Admin Portal – Outbound Calling Plans

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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.

| | Dashboard | Advanced Services | Site: <u>JHS (14460) v</u> | | | | |
|-----|-------------------|---|----------------------------|--|--|--|--|
| | Numbers (271) | Call Routing Site Package Settings Productivity Services | | | | | |
| | Devices (100) | Scheduling Time schedule is used to support other features (e.g. auto attendant). A time schedule establishes a set of timestots in which a feature | | | | | |
| ŝ'n | Users (89) | can execute specific behaviour. | | | | | |
| < | Advanced Services | Voice Portals Divide a trill interface that non having the Site administrators to manage Automated Mandaet anonancements and by Site usars to | | | | | |
| | Analytics | Provises an init lute tack that can be used of an earlier and an analyze and taken an announcements and of are users to call from any phone to access their voice mallbox messages or to change their passcode. | | | | | |
| 2 | Reports | Office Anywhere | | | | | |
| Q | Call Recording | This service allows users to recorrectable to their main telephone number on any landine or wreteles devices. The Other Anywhere portal is available to user's of this feature to make outbound calls from any device which displays the Caller ID number of their main telephone number. | | | | | |
| | Profile | Music On Hold | | | | | |
| Ξ | | Play music for callers on hold. | | | | | |
| | | Outbound Calling | | | | | |
| | | Sets the Site default for allowing or blocking calls to specific call types (Local.Long Distance, International, Directory Assistance, Operato Assistance and special/premium). | × | | | | |
| | | Location Code | | | | | |

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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**.

| | Dashboard | Users | | | | | | Star All Step | |
|----|-------------------|---|----------------------|--------------|-----------|----------------------|----------------------------------|------------------------|--------|
| ۵ | SIP Trunking | First Name | Starts With + | jaean | | 0 | | | |
| | Nambers (535) | + Add Search Parameter Set Up a User Che | ck Station Inventory | | Clear All | Search | | | |
| S | Devices (201) | Show 10 . and | | | | | Shawing 1 to 2 of 2 could | . [Invester] | Trent |
| ŝ | Users (146) | | er per perpe | | | | Change of Local | , [mport | |
| × | Advanced Services | First Name | + Last Name | Phone Number | Extension | Station | Primary Device | Ste | ۰ |
| ~ | Analytics | Jason | Centrel | \$184987745 | | Premium User Station | 55:56:66:44:4A:4A (Yealink T41P) | JH Edit | J |
| Ŷ | Reports | Jason | Chandler | 0154987732 | 345 | Common Area Station | | JH Reboot De | |
| 00 | Call Recording | | | | | | | On to My P Remove U | kone g |
| 2 | Profile | | | | | | | | |
| ≡ | | | | | | | | | |
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5. When the edit user dialog appears, click on **Calling Permissions**. You can configure Outbound Calling here.

| Filt User - Jason Cartell | | × |
|---------------------------|---|-----|
| | | |
| User Information | Calling Permissions | |
| User Assignments | | |
| Voicemail | Dutbound Calling Inbound Calling Call Waiting | |
| Call Ferwarding | | |
| Devices | Settings | |
| Nobile & PC Applications | Use custom settings | |
| Advanced | | |
| Analog Hotline | Custom Settings | |
| Calling Permissions | htternal Cala | |
| Maniharian | Allow * | |
| Privacy | Transfet/Torwards | |
| Darge In | Lood Gifs | |
| Call Recordings | Allow • | |
| Push To Talk | ChandevForwards | |
| | Toll Prec Gala | |
| | Allow • | |
| | TrensfectForwards | |
| | Long Distance Calls | |
| | Allow v | |
| | TransferForwards | |
| | transmission Cultin | |
| | Allow Y | |
| | Transfer/Forwards | |
| | Center Assistance | |
| | Allow • | |
| | Transfel Tonewis | |
| | Provention Territories | |
| | Cancel 3 | 410 |

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Туре

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.

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 CodeCalls 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.

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