Admin Portal – Outbound Calling Plans

🌐 carrier.webex.com/outbound_calling_plans_rep/

Overview

Administrators can manage the customer 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)**
- **Local**
- **Long Distance**
- **Toll Free**
- **International**
- **Operator Assistance**
- **Chargeable Directory Assistance**
- **Special Services I**
- **Special Services II**
- **Premium Services I**
- **Premium Services II**
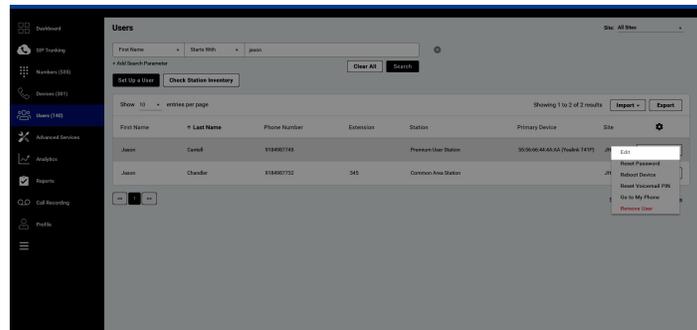
Configure Outbound Calling For Locations

1. Log in to the admin portal and select your site.
2. Select **Advanced Services** in the left-hand navigation menu.
3. Then select **Outbound Calling** in the Site Package Settings section.
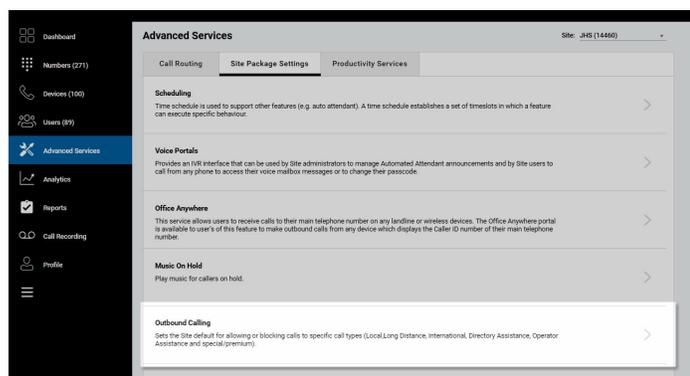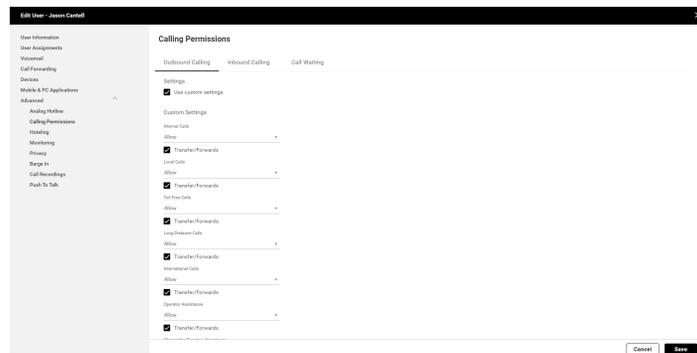
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Configure Outbound Calling for Individual Users

1. Log in to the admin portal and select your site.
2. Select the **Users** tab in the left-hand navigation menu.
3. Find the user you wish to configure and click on the **Actions** drop-down menu. Select **Edit**.

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5. When the edit user dialog appears, click on **Calling Permissions**. You can configure Outbound Calling here.

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The Outbound Calling has initial default configuration. It can be modified to fit the business need to either allow or block certain types of outbound calls. This Site Level Outbound Calling configuration is the default for all users, however users may have their own Outbound Calling plan configured for their specific business need in the Assignments/List by User section.

These are the default settings for the Outbound Calling Plan.

Type	Default Setting	Transfer/Forwards Enabled

Internal (intracompany)	Allow	Yes
Local	Allow	Yes
Long Distance	Allow	Yes
Toll Free	Allow	Yes
International	Block	No
Opeartor Assistance	Allow	Yes
Chargable Directory Assistance	Allow	Yes
Special Services I	Allow	Yes
Special Services II	Allow	Yes
Premium Services	Block	No
Premium Services II	Block	No

Configuring Actions

For each outbound calling type, an action can be configured for a specific treatment

- **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 which are defined in the Authorization Codes screen under More Options.
  - Block – Calls are blocked to the destination type.
  - Transfer to 1st, 2nd and 3rd – Calls attempted to the destination type are transferred to a specified number which are defined in the Transfer Numbers screen under More Options.
  - Transfer/Forwards – Choose if the specific call types are allowed to be Transferred or Forwarded to another number by clicking the checkbox. If enabled, users are able to transfer or forward the call type to another number.

- **Authorization Code** Calls of this type require an authorization code to be entered by the user before it will be permitted. At least one Authorization code must be defined before it can be utilized in a Call Plan action drop down.
Under More Options select Authorization Codes. A code description in the list can't be modified. If the description needs to be edited, delete the code and re-add it with a new description.

  - Code List – A list of previously defined codes will be shown in the list. The list may be searched using the search bar at the top of the pop-up window.
  - Add a Code – Click "Add" to add a new authorization code. Enter the code name and a number. The number can be entered or chosen from the drop-down box. It must be an integer from 2 through 14 digits. Enter a short description for the code which will display in the code list.
  - Delete a Code – When viewing the code list, hit the box in the left most column to select the code or codes to delete. Hit the "Delete" button. The selected codes will be removed from the list and will not allow calls to process if entered.

- **Transfer to a Number**
Enter a number in the appropriate field(s) below which will be used as the destination number when a user makes a call of the type defined with the Transfer to 1st, Transfer to 2nd or Transfer to 3rd setting.

  - Transfer Numbers 1 – the phone number used for the Transfer to 1st setting.
  - Transfer Numbers 2 – the phone number used for the Transfer to 2nd setting.
  - Transfer Numbers 3 – the phone number used for the Transfer to 3rd setting.