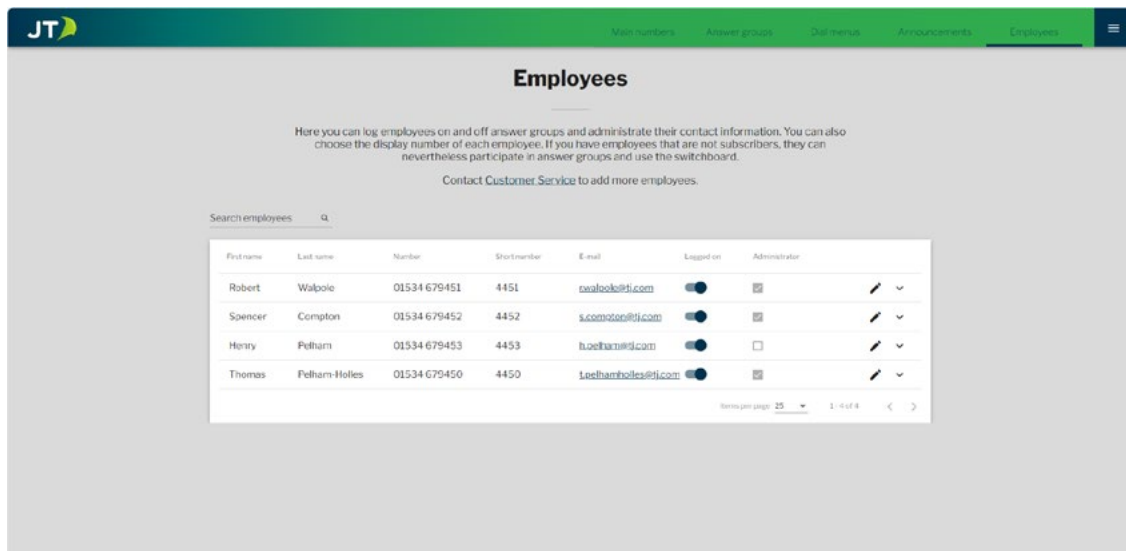
In this screen, you can edit existing Employees.

When editing a employee, the following fields are available:

The Pen icon will open the user's fields for editing.

The arrow will expand the Employee's options and allow you to make changes.

The drop-down and arrows at the bottom of the page can be used to navigate a large number of employees info.

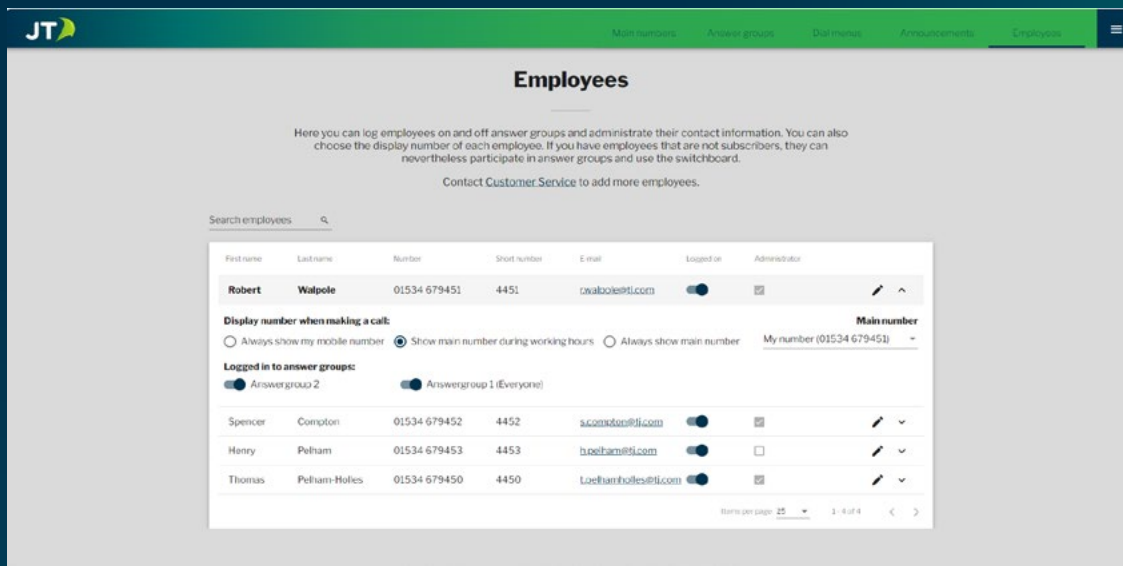


- **First name** - The employee's first name.
- **Last name** - The employee's last name.
- **Short number** - This is a four-digit extension number used to quickly ring a specific individual within your company. It is common to set this as the last four digits of their phone number for ease of use.
- **E-Mail** - The employee's email address.
- **Logged on slider** - This slider can be used to log off an employee, this will temporarily remove them from any answer groups they are in
- **Administrator tick box** - Ticking the box will enable additional admin settings.

When making edits to a user, ensure you don't click elsewhere on the screen, or the dialogue will close without saving your edits. When you are happy with the fields, make sure you hit save!

# Administration

## Changing an Employee's display number



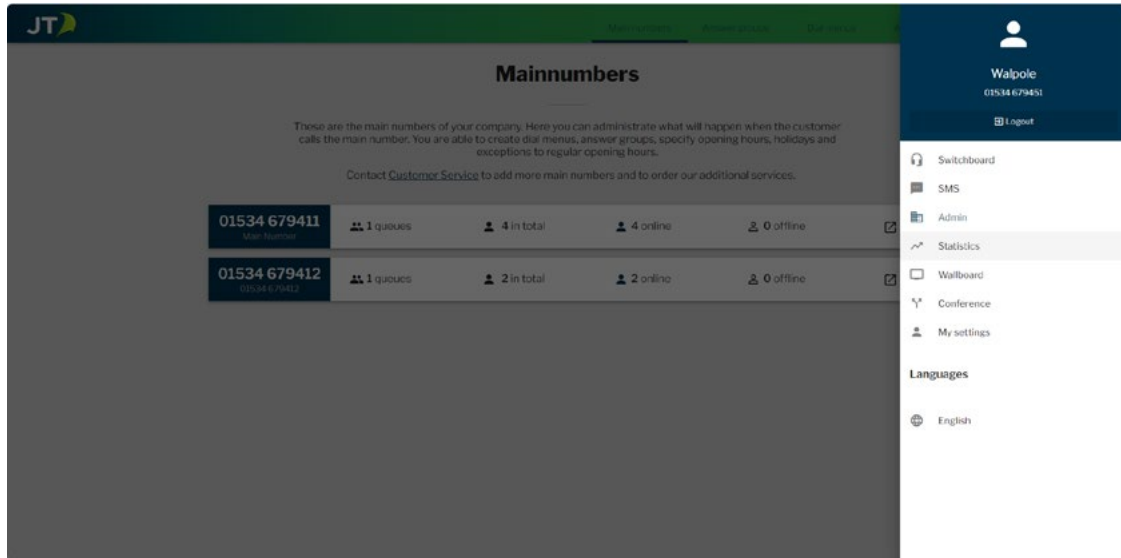
**Display Number** – Using the expanded employee options depicted below (opened by pressing the down arrow next to an employee) you can change the outgoing phone number of your employees. The following options are available:

- **Always show my mobile number** – This option will always show the number of the employee's mobile device
- **Show main number during working hours** – This option will show the main number that has been associated with the company, but only during working hours
- **Always show main number** – This option will always display your companies main number
- **Main number** – This drop-down menu will allow you to select a main number for the employee on a case by case basis. This is useful if your solution has more than one main number associated with the CPBX

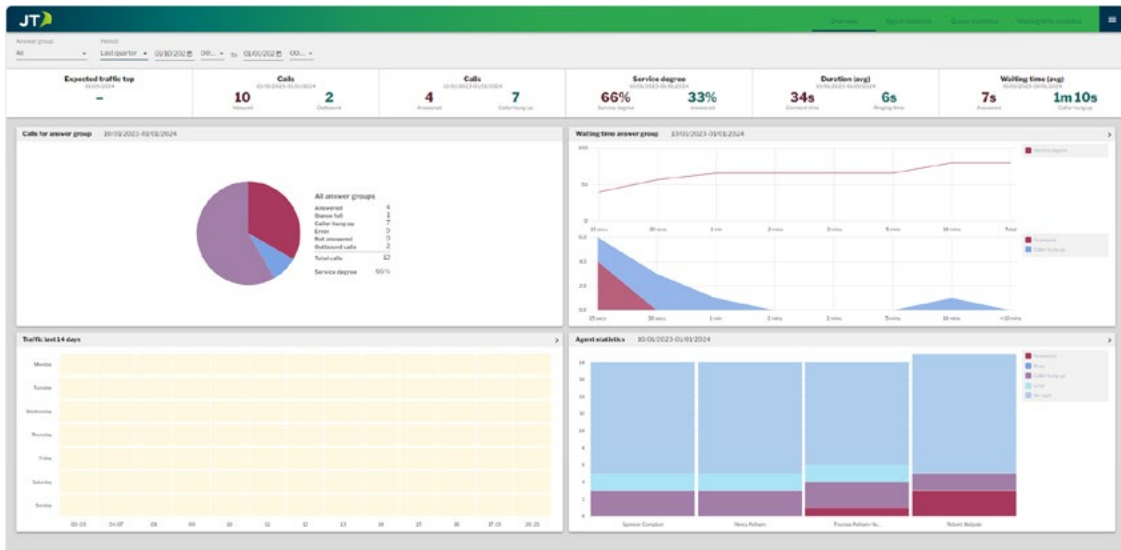
Always remember to click save after configuring your settings!



# Statistics

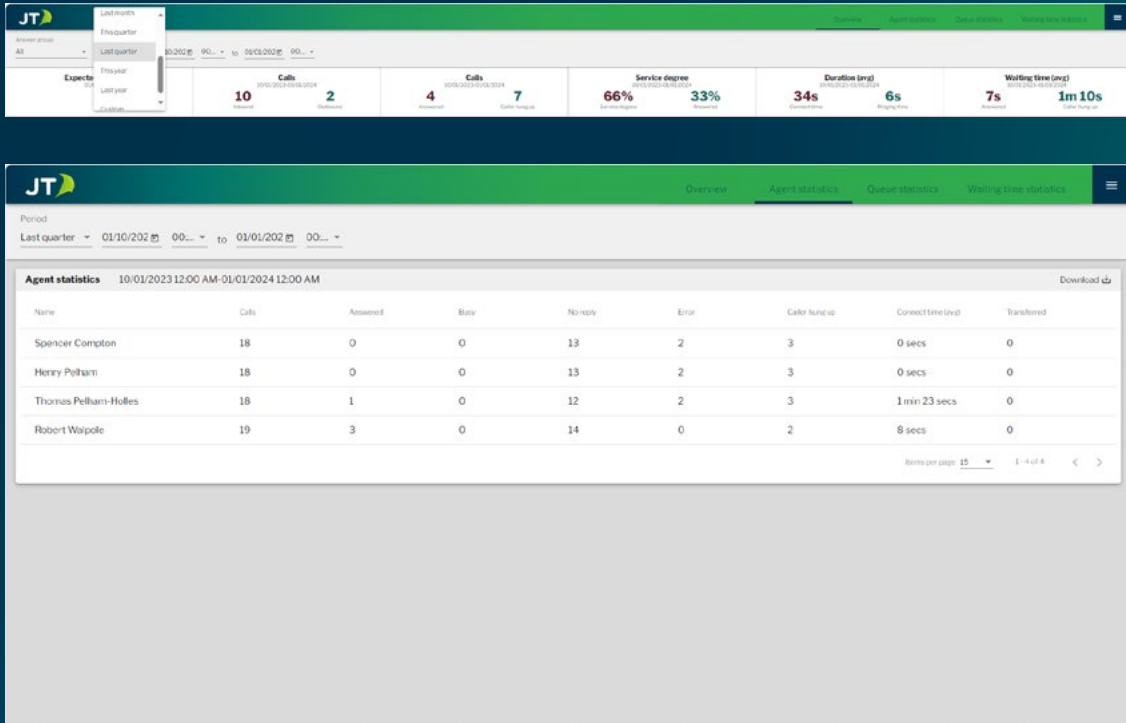


Accessed through the triple-bar menu, this page is where you can view and export statistics showing your company's calling traffic.

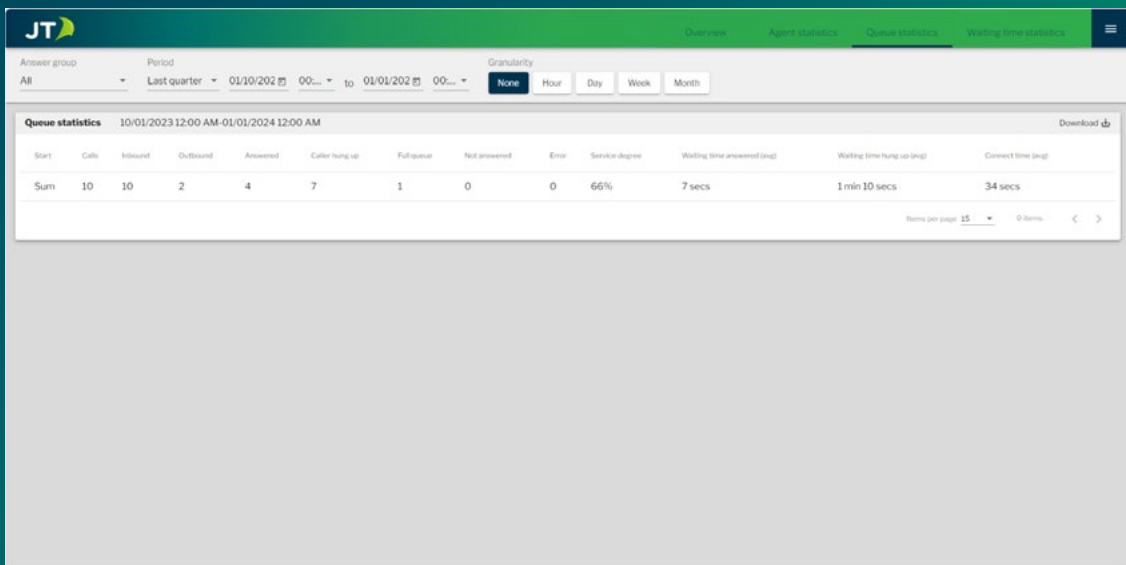


The Overview tab shows all the statistics in an easy-to-read format, you can define the date and time range at the top of the page.

# Statistics



The Agent Status tab shows information for each employee. You can define the date and time range at the top of the page. You can also download a .csv file of this data by clicking the Download button.



The Queue Statistics tab shows information for the call Queue. You can define the date and time range at the top of the page as well as the granularity. You can also download a .csv file of this data by clicking the Download button.

# Statistics

**Waiting time statistics** 10/01/2023 12:00 AM-01/01/2024 12:00 AM Download

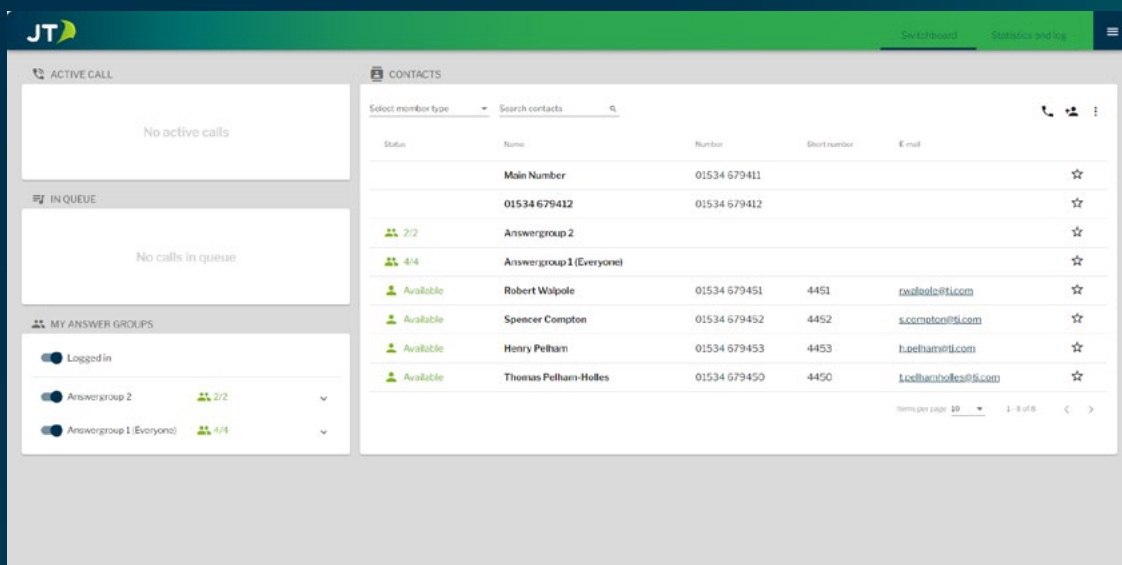
Values are accumulated for each time interval, i.e. calls answered within 15 seconds are also counted as answered within 30 seconds (and all later intervals). Hover over the values for "Answered" and "Caller hung up" to see percentage of total calls per interval.

|  | 15secs | 30secs | 1 min | 2 min | 3 min | 5 min | 30 min | Total |
|--|--------|--------|-------|-------|-------|-------|--------|-------|
| <b>From 10/01/2023 12:00 AM to 01/01/2024 12:00 AM</b> |        |        |       |       |       |       |        |       |
| Answered   | 4      | 4      | 4     | 4     | 4     | 4     | 4      | 4     |
| Caller hung up   | 2      | 5      | 6     | 6     | 6     | 6     | 7      | 7     |
| Service degree   | 40%    | 57%    | 66%   | 66%   | 66%   | 66%   | 80%    | 80%   |

Records per page: 15 1 - 4 of 4

The Waiting time Statistics tab shows information for wait times across your system. You can define the date and time range at the top of the page as well as the granularity. You can also download a .csv file of this data by clicking the Download button.

# Switchboard



After logging in you will be presented with the Switchboard. From here you can view and manage calls and employees in your JT Cloud PBX.

**Active Call** - This will show any ongoing calls in or out of your extension number, you will see the caller's number, duration of call and the answer group. You can also transfer, hold or hangup a call from this page.

**In Queue** - This will show any calls waiting in queues, it will show the number, length of time in queue and destination employee. You can transfer, answer or reject the call when it is in the queue.

**My Answer Groups** - Here you can log yourself in or out of the answer groups.

When a call is received a notification is displayed at the bottom of your screen. Clicking accept will take you to the Switchboard page.

Incoming call from 01534 670860, do you want to go to switch board?

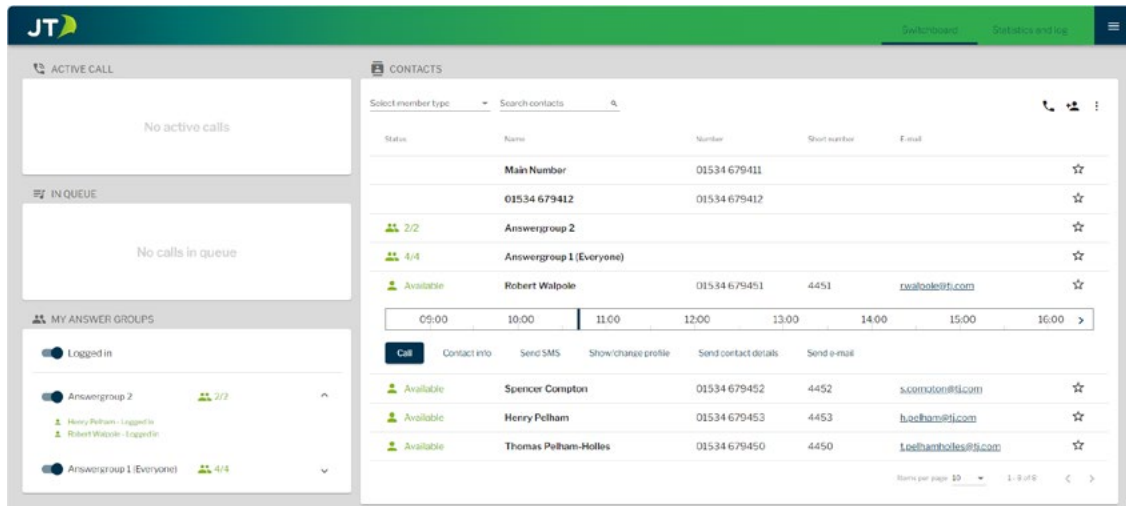
Accept

# Switchboard

## Contacts

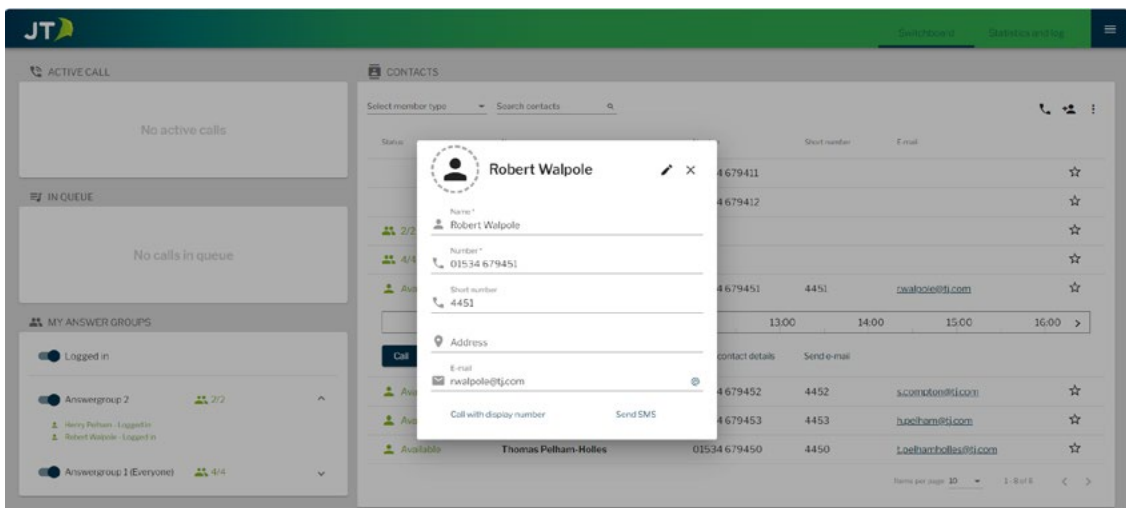
The Contacts section lists all available contacts, to begin with you will only see your answer groups and employees, but you can add additional contacts as needed.

This list is dynamic, updating to show the call status of users and answer groups. Clicking an existing contact will show additional information and actions.



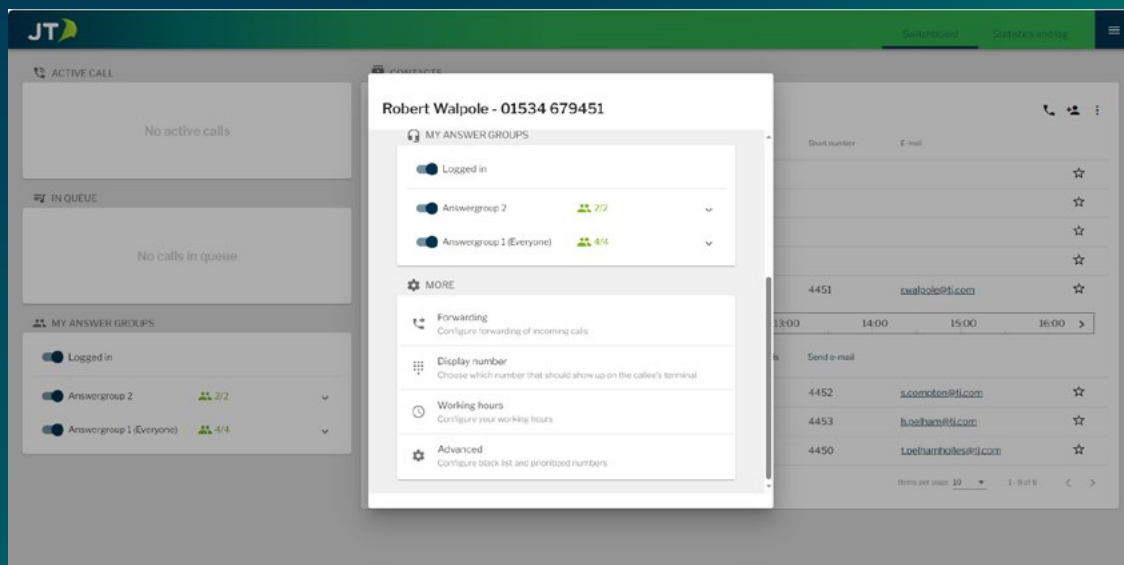
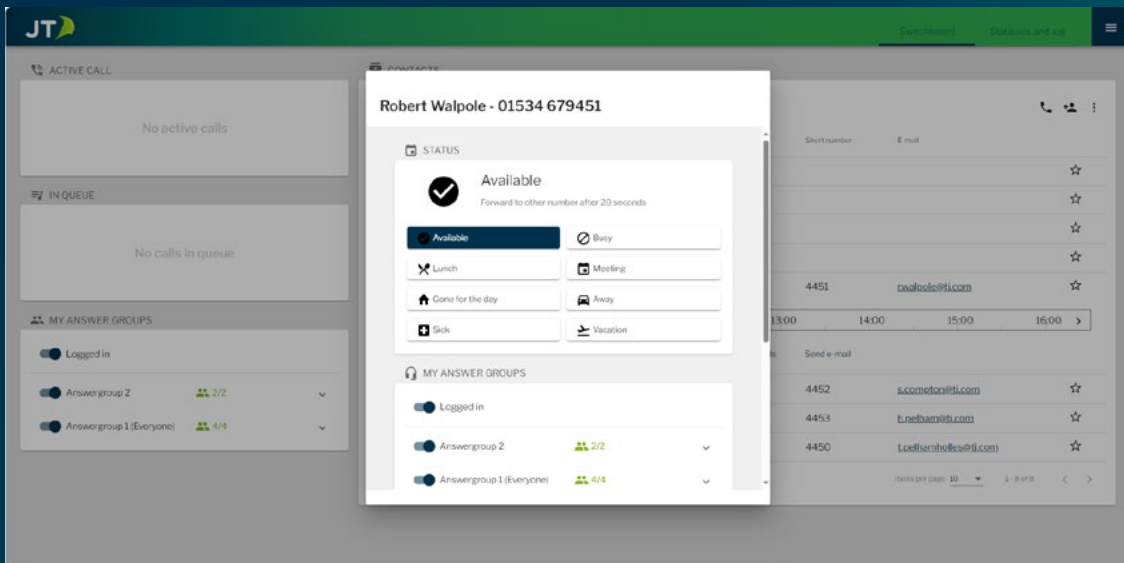
**Call** - This will start a call to the selected contact.

**Contact info** - This will open a new window with contact information and the ability to edit. To edit the contact, click the pen icon in the upper right. You can also call the contact or send an SMS from this window.



**Send SMS** - This will open a new page that will let you send SMS messages from within the switchboard. For more details see page 35.

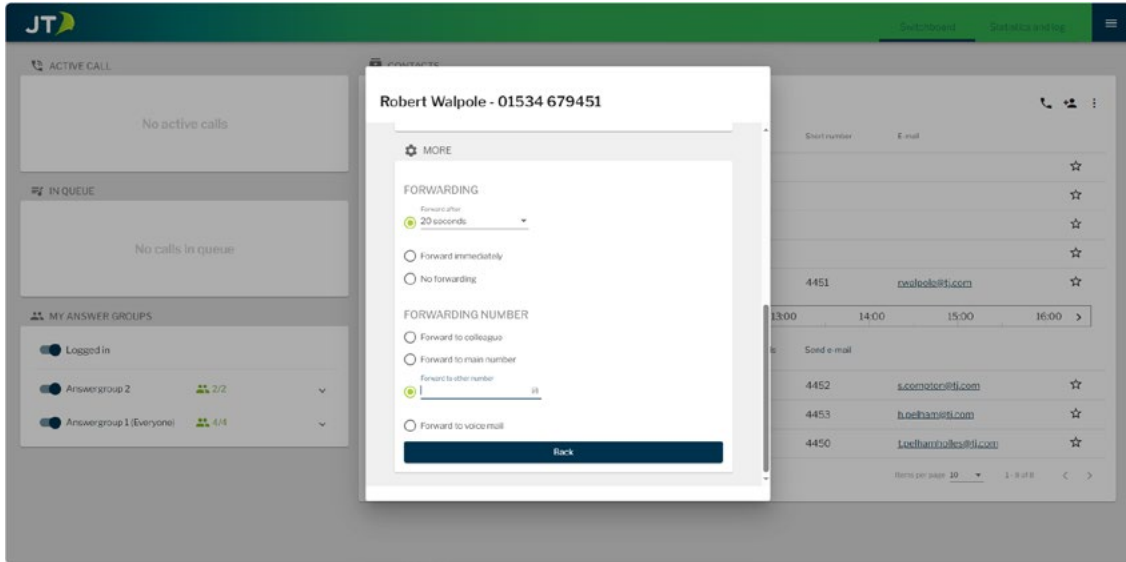
# Switchboard



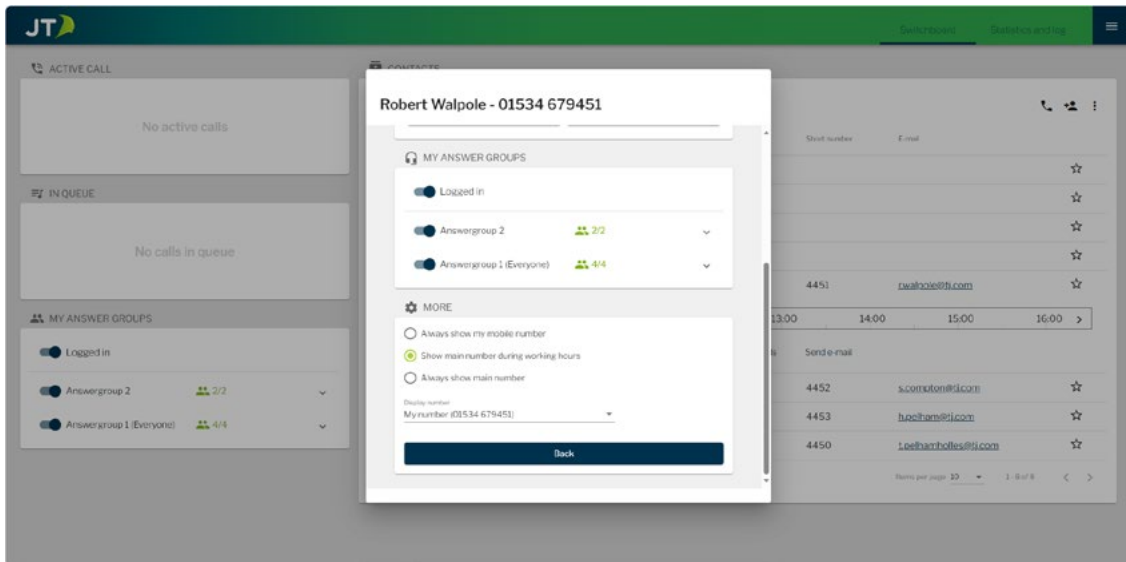
**Show/Change profile** – This allows you to change your status, log in and out of answer groups, set up call forwarding, configure your display number, set working hours and configure black and prioritised numbers. For Status settings please see My Settings Page 42.

# Switchboard

**Forwarding** – This allows you to set how quickly calls are forwarded and where they should forward to.

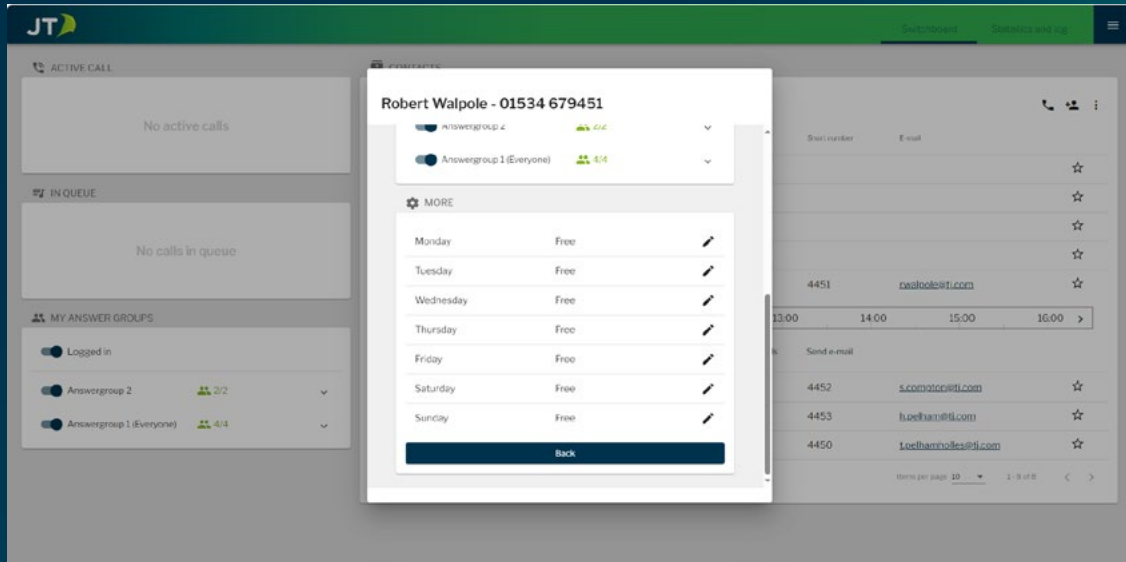


**Display Number** – Choose what number is displayed to the person you are calling.

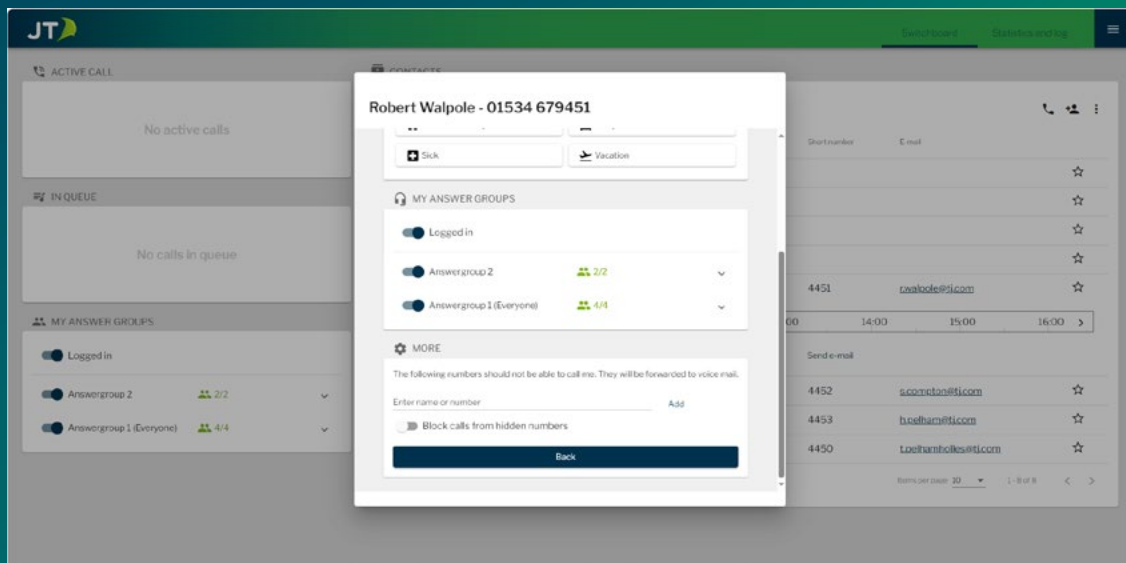


# Switchboard

**Working hours** – Configure your working hours.



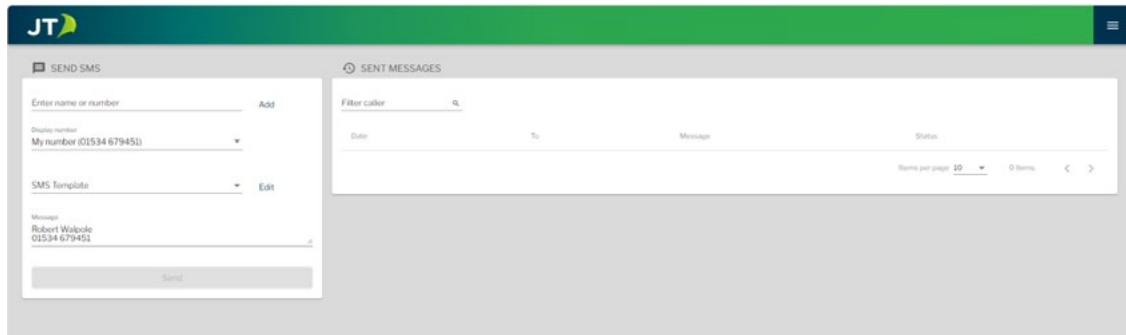
**Advanced** – Configure Black Listed and Prioritised numbers. Blacklisting means calls from that number will be blocked. Prioritised a number means that person can call through no matter what status you have set. Enter the desired number to either list then click the Add button. You can also toggle to block all hidden numbers from connecting.



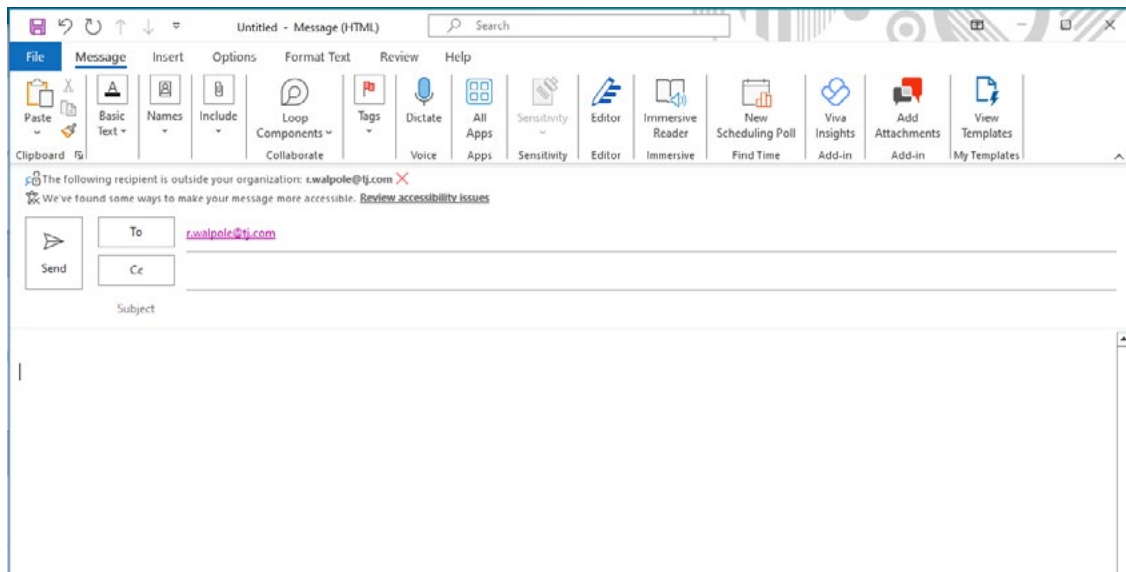


# Switchboard

**Send contact details:** allows you to send the selected contact's details via SMS.



**Send e-mail:** opens an email in you native email client to that contact.

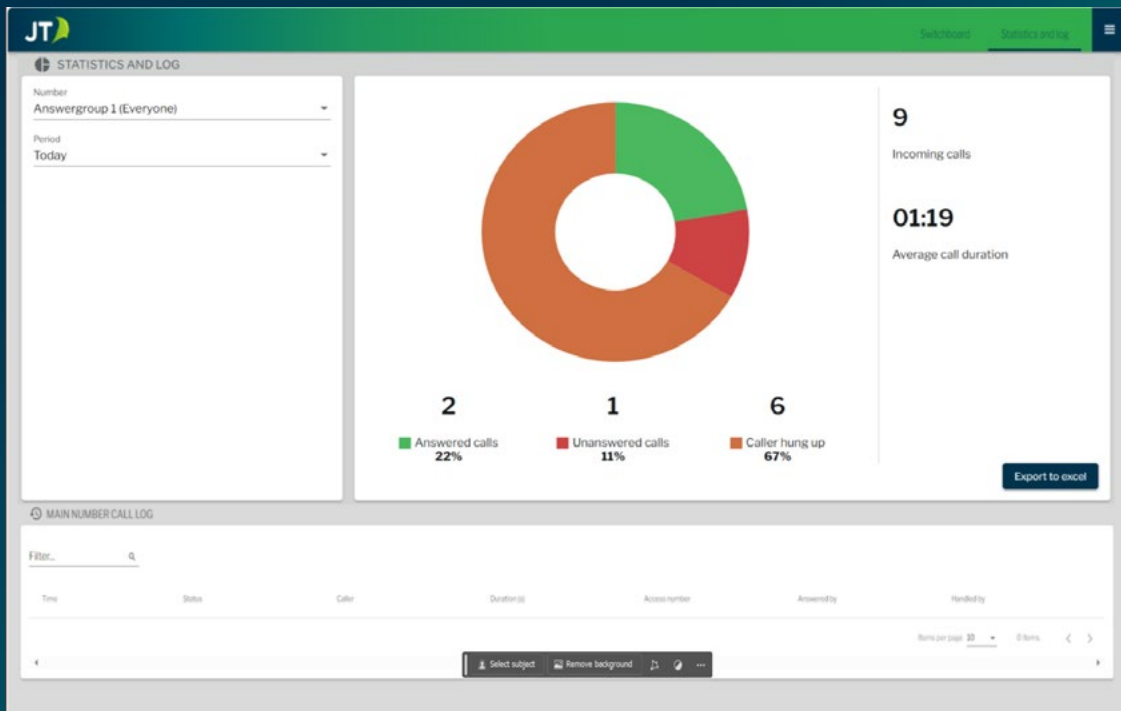


# Statistics and Log

The Statistics and Log tab will show an overview of calls to the employee or answer group. You can view these statistics based on phone number and date.

At the bottom of this page you can also view the call history for the main number, including details such as duration and the employee that handled the call.

For more detailed statistics please see the Statistics section on page 25.



**MAIN NUMBER CALL LOG**

Filter...

| Time ↑ | Status         | Caller         | Duration (s) | Access number            | Answered by          | Handled by |
|--------|----------------|----------------|--------------|--------------------------|----------------------|------------|
| 11:44  | Caller hung up | (01534 670860) | 00:22        | Answergroup 1 (Everyone) |                      |            |
| 11:37  | Caller hung up | (01534 670860) | 00:33        | Answergroup 1 (Everyone) |                      |            |
| 11:36  | Caller hung up | (01534 670860) | 00:20        | Answergroup 1 (Everyone) |                      |            |
| 11:35  | Caller hung up | (01534 670860) | 00:36        | Answergroup 1 (Everyone) |                      |            |
| 11:32  | Not answered   | (01534 670860) | 00:39        | Answergroup 1 (Everyone) |                      |            |
| 11:24  | Caller hung up | (01534 670860) | 07:15        | Answergroup 1 (Everyone) |                      |            |
| 11:22  | Caller hung up | (01534 670860) | 00:22        | Answergroup 1 (Everyone) |                      |            |
| 11:14  | Answered       | (01534 670860) | 01:33        | Answergroup 1 (Everyone) | Thomas Pelham-Holles |            |
| 11:13  | Answered       | (07797 794570) | 00:13        | Answergroup 1 (Everyone) | Robert Waipole       |            |

Items per page: 10 | 1-9 of 9

# Send SMS

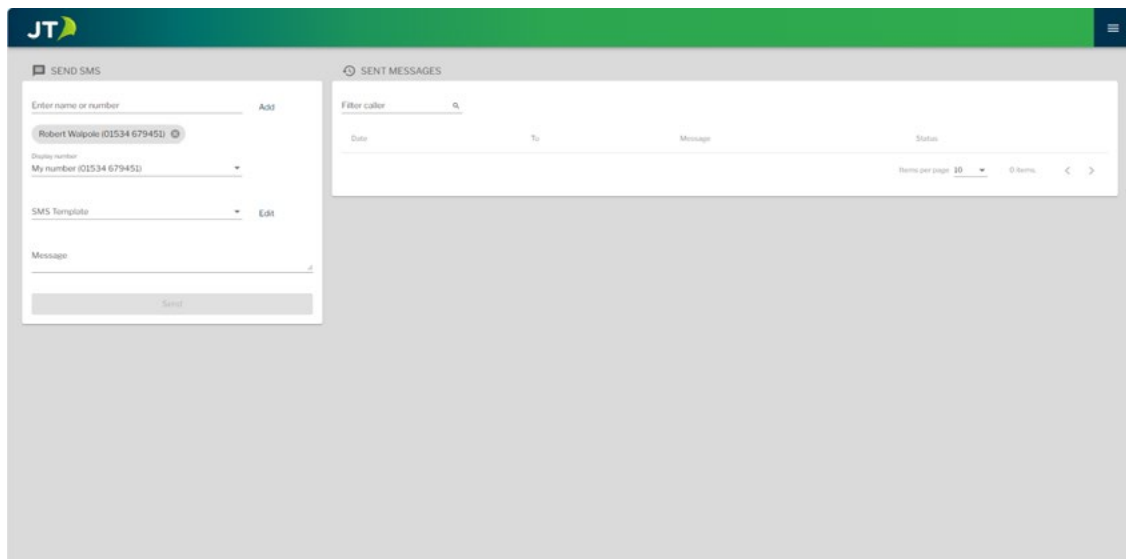
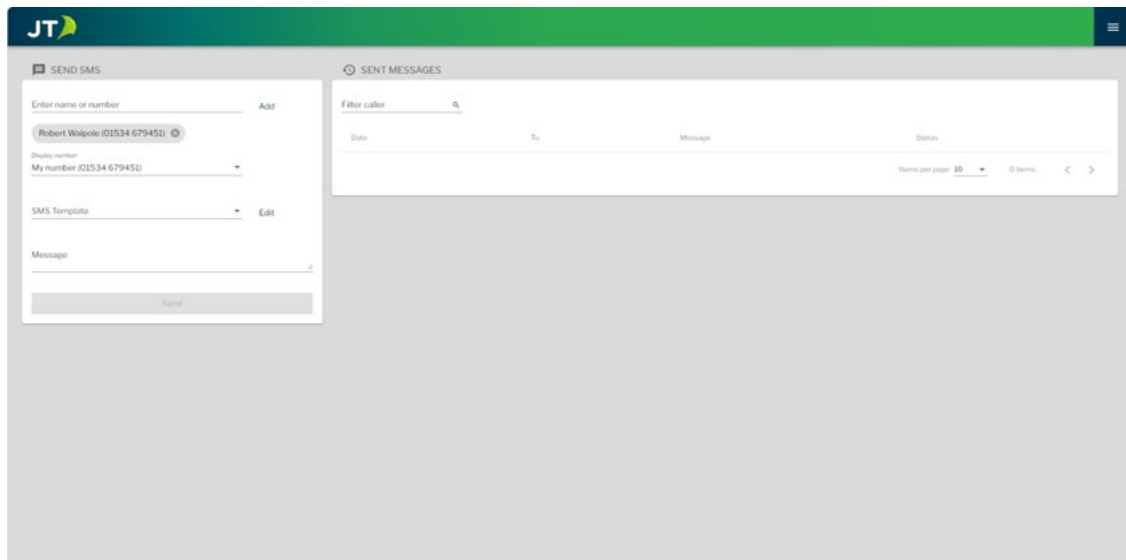
The Send SMS page lets you send an SMS from within the switchboard.

Enter a number or select one from the drop-down and then click Add, you can do this multiple times to send the same message to more than one recipient.

Once you have added the required numbers, select the display number from the drop-down. The message will be sent from this number.

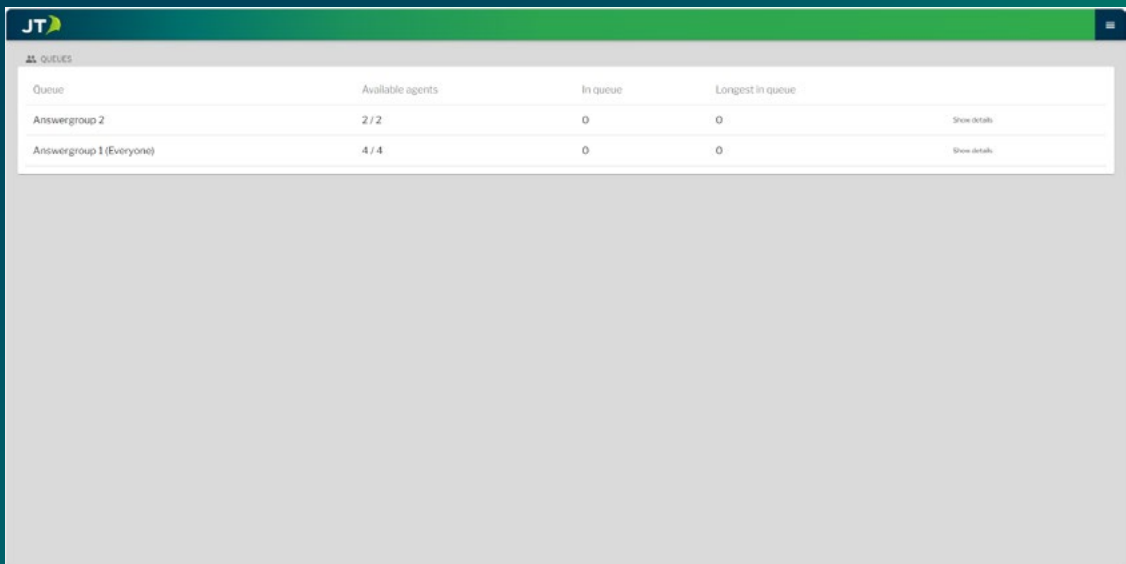
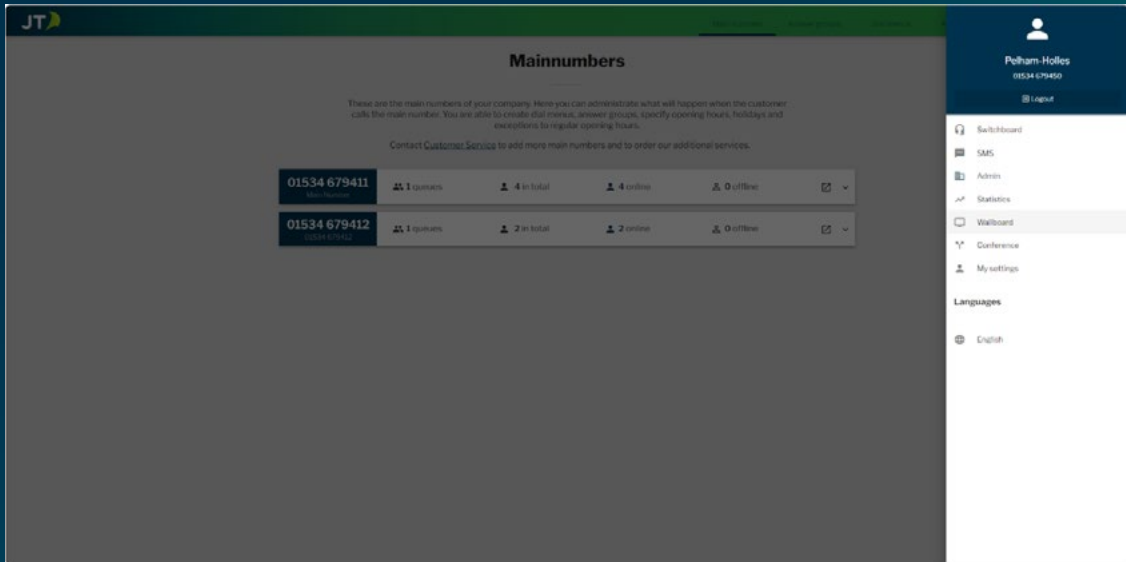
Select an SMS Template if required, you can also add or edit a template by using the Edit button. If you are not using a template, enter your message in the last field and click Send when ready.

On the right hand side of the page you will see a list of previously sent messages.



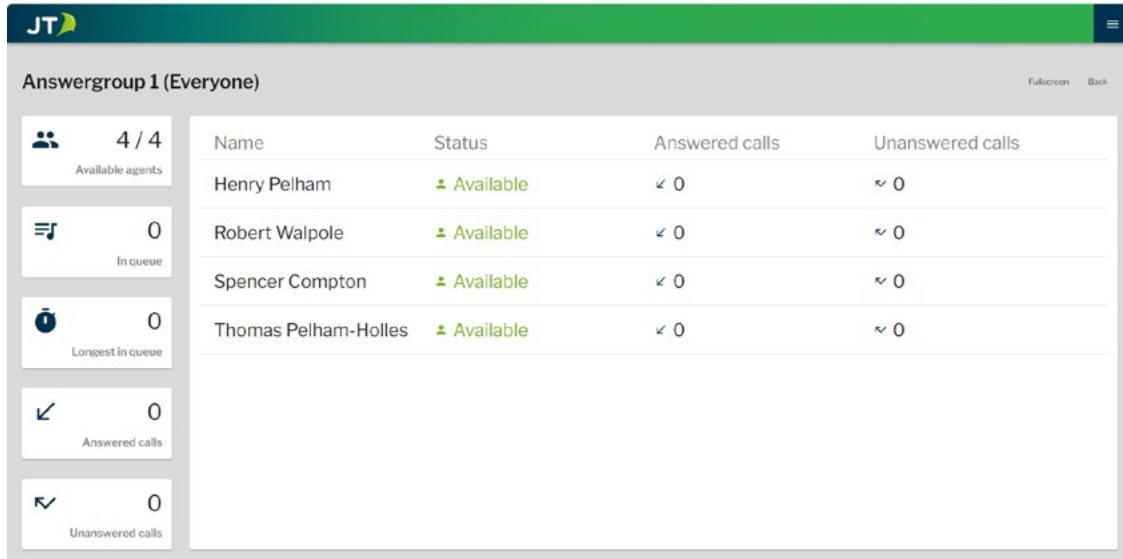
# Wallboard

The Wallboard allows you to create a real time display of calls, call history and current Queue.



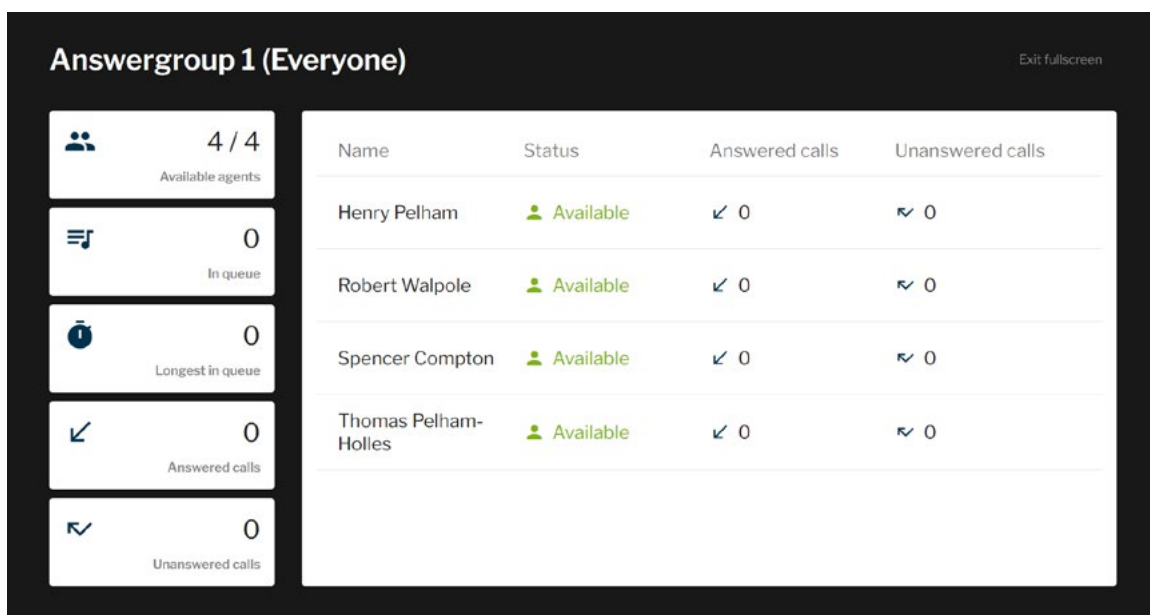
Clicking Show Details will expand the screen to show additional details including individual employee stats and status.

# Wallboard



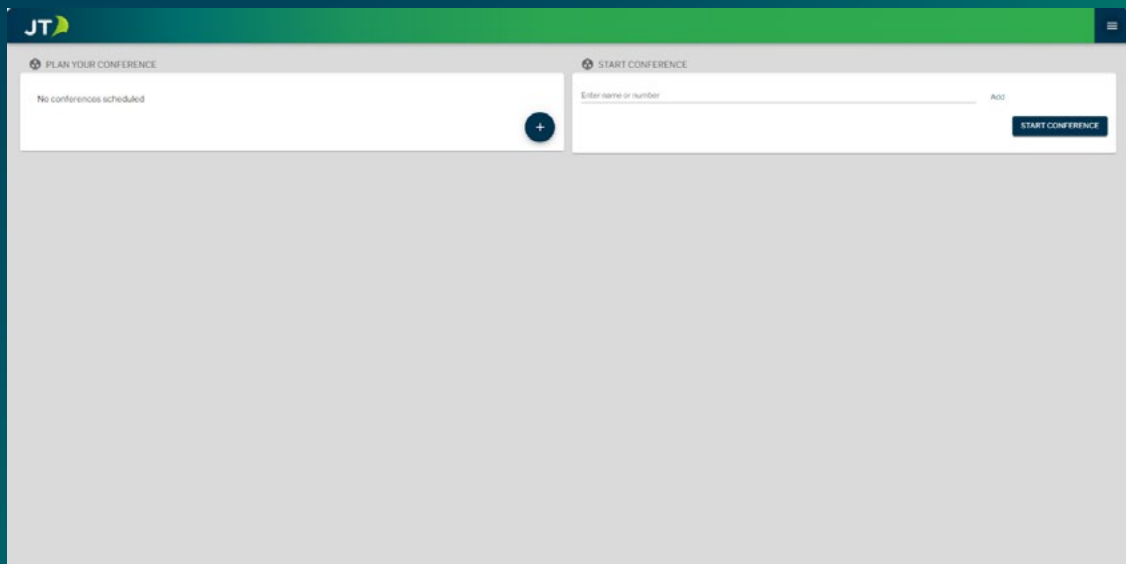
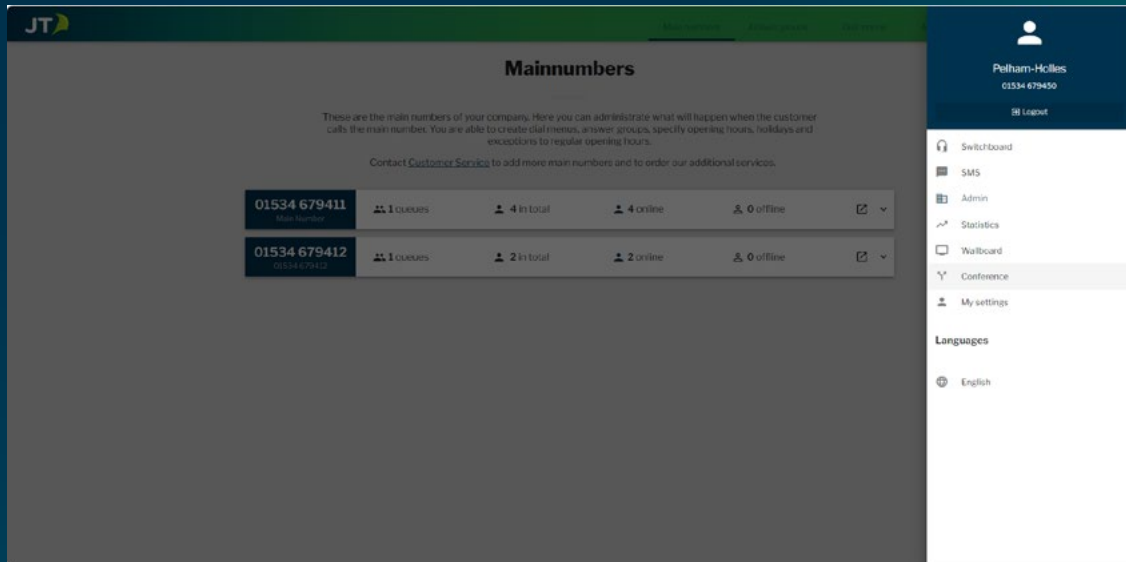
The following details are displayed on this page:

- Available agents - current and maximum Number of callers waiting in the Queue.
- Duration of the longest caller currently in the Queue Number of calls answered that day.
- Number of calls not answered that day.
- The name, Status, answered and unanswered calls for each employee is also displayed.
- This page can be expanded to a full screen view for use on a large display, to do this click the Full-screen button in the top right.



# Conference

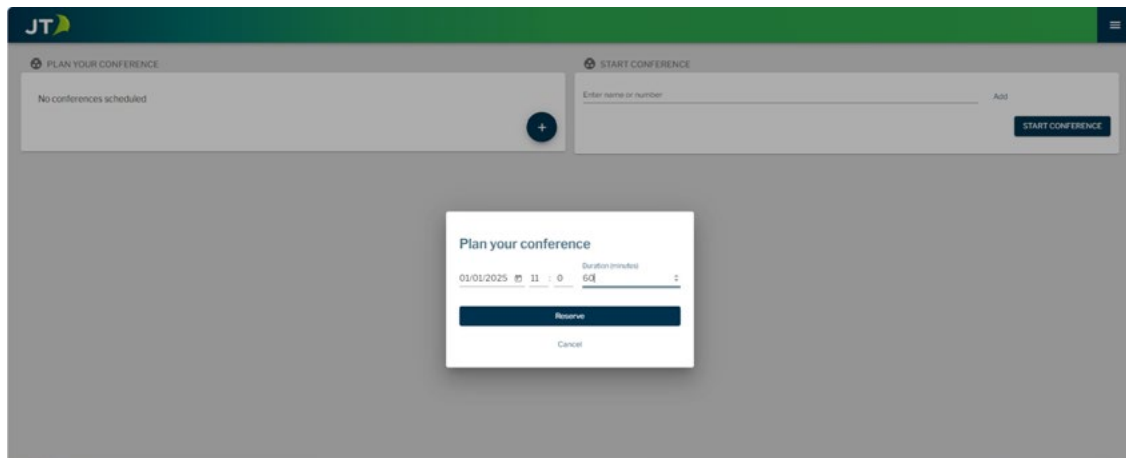
The Conference page allows you to set up and manage conference calls, you can access it using the right hand “triple-bar” menu.



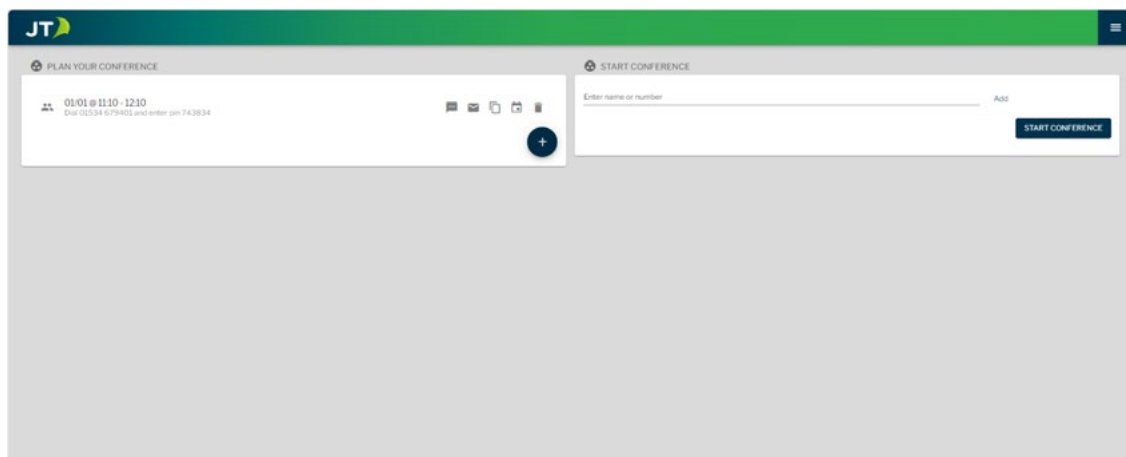
## Scheduled Conference

On the left of the page, you can schedule a conference. If you have any scheduled conferences they will be listed here. To add a new conference, click the + button, this will open a window with date, time, and duration.

# Conference



Once you have entered the desired information, click the Reserve button. The new conference plan will be listed, including the number and pin needed to access it.



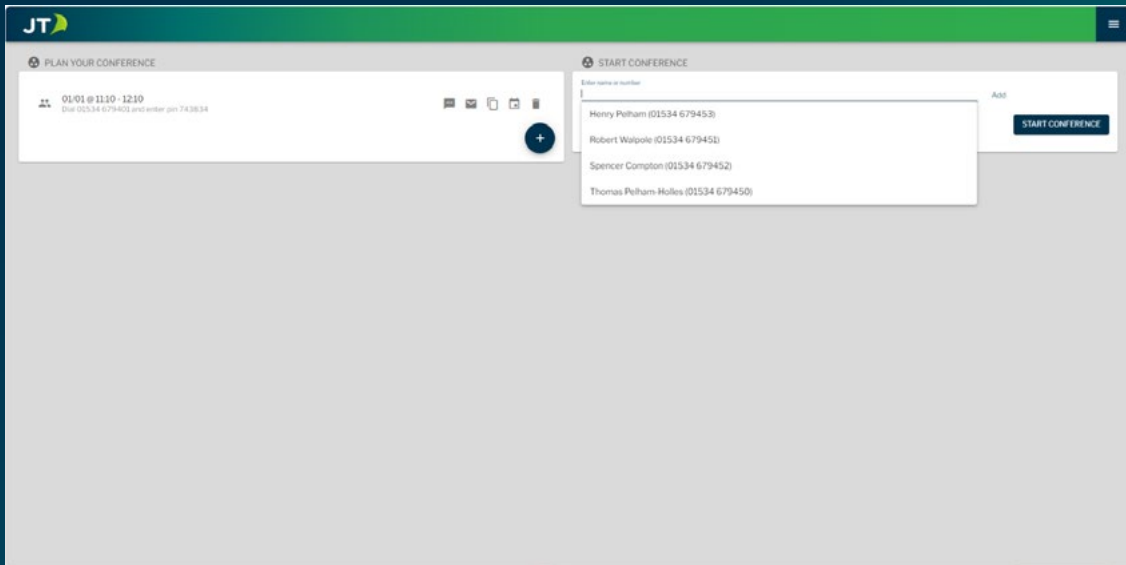
You can use the icons on the right to perform the following actions:

- **SMS** - Allows you to send an SMS to inform participants of the number and pin needed to access the conference.
- **Email** - Allows you to send an email to inform participants of the number and pin needed to access the conference.
- **Copy** - This will copy the Date, Time, phone number and pin for the conference into your device clipboard, you can then paste it as text to another application.
- **Calendar** - This will let you download a .ics file that can be used to add the conference to your calendar app.
- **Delete** - This will end and remove the conference.

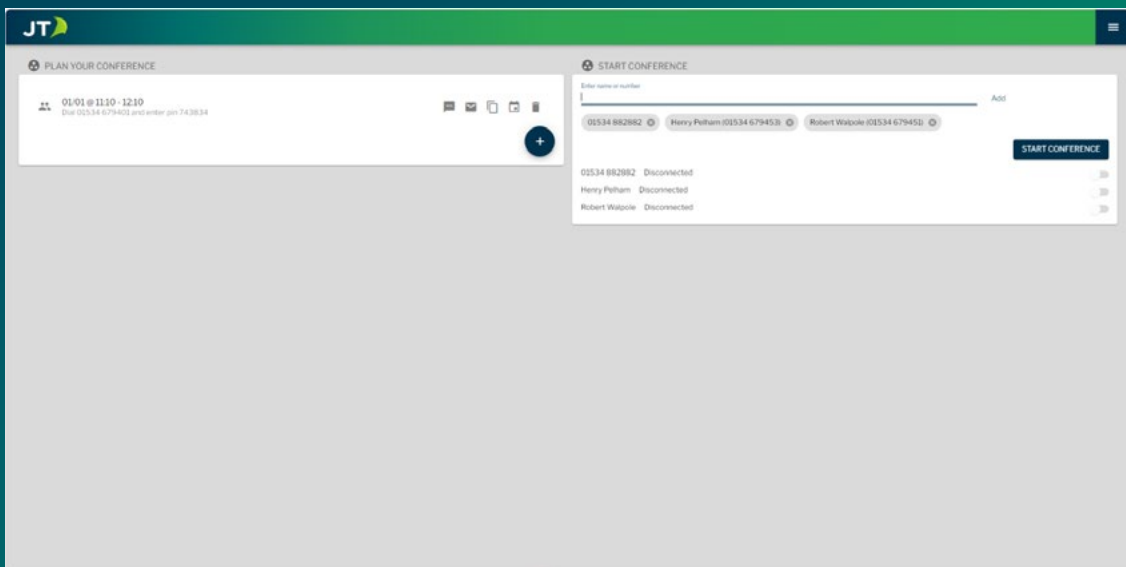
# Conference

## Dedicated Conference

You can use this section to create a conference call on the spot, simply select the employees from the drop-down or enter the phone number of the participant you want to connect with and click Add.



Selected participants will be displayed in a list.



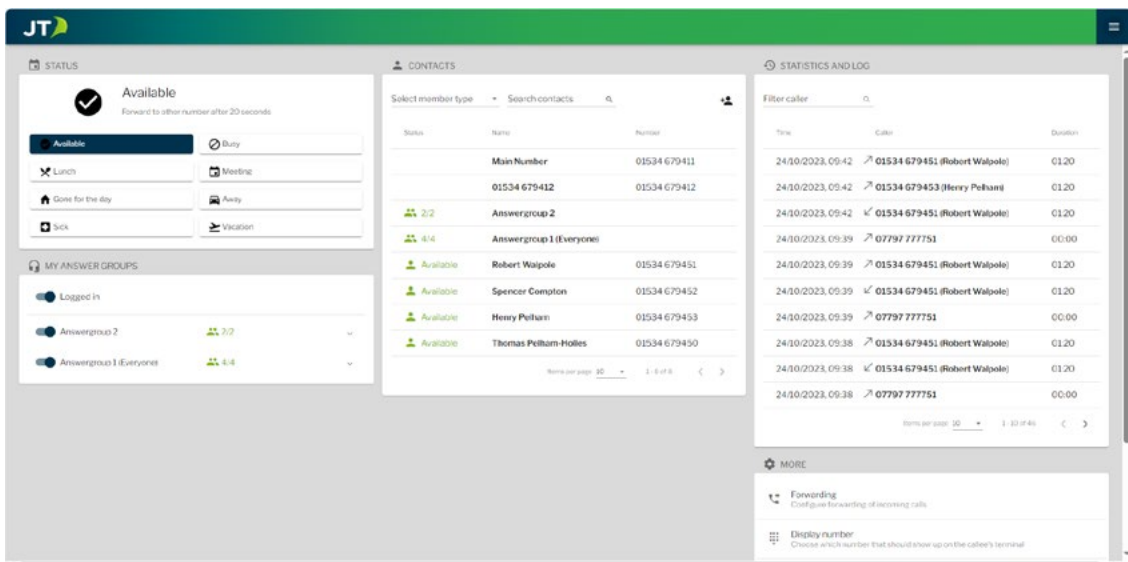
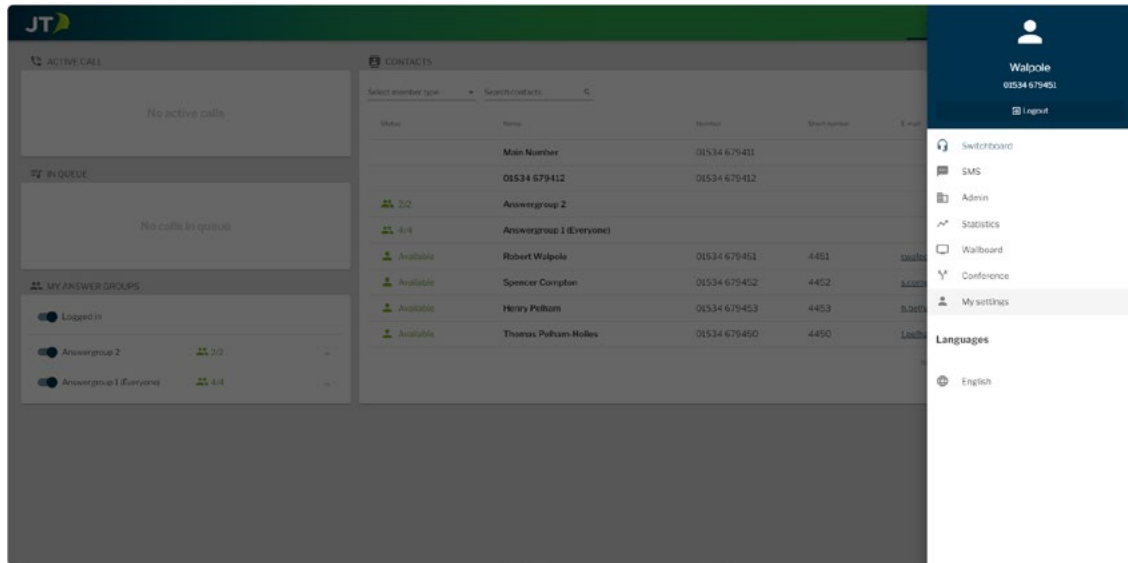
When you are ready, click the Start Conference button and the system will then call each listed user and bring them into the conference call automatically.

Once a conference has connected, you can disconnect it with the End Conference button, you can also disconnect individual users by switching the toggle.



# My Settings

The My Settings section under the triple-bar menu allows you to modify and fine tune your personal extension settings, there are multiple sections including Status, Contacts, Statistics and Log, Answer Groups and more. These functions can also be accessed as set from the Switchboard view. Please see pages 29-33 for details.



# My Settings

## Status

From here you can change your current availability, clicking a selection may open additional options, such as duration. Once selected you will be placed into that mode, any incoming calls will then be redirected as set in the forwarding options. You can access the forwarding options by clicking the sub heading or the Forwarding category in the “More” section at the bottom right of the screen.

## My Answer Groups

This section will display a list of Answer Groups and the availability of Employees in them. You can log yourself out with the top toggle, this will prevent calls from all groups coming through to you, or you can set yourself to inactive in individual groups with the corresponding toggle.

## Contacts

Just like on the Switchboard page, the contacts section allows you to see the availability of Employees and Answer groups, add additional contacts that are not part of your group, and call or send an SMS. If logged on as an admin you can also toggle the log in status of employees as well as add or remove them from the group

## Statistics and Log

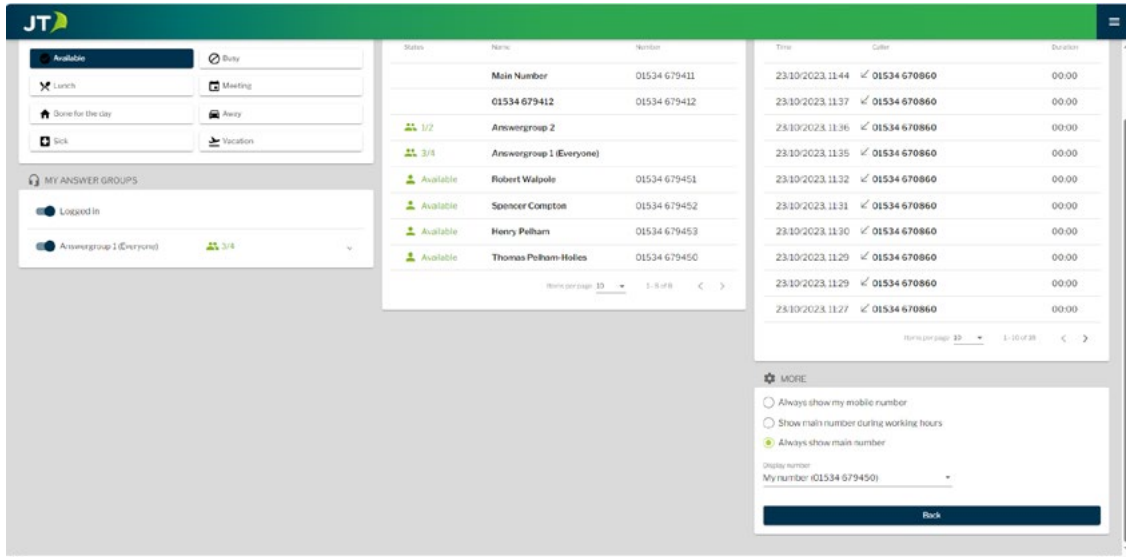
This section will display a list of recent calls. You can use the Filter at the top of the screen to search the list for specific calls. Clicking a call will open a contact card for the caller, this will allow you to call them or send an SMS.

## More

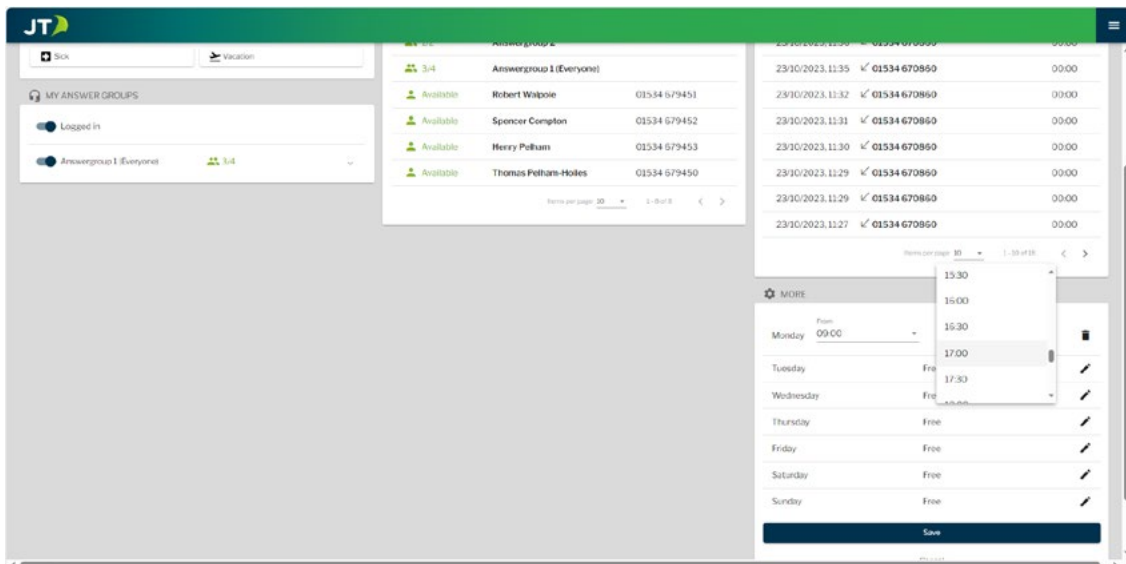
Forwarding will allow you to change your forwarding setting including how long a call will take to be forwarded, and where it will be forwarded to.

Display Number settings are used to set the number others see when you call them. You can set this to always be your Mobile or an available Main number. You can also set this to automatically change to a main number during working hours. Simply select the desired option, then the number from the drop-down list. Click Back to confirm and return to the “More” list.

# My Settings

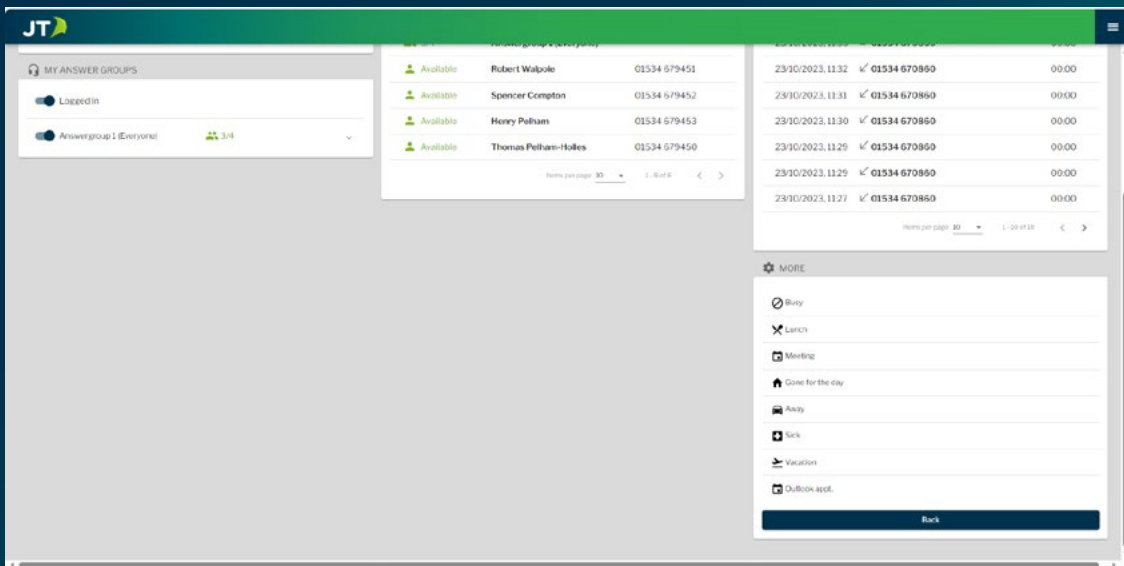


Working Hours can be used to set when you are logged into answer groups, use the pen icon to set the start and end time, calls outside of this time will follow your forwarding configuration. Once selected, click the save button to commit. If you need to remove the times, click the dustbin icon.

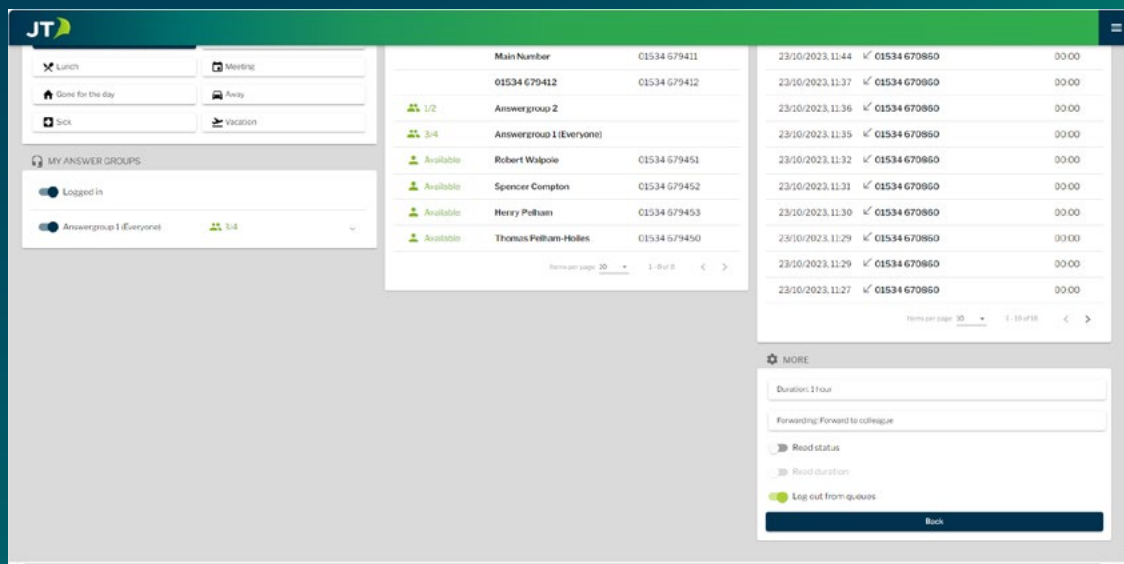


Status settings, these settings are used to configure your Status.

# My Settings



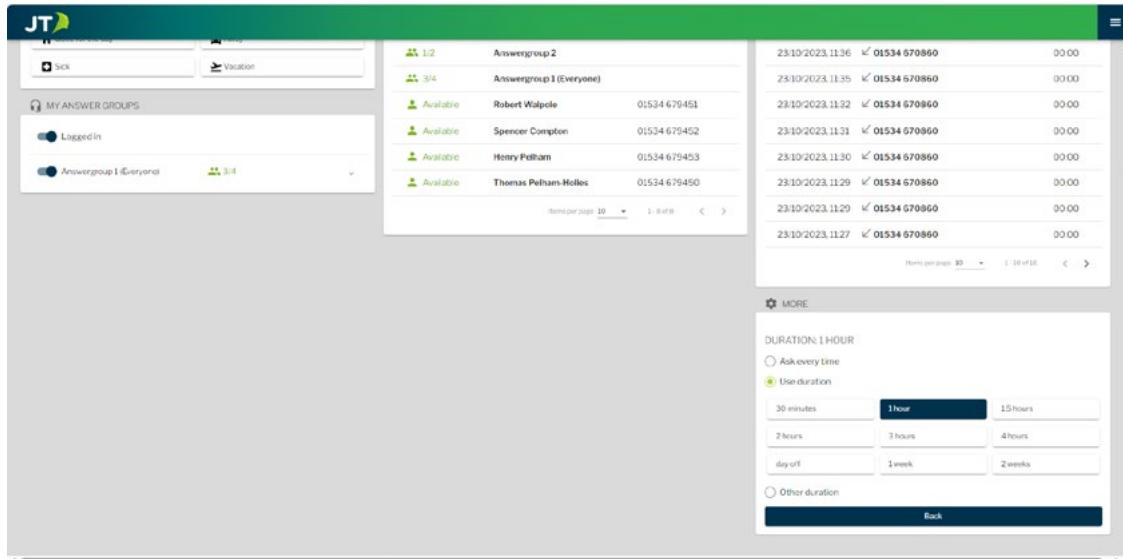
Click one of the options in the list to change the duration setting, forwarding options, read status and duration, and if you are logged out of queues or not.



Clicking Duration will allow you select from 3 options:

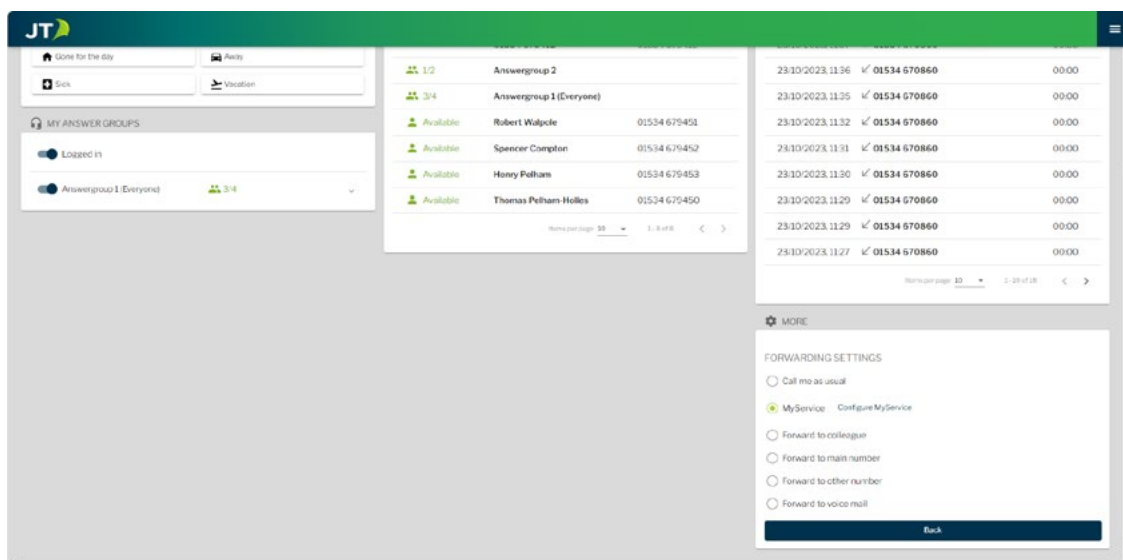
- **Ask every time** - This will prompt you for a duration each time you enable the absence.
- **Use Duration** - This will always select the entered duration, selectable from a pre-set list.
- **Other Duration** - This lets you select a custom duration in 5 to 10 minute increments.

# My Settings



Clicking Forwarding will let you choose from the following options to forward the caller to:

- **Call me as usual** - no forwarding.
- **MyService** - this will enable an answering service with up to 3 options, connect anyway, connect to colleague and connect to main number, these can be toggled and configured by clicking the “configure MyService button.
- **Forward to colleague** - select an employee form the list to forward to.
- **Forward to main number** - select the main number to forward to.
- **Forward to other number** - enter an external number to forward to.
- **Forward to voice-mail** - select to automatically send the caller to your voice-mail service.



# My Settings

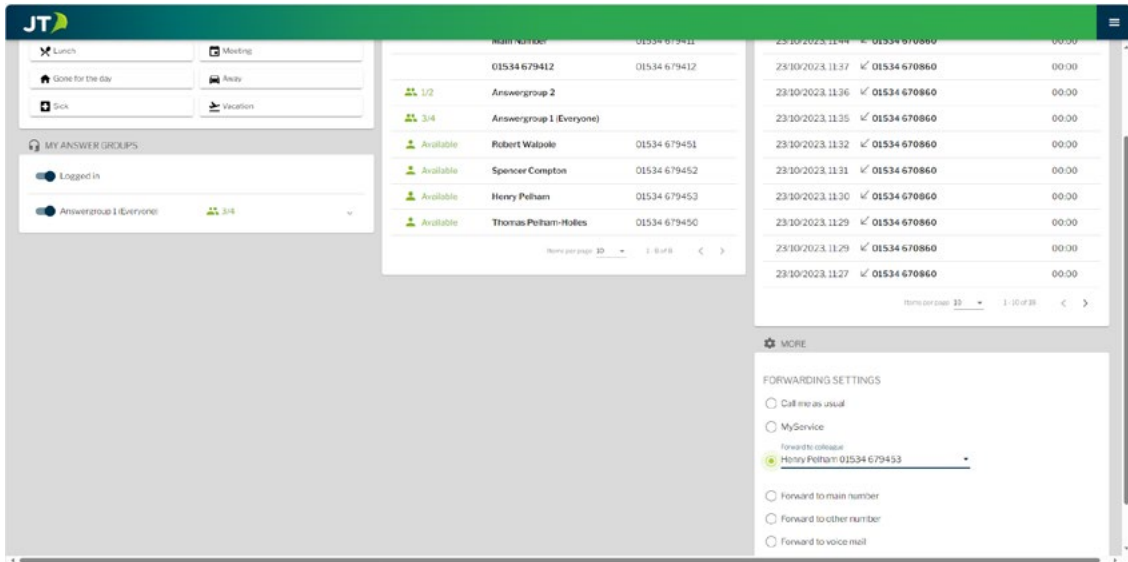
The screenshot shows the 'My Settings' page with the 'MY ANSWER GROUPS' section expanded to show 'Answergroup 1 (Everyone)'. The page includes a navigation menu on the left with options like 'Lunch', 'Meeting', 'Gone for the day', 'Away', 'Sick', and 'Vacation'. The main content area displays a list of answer groups and a table of call logs.

| Main Number  | 01534 679412                      | 23/10/2023 11:44 | 01534 670860 | 00:00 |
|--------------|-----------------------------------|------------------|--------------|-------|
| 01534 679412 | 01534 679412                      | 23/10/2023 11:37 | 01534 670860 | 00:00 |
| 1/2          | Answergroup 2                     | 23/10/2023 11:36 | 01534 670860 | 00:00 |
| 3/4          | Answergroup 1 (Everyone)          | 23/10/2023 11:35 | 01534 670860 | 00:00 |
| Available    | Robert Walpole 01534 679451       | 23/10/2023 11:32 | 01534 670860 | 00:00 |
| Available    | Spencer Compton 01534 679452      | 23/10/2023 11:31 | 01534 670860 | 00:00 |
| Available    | Henry Pelham 01534 679453         | 23/10/2023 11:30 | 01534 670860 | 00:00 |
| Available    | Thomas Pelham-Holles 01534 679450 | 23/10/2023 11:29 | 01534 670860 | 00:00 |
|              |                                   | 23/10/2023 11:29 | 01534 670860 | 00:00 |
|              |                                   | 23/10/2023 11:27 | 01534 670860 | 00:00 |

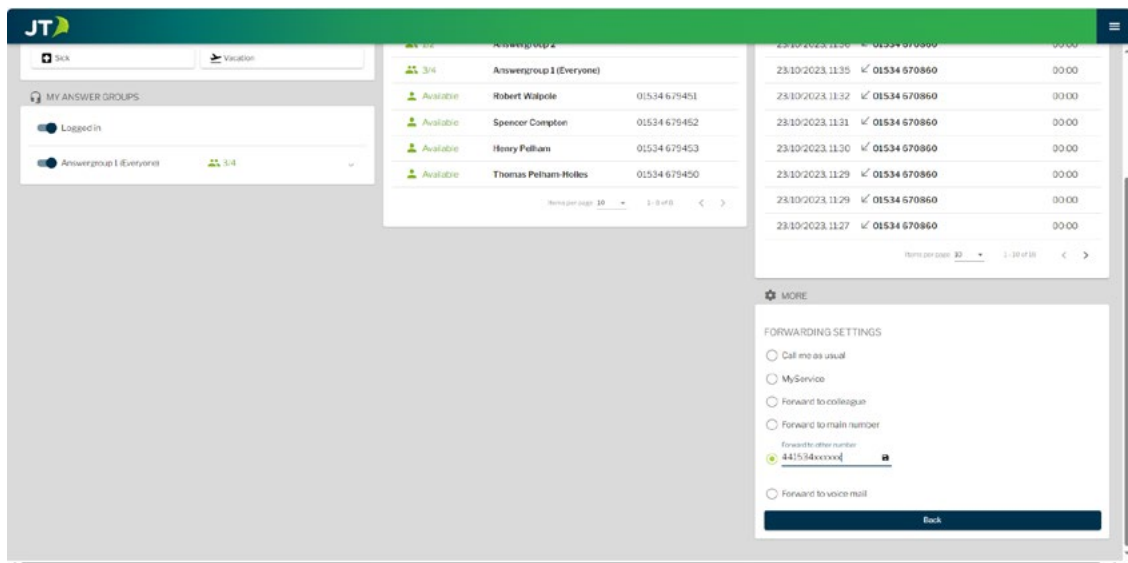
This screenshot is identical to the one above, but with a dropdown menu open under the 'Connect to colleague' option in the 'MORE' settings section. The dropdown lists the following names and phone numbers:

- Robert Walpole 01534 679451
- Spencer Compton 01534 679452
- Henry Pelham 01534 679453
- Thomas Pelham-Holles 01534 679450

# My Settings

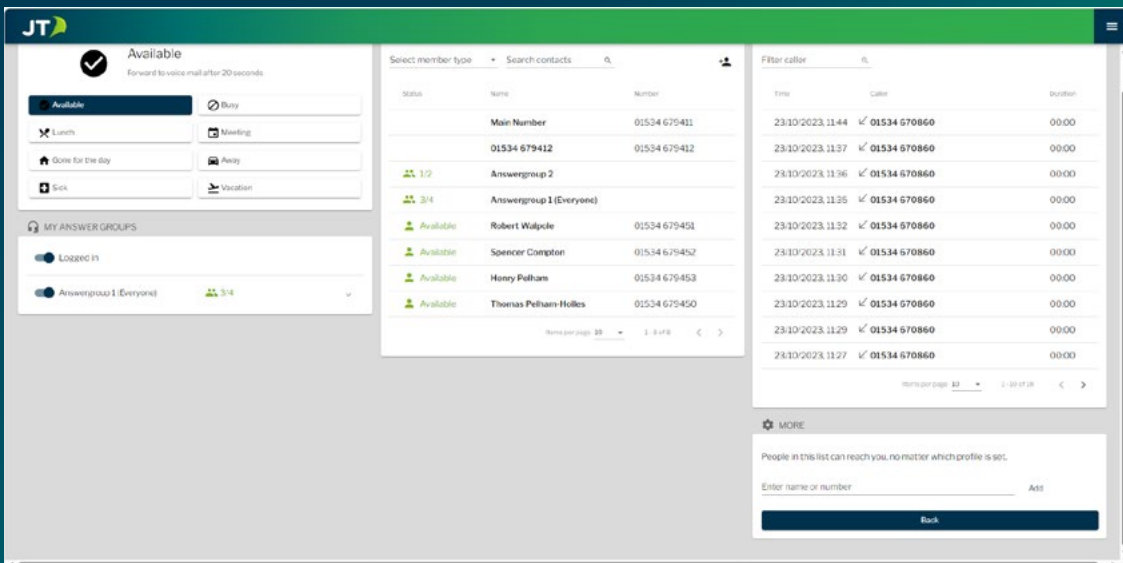
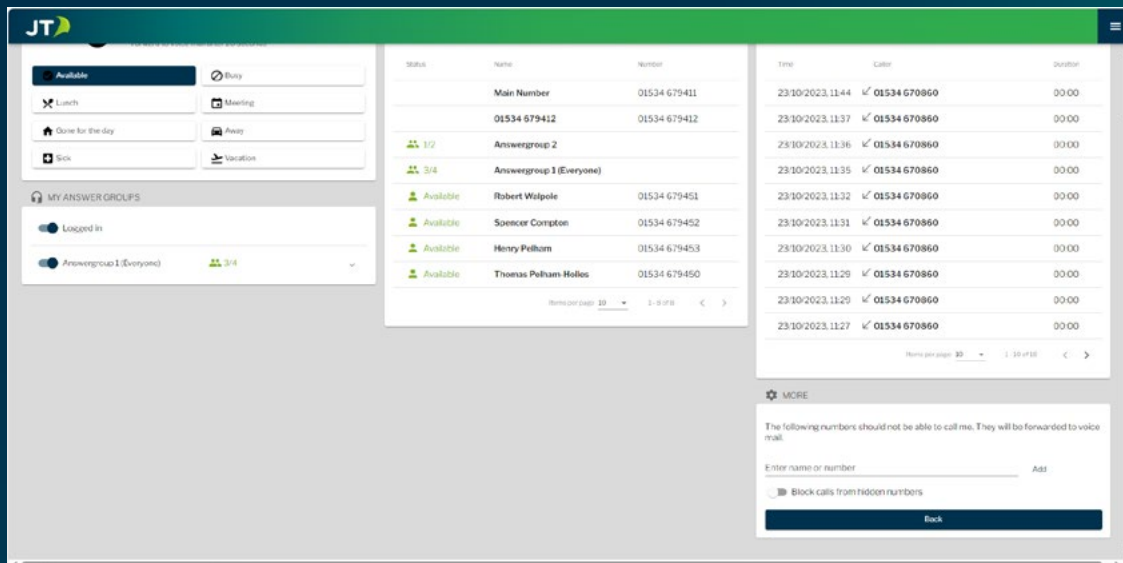


Forward to another number:



Advanced – Configure Black-Listed and Prioritised numbers. Black-listing means calls from that number will be blocked. Prioritising a number means that person can call through no matter what status you have set. Enter the desired number to either list then click the Add button. You can also toggle to block all hidden numbers from connecting.

# My Settings





# Glossary

**PBX (Private Branch Exchange):** In the JT Cloud PBX system, PBX stands for Private Branch Exchange. It serves as the central communication hub, facilitating internal and external calls. Admins configure settings, including features like IVR, while users benefit from a seamless phone system experience. Understanding PBX functionalities ensures effective communication within the JT Cloud PBX environment.

**Auto Attendant and IVR (Interactive Voice Response):** The Auto Attendant in the JT Cloud PBX system is a personalised voice menu utilising IVR. It offers up to nine options per level, accessible through number keys on your handset. Similar to experiences with banks, it plays pre-recorded files, allowing callers to choose from available options for seamless interaction.

**Menu:** Another term for auto attendant. They can be multi-level e.g. one auto attendant can have an option that passes you to another. There is no limit to how many levels may be configured.

**Switchboard:** In the JT Cloud PBX system, a switchboard serves as a central control panel for managing calls, directing them to various extensions or departments. It allows operators to efficiently handle incoming and outgoing calls, facilitating smooth communication within the organisation.

**Absence/Status:** Setting an absence or status on a JT Cloud PBX number lets you personalise your phone's response when away. It allows for custom messages and call redirection, ensuring callers receive relevant information during your absence.

**User:** In the JT Cloud PBX system, a User, identified by a personal phone number, utilises preset absences and engages with features like IVR.

**Answer Group:** In the JT Cloud PBX system, an answer group comprises a designated list of employees (Users) with predefined rules. These individuals receive alerts when the system routes a call to the answer group, ensuring efficient call handling and timely responses.

**Participants:** Employees who are part of an answer group.

**Main Number:** In the JT Cloud PBX system, the main number is the designated phone number assigned to your solution. It serves as the primary point of contact for incoming calls, facilitating communication within the organisation.

**IVR:** Interactive Voice Response is an automated phone system technology that allows incoming callers to access information via a voice response system of pre-recorded messages without having to speak to an agent, as well as to utilise menu options via touch tone keypad selection.

**Queue:** In the JT Cloud PBX system, a queue is where callers wait for an available User. Options include playing messages or music during the wait time, enhancing the caller experience while facilitating efficient call management.

**Music on Hold:** In the JT Cloud PBX system, music on hold refers to the audio that callers hear while waiting in the queue for an available participant. It enhances the caller experience by providing pleasant background music during the waiting period.

# Glossary

---

**Overflow:** In the JT Cloud PBX system, overflow settings dictate the system's response when a call remains unanswered by participants of an answer group. These settings ensure efficient call handling by routing calls to alternative destinations or voice-mail when necessary.

**Announcement:** An announcement in the JT Cloud PBX system is a message played to the caller in specific circumstances. It provides important information or instructions tailored to the caller's situation, enhancing communication effectiveness.

**Wallboard:** Within the JT Cloud PBX system, a wallboard acts as a visual display, presenting real-time call metrics and performance data. It provides operators with instant insights into call queues, wait times, and agent availability, facilitating informed decision-making and efficient call management.

**Conference:** In the JT Cloud PBX system, a conference feature enables users to host virtual meetings with multiple participants. It allows for seamless collaboration, sharing of ideas, and discussions without the need for physical presence. Participants can join conferences using their phones or other compatible devices, enhancing communication and productivity within the organisation.

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