



Cloud Voice – Calling Plan

1 What is it?

Your Cloud Voice Calling Plan is like a sophisticated call barring system.

As an administrator, you can control the types of calls that people (at individual and site levels) and can both make and receive by using call screening templates. If you set a site template, any individual templates that you subsequently set will take precedence.

You can set different screening templates for:

Incoming calls

- Calls from within the site
- Collect or reverse charged calls
- Calls from outside the site

Outgoing calls

- Calls within the same site
- Local calls
- UK landline
- International calls
- Operator assisted calls
- Directory assistance
- Mobile
- Local and national non-geographic numbers (such as 0844, 0845, 0870, and 03)
- Premium rate 09 numbers
- Special rate 0871 numbers
- Specific digit strings (number patterns that you set yourself)

Forwarding or transferring calls

You can use the forward and transfer templates with all of the call types above.

2 How do I set it up?

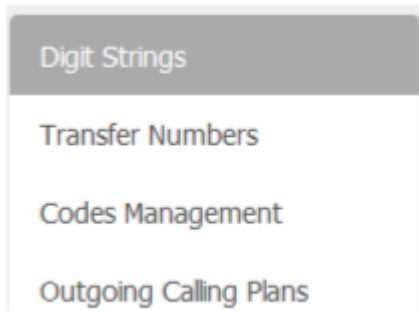
1. Login to the [BT Cloud Voice portal](#)
2. Select the '**Sites**' menu
3. Select your site
4. Select '**Features**' and scroll down to '**Management**'
5. Select '**Calling Plans**'



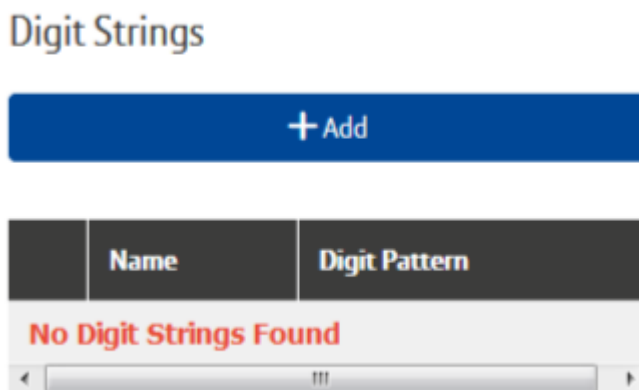
6. Select '**Configure**'

Digit strings

1. Click on '**Digit Strings**' in the '**Calling Plans**' menu on the left



2. Click 'Add'



3. Enter a name for the new digit string
4. Enter the '**Digit Pattern**' for the new digit string

New Digit String



* **Name**

* **Digit Pattern**

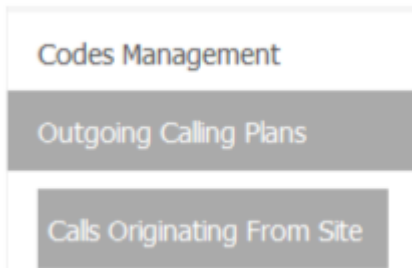
- This is a pattern of digits at the start of a phone number that you want to stop people being able to call. For instance, you might want people to be unable to call all numbers that start with 0207.
- Use an asterisk to indicate a wildcard digit (for example, if you want to allow or prevent calls to 0800 numbers, just enter 0800*).

5. Click **'Save'**

The digit string is now part of the outgoing calling plan; you'll see it on the 'Outgoing Digit Plans' page. Repeat the steps above to add any other digit strings that you want to stop people calling

To configure 'Outgoing Call Plans' for your site

1. Click '**Calls Originating from Site**' from the menu on the left under the '**Outgoing Calling Plans**' submenu



Calls Originating From Site

Within Group

Local

FreePhone

National

- If you have the '**Enhanced Calling Plan**' feature in your feature pack you'll see a list of drop down options
 - Set the options to '**Yes**' or '**No**'
2. Check the boxes to allow site members to make this type of call (uncheck it to stop them making that type of call ...)
 3. Click '**Save**'

To configure 'Outgoing Call Plans - Calls Forwarded by Site Employee'

1. Click '**Calls Forwarded by Site Employee**' from the menu on the left.
2. On the '**Calls Forwarded by Site Employee**' page check or uncheck the boxes, depending on what you want to do

For example, if you check the '**International**' option, people will be able to forward calls to international numbers. If you uncheck it, anyone who tries to forward a call to an international number will hear a message telling them that they can't do it.

3. Click '**Save**'

To configure 'Outgoing Call Plans – Site Employee Calls Forwarded by Another Party'

1. Click the 'Site Employee Calls Forwarded by Another Party' menu on the left
2. Select the 'Outside Group' check box to allow site members to transfer or forward calls to numbers outside the site
3. Uncheck the check box to prevent the transferring or forwarding of internal calls to external number

Site Employee Calls Forwarded By Another Party

Outside Group



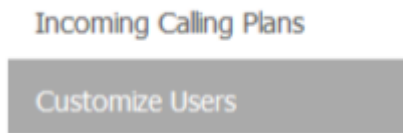
4. Click '**Save**'

To configure 'Outgoing Call Plans for an Individual User'

By default, the outgoing calling plan that you set for a site applies to all of the people in that site.

If needed, you can apply custom outgoing calling plans to individuals within the site

-
1. From '**Site Feature Settings**' go to the '**Calling Plans**' page and click '**Customize Users**' in the box on the left.



2. Find the person you're interested in from the list of all of the members of your site
3. Check the '**Customize**' box to the left of the '**Outgoing Plan**' column for the user who you're setting up.

Name	Customize	Incoming Plan	Customize	Outgoing Plan
Joe McNeil	<input type="checkbox"/>	Incoming Calling Plans • Incoming Calling Plans	<input type="checkbox"/>	Outgoing Authorization Codes • Codes Management Outgoing Calling Plans • Originating • Initiating Call Forwards/Transfers • Being Forwarded/Transferred

4. Click '**Save**' at the bottom of the page.
The list of functions in the 'Outgoing Plan' column will now be available as hyperlinks.
5. You can change any of the settings in the '**Outgoing Calling Plans**' section under the '**Outgoing Plan**' heading, by clicking on the appropriate hyperlink and changing the setting to allow or disallow the action
6. When setting call transfers or forwarding, you can choose to allow transfer or forwarding to people outside the site by checking or unchecking the '**Outside Group**' check box. The default is for users to be unable to transfer or forward calls outside the site.
7. Click '**Save**'

To configure 'Outgoing Digit Plans': site level

Before you can configure a digit string, you need to add it to the calling plan (**go to the 'Digit Strings' section earlier in this document**).

1. From '**Site Feature Settings**' go to the '**Calling Plans**' page and click '**Outgoing Digit Plans**' in the box on the left.

Outgoing Digit Plans

test

Yes

✓ Save

⊘ Cancel

2. For each digit string, you configure the settings by selecting either 'Yes' or 'No' from the drop down list.
 - 'Yes' – you can make outgoing calls with that digit string
 - 'No' – you can't

To configure 'Outgoing Digit Plans': user level

Before you can configure a digit string, you need to add it to the calling plan (**go to the 'Digit Strings' section earlier in this document**).

The individual '**user digit plan**' takes precedence over the '**site digit plan**'.

1. From '**Site Feature Settings**' go to the '**Calling Plans**' page and click '**Customize Users**' in the box on the left.
2. Select the '**Customize**' box to the left of the '**Outgoing Plan**' column for the person you want to configure settings for..
3. Click '**Save**' at the bottom of the page.

The list of functions in the 'Outgoing Plan' column will now be available as hyperlinks.

4. You can change any of the settings in the '**Outgoing Calling Plans**' section under the '**Outgoing Plan**' heading, by clicking on the appropriate hyperlink and changing the setting to allow or disallow the action.

- When setting call transfers or forwarding, you can choose to allow transfer or forwarding to people outside the site by checking or unchecking the '**Outside Group**' check box. The default is for users to be unable to transfer or forward calls outside the site.
- Click '**Save**'

To configure 'Incoming Calling Plan': site level

With an 'Incoming Calling Plan' an administrator can screen incoming calls to everyone in a site or an individual

- From '**Site Feature Settings**' go to the '**Calling Plans**' page and click '**Incoming Calling Plan**' from the Calling Plans menu on the left

Incoming Calling Plans

Custom Settings

Within Group

Allow

Outside Group

Allow

Collect Calls

Allow

test

Allow

✓ Save

⊘ Cancel

- Configure the options as required: '**Allow**', '**Partial**', or '**Block**'.
 - Within Group: specify whether site members can receive incoming calls from within the site

-
- **Outside Group:** specify whether site members can receive calls from outside the site

If you select 'Partial', you can only receive outside calls transferred from another site member

- **Collect Calls:** specify whether site members can receive incoming collect calls
- **Custom Digit String** (if configured): specify whether site members can receive calls that match the custom digit string
- Click '**Save**'

To configure 'Incoming Calling Plan': user level

The individual 'Incoming Calling Plan' takes precedence over the site 'Incoming Calling Plan'.

1. From '**Site Feature Settings**' go to the '**Calling Plans**' page and click '**Customize Users**' from the Calling Plans and Activities box on the left.
2. Select the '**Customize**' box to the left of the '**Incoming Plan**' column for the person you want to configure settings for..
3. Click '**Save**' at the bottom of the page.

The list of functions in the 'Outgoing Plan' column will now be available as hyperlinks

4. You can change any of the settings in the '**Incoming Calling Plan**' section under the '**Incoming Plan**' heading, by clicking on the appropriate hyperlink and changing the settings: 'Allow', 'Partial', or 'Block'
 - **Within Group:** specify whether site members can receive incoming calls from within the site
 - **Outside Group:** specify whether site members can receive calls from outside the site

If you select 'Partial', you can only receive outside calls transferred from another site member
 - **Collect Calls:** specify whether site members can receive incoming collect calls
 - **Custom Digit String** (if configured): specify whether site members can receive calls that match the custom digit string
5. Click '**Save**'

How to configure Calling Plans to allow calls to a specific 09 (premium rate) number

Premium rate numbers are set to a Calling Plan default of 'No'.

If you want to allow people to call a specific 09 number for business reasons, you could set 09 numbers to 'Yes' in the Outgoing Calling Plan for the site. However, this will allow everyone to dial any 09 number, including those that may not be for valid business reasons.

So, to set it up so people can only dial a specific 09 number -

1. Create two Digit Strings:
 - 09*
 - 09123456789 (this is just an example of a specific 09 number)

2. In the 'Outgoing Calling Plan'
 - Set 09 numbers to 'Yes'

3. In the 'Outgoing Digit Plan' set the digit strings to
 - 09*' = Block
 - 09123456789' = Allow

If only a couple of people need to call the 09 number, you can do steps 2 and 3 at the 'Customize User' level.

This is also a useful method for restricting access to 'approved' international destinations.