BT Cloud Work

User guide

V23.1

CONTENTS

Access your account

Accessing your account

Log in to your online account by going to BT Cloud Work login. The default method of account access is by BT Cloud Work email or phone number.

Unified login

If you have both BT Cloud Work and BT Cloud Work app credentials which use the same email address, you will use BT Cloud Work credentials for logging in to all endpoints.

Google as user ID

If configured by the admin for your account, users can log in with their Google (Gmail or G Suite) account. For more information, visit **Log in to the Account Using Google Credentials**.

Single Sign-on

If Single Sign-on is set up for your account, click **Single Sign-on** at the sign in page and enter your email address on the following screen, then log in with your corporate credentials.

Account validation

Account Validation is a two-step account verification feature that requires a user to enter a security code when logging in to their BT Cloud Work account for the first time on a new computer or a new browser. The security code is sent to the User's email address, depending on the information stored in the User's account. This feature improves the security of your BT Cloud Work account and reduces the risk of fraudulent activity.

Logging in

You can log in to your BT Cloud Work account by using your BT Cloud Work phone number, a unique email address, or by using a Google account.

Using your phone number to log in

1. Enter your BT Cloud Work phone number.
2. Click **Next.**
3. Select your country from the dropdown menu.
4. Enter your extension number (optional) and password.
5. Click **Sign In.**

Using your email address to log in

In addition to your phone number, you can also log in using a unique email address. To proceed, the **Use email to log in** feature must be enabled on your account. If you are unable to login to your BT Cloud Work account using your email, contact your account Administrator. See **How to Enable "Use email to log in"** to learn more.
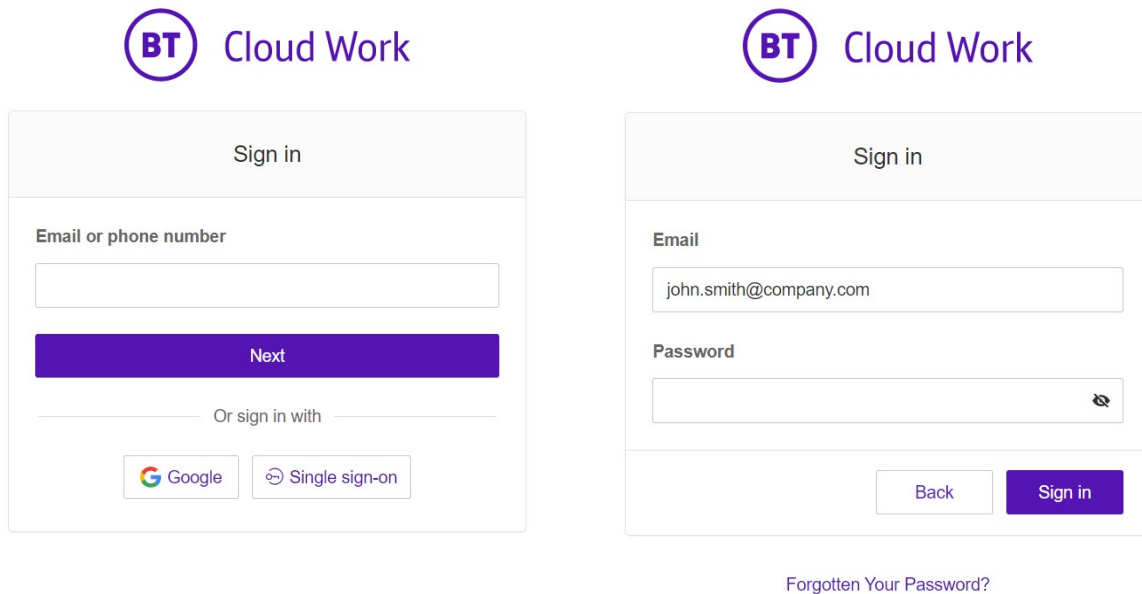
Existing Users with a unique email address can immediately log in with their email credentials after the update.

Existing Users who log in with their phone numbers will be notified with a pop-up message about the feature and will be given the ability to set their email addresses as unique.

This feature applies to accessing your BT Cloud Work online account, BT Cloud Work app, and integration applications.

To log in using your email:

1. Enter your email address.
2. Click **Next**.
3. Enter your password.
4. Click **Sign In**.

Using a Google account to log in

The Google login feature allows users native support for logging in using a Google email address and password. This feature requires a unique Google email address (Gmail or G Suite email). The admin configures a Google email address when assigning an extension, and verifies the uniqueness of the email address. By default, users can log in with their Google email address or other BT Cloud Work credentials.

Before proceeding with the steps below, make sure first that you enable **Use email to log in** feature to log in to your BT Cloud Work online account with Google. See **How to Enable "Use email to log in"** to learn more.

If not already configured, admins can set a Google email address. To do this, follow these steps:

1. Log in using your BT Cloud Work credentials.
2. Select **Users**.
3. Select a user.
4. Click **User Details**.
5. In the **Email** field, specify a unique email address.
6. Click **Verify email uniqueness**. Resolve duplicates.
7. Click **Save**.

For users to log in using Google, follow these steps:

1. In the login screen, click **Google**.
2. If you have logged in before using your Google credentials, select your Google account from the login page to log in automatically
   OR
   If this is your first time logging in, click **Use another account** on the **Sign in with Google** window.
3. Enter your Google email address or phone number.
4. Click **Next**.
5. Enter your password.
6. Click **Next** to navigate to a page requesting access to your Google account.
7. Click **Allow** to finish logging in to your online account.
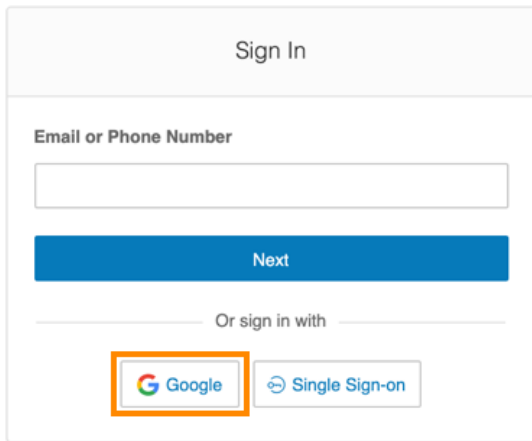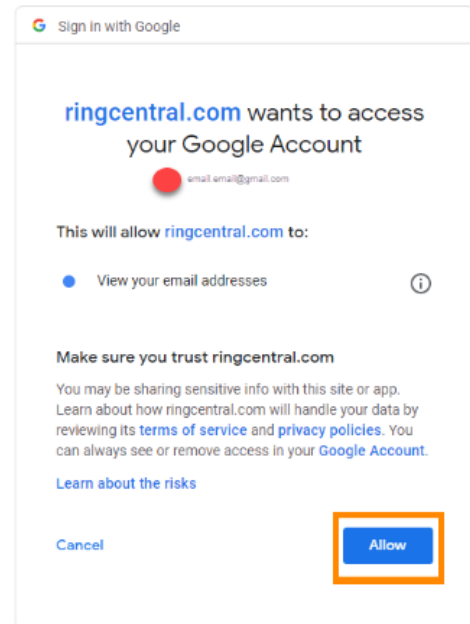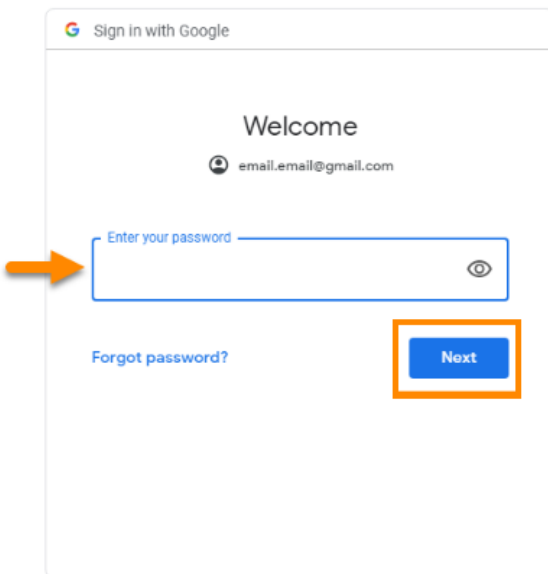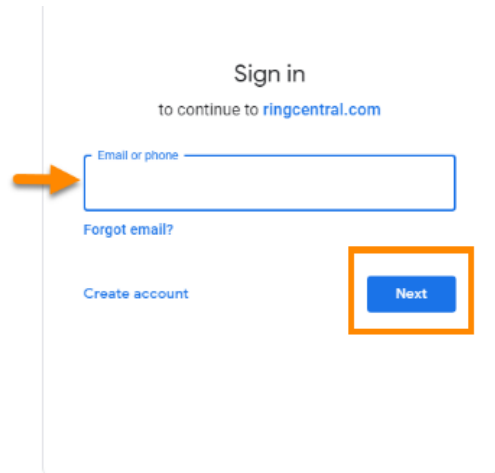
BT Cloud Work for Google Chrome extension

Increase your productivity by handling everything without leaving Google. With BT Cloud Work for Google, you can make BT Cloud Work calls directly from your Chrome browser softphone, and schedule and join BT Cloud Work Video meetings with your Google Calendar. BT Cloud Work for Google is available to all BT Cloud Work BT CLOUD WORK customers.

Requirements

- Windows® 7 (or later) or Mac OS X® 10.8 Mountain Lion (or later) operating systems are required
- Google Chrome™ 69 (or later) is required
- To utilize Google Login, your Google email must be associated with your BT Cloud Work account

Installing the BT Cloud Work for Google Chrome Extension

1. Download the BT Cloud Work for Google Chrome extension from one of the links below:

   - BT Cloud Work App Gallery - Click **Get it now** to navigate to the Chrome web store
   - Chrome web store

2. Click **Add to Chrome**.
3. Click **Add extension** to confirm the installation.
4. Click the BT Cloud Work for Google extension icon.
5. Click **Sign In**, and then enter your BT Cloud Work login credentials.
6. Authorize BT Cloud Work for Google Extension to integrate with your Google account.
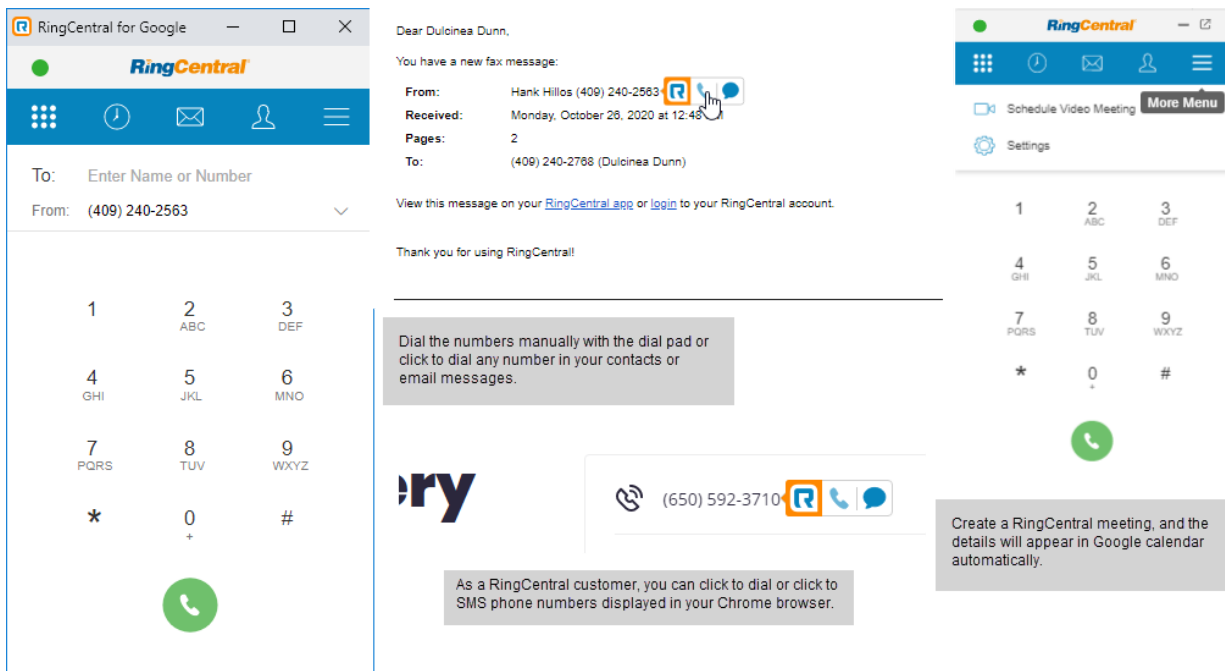
Using your account

Introduction to using your account

BT Cloud Work is an award-winning cloud communications system that delivers high-quality, online meetings, unified voice, fax, text, and audio conferencing for businesses of all sizes.

This guide will help users set up and access the following BT Cloud Work features:

- Messaging
- Call Log
- Contacts
- BT Cloud Work App
- Audio conferencing
- RingOut
- FaxOut
- Presence
- Intercom
- User Greetings
- Audio and Hold Music
- Call Handling and Forwarding
- Call Flip
- Hot Desking
- Notifications
- Outbound Caller ID
- Gmail (or G Suite) email as user ID
- BT Cloud Work for Google Chrome Extension

Overview page

The Overview page is your account homepage. It shows your recent voicemail, faxes, and inbound and outbound calls.

Let's take a look at the navigation bar across the top of this page and see how to use it. Some features are described in more detail later in this document.

Note: The pages discussed in this section of the guide can be found under My Extension. Admin users will see a dropdown menu at the top right for **Admin Portal**, **My Extension**, and **Call Queue Management**. Users will only see the **My Extension** page and will not have the option to switch to **Admin Portal**.

Messages

Your voicemail and fax messages are stored here. Under Messages, you can:

- Listen to voicemail
- View faxes
- Save voicemail and received faxes to your computer
- Forward messages and faxes by email
- Click on a caller's number or extension number to call them back
- Delete and undelete items
- Block caller

Under the **Message** column, you will see symbols for the following types of messages:

- **Voicemail**: Hover over the play symbol to hear the message
- **Fax**: Hover over the fax symbol to view a preview of the fax cover page

Call Log

The Call Log provides customized reports on inbound and outbound calls and faxes for the company number and specified extensions. Select the time period, type of call (inbound or outbound), blocked calls, or recorded calls.

Save reports for analysis, or you can have the call log delivered to an email address daily, weekly, or monthly on specified days.

In the **Type** column, you will see icons for these types of calls:

- 📞 Inbound Call

- 📞 Outbound Call

- 📞 Missed Call

Contacts

The Contacts tab includes your Company and Personal contacts. Company contacts are all the users in your BT Cloud Work system. You can add Personal contacts manually or import from a comma-separated variable (CSV) text data file or from Microsoft Outlook®.

User Settings

Click the Settings tab at the top of the homepage to access your Settings page. On the Settings page, you will see the following options for your user extension: User Details; Phones & Numbers; Screening, Greeting & Hold Music; and Call Forwarding and Voicemail. You will also see the settings for Outbound Calls/Faxes, Meetings, and Notifications.
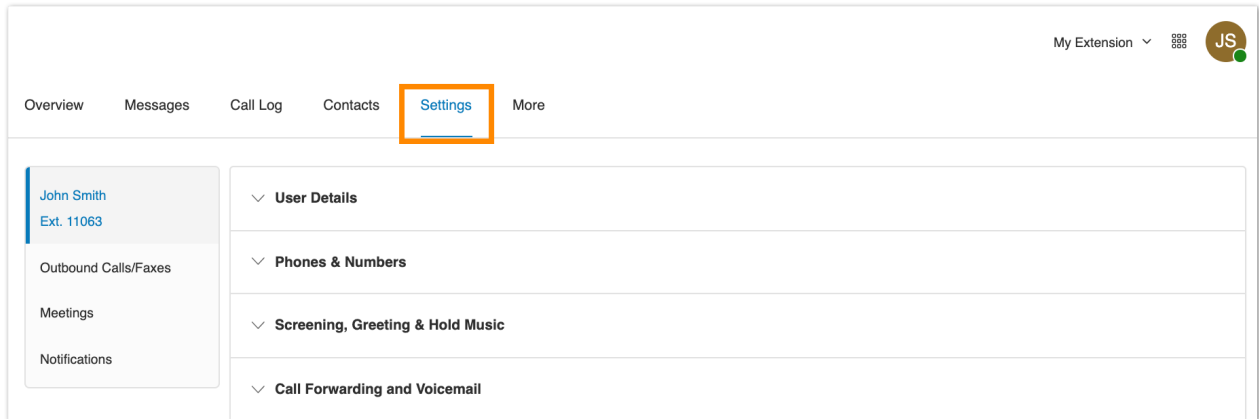
More

This section allows you to obtain the latest tools to enhance your productivity and customize your service to suit the way you work.
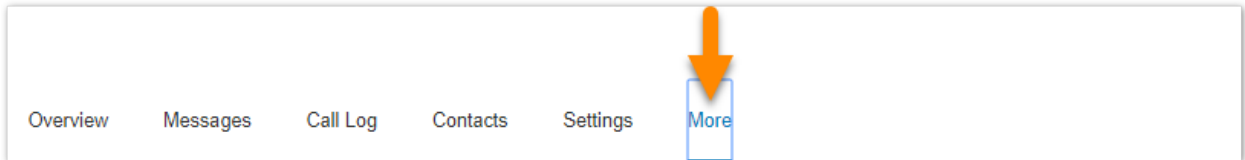
Service Console

Authorised Apps

Allows you to track what BT Cloud Work apps are connected to your account. Easily manage a wide range of app authorizations, including BT Cloud Work Video Pro and Pro+, BT Cloud Work integration apps, and apps from the BT Cloud Work App Gallery.

Service Status

Service Status allows administrators and users to view any high level service impacting issues on the BT Cloud Work platform with or without logging in.

My Recordings

The **My Recordings** tab contains a list of the meetings you have recorded.

Apps and Resources

Desktop Apps

Use the BT Cloud Work app to control your calls from your PC or Mac. Send and receive text messages, faxes, and answer or screen incoming calls, send to voicemail, transfer, disconnect, or monitor voice messages as they are being left and pick up the ones you want to answer.

Mobile Apps

Download the BT Cloud Work app for iPhone®, Android™, or iPad® to take your BT Cloud Work service on the go.

Archiver

BT Cloud Work Archiver lets you securely save your messages and recorded calls automatically. BT Cloud Work Archiver integrates with SFTP or Dropbox to allow you to easily search the stored data at any time from within your SFTP or Dropbox cloud storage account to quickly retrieve the records.

App Gallery

App Gallery is where you can discover application integrations that are commercially available, and where developers can showcase their integrations.

Developer Portal

Developer Portal is a place where you request access to the BT Cloud Work Connect Platform.

What's New

Check out the latest updates and features in your BT Cloud Work phone system.

Ring Me

The RingMe button gives your customers the ability to call you by clicking the button on your website or email signature.

Service Console

Authorised Apps

The Authorised Apps Manager allows you to track which BT Cloud Work apps are connected to your account. You can easily manage a wide range of app authorizations, which includes BT Cloud Work for desktop, mobile apps, Integration apps (Office 365, Google, SalesForce), and apps from the BT Cloud Work App Gallery. It provides better security management to reset authorization, if necessary.

Accessing the Authorised Apps manager

1. Select the **More** tab.
2. Under **Service Console** on the left side, select **Authorised Apps**. You will see a list and description of your available apps.
3. On the right of each authorised app, you will see a **More** icon that you can click to view the actions available:

   - **View Permissions**: View the permissions granted to the app. Click on the **i** icon for a brief description of the permission.
   - **Delete**: Delete the authorised app. On the **Remove App** confirmation window, click **Remove** to proceed deleting the app.
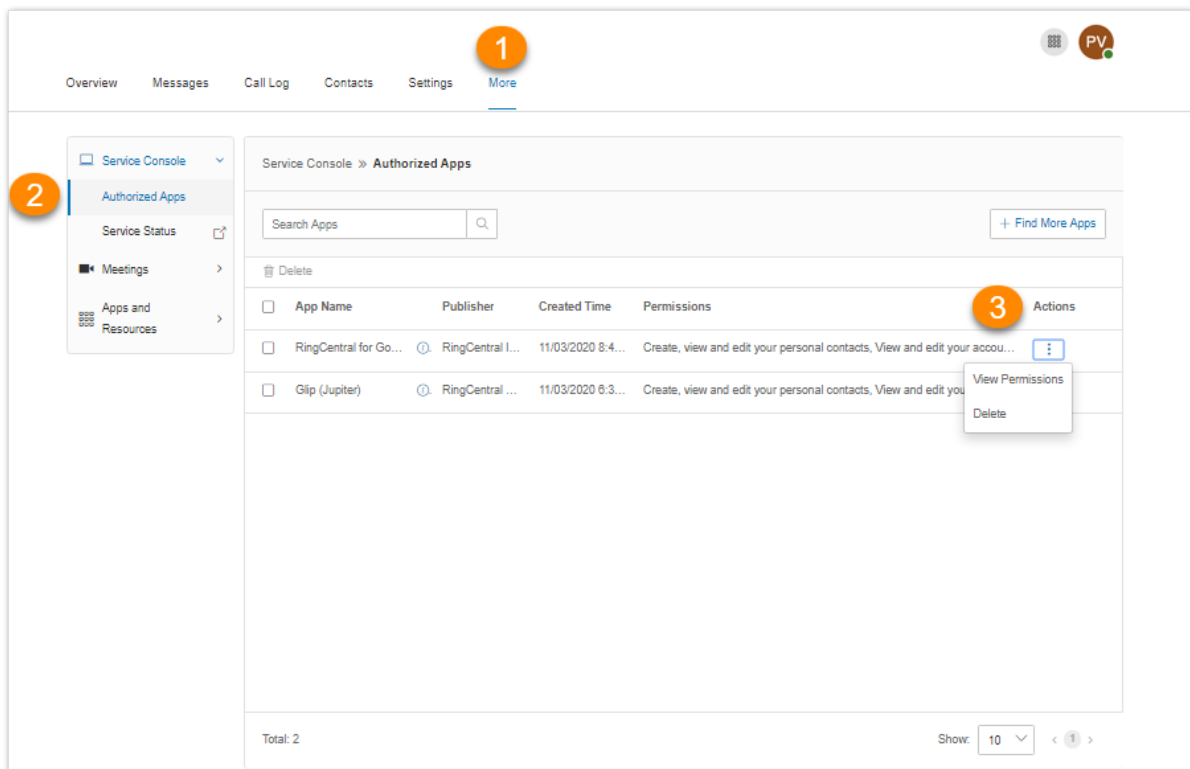
Service Status

The BT Cloud Work Service Status site allows admins and users to view any high level service impacting issues on the BT Cloud Work platform with or without logging in. This site allows customers to see by feature and region what is being impacted. It also notifies the admin and users for service-impacting issues via email and SMS.

To log in to the Service Status page from the BT Cloud Work online account:

1. Select the **More** tab.
2. Under **Service Control** on the left side, select **Service Status**.
3. The **Service Status** page opens on another tab.

(BT) Cloud Work

Service Status

Core Services   ✓ ! ⚠ !

	UNITED KINGDOM
⊕ Calling	✓
⊕ Phones	✓
Meetings	✓
⊕ Fax	✓
Service Portal	✓
⊕ Analytics	✓

Meetings

My Recordings

The **My Recordings** tab contains a list of the meetings you have recorded for BT Cloud Work Video.

1. Select the **More** tab.
2. Select **Meetings** on the left.
3. Select **My Recordings**.
4. On the far right of each of the recording, select the **More** icon under **Actions** to view the following options:

   - **Download**: Download the meeting recording. A new tab will open up and the file will be automatically downloaded to your computer.
   - **Delete**: Delete the meeting recording. On the confirmation window, click **Yes** to proceed deleting the recording.
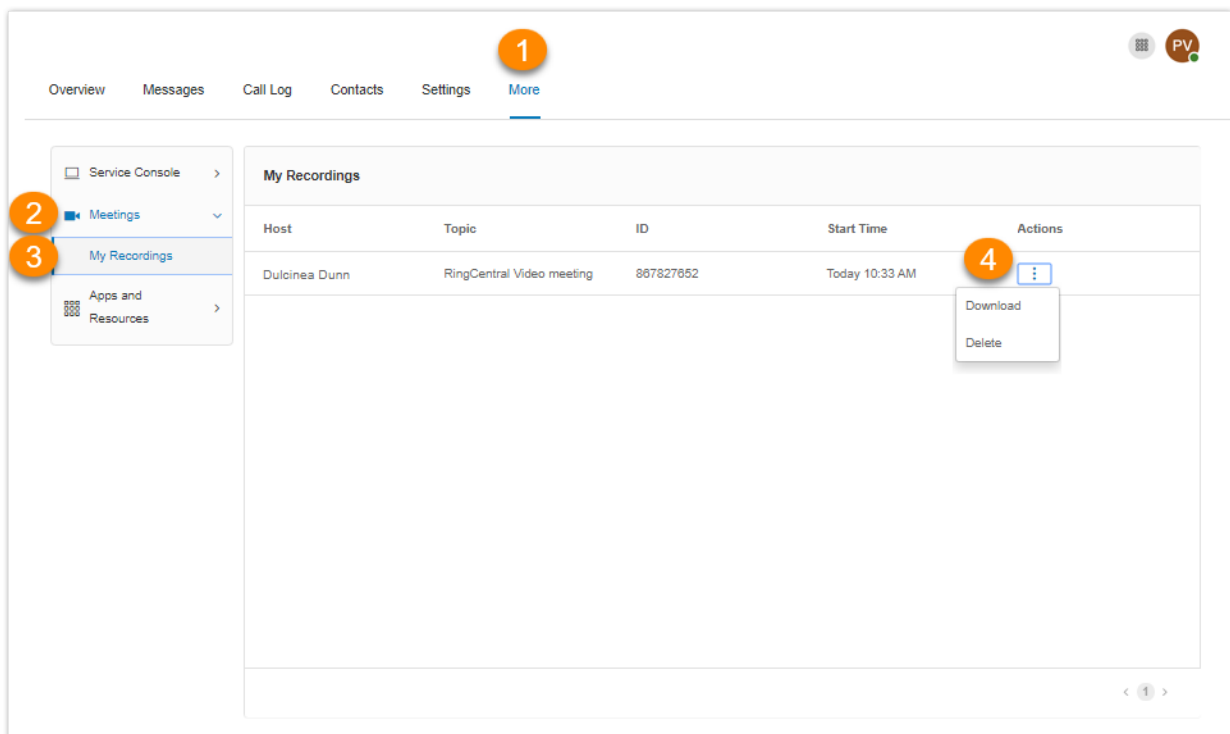
Apps and Resources

Desktop Apps

BT Cloud Work app

BT Cloud Work app turns your PC or Mac computer into an all-in-one communication hub completely synced to your office network so you can collaborate with your colleagues and clients anywhere you have a broadband connection. With the BT Cloud Work app, you're ready to communicate as soon as you log in to your computer, no matter where you are.

BT Cloud Work app combines the call handling power you expect from your desk phone with the collaboration tools you rely on most—like team messaging, texting, video meeting, conferencing, and faxing—so you can stay productive with fewer devices to worry about.

BT Cloud Work app is easy to install and even easier to use. To download the BT Cloud Work app, follow these steps:

1. Select the **More** tab.
2. Select **Apps and Resources**.
3. Select **Desktop Apps**.
4. Click **Download for Mac** or **Download for PC**. The file will download from your browser.
5. Follow the prompts in the **BT Cloud Work Setup Wizard**.

See the **BT Cloud Work App Overview** for more details.

Mobile Apps

With the BT Cloud Work mobile app, you have the convenience and power of your entire business communications solution in the palm of your hand. Easily navigate the interface to take calls, check messages, send business texts, start or join video meetings, and more—from virtually anywhere.

To download the BT Cloud Work mobile app, visit the App Store for iOS or Google Play Store for Android.

Archiver

BT Cloud Work Archiver makes archiving important communications data simple and convenient through the seamless integration of SFTP or Dropbox cloud storage with your BT Cloud Work service. Note that your administrator must turn this feature on for users to be able to access it.

With BT Cloud Work Archiver, you can securely save your messages and recorded calls automatically and easily search the stored data at any time from within your Dropbox account to quickly retrieve the records you want.

1. Log in to your BT Cloud Work account.
2. Go to **More** in the top navigation tabs.
3. From the left navigation bar, click on **Apps and Resources** then click **Archiver**. Choose the account to which you want to upload your file and click **Connect**.
4. The **Accounts** tab displays the connection status of your available accounts.
5. Click **Connect** and enter the credentials to connect BT Cloud Work to your preferred cloud archiver account.
6. Click **Sync Options**.
7. You can enable or disable data backup from BT Cloud Work to Dropbox, SFTP, Google Drive, or Box by selecting **Enable Backup**. BT Cloud Work Archiver will run the job on an hourly basis and archive to your extensions' call recordings generated within the hour before last Archiver job run.
8. Select the types of **Data to backup**. By default, Call Recordings are backed up for admins and users. Users can select for their own extensions whether to backup Call Recordings, Voice Mails, SMS, and/or Fax.

For more information on using the BT Cloud Work Archiver tool, see the **BT Cloud Work for Archiver User Guide**.

App Gallery

The App Gallery is a destination where you can discover application integrations that are commercially available, and where developers can showcase their integrations.

To access the App Gallery:

1. Select the **More** tab.
2. Select **Apps and Resources**.
3. Click **App Gallery**.
4. A new window will open to the **BT Cloud Work App Gallery** website.

Developer Portal

The BT Cloud Work Developer Portal offers a set of tools and services to build, deploy, and manage custom integrations using BT Cloud Work APIs. With this, developers can build out-of-the-box integrations with BT Cloud Work to add powerful communication capabilities to business applications.

To access the Developer Portal:

1. From the **More** tab, select **Apps and Resources**.
2. Click **Developer Portal**.
3. A new window will open to the **Developer Portal**.

Ring Me

RingMe is a click-to-call feature designed to help drive traffic from your website or email to your telephone sales team and thereby increase lead opportunities. Whether you are using a local or a toll-free number, you can provide your visitors a way to call you with a simple click of the mouse.

1. Select the **More** tab.
2. Select **Apps and Resources.**
3. Select **RingMe**. The RingMe Configuration page lets you generate a RingMe button or a RingMe hyperlink. You may configure these settings in any order. As a user, the call will be routed to your extension.
4. Click the drop-down box under **RingMe Style** to select between *Button* or *Hyperlink*. If you select *Button*, you will have the option to **Change Button Style** to customize the appearance of the RingMe button.
5. You may enable your preferred **Security** option/s. This is optional:

   - **Use SSL mode**: SSL is the standard security technology for establishing an encrypted link between a web server and a browser. Enable this setting to ensure that all data passed between the web server and browsers will remain private and integral.
   - **Require caller to enter security image confirmation code:** Enable this setting to require the caller to type a code from an image. This can help prevent SPAM calls to your company.

6. Under **Preview and Test**, click the **RingMe** button/hyperlink to test your generated RingMe button/hyperlink. The preview will appear on a separate window. Close the window after testing.
7. Select a code to generate via one the following tabs: **With JavaScript**, **Without JavaScript**, or **URL (Hyperlink only)**, and then click **Copy Code**. **URL (Hyperlink) only** is recommended for email signatures.

Overview   Messages   Call Log   Contacts   Settings   More

Service Console >

Meetings >

Apps and Resources ⌄

Desktop Apps

Mobile Apps

Meetings Apps

Archiver Beta

App Gallery ⬈

Developer Portal ⬈

What's New ⬈

RingMe

Apps and Resources » **RingMe**

The RingMe button gives you the ability to be contacted from your web site or email signature with a simple click.

Set up the functionality of your RingMe button and click to preview and test below.

How does RingMe work.

RingMe Configuration

Callers will be directed to your extension 11103
(contact your admin if you need another extension)

RingMe Style

Hyperlink ⌄

Security

☑ Use SSL mode

☐ Require caller to enter security image confirmation code ⓘ

Preview and Test

Click button/link to test RingMe.

RingMe

Generate Code

The following code has been generated based on your above configuration.

With JavaScript   Without JavaScript   URL (Hyperlink) only

Copy the code and use to add RingMe to your web site.

Copy Code

```
<img src="https://service.ringcentral.com/picture/dot.gif" width="1" height="1" alt=""/><a
            class="tools-ringme-ringmeLink"
            id="tools-ringme-ringmeLink"
            data-test-automation-id="ringmeLink"
            tabindex="0"
            role="button"
```

Audio Conference

BT Cloud Work customers can set up, host, and join conference calls anytime, anywhere. Click the circles Conference icon in the **App launcher** at the right-hand side of your online account to invite participants. Each customer receives a unique conference bridge number, and each user on the phone system gets his or her own host and participant access code, so that you and your team can hold independent conferences whenever you want.

Each conference call can include up to 1,000 attendees, enabling you to hold large meetings and broadcasts.

You also have the option to add the international dial-in number in the invitation. Click the **Select** button, and then check the countries to be included from the list.

The host and participants have the same conference bridge number to dial, but their call controls depend on the access codes they will use.

Launch the Conference application

1. Click on the **App launcher** in the upper right-hand side and select the circles **Conference** icon.
2. On the **Conference** window, view and set the following:

   a. View **Dial-in number**.

   b. View **Host** and **Participant** codes.

   c. If you have international participants, click on **Select** under **International Dial-In Numbers**.

   d. Select international dial-in numbers. Click **Done**.

   e. Check the box next to **Enable join before host** to allow participants to start a conference call without a host.

   f. Click **View** under **Conference Commands** to view the touch-tone dialpad keys you can use during your conference call.

   g. Click **Invite with Email** to open an email with pre-populated conference details. Enter participant emails and send.
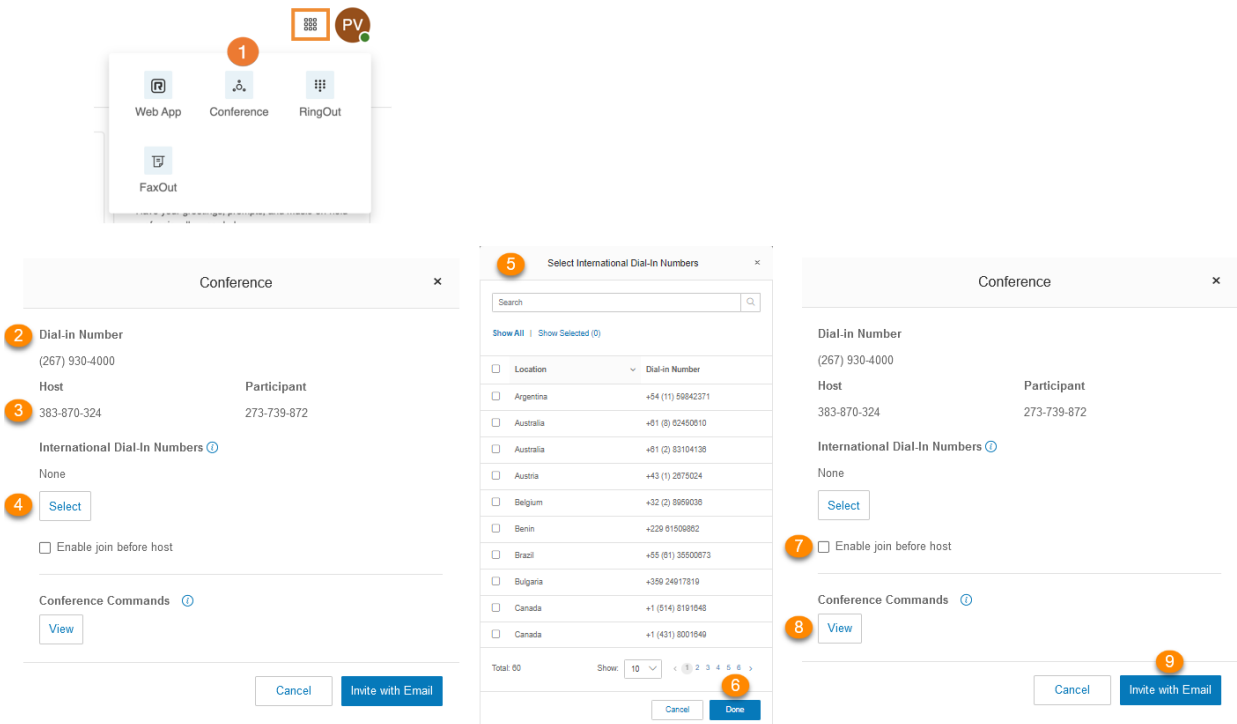
Conference Commands

The host has the full call control and can access all features through the conference commands in the following table.

Participants, on the other hand, have limited control of the conference commands, but can join the conference without a host provided that the host selected the option to **Enable join before host**.

The commands are displayed with the conferencing dial-in information.

	Conference Commands	✕
	Use your touch-tone dialpad keys to mute or block participants, record the call, and more.	
Command	**Action**	
(*) (#) (2)	**Caller Count** Keep track of how many people are on the call	
(*) (#) (3)	**Leave Conference** Lets the host hang up and end the call	
(*) (#) (4)	**Menu** Listen to the list of touchtone commands	
(*) (#) (5)	**Set Listening Modes** Press 1x: Mute callers - Callers can unmute with * # 6 Press 2x: Mute callers - Listen only. No unmuting option Press 3x: Unmute callers - Opens the line again	
(*) (#) (6)	**Mute Host Line** Press once to MUTE Press again to UNMUTE	
(*) (#) (7)	**Secure the Call** Press once to BLOCK all callers Press again to OPEN the call	
(*) (#) (8)	**Hear sound when people Enter or Exit call** Press 1x: Turns OFF sound Press 2x: Enter tone is ON Exit tone is OFF Press 3x: Enter tone is OFF Exit tone is ON Press 4x: Turns ON sound	
(*) (9)	**Record your conference** Press once to START recording Press again to STOP recording	

Done

RingOut

RingOut enables one-touch calling from any phone or internet-enabled computer, allowing you to make calls using your business caller ID from any location, such as a hotel room. The RingOut icon is located in the App launcher in the upper right of every online account page.

To make a call via RingOut:

1. Click the **App launcher** in the upper right-hand side and select the **RingOut** icon.
2. The **RingOut** dialer window will appear.
3. In the **From** field, enter the phone number of your current location (for example, your mobile number).
4. In the **To** field, enter the number you want to call. Click the **Clock** button to choose from among your recent calls, or the Add button to choose from your contact list. Once you have entered **From** and **To** numbers, the **Call** button will turn green.
5. Check the box next to **Prompt me to press 1 before connecting the call** if you'd like the system to confirm that you would like to make the call before you are connected. When the system calls you, you will hear "*Hello. To connect this call, press one.*" This message protects you in case you mistyped your own number, or if your voicemail picks up too quickly.
6. Click the **Call** icon. The system first calls you. When you answer (and press 1 as instructed if you've selected this option), it then calls the other number and connects you.
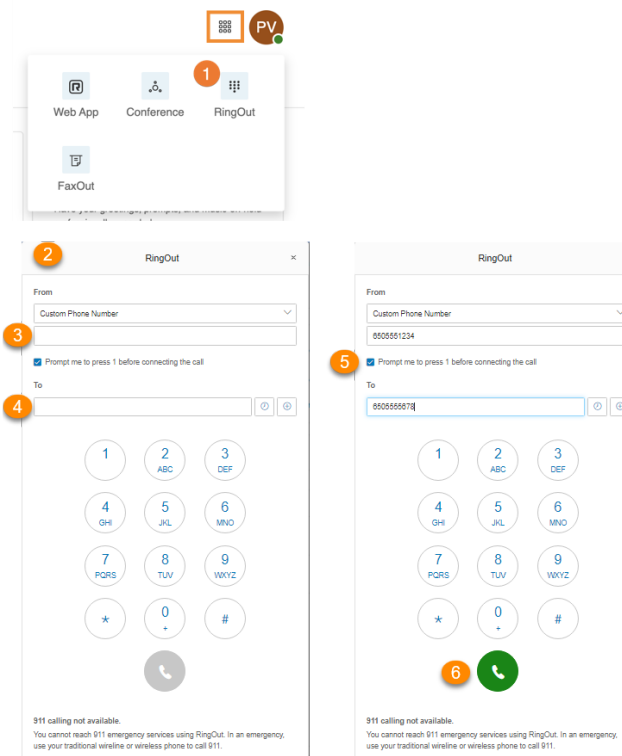
FaxOut

From any page on your BT Cloud Work online account, click the FaxOut icon located in the **App launcher** in the upper right corner. Fill in the form with the recipient's fax number and cover page information, and attach or scan a document, which will automatically be converted into a fax.

A wide variety of standard document types, including word processing and spreadsheet and PDF documents, are recognized by FaxOut.

Send files from your computer, Box, Dropbox, or Google Drive with just a few clicks

1. Click the **App launcher** in the upper right corner and select **FaxOut** icon.
2. Type the recipient's fax number in the **To** field. Press **Enter** on your keyboard. You can add up to 50 fax numbers by typing it in the **To** field separated with commas or semicolons. Alternatively, you can select a recipient from your contact's list by clicking the **plus** icon. Select contact/s to send a fax to, then click **Insert**.
3. Check **Enable** under **Cover Page** if you want to include a cover page. Click **Select** to choose a cover page design from the list, then add optional notes if needed.
4. You can attach files saved locally on your PC or from your cloud storage - *Box*, *Dropbox*, and *Google Drive*. Click **Browse**, and then locate the files to send.
5. Click **Send Now** to send the fax immediately. If you want the fax to be sent out automatically at a later period, check the **Enable** box under **Schedule**. Set the date and time when the fax needs to be sent and click **Schedule**.
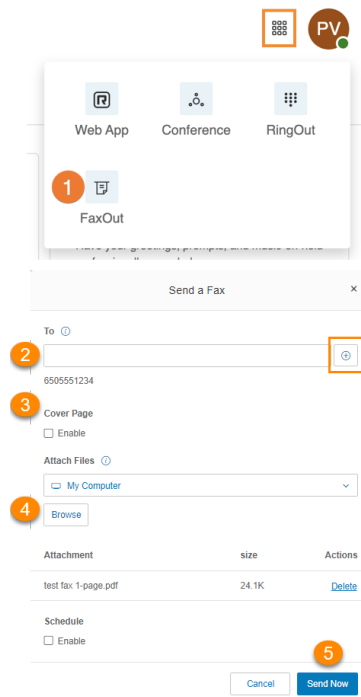
You can set up the body of your email to be your fax page.

1. Log in to your BT Cloud Work account and go to *My Extension*.
2. From the top navigation tabs, click **Settings**.
3. From the left navigation bar, click **Outbound Calls/Faxes**.
4. Scroll down to **Faxes Sent via Email**.
5. Under **Cover Page Note**, select **Use Email Body**.
6. Click **Save**.

If you include a cover page in your fax transmission, your email will be used as the fax cover page.

Hot desking

Hot desking enables you to log in to a shared phone that adopts your phone settings. Hot desking allows employees who travel from different offices to share the same common phone and desk while keeping their own extension profiles and voicemail access.

Hot desking is only available for extensions with digital lines. Host phones will not support any inbound or outbound calling without a guest user logged in (except emergency calls).

Logging in to a hot desk phone

1. Press the **Login** soft key (or dial *90) on a hot desk phone. The phone will reboot to register with the new user's information. If the phone does not automatically reboot, reboot the phone manually.
2. At the prompt, enter the extension number and a pin (used at set up).
3. You are logged in to the hot desk phone.

Logging out from a hot desk phone

1. Press the **Logout** soft key on the phone (or dial *90) to log out.
2. You are logged out from the hot desk phone.

media

My extension settings

My extension settings

As a user, you may be able to change your contact info, voicemail greeting, call handling, user hours, password, and more, but not the extension number that was assigned to you by the system administrator.

Your administrator may use the Roles and Permissions feature to control which settings users can access or edit. A role is a set of permissions that is assigned to a user. If some settings described here are not available to you, your administrator may not have granted you a role with permissions that can access or edit those particular settings

Setting user details

1. Select the **Settings** tab. Your name and extension on the left will be selected by default.
2. Click **User Details,** and then select and change the information you want to change on the **General**
   tab:
   a. **First Name**
   b. **Last Name**
   c. **Record User Name**: Use BT Cloud Work text-to- speech name to create a phonetic spelling of your name so the system can pronounce it correctly. Or click **Edit** to speak or import the correct pronunciation. See **Setting a custom name recording** on Page 68.
   d. **Job Title**
   e. **Department**
   f. **Contact Phone**
   g. **Mobile Phone**
   h. **Email**: Use this address for BT Cloud Work communications. If your BT Cloud Work account is enabled for Google G Suite, enter a valid Google email address.
   i. **Status**: Indicates whether your account is enabled.
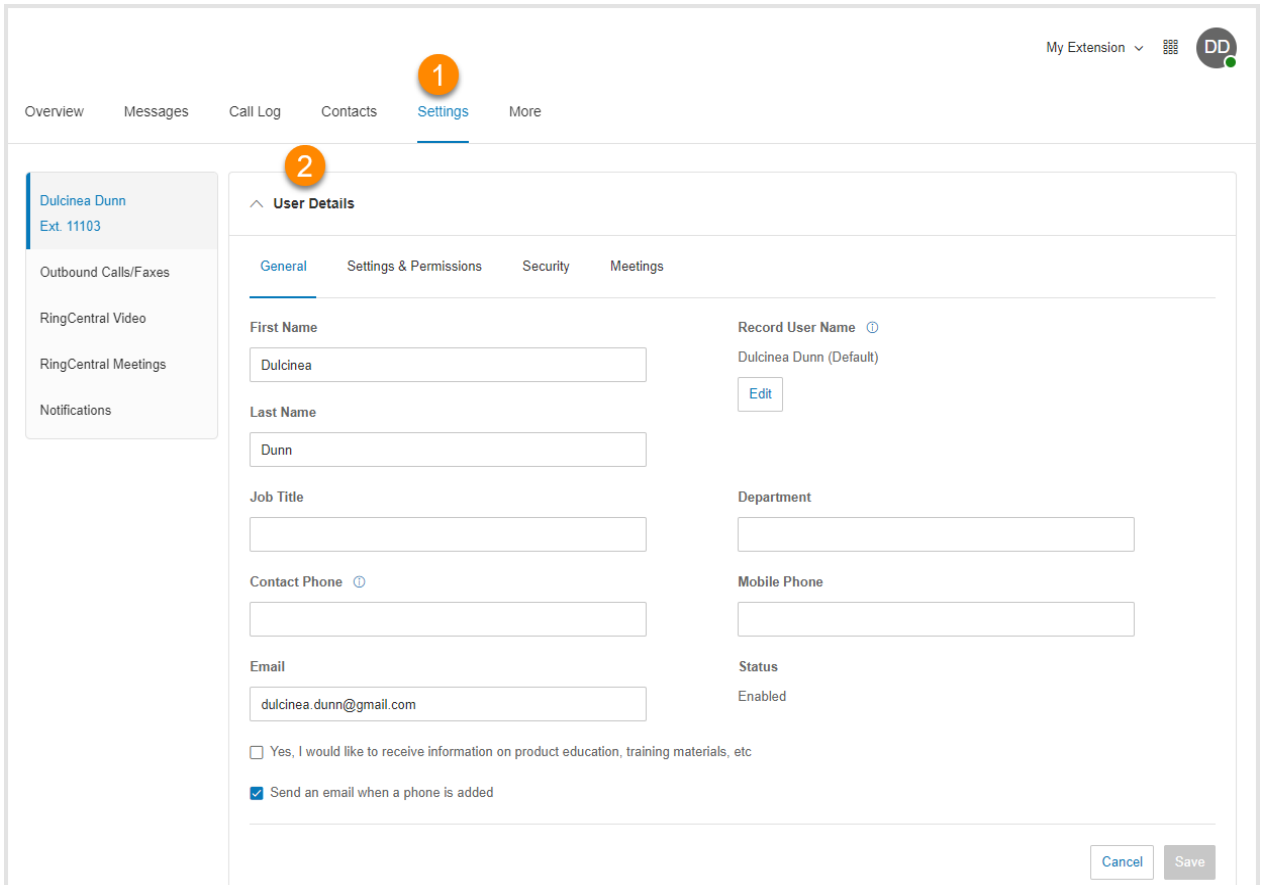
3. Select and change the information you want to update on the **Settings & Permissions** tab:

   a. **Regional Settings**: Contains timezone, home country code, greetings language, time format, user language, and regional format.
   b. **User Hours**: Set your working hours.
   c. **Roles**: The role assigned to you by your admin that controls what you can do within the system. A role is a collection of permissions that could be based on a job function.
   d. **User Groups**: Specifies any user groups where you are a member. The user group manager can modify your settings and view your call log.
   e. **Template**: Implement a set of configurations to a user account.
   f. **Site**: Select a site (for multi-site accounts).
   g. **Confirmation Message**: Specifies how long the confirmation message will appear for after a successful operation is finished. The user has the option to disable the confirmation message.
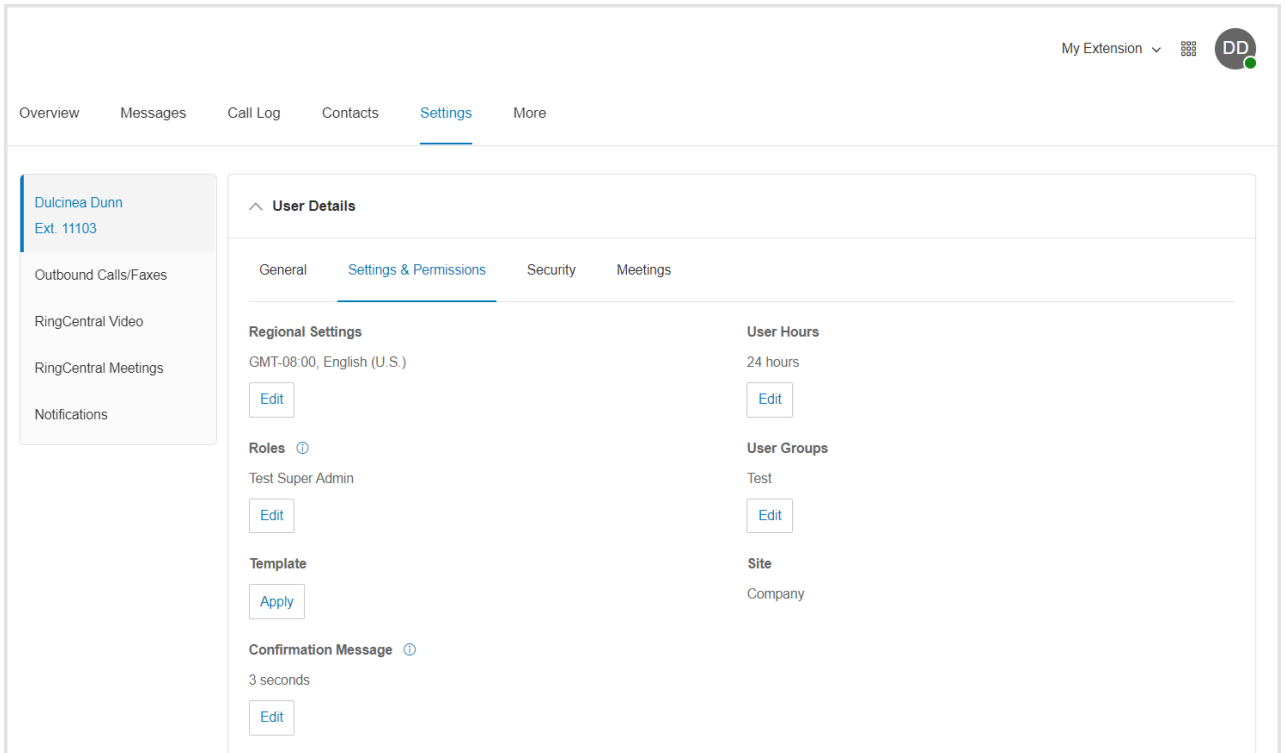
4. Change your password, PIN, and security question and answer on the **Security** tab.
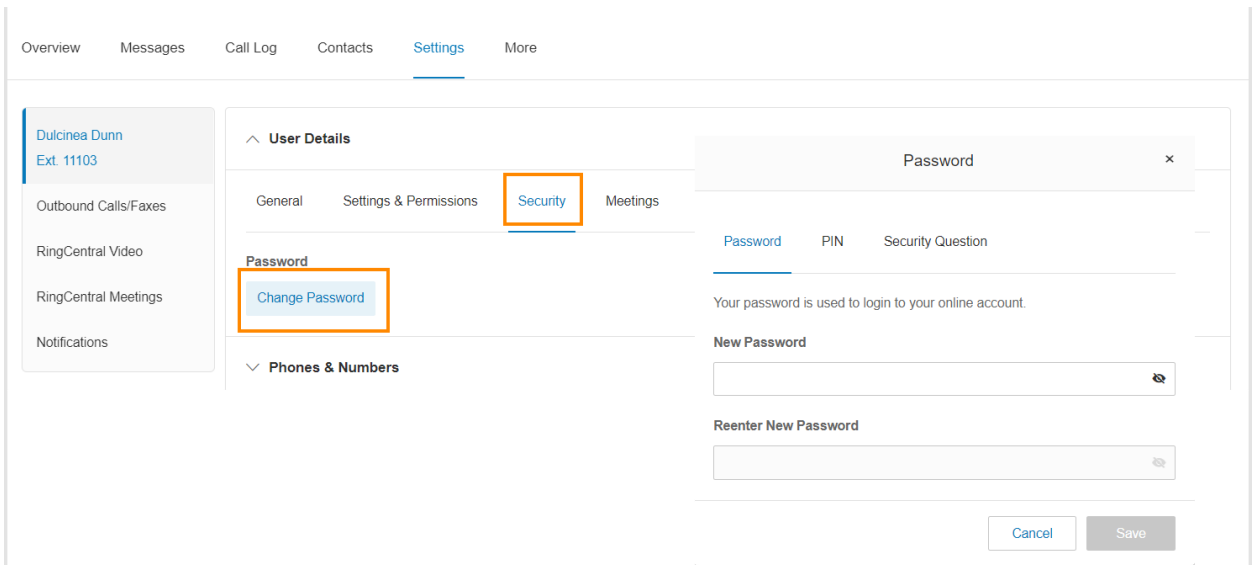
Using text-to-speech name

1. Select the **Settings** tab.
2. Select your name and extension in the left navigation bar.
3. Select **User Details**.
4. Under **General**, click **Edit** under **Record User Name**. The **Record User Name** window will appear.
5. Under **Record by**, select *BT Cloud Work text-to-speech* from the dropdown menu.
6. Enter your name in the **Greeting Name** field.
7. Click **Save**.

Setting a custom name recording

1. Select the **Settings** tab.
2. Select your name and extension on the left.
3. Select **User Details.**
4. Under **General**, click **Edit** under **Record User Name**. The **Record User Name** window will appear.
5. Under **Record by**, select *Record my name* from the dropdown menu.
6. Select how you'd like to set your custom recording:

   a. **Phone**: Under **Call me at**, enter a phone number in the text field. Click the **Call Now** button, and BT Cloud Work will call you to record your message.

b. **Computer Microphone**: Click **Allow** if BT Cloud Work asks to use the microphone of your computer. The **Microphone Test and Record** settings will appear. When ready, click the red Record button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.

c. **Import**: Click **Browse** to search your computer for a WAV or MP3 file you want to use. Click
Attach. Click the play button to listen to your greeting.

7. Click **Save.**

Phones and numbers

Phones and numbers

In the Phones & Numbers section, you can view your phones and numbers, edit your presence and intercom settings, view your conference number, and invite people to a conference call via email.

Setting phone details

1. Select the **Settings** tab.
2. Select **Phones & Numbers**.
3. Click the **Phones** tab.
4. Click **Edit in an entry** to see the details of a phone. You can view your **Device**, **Serial Number, Assignee Type**, and **Status**, edit your phone **name**, your **Default area code** and your **Bandwidth Settings**, enable **HD Voice***, and edit your **Emergency Address**.
5. Click **Save**.

*Available for BT CLOUD WORK Premium and Ultimate users only.

Setting your presence

Presence-capable phones have status indicator lights that let you see who is available, busy, or on hold. You can turn on Presence and decide who gets monitored and how you want to handle the calls.

1. Select the **Settings** tab.
2. Select **Phones & Numbers**.
3. Click the **Phones** tab.
4. Click **Presence**. A pop-up will appear with a list of users who are currently able to see your **Presence**
5. On the **Appearance** tab, check the box next to **Ring my phone when any user I am monitoring rings**
   if you'd like to use this feature.
6. Check the box next to **Enable me to pick up a monitored line on hold** if you'd like to use this feature.
7. Click **Select a User**.
8. Select a user to add from the list to your Presence-capable phone.
9. Click **Done**.
10. Repeat Steps 6-8 as necessary.

Note: If you use the BT Cloud Work app for desktop or web, the list of users under Appearance will automatically sync with the head-up display (HUD) list used to manage incoming calls on your desktop. Any changes you make to the HUD list on your BT Cloud Work app desktop or web will also automatically sync with the Appearance list in your online account.

11. Click the **Permissions** tab.

12. Next to **Allow other users to see my Presence status**, select the radio button next to **On** or **Off**.

13. Select the users who you'd like to allow to see your Presence.

14. Click **Save**.

15. If the **Attention** window appears, click **Yes** to automatically reboot your phones to reflect the changes you made. If a call is in progress the phone will reboot after it completes.

Enabling intercom

Intercom allows hands-free peer-to-peer conversations between users on desk phones. With Intercom, you can call another extension in your company using the Intercom softkey on the phone. Press the Intercom softkey and dial an extension. The extension phone beeps to notify the user of an incoming intercom call, and the user's speakerphone is activated and answers the call in speakerphone mode. This feature is useful for announcing parked calls, notifying visitors, and engaging in hands-free communications with colleagues.

Call routing and forwarding is supported, so if users are on intercom calls on their desk phones, incoming regular phone calls can forward automatically to another device.

The Polycom 6000 conference phone does not have softkeys; use the touch-tone command *85 to initiate an Intercom session.

Enabling intercom calls

1. Select **Settings** tab.
2. Select **Phones & Numbers**.
3. Click the **Phones** tab.
4. Click **Intercom**.
5. Select the radio button next to **On** to enable intercom calling.
6. On the Phones tab, select a phone to accept intercom calls.
7. On the **Users** tab, select users who you'd like to be able to make intercom calls to you.
8. Click **Save**.

Screening, greeting, and hold music

Setting screening, greeting, and hold music

In this section, you can set your preferences for your different greetings, hold music, and blocked calls.

Setting a user greeting

Your BT Cloud Work system comes with a default personal greeting, such as "Thank you for calling (user name)." You can easily change this greeting to your own custom greeting. Follow the steps below to record a custom greeting over the phone or import a prerecorded greeting from your computer.

1. Select the **Settings** tab.
2. Select **Screening, Greeting & Hold Music**.
3. In the **User Hours** tab, under **User Greeting**, click **Enable**.
4. Click **Edit** under **User Greeting**.
5. Under **Set Greeting,** choose your preferred type of greeting from the dropdown menu:

    a. *Default*: Select if you want to set your User Greeting to default.
    b. *Custom*: Select this from the menu and select how you'd like to set your custom recording:

       - **Phone**: Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and BT Cloud Work will call you to record your message.
       - **Computer Microphone**: Click **Allow** if BT Cloud Work asks to use the microphone on your computer. The **Microphone Test and Record** settings will appear. When ready, click the red **Record** button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
       - **Importing**: Click **Browse** to search your computer for a WAV or MP3 file you want to use. Click **Attach**. Click the play button to listen to your greeting.

6. Click **Done**.
7. Click **Save**.

Overview   Messages   Call Log   Contacts   **Settings**   More

(1)

PV

Dulcinea Dunn
Ext. 11103

Outbound Calls/Faxes

Meetings

Notifications

∨ **User Details**

∨ **Phones & Numbers**

(2) ∧ **Screening, Greeting & Hold Music**

User Hours   After Hours   Blocked Calls

(3) **User Greeting** ⓘ   **Call Screening** ⓘ

☑ Enable   ☐ Enable

Default

▶ ───────── 00:00 / 00:00 🔊 ────

Default Greeting: "Thank you for calling Dulcinea Dunn"

(4) [Edit]

| | User Greeting   × |
| | |

(5)   **Set Greeting**

User Greeting   × | Custom   ∨ |

Set Greeting   Press ▶ to listen and ● to re-record your custom greeting.

| Default   ∨ | ▶ ───── 00:00 / 00:00 🔊 ──── ● ⬇

| **Default** | Your custom greeting was recorded and successfully activated.

| Custom | **(6)**

▶ ───────── 00:00 / 00:00 🔊 ────   [Cancel] [**Done**]

[Cancel] [Done]

(7)

[Cancel] [**Save**]

Setting up call screening

Turn on this option when you want callers to announce their names before continuing to connect the call. This option lets you identify the caller so you can pick up the call immediately.

1. Select the **Settings** tab.
2. Select **Screening, Greeting & Hold Music**.
3. Under **Call Screening**, click **Enable**.
4. Click **Edit** to set call screening options. Under **Ask callers to say their names before connecting**, select the button next to your preferred condition.
5. Click **Done**.
6. Click **Save**.

Setting connecting message

Set the recorded message you want callers to hear to let them know the call will be transferred to your line.

1. Select the **Settings** tab.
2. Select **Screening, Greeting & Hold Music**.
3. Under **Connecting Message**, click **Enable**.
4. Click **Edit**. The **Connecting Message** window appears with the current connecting message.
5. Under **Set Greeting,** choose your preferred type of message from the dropdown menu.

   a. *Default*: Select if you want to set your Connecting Message to default.
   b. *Custom*: Select this from the menu and select how you'd like to set your custom recording:

      • **Phone**: Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and BT Cloud Work will call you to record your message.
      • **Computer Microphone**: Click **Allow** if BT Cloud Work asks to use the microphone on your computer. The **Microphone Test and Record** settings will appear. When ready, click the red **Record** button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
      • **Importing**: Click **Browse** to search your computer for a WAV or MP3 file you want to use. Click **Attach**. Click the play button to listen to your greeting.

6. Click **Done**.
7. Click **Save**.

Setting audio while connecting

Set the music you'd like callers to hear while waiting to be connected. Please note that the **Audio while connecting** setting is applied on a rule basis, while the **Hold music** setting is applied for all calls.

1. Select the **Settings** tab.
2. Select **Screening, Greeting & Hold Music**.
3. Under **Audio While Connecting**, click **Enable**.
4. Click **Edit**. The **Audio While Connecting** window appears with the current audio.
5. Under **Set Audio**, choose your preferred type of audio from the dropdown menu:

   a. *Ring Tones*.
   b. *Music*: Select audio from the dropdown menu under **Select Music**.
   c. *Custom*: Upload a WAV or MP3 file. Press the **Play** button to listen to your greeting. Press
   Record to re-record your custom greeting or select a different type of audio.

6. Click **Done**.
7. Click **Save**.

Setting hold music

Set the music you'd like callers to hear while on hold. The hold music selected will be applied to all calls.

1. Select the **Settings** tab.
2. Select **Screening, Greeting & Hold Music**.
3. Under **Hold Music**, click **Enable**.
4. Click **Edit**. The **Hold Music** window appears with the current music.
5. Under **Set Audio**, choose your preferred hold music from the dropdown menu.

    a. *Ring Tones.*
    b. *Music*: Select your choice of music from the dropdown menu under **Select Music**.
    c. *Custom*: Upload a WAV or MP3 file. Press the **Play** button to listen to your greeting. Click
       Record to re-record your custom greeting or select a different type of audio.

6. Click **Done**.
7. Click **Save**.

Blocked Calls

Blocking calls

Choose specific phone numbers and fax numbers that you'd like to block and prevent from calling or faxing your number. You can also choose what message they will hear when they attempt to call.

1. Select the **Settings** tab.
2. Select **Screening, Greeting & Hold Music**.
3. Click the **Blocked Calls** tab for call blocking options. If you are the administrator, you will see a message notifying you that calls blocked for this extension will apply to any calls to the company as well as your own extension.
4. Under **Block Option** select whether you'd like to block *Specific calls and faxes* or *All calls.*
5. Under **Only Block these numbers or area codes**:

   a. Enter phone numbers or area codes and names (optional) to this list of numbers you'd like to block.
   b. Click **Add**.

6. Under **Callers will hear,** you can click **Edit** to set the message you'd like these callers to hear.
7. For **Robocalls**: Under **Block option**, select from the dropdown menu how suspected robocalls will be treated:

   a. *Ring devices and apps*: rings your phones as normal
   b. *Play message and disconnect*: plays the blocked calls message and disconnects the call

8. Under **Trusted numbers**:

   a. Enter phone numbers and names (optional) to this list to ensure that they are not treated as robocalls.
   b. Click **Add**.

9. Under **Block calls with no caller ID**, select one from the dropdown menu under **Block option**: *None*, *Call and Faxes*, or *Faxes.*
10. Under **Block calls from payphones**:

    a. Check the box next to **Enable block calls from payphones** if you'd like this option.
    b. Under **Callers will hear**, click **Edit** to set the message you'd like these callers to hear, and then click **Done**.

11. Click **Save**.

①

Overview   Messages   Call Log   Contacts   **Settings**   More

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Dulcinea Dunn
Ext. 11103

Outbound Calls/Faxes

Meetings

Notifications

∨ **User Details**

∨ **Phones & Numbers**

② ∧ **Screening, Greeting & Hold Music**

③

User Hours   After Hours   **Blocked Calls**

Block option ⓘ

④ Specific calls and faxes   ∨

Only block these numbers or area codes

⑤ Phone Numbers or Area Codes   Name (Optional)   + Add

Callers will hear

I'm sorry. The number you dialed can not be reached from your calling area. Goodbye.

▶ ——○———————————— 00:00 / 00:00 ◀) ——●——

⑥ Edit

Robocalls

Block option ⓘ

⑦ Ring devices and apps   ∨

Trusted numbers ⓘ

⑧ Phone Number   Name (Optional)   + Add

Block calls with no caller ID

Block option

⑨ None   ∨

Block calls from pay phones

⑩ ☑ Enable block calls from pay phones

Callers will hear

I'm sorry, the number you dialed cannot accept calls from payphones at this time. Please try your call again later. Goodbye.

▶ ——○———————————— 00:00 / 00:00 ◀) ——●——

Edit

⑪

Cancel   Save

Call handling and forwarding

Setting call handling and forwarding

This section explains how to set call handling and call forwarding options.

Call forwarding

Setting call forwarding for work hours

As a user, you can set up different call forwarding rules for your extension(s). Add up to 10 forwarding numbers for each extension assigned to you, and set calls to ring at these numbers sequentially or simultaneously.

An additional setting is available only to administrators to configure the rerouting of inbound calls when an Internet outage occurs. For more information, visit **Forwarding calls when all phones are offline**.

1. Select the **Settings** tab.
2. Select **Call Forwarding and Voicemail.**
3. Set **Incoming calls** as follows:

    a. *Ring in order*: Your forwarding numbers will ring one at a time in order of priority.
    b. *Ring all at once*: All your forwarding numbers will ring at the same time.

4. **Create Ring Group**: Use this feature to group numbers and allow them to ring at the same time. Check the box beside the numbers you want to select and click **Create Ring Group**. Click **Ungroup** to ungroup the numbers.
5. **Add number or coworker**: Click this button to add another phone number.
6. Set how you'd like your missed calls to be handled during work hours under **Missed calls**. You can choose to send *them to voicemail*, p*lay message and disconnect, forward to extension* or *to an external number*.
7. Click **Save**.
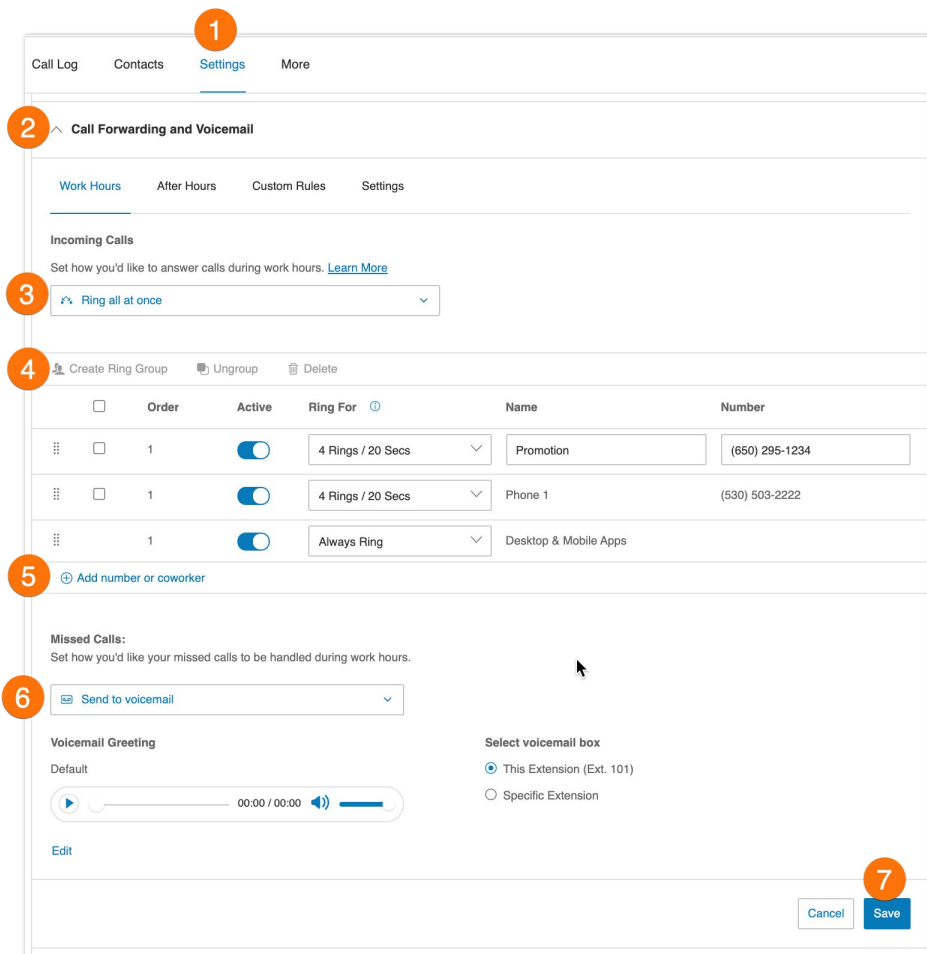
Setting call forwarding for after hours

After hours call handling takes effect when your business is closed.

1. Select the **Settings** tab.
2. Select **Call Forwarding and Voicemail**.
3. Select **After Hours**.
4. Set how calls to your extension are handled after your work hours:

   - *Ring in order*: All incoming calls will ring one at a time, depending on the order you have set for each device. You can toggle the button on or off beside each number for it to be included in the ring order. You can also add additional phone numbers.
   - *Ring all at once*: All incoming calls will ring at once. You can toggle the button on or off beside each number for it to be included in the ring order. You can also add additional phone numbers.
   - *Send to voicemail*: Select if you want calls to go directly to your voicemail, then click **Save.**

● *Play message and disconnect*: Select if you want to play a recorded greeting, and then immediately hang up. If you want to customize and play your announcement, you can click **Edit** and then select one of three *Custom* options under **Set Greeting**.
   ○ **Phone**: Under **Call me at**, enter a phone number in the text field. Click the **Call Now**
     button, and BT Cloud Work will call you to record your message:
   ○ **Computer Microphone**: Click **Allow** if BT Cloud Work asks to use the microphone of your computer. The **Microphone Test and Record** settings will appear. When ready, click the red Record button to record your company greeting through your computer microphone. Stop the recording and listen to the playback.
   ○ **Importing**: Click **Browse** to search your computer for a WAV or MP3 file you want to use. Click **Attach**. Click the play button to listen to your greeting.

● *Forward to extension*: Select if you want to forward the call to multiple phone numbers in a specific order and have your greeting settings apply.
● *Forward to external number*: Select if you want to forward the call to a different phone number without having to go through your greeting settings. This option is good when you want the call to go directly to your personal voicemail when you don't pick up. Enter the phone number on the **Forwarding Number** field, and then click **Save**.
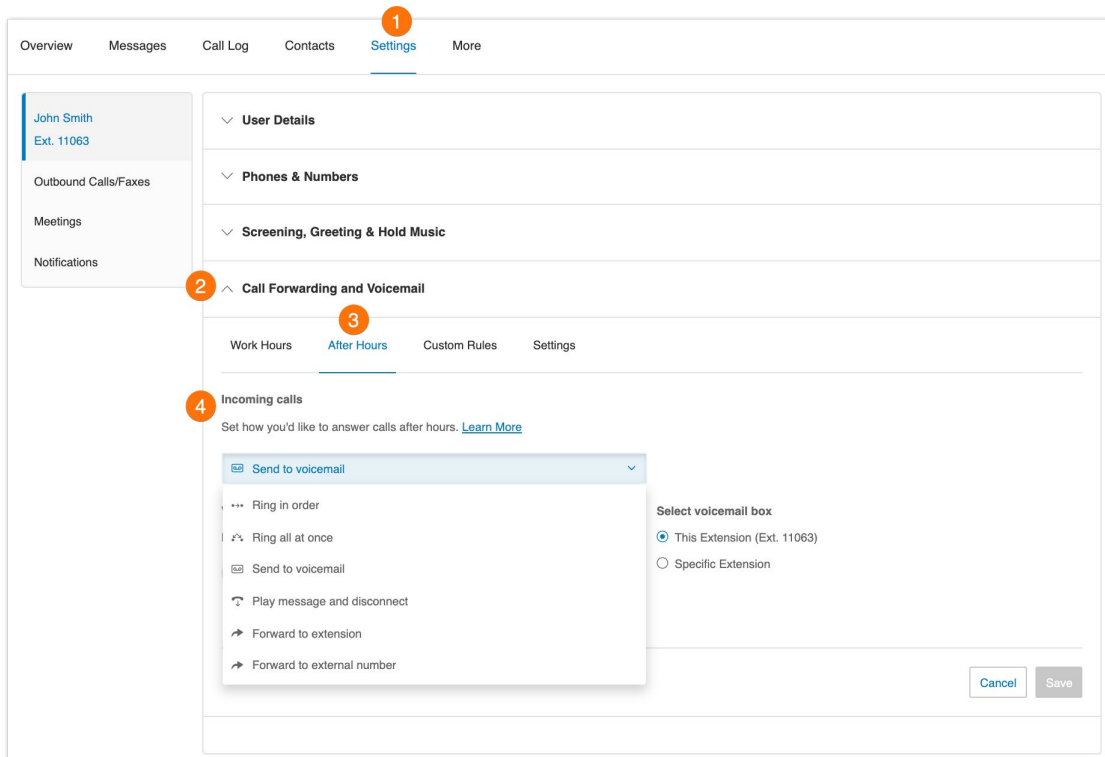
Setting up incoming call handling

You can choose settings in Incoming Call Information so that when you receive a call, either at your office or forwarded to another of your phones, you will hear a recorded prompt that announces the name of the extension the caller dialed. For example, it may say, "John, you have a call." Or "Sales, you have a call."

This feature helps users who are members of more than one department or who use phones that are both business and personal answer the call appropriately.

1. Select **Settings** tab.
2. Select **Call Forwarding and Voicemail**.
3. Click the **Settings** tab.
4. Click **Edit** under **Incoming Call Information**.
5. On **Display Number**, you can select *Incoming Caller ID* or *Called Number* on the dropdown menu under **Incoming Number Displayed to Me**. This setting is useful if you are using a non-BT Cloud Work phone as a forwarding number, so you would be able to identify a BT Cloud Work call:

    a. *Incoming Caller ID*: Displays the phone number of the person calling.
    b. *Called Number*: Displays the phone number the person dialed. If you also use your business phone for personal use, it allows you to identify business calls and answer them appropriately.
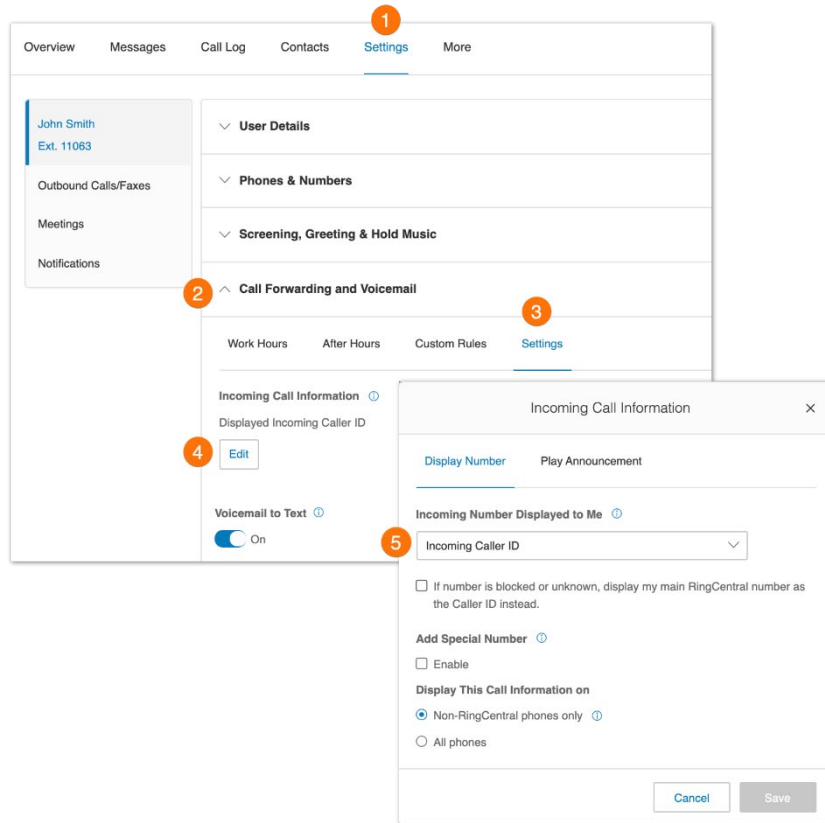
6. Click **Play Announcement** to configure how you want the announcement to play before connecting.
7. **Direct Calls**: this setting allows you to hear an announcement when your extension or phone is called directly. This is helpful for identifying how you should answer the phone, especially if you use the phone for both business and personal use. You can select the following options under this setting:

   a. *For non-BT Cloud Work phones only*: Plays the announcement when forwarding a call to your home or mobile phone (to help you distinguish between personal and business calls), but not when forwarding to your BT Cloud Work desk phone or the BT Cloud Work app.
   b. *Always*: All calls will be announced before being forwarded to any of your phones.
   c. *Never*: All calls will be connected without an announcement (unless they are from blocked numbers).

8. **Call Queue Calls**: This setting applies if you are a member of a call queue. This is helpful for identifying how you should answer the phone, especially if you are a member of multiple call queues.

   a. *For non-BT Cloud Work phones only*: Plays the announcement when forwarding a call to your home or mobile phone (to help you distinguish between personal and business calls), but not when forwarding to your BT Cloud Work desk phone or the BT Cloud Work app. You will still be prompted to press 1 to accept department (Call Queue) calls on your non- BT Cloud Work phones.

     b.   *Always*: All calls will be announced before being forwarded to any of your phones.

9. Check **Include mailbox name in announcement** if you'd like the mailbox name to be included in the announcement. If this option is unchecked and you get a department (Call Queue) call, the prompt will say "Queue Call, to accept this call, press 1". If you want to accept calls from the Sales and Technical Departments, for example, checking this option will let you know if the call you are getting is for Sales or Technical Department.

10. Check **Require my pin to answer**: This option requires the BT Cloud Work PIN to be entered before accepting a call. This is a helpful security feature if you do not want other people to accept your calls, such as when you are at home or another location.

11. Click **Save**.

If enabled, you have the option to turn call queue call acceptance on or off.

1. Click on your profile in the upper right corner.
2. Use the slider to the right of **Accept queue calls** to turn call queue calls on or off.
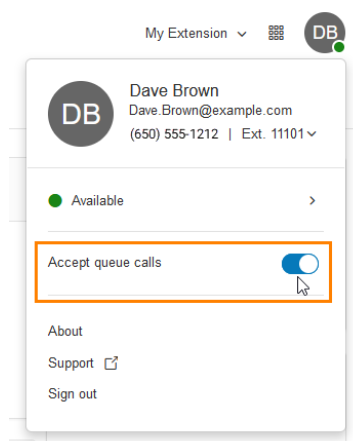
Call flip

BT Cloud Work Call Flip lets you transfer conversations from one device to another quickly and easily. Flip a call to your mobile phone on your way out of the office or flip a mobile call to your home phone once you've finished your commute.

Managing your call flip numbers

1. Select the **Settings** tab.
2. Select **Call Forwarding and Voicemail**.
3. Click the **Settings** tab.
4. Under **Call Flip** click **Edit**. The **Call Flip** window will appear with a list of numbers/devices assigned to you with a Flip number beside each.
5. Hover your mouse over the eight-dot icon on the left of each row, click and hold, then drag and drop the row to change the Flip Number assigned to the phone number. You may skip or leave any number unassigned.
6. Click **Save**.

Using call flip

When you are on a phone call, press the asterisk key (*) and a number corresponding to the device to which it is assigned. The call is transferred immediately to that device. For example, if you have the number 2 assigned to your home phone, clicking *2 while you are on a call will instantly transfer the call to your home phone.

Custom rules

Custom answering rules are call handling actions carried out when a specific condition is met. These rules take priority over the standard call forwarding settings of a user extension.

Creating custom rules

You can create custom answering rules for special routing during holidays or specific times of the day (e.g. lunch break) or for special callers.

1. Select the **Settings** tab.
2. Select **Call Forwarding and Voicemail**.
3. Select **Custom Rules**.
4. Select **Add Rule**.
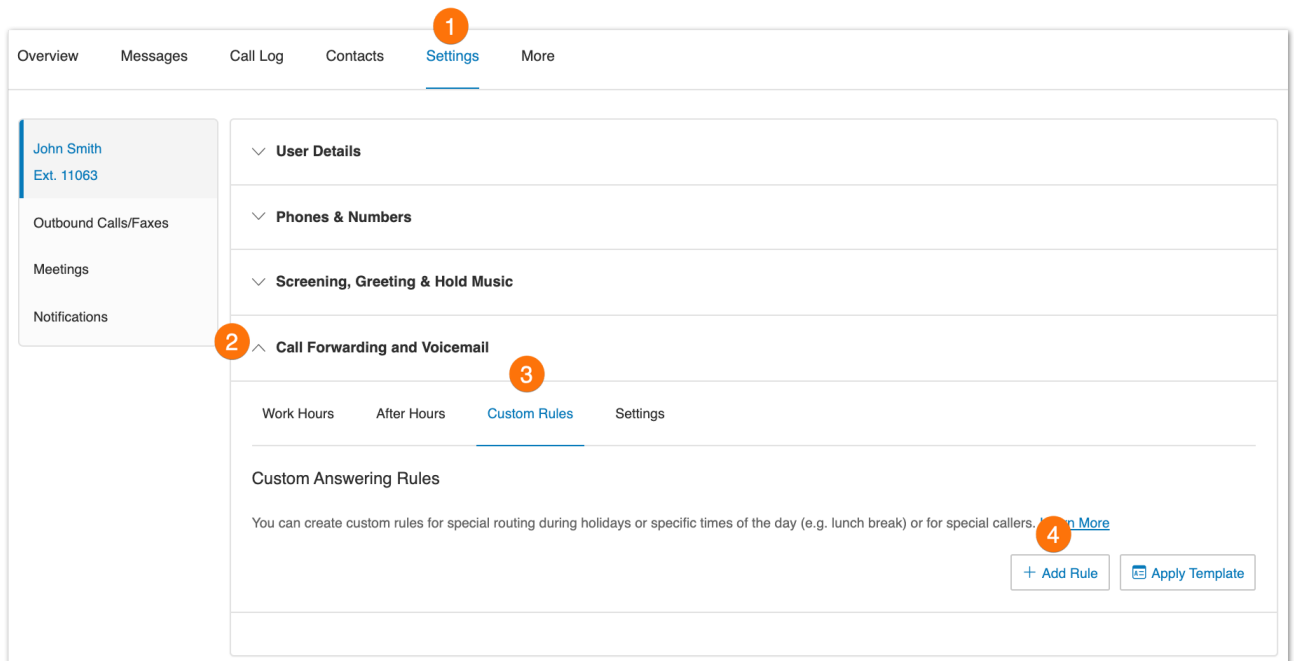
5. Create a name for your custom answering rule.
6. Click **Next**.

7. [Define the call conditions for your custom answering rule](#).
8. Click **Next**.

9. [Define the call handling action to be performed when conditions are met](#).
10. Click **Save**.

Your custom answering rule will now appear in the Custom Rules tab. You may disable, edit, or delete the rule. Click **Validate Rules** to check if your custom answering rule overlaps or has a conflict with another rule. For custom rules with conflicts, you may edit, delete, or temporarily disable the conflicting rules.

Custom rule conditions

There are three different conditions that you can configure to trigger a custom answering rule. You may enable a single condition or multiple conditions based on:

- **Caller ID**: Type the phone number to use. You can use a partial number, such as just country code plus area code. Contacts from your address book can be found by typing their names or numbers.
- **Called Number**: Use this option to configure rules based on the phone number the caller dialed. You may use this when creating custom answering rules for your phone numbers used on promotional or marketing campaigns.
- **Date and/or Time**: Select a specific date range to handle calls differently for holidays, vacation, or other specific dates. To handle calls a certain way on the same days and times each week, select a weekly schedule. Note that such custom answering rules are applied before the User Hours and After Hours rules.

Custom rule call handling actions

Once the custom rule conditions are configured, you need to define the appropriate call handling action when the condition is met. Select what should happen when incoming calls match the rule.

- **Ring my devices**: Rings the phones and numbers you've configured on your call forwarding settings.
- **Send to voicemail**: Sends callers to voicemail. You can select the voicemail box of the current extension or a different extension.
- **Play message and disconnect**: Plays an Unavailable Greeting to the caller. You can use the default unavailable greeting or record a custom unavailable greeting.
- **Forward to extension**: Forwards the call to the selected extension.
- **Forward to external number**: Forwards the call to the specified phone number.

Setting up the Forward all calls feature

The **Forward all calls** feature allows you to easily forward all your incoming calls when you're unable to answer. You can forward incoming calls to a voicemail, coworker, external number, call queue, announcement, IVR menu, or other locations. You can also schedule the time period when the incoming calls should be forwarded.

Admins can set the **Forward all calls** feature for users.

1. Go to the [Admin Portal](#) and sign in.
2. Click your profile at the top right.
3. Turn on the toggle for **Forward all calls.**
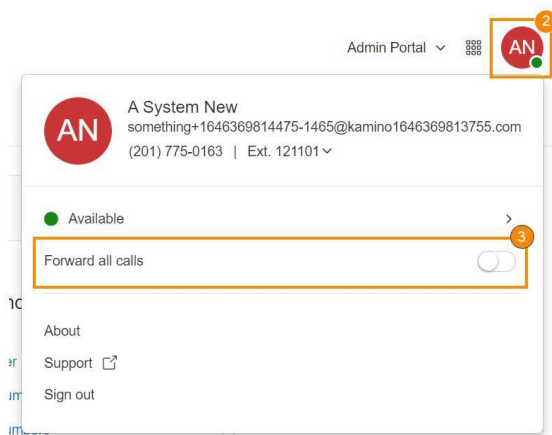
4. Click the button next to one of the options under **Where would you like to forward your calls?.** Click
   Show more options to see the complete list.
5. Check the box for **Specify start and end dates** to set start and/or end dates or times (optional). This feature is useful for forwarding calls around your break or vacation schedule.
6. Click **Save**.

A banner will appear at the top of the BT Cloud Work Admin Portal page to remind you when your calls are forwarded. You can click **Edit** in the banner to modify your call forwarding settings or click **Turn off** to stop forwarding your calls.

Where to forward your calls

- **Voicemail:** Forward calls to your voicemail box. You can play and customize your voicemail greeting.
- **Coworker:** Forward calls to a coworker. Type the coworker's name or extension number in the search box, then click on the desired coworker.
- **External number:** Forward calls to an external number, such as an answering service.
- **Announcement:** Play an announcement. You can play and customize the greeting.
- **Call queue:** Forward calls to a call queue. Type the call queue name or extension number in the search box, then click on the desired call queue.
- **Delegated line:** Forward calls to a delegated line. Type the delegated line name or extension number in the search box, then click on the desired delegated line.
- **Shared line:** Forward calls to a shared line. Type the shared line name or extension number in the search box, then click on the desired shared line.
- **Limited extension:** Forward calls to a limited extension. Type the limited extension name or extension number in the search box, then click on the desired limited extension.
- **IVR menu:** Forward calls to an IVR menu. Type the IVR menu name or extension number in the search box, then click on the IVR menu line.

Note:
- To use the **Forward all calls** features, the **User Settings - Call handling** permission is required. If the user doesn't have this required permission, the Forward all calls feature won't be available to them. For more information, go to List of User Permissions.
- When **Forward all calls** and Do Not Disturb (DND) are both turned on, calls will be forwarded according to your **Forward all calls** settings.

Setting up notifications

Set your settings for email alerts or text messages when you receive a voicemail message, fax, missed call or for the status of their fax transmission results.

1. Select the **Settings** tab.
2. Select **Notifications** in the left navigation bar.
3. Click **Messaging Notifications**.
4. The options will appear for **By Email** or **By SMS** notifications to a recipient of your choice for your received voicemail messages*, faxes, or text messages, missed calls, or fax transmission results.
5. Set your notification settings by checking the boxes and filling in email and phone numbers.
6. Click **Basic Settings** and switch to *Advanced Settings* to see more detailed notification settings.
7. Under **Actions**, click **Customize Notifications** for each of the categories:
    a. Set your **Advanced Settings Options**.
    b. Click **Done**.
8. Click **Save**.

Outbound caller ID

Setting an outbound caller ID

This option allows a user to display or block the caller ID of their phone numbers during outbound calls. As a default, your outbound caller ID is not blocked. Follow the steps below to change it.

1. Select the **Settings** tab.
2. Select **Outbound Calls/Faxes** in the left navigation bar.
3. Select **Caller ID**.
4. You have the option to choose different numbers to display:

    a. **By Phone**: Choose a number to display for your softphone, mobile phone, or desk phone.
    b. **By Feature**: Choose a number to display for RingOut from Web, RingMe, Call Flip, Fax Number, Mobile App, Additional Desktop App, Common Phone, Delegated Caller ID, and Alternate Caller ID.

5. Click **Edit** next to a phone number to select a phone number you want to display as your caller ID number for that phone or feature type. Click **Done.**
6. Under **Internal Calls**, check the box next to **Display my extension number for internal calls** if you want to display your extension as your caller ID when making internal calls. All BT Cloud Work and IP phones will see the extension. Calls forwarded to external phones, like a mobile phone, will still show your complete direct phone number.
7. Click **Save**.

Note: The default outbound caller ID name is the company name. For BT Cloud Work Canada accounts, you may optionally configure the Use user's name in Outbound Caller ID instead of the default company name. This feature can also be bulk enabled through the Template feature. This parameter is not supported for BT Cloud Work US accounts.

Overview   Messages   Call Log   Contacts   **Settings** (1)   More

Dulcinea Dunn
Ext. 11103

(2) Outbound Calls/Faxes

Meetings

Notifications

(3) ∧ **Caller ID**

Decide which phone number will display as Caller ID for outgoing calls. ⓘ

(4) By Phone

Dulcinea Dunn

(409) 240-2563 - Main Company Number

(5) Edit

By Feature

RingOut from Web   **RingMe (Outgoing to Caller)**

(409) 240-2563 - Main Company Number   (409) 240-2563 - Main Company Number

Edit   Edit

Call Flip   **Fax Number**

(409) 240-2563 - Main Company Number   (409) 240-2563 - Main Company Number

Edit   Edit

Mobile App   **Additional Desktop App**

Not-specified   (409) 240-2563 - Main Company Number

Edit   Edit

Common Phone   **Delegated Caller ID**

(409) 240-2563 - Main Company Number   (409) 240-2563 - Main Company Number

Edit   Edit

Alternate Caller ID

Not-specified

Edit

Internal Calls

(6) ☑ Display my extension number for internal calls. ⓘ

(7)

Cancel   Save

Outbound fax settings

Setting outbound fax settings

Changing the fax cover sheet

1. Select the **Settings** tab.
2. Select **Outbound Calls/Faxes** in the left navigation bar.
3. Select **Fax Settings**.
4. Edit your **Cover page info**. Enter your **Company name**, **Address**, **City**, **State/Province**, **Zip/Postal Code**, and **Country**.
5. Under **Cover Page** click **Select**.
6. Select and preview the **Default Cover Page**. A default cover sheet is attached to each fax you send through BT Cloud Work. The variable information on the cover page will be filled in during the fax-sending process.
7. Click **Done**.
8. Click **Save**.

Overview   Messages   Call Log   Contacts   **Settings**   More

1

PV

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Ext. 11103

2 Outbound Calls/Faxes   **3** ∧ **Fax Settings**

Meetings

Notifications

∨ **Caller ID**

Cover Page Info

4 This information will be printed on your fax cover page

Company

e.g. John Doe

Street Address

Country

United States

Additional address (Optional) ⓘ

e.g. Suite 500 or Building A, Floor 3

State/Province

Select State/Province

---

6 Cover Page   ✕

The cover page is used to identify who the fax is from and who the intended recipient of the fax is. It does not have to be used if not needed.

Default Cover Page

Contempo

Preview

Cover Page

Contempo

5 Select

addresses, enter them here. To send a fax via email, send the fax via faxnumber@rcfax.com.

Cancel   **7** **Done**

Add

8

Cancel   **Save**

Adding emails that can send faxes

When a user sends a fax via BT Cloud Work, the system checks the sender's email address and sends the fax if the address is on the approved list. Emails might include alternate company accounts or personal accounts. You can have up to 25 email addresses on your trusted email addresses list.

1. Select the **Settings** tab.
2. Select **Outbound Calls/Faxes** in the left navigation bar.
3. Select **Fax Settings**.
4. Select the button next to **On** or **Off** under the **Omit cover page when the email subject line is blank** under the **Faxes Sent via Email** section. **Depending on your preference,** when this option is enabled, a cover page will be used when you send a fax via email with a subject line and not send a cover page for emails containing no subject line.
5. Enter the email address you wish to add.
6. Click **Add** (repeat for up to 25 additional addresses as necessary).
7. Click **Save**.

Faxing via email

Send faxes by emailing them as attachments from any email address you have added to the **Faxes Sent via Email** menu described previously.

1. Enter the recipient's 10-digit fax number@rcfax.com in the **To:** field.
   For example, to send a document to the fax number 1-123-555-1111, you would use the following email address, 123555111@rcfax.com.
2. Enter a subject in your email to use as your fax subject. Depending on your settings for **Faxes Sent via Email**, adding a subject may determine whether or not a cover page is sent with your fax. See instructions for **Adding emails that can send faxes** for more information.
3. Attach the document you wish to fax.
4. Type your message in the body of the email.
5. Click **Send**.

To	6 6505556567@rcfax.com ✕	Bcc
Cc		

RingCentral Update

pdf	update.pdf
	143 KB

Check out the new update.