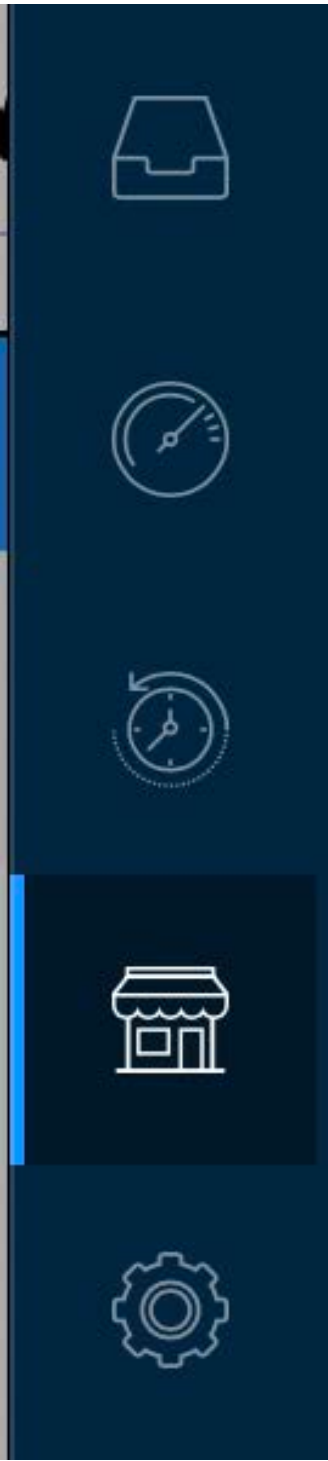




Admin Guide

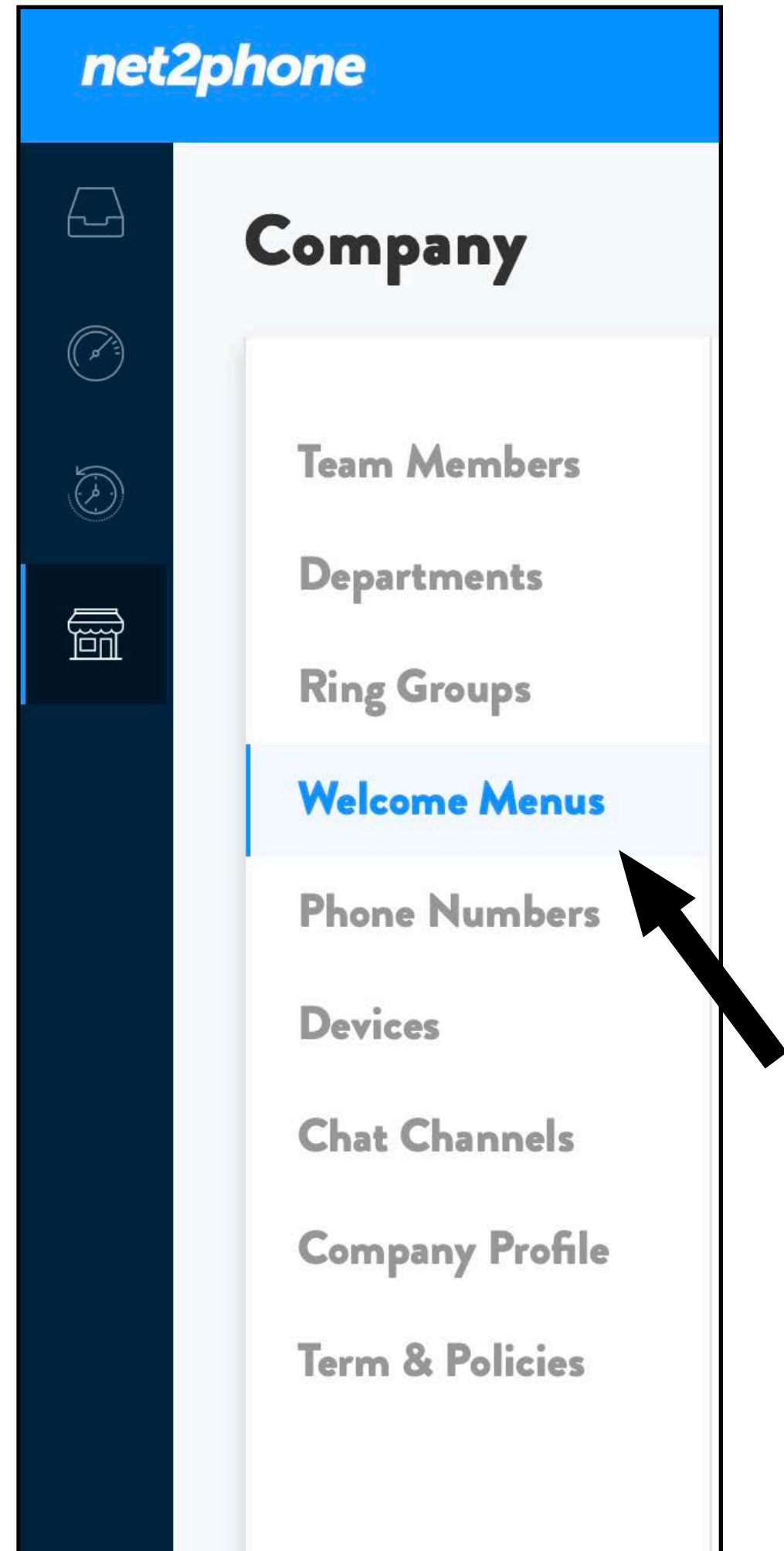
NAVIGATING NET2PHONE


Navigating around net2phone is easy. On the left side of the application, you'll find 5 icons that will take you to the main parts of the application. Below you'll find a brief description of each icon and section.



- ← **Inbox**: a central place for all your messages
- ← **Dashboard**: an overview of your account and team
- ← **Calls**: view your call history, call info and voicemails
- ← **Company**: various options on editing your account
- ← **Settings**: miscellaneous account settings

ADDING A WELCOME MENU



- From the Company Tab, Click on “Welcome Menus” on the left of your screen.
- Then, click the blue  button in the top right.
- On the next page, we’ll go into details on the various options you’ll have when creating your new Welcome Menu.

ADDING A WELCOME MENU (cont)

Step 1: Name Your Welcome Menu (this will help you manage your welcome menus later)

Step 3: Choose where sms will go when sent to the number assigned to your welcome menu

Step 5: Now Select where each key option will go. You can select a team member, a department, a voicemail, a ring group or another welcome menu.

Add Welcome Menu

Name

Holiday Welcome Menu

Assigned Numbers

Optional

9739331215

Callers will be routed to the following welcome menu

Send SMS to

Will Weinraub

Choose a number to send all SMS to.

Menu Options

Let's build your menu options and greeting!

Key Options

Forward Calls To

No Selection

Required

R

Marketing Team

1

DE

Design

2

MA

Marketing

+ Add Menu Option

SAVE

CANCEL

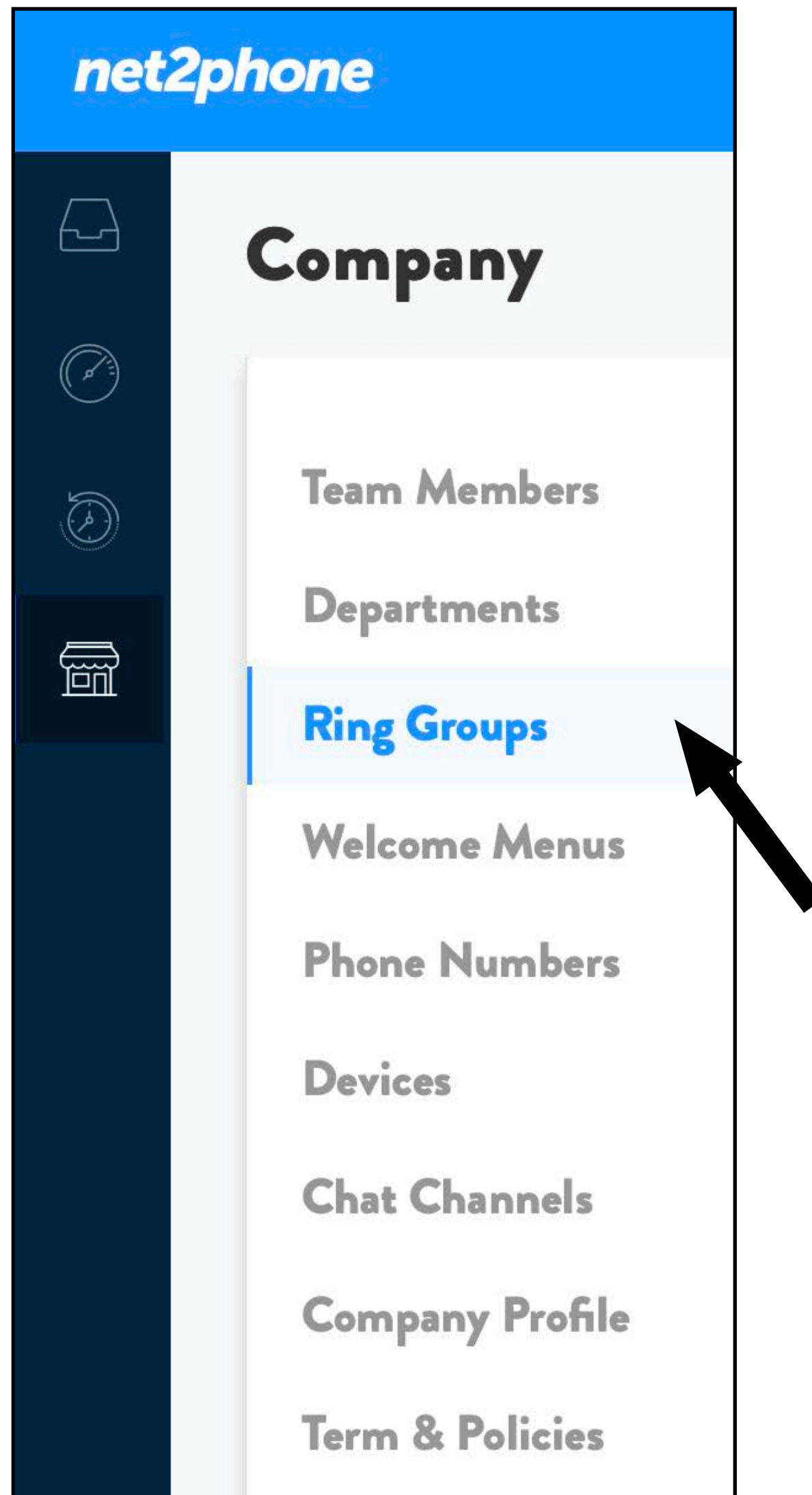
Step 2: Choose which of your Phone Number(s) this Welcome Menu will be used by


Step 4: Now it's time to create your Key Options. First, select what happens when the caller doesn't make a selection. This is a required step.

Step 6 : Scroll down to record/upload your Greeting, click "SAVE" and you're all set!

(You can edit your Welcome Menu at anytime by clicking on the  icon on the Welcome Menu page.)

ADDING A RING GROUP




- From the Company Tab, Click on “Ring Groups” on the left of your screen.
- Then, click the blue  button in the top right.
- On the next page, we’ll go into details on the various options you’ll have when creating your new Ring Group.


ADDING A RING GROUP (cont)

Step 1: Name Your Ring Group
(this is just for internal/organizational purposes)

Step 3: Choose which of your Phone Number(s) this Ring Group will be used by

Step 5: Now it's time to build your Ring Group Tiers. This is the order in which the group will ring and try to contact different team member of your organization to answer the call. First, select the team member or department you want the tier to go to (you can select multiple), and then how many times it'll ring before progressing to the next tier. You can add as many tiers as you'd like.

Step 7: Click SAVE to finish!
(You can edit your Ring Group at anytime by clicking on the  icon on the Welcome Menu page.)



Add Ring Group

Name


Design Team

Ext

Auto

403

Assigned Numbers



9739331215

Send SMS to

All Company

Choose a number to send all SMS to.

Tiers


Tier 1

DE

Design

Rings

4




Tier 2

MA

Marketing

Rings

4




Tier 3

?

Alexandra Lasky


Rings

4



+ Add New Section

If Call Not Answered



Hangup Call

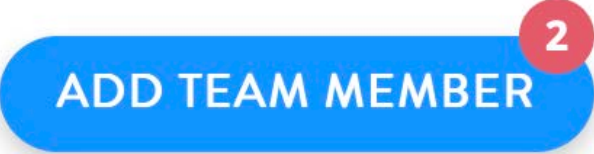

Step 2: Choose an Extension for this ring group
This internal extension gives you the ability to ring it directly from another internal device

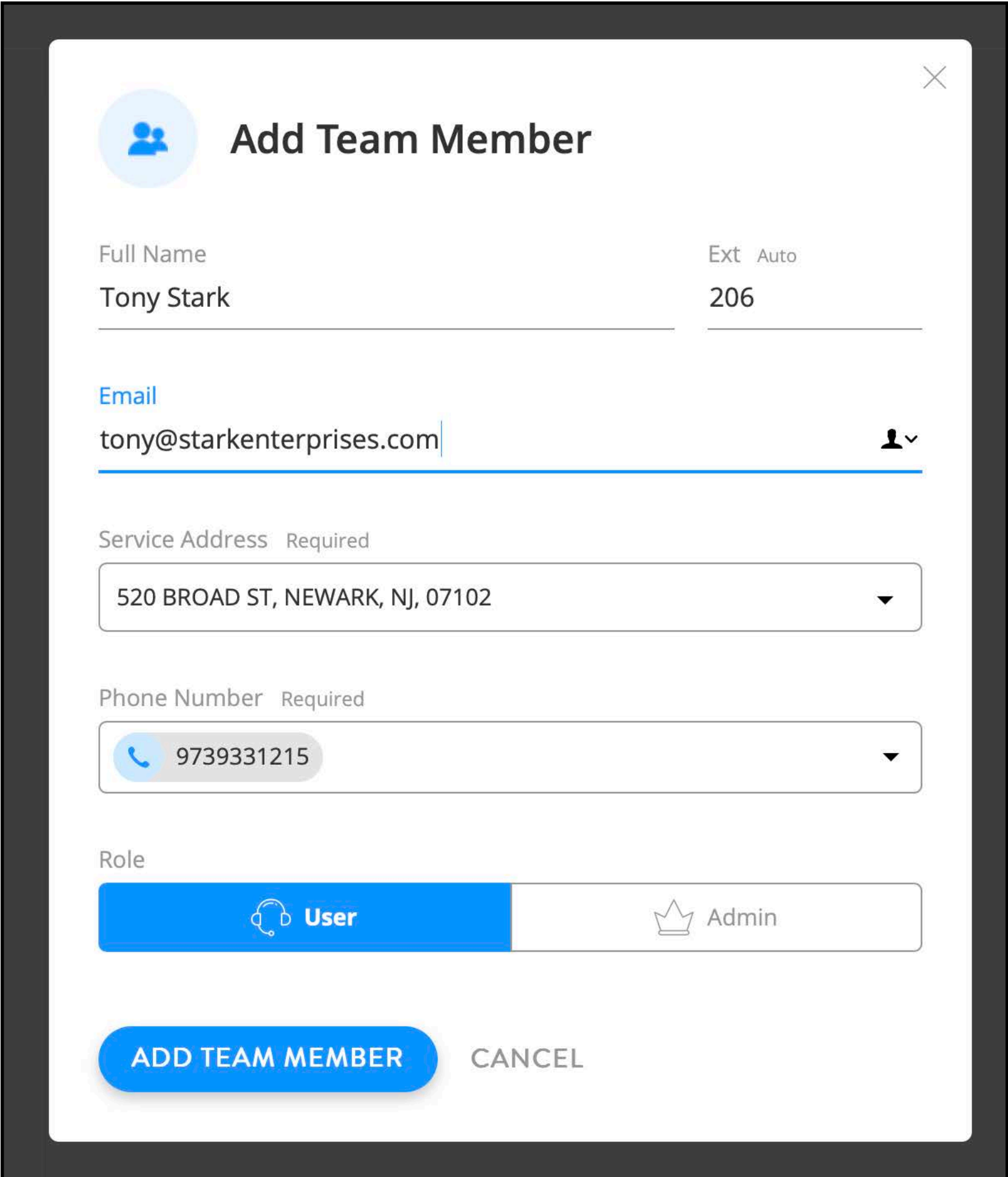
Step 4: Choose where sms will go when sent to the number assigned to your welcome menu


Step 6: Decide what will happen if the call is not answered. It can go to a team member, a department, their voicemails, or a welcome menu. You can also add a forwarding number or choose to hang up the call

net2phone


ADDING A TEAM MEMBER

- From the Company Tab, Click on “Team Member” on the left of your screen.
- Then, click the  button in the top right.
 - *Note: the red badge indicates how many available slots you have for new team member*
- Enter the Full Name of the New Team Member, Choose their Extension, and then enter in their Email Address
- Choose your Service Address for this User (you can also add a new address from the drop down menu) This will be used for emergency services.
- Assign a Phone Number for this user. You can select an existing number, or follow the flow to add a new number. Note: every team member must have at least one phone number.
- Once finished, click “ADD TEAM MEMBER”.
 - As an admin, you can edit the info of each Team Member at anytime by clicking on the  icon on the Team Member page.






 **Add Team Member**

Full Name Ext Auto
Tony Stark 206

Email
tony@starkenterprises.com 

Service Address Required
520 BROAD ST, NEWARK, NJ, 07102

Phone Number Required
 9739331215

Role
 **User**  Admin

ADD TEAM MEMBER CANCEL

EDITING A TEAM MEMBER:

To Edit A Team Member, click on the  icon by the team member you'd like to edit. Here you'll find lots of options for editing a team member.

net2phone

4

?

Company

Team Members

Departments

Ring Groups

Welcome Menus

Phone Numbers

Devices

Chat Channels

Company Profile

Term & Policies

TEAM MEMBERS

Search

Total: 2


ADD TEAM MEMBER

NAME	EXT	EMAIL	DEPARTMENT
<div><div></div><div>Alexandra Lasky</div></div>	202	liveninja-user1@test.com	Design, Marketing
<div><div></div><div>Will Weinraub</div></div>	205	liveninja-admin1@test.com	None

EDITING A TEAM MEMBER: PROFILE

In the **Profile** tab, you'll find the ability to edit various aspects of each team member such as their avatar/profile picture, their name, email, service address and timezone.

You can also update their password from here and delete the team member if you choose to do so.

**Alexandra Lasky**✕

[Profile](#) [Company](#) [Call Options](#) [Devices](#) [Voicemail](#)

Drag and Drop your Avatar here.
or
[Browse Files](#)

i

Supported: png, jpg, jpeg | Max size: 4MB

Full Name

Alexandra Lasky

Email

liveninja-user1@test.com

Service Address

520 BROAD ST, NEWARK, NJ, 07102

Time Zone

Eastern Standard Time

[Update Password](#)

[Delete Team Member](#)

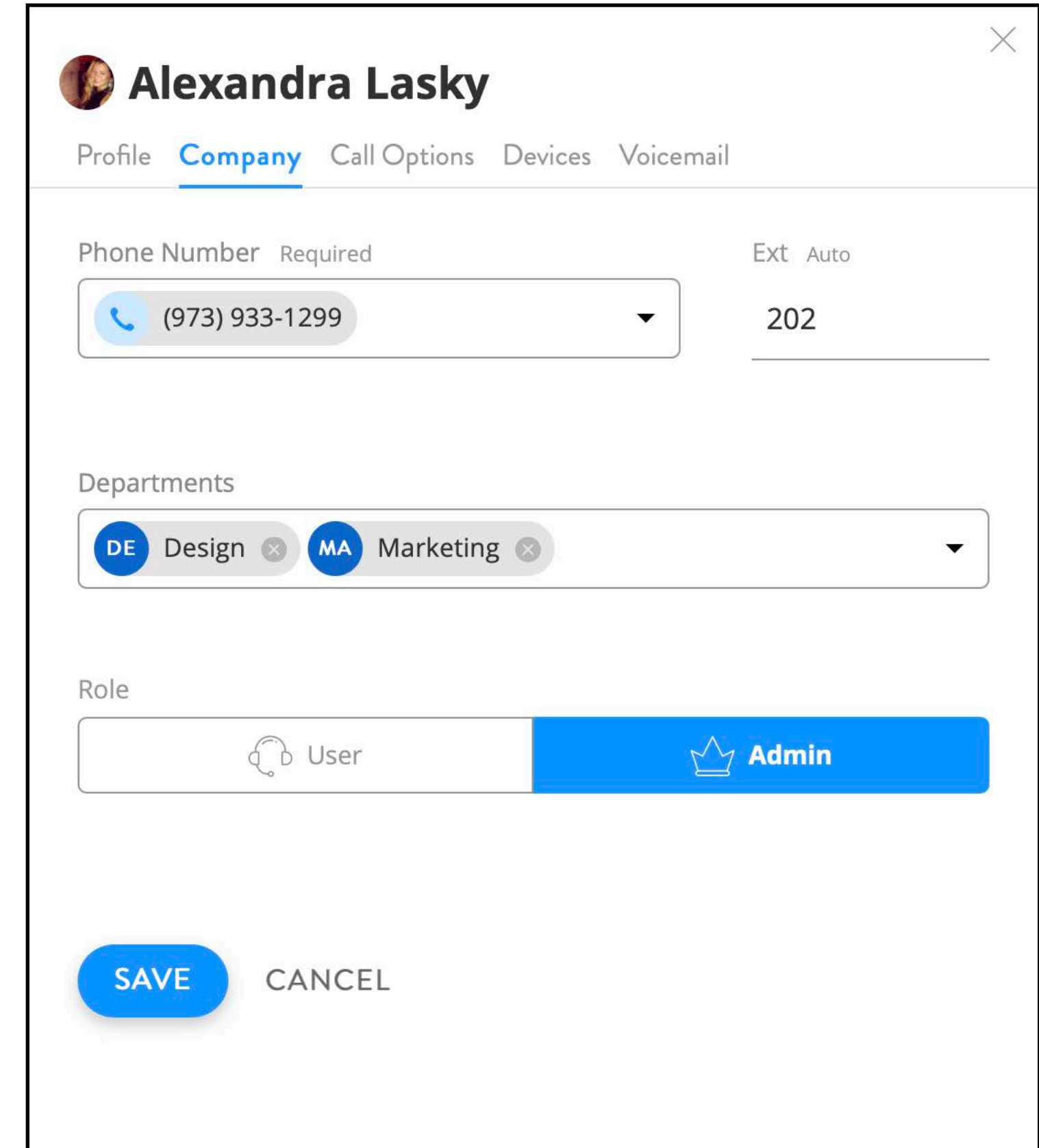
SAVE

CANCEL

EDITING A TEAM MEMBER: COMPANY

In the **Company** Tab, you'll be able to:

- Change their phone number
- Change their extension
- Change which departments they belong to
- Change whether or not they have admin capabilities.




The screenshot shows a user profile editing window for Alexandra Lasky. The window has a close button (X) in the top right corner. Below the name, there are tabs: Profile, **Company** (selected), Call Options, Devices, and Voicemail. The main content area includes:

- Phone Number** Required: A dropdown menu showing (973) 933-1299 with a blue phone icon and a dropdown arrow.
- Ext** Auto: A text input field containing 202.
- Departments**: A multi-select dropdown menu showing DE Design and MA Marketing, each with a close button (X).
- Role**: Two buttons, User (with a headset icon) and Admin (with a crown icon). The Admin button is highlighted in blue.
- SAVE** and **CANCEL** buttons at the bottom.

EDITING A TEAM MEMBER: CALL OPTIONS

In the **Call Options** Tab, you'll find a lot of different options and capabilities when it comes to how each user receives calls on net2phone. From here you can:

- Edit their call forwarding options
- Edit if their phone numbers ring individually or at the same time.
- Edit their forwarding numbers and add new ones if needed.
- Turn on/off Call Screening
- Turn on/off Incoming Call ID
- Turn on/off Call Recording

 **Alexandra Lasky**

[Profile](#) [Company](#) [Call Options](#) [Devices](#) [Voicemail](#)

Call Forwarding Options

Ring Both


Ring your Devices & Forwarding Numbers at the same time.

Phone Rings


Ring your phone numbers Individually or all at the same time.

Individually

Forwarding Numbers

 (786) 258-2484

2 Rings




[Add Forwarding Number](#)

Call Screening


Informs you that it's a net2phone call and provides Accept/Deny Call capabilities for your Forwarding Numbers.

☐ Record the Caller's Name




Incoming Call ID

When your calls are being forwarded to your forwarding numbers, Caller ID will show your number rather than the caller's phone number.



Call Recording


Records all of the incoming and outgoing calls, to all of your phone numbers.



EDITING A TEAM MEMBER: DEVICES

In the **Devices** Tab, you'll be able to:

- Change how outbound calls will appear on caller IDs
- Change the number of times their phones will ring
- Turn on/off WebRTC calling
- Add, edit, and delete desk phones.

 **Alexandra Lasky**

Profile

Company



Call Options

Devices

Voicemail

Caller ID

Your outbound calls will appear to come from this phone number.

 (973) 933-1299 

Phone Rings

All of your desk phones will ring at the same time.

4 Rings



WebRTC Calling

When enabled you will be able to make and receive phone calls from your computer.

Desk Phones

Polycom VVX 300


http://prov.net2phone.com/Jqif2MSMArX3mCmL/0004F277C82D.cfg




EDITING A TEAM MEMBER: VOICEMAIL


In the **Voicemails** Tab, you'll be able to:

- Turn on/off the user's voicemail
- Reset their voicemail password
- Change their voicemail greeting





 **Alexandra Lasky**



[Profile](#) [Company](#) [Call Options](#) [Devices](#) **[Voicemail](#)**

Voicemail
When off, your callers won't be able to leave you voicemails if you miss their calls. 




[Reset Password](#)

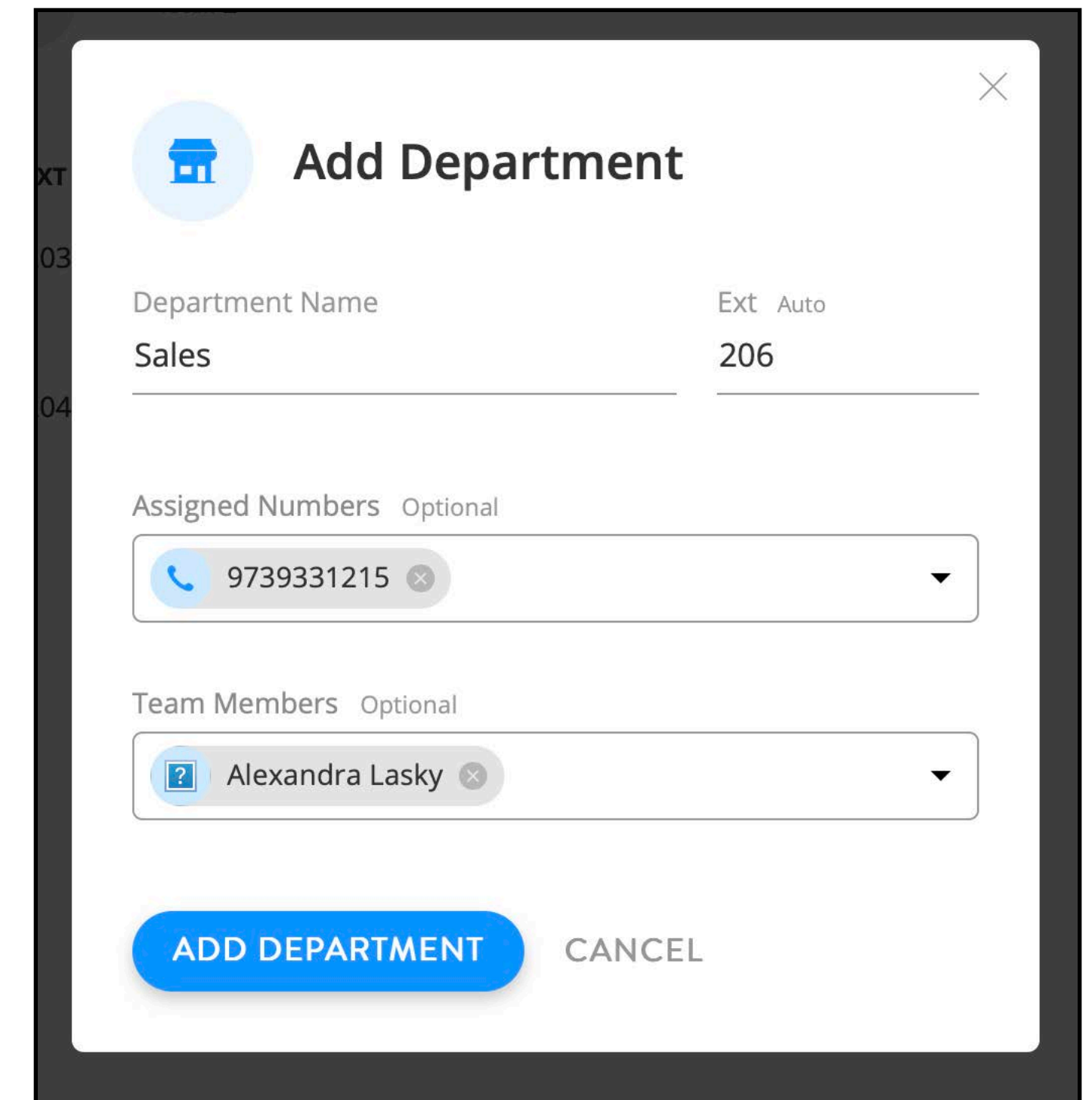
  00:00

Greeting

-  Default Voicemail Greeting
-  Record Greeting via Phone

ADDING A DEPARTMENT

- From the Company Tab, Click on “Departments” on the left of your screen.
 - Then, click the  button in the top right.
 - Enter in your Department Name
 - Choose an Extension number (for external and internal dialing purposes)
 - Additionally, you can choose to assign a number and/or team members to this department.
 - Click  to finish.
- Note: You can edit your Department at anytime by clicking on the  icon on the Department page.



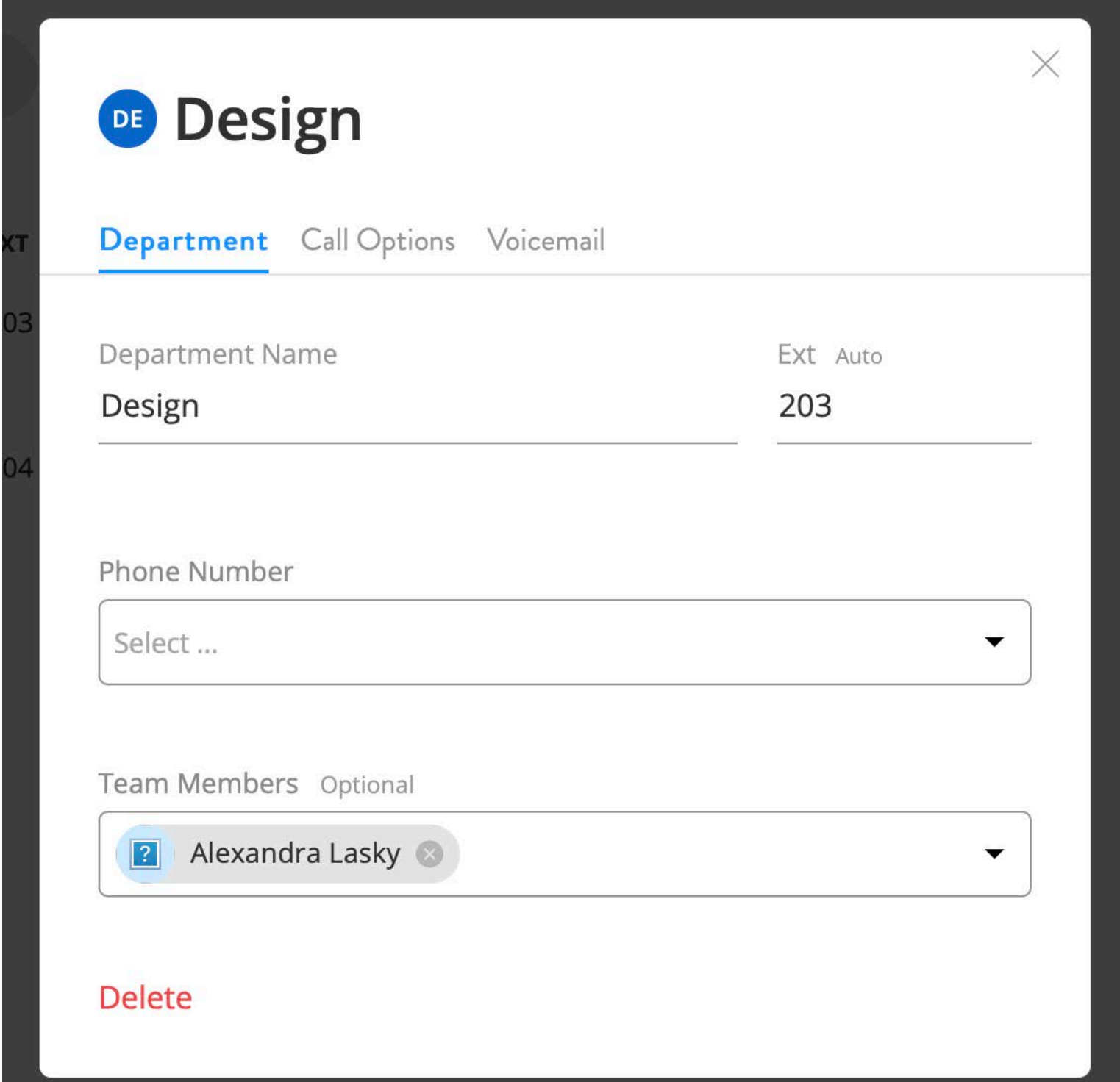
The screenshot shows a modal window titled "Add Department" with a close button in the top right corner. The form contains the following fields:

- Department Name:** A text input field with the value "Sales".
- Ext:** A text input field with the value "206".
- Auto:** A checkbox that is currently unchecked.
- Assigned Numbers:** A dropdown menu with the label "Optional". The selected value is "9739331215" with a phone icon and a close button.
- Team Members:** A dropdown menu with the label "Optional". The selected value is "Alexandra Lasky" with a question mark icon and a close button.
- Buttons:** At the bottom, there are two buttons: "ADD DEPARTMENT" (blue) and "CANCEL" (gray).

EDITING A DEPARTMENT

In the **Department** Tab, you'll be able to:

- Change the department name
- Change the extension of that particular department
- Select/Assign a phone number to that department
- Add/Edit/Remove team members from the department



The screenshot shows a web interface for editing a department. At the top, there's a header with a blue circle containing 'DE' and the title 'Design'. Below this is a tabbed interface with 'Department' selected, and 'Call Options' and 'Voicemail' as other tabs. The main form area has two sections: 'Department Name' and 'Ext'. The 'Department Name' field contains 'Design'. The 'Ext' field contains '203'. Below these is a 'Phone Number' section with a dropdown menu showing 'Select ...'. At the bottom is a 'Team Members' section with a dropdown menu showing 'Alexandra Lasky' and a 'Delete' button.

DE Design

Department Call Options Voicemail

Department Name Ext Auto
Design 203

Phone Number
Select ...

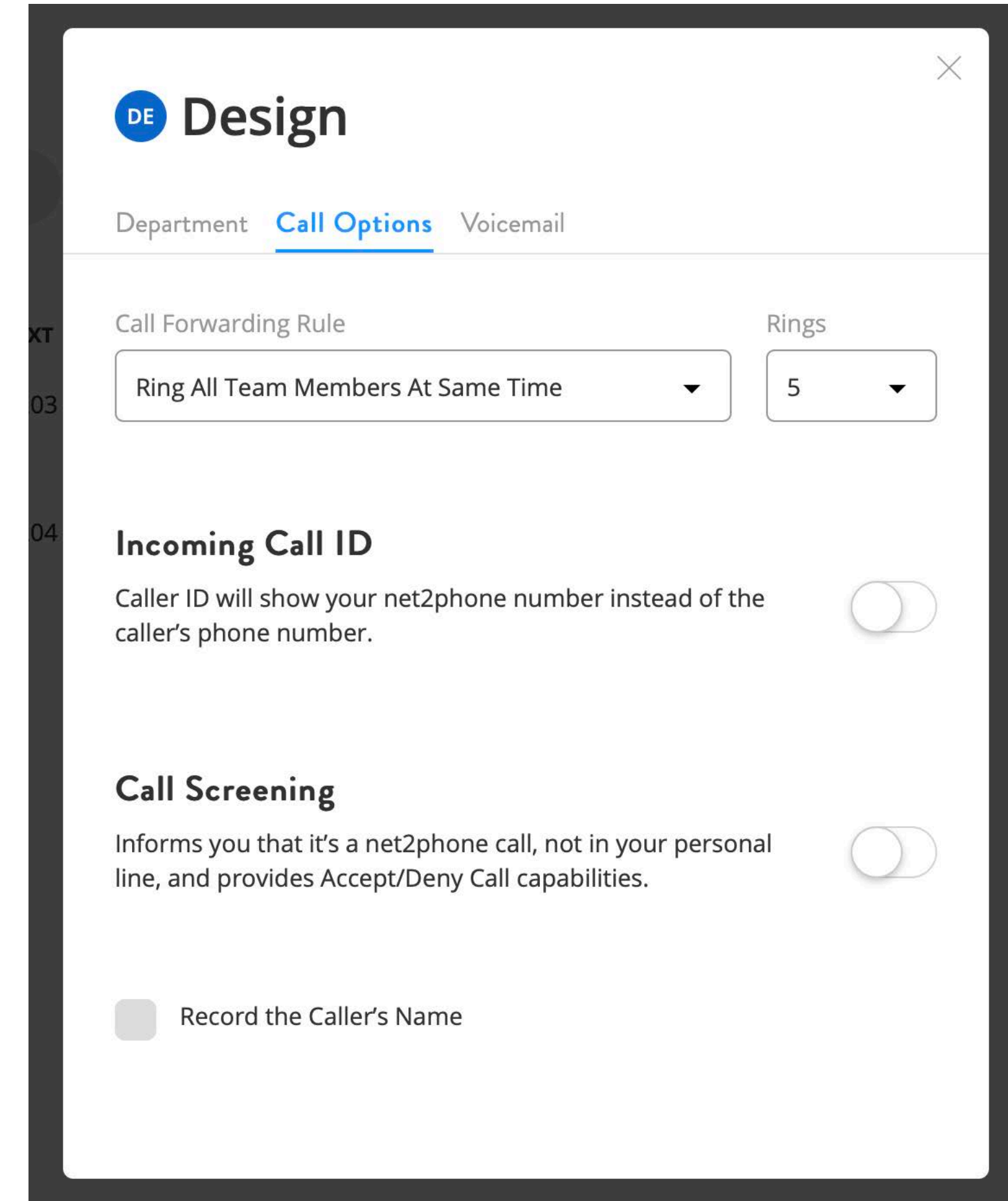
Team Members Optional
Alexandra Lasky

Delete

EDITING A DEPARTMENT: CALL OPTIONS

In the **Call Options** Tab, you'll be able to:

- Change the Call Forwarding Rule and how many times it will ring
- Turn On/Off Incoming Call ID
- Turn On/Off Call Screening
 - Turn On/Off the option to record the caller's name



The screenshot shows a web interface titled "Design" with a close button (X) in the top right corner. Below the title, there are three tabs: "Department", "Call Options" (which is selected and underlined in blue), and "Voicemail".

Under the "Call Options" tab, there are two main sections:

- Call Forwarding Rule**: This section contains a dropdown menu with the text "Ring All Team Members At Same Time" and a "Rings" field with a dropdown menu showing the number "5".
- Incoming Call ID**: This section has a description: "Caller ID will show your net2phone number instead of the caller's phone number." and a toggle switch that is currently turned off.

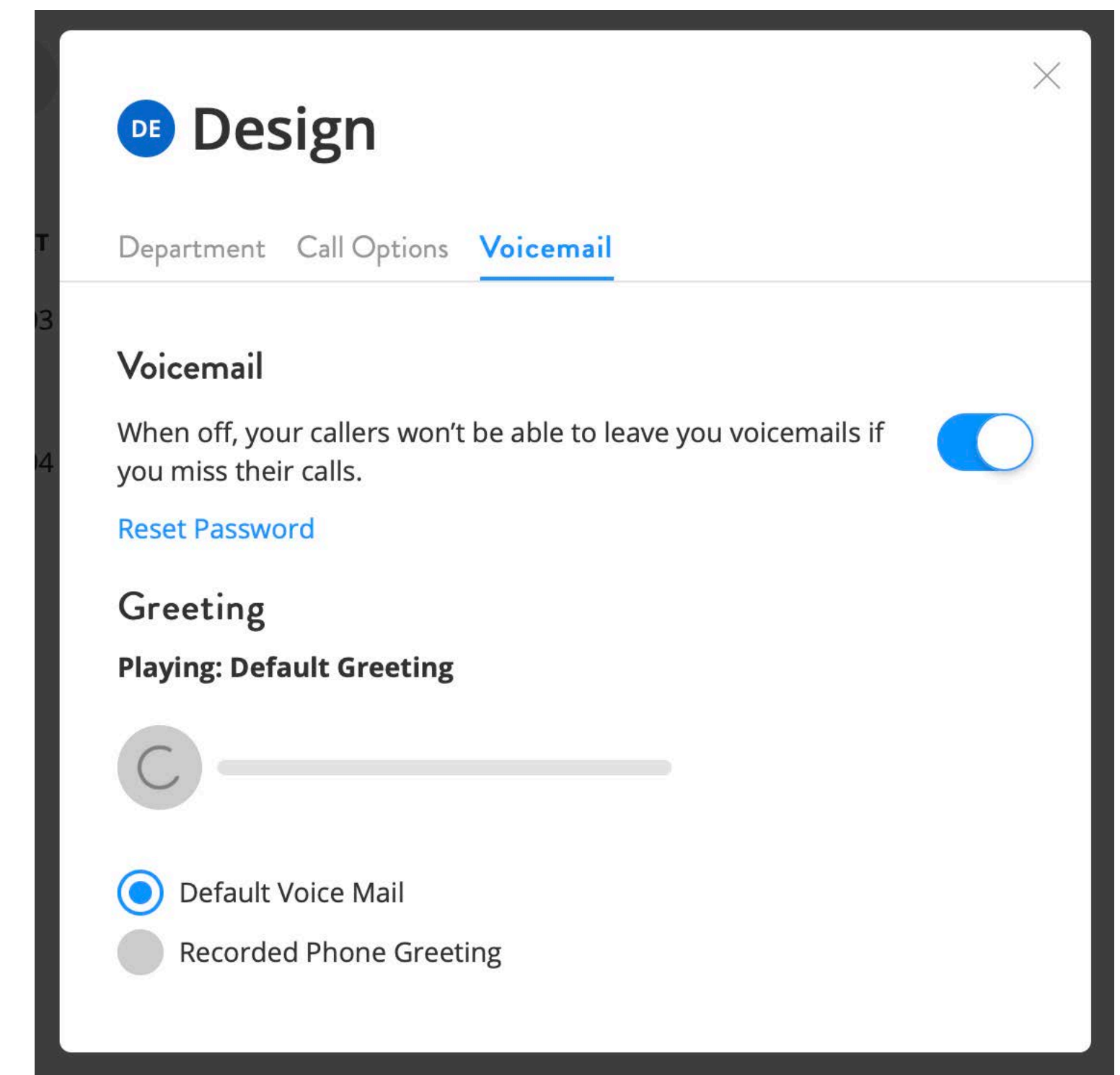
Below these sections is the **Call Screening** section, which has a description: "Informs you that it's a net2phone call, not in your personal line, and provides Accept/Deny Call capabilities." and a toggle switch that is currently turned off.

At the bottom of the interface, there is a checkbox labeled "Record the Caller's Name" which is currently unchecked.

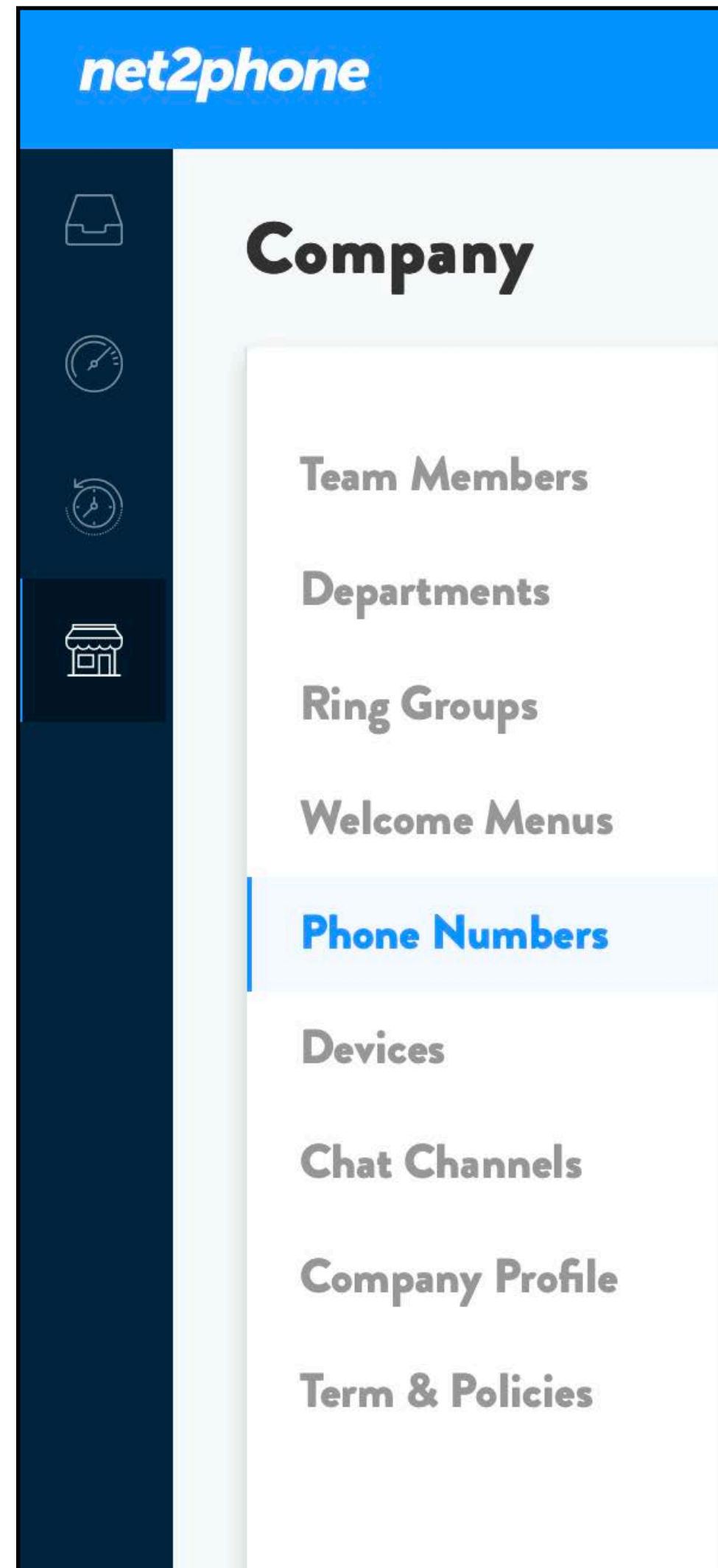
EDITING A DEPARTMENT: VOICEMAIL

In the **Voicemail** Tab, you'll be able to:

- Turn On/Off the department's voicemail
- Reset the voicemail password
- Change the department's voicemail greeting



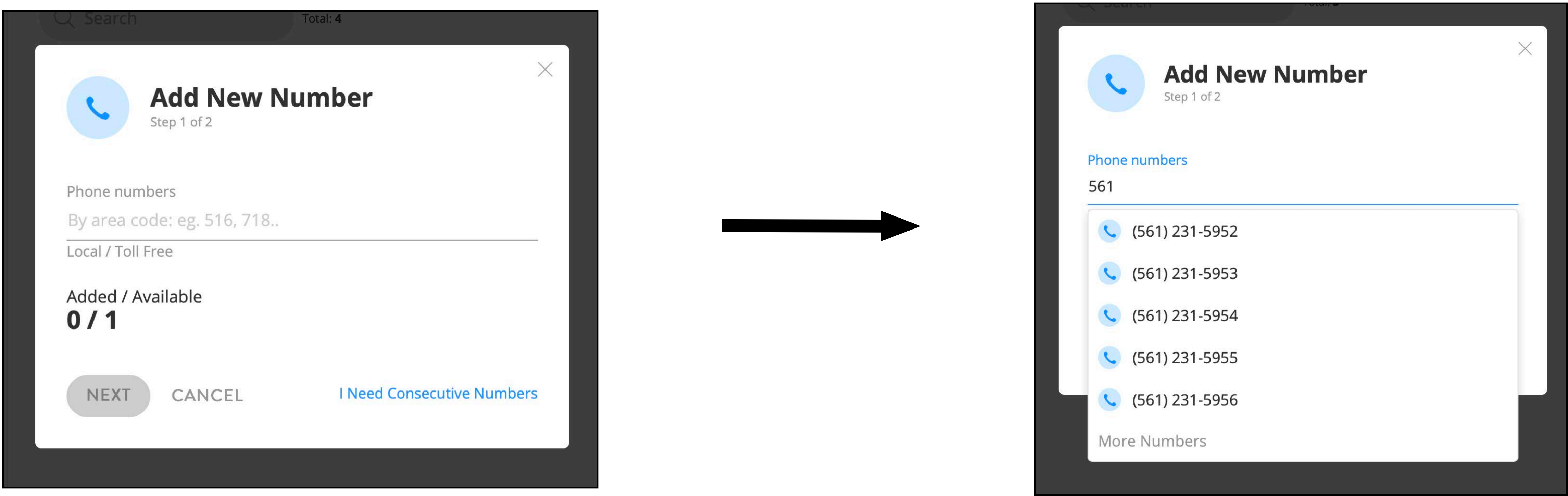
ADDING A PHONE NUMBER



- From the Company Tab, Click on “Phone Numbers” on the left of your screen.
- Then, click the blue **ADD PHONE NUMBER** button on the top right.
- On the next page, we’ll go into details on the various options you’ll have when adding a new number.

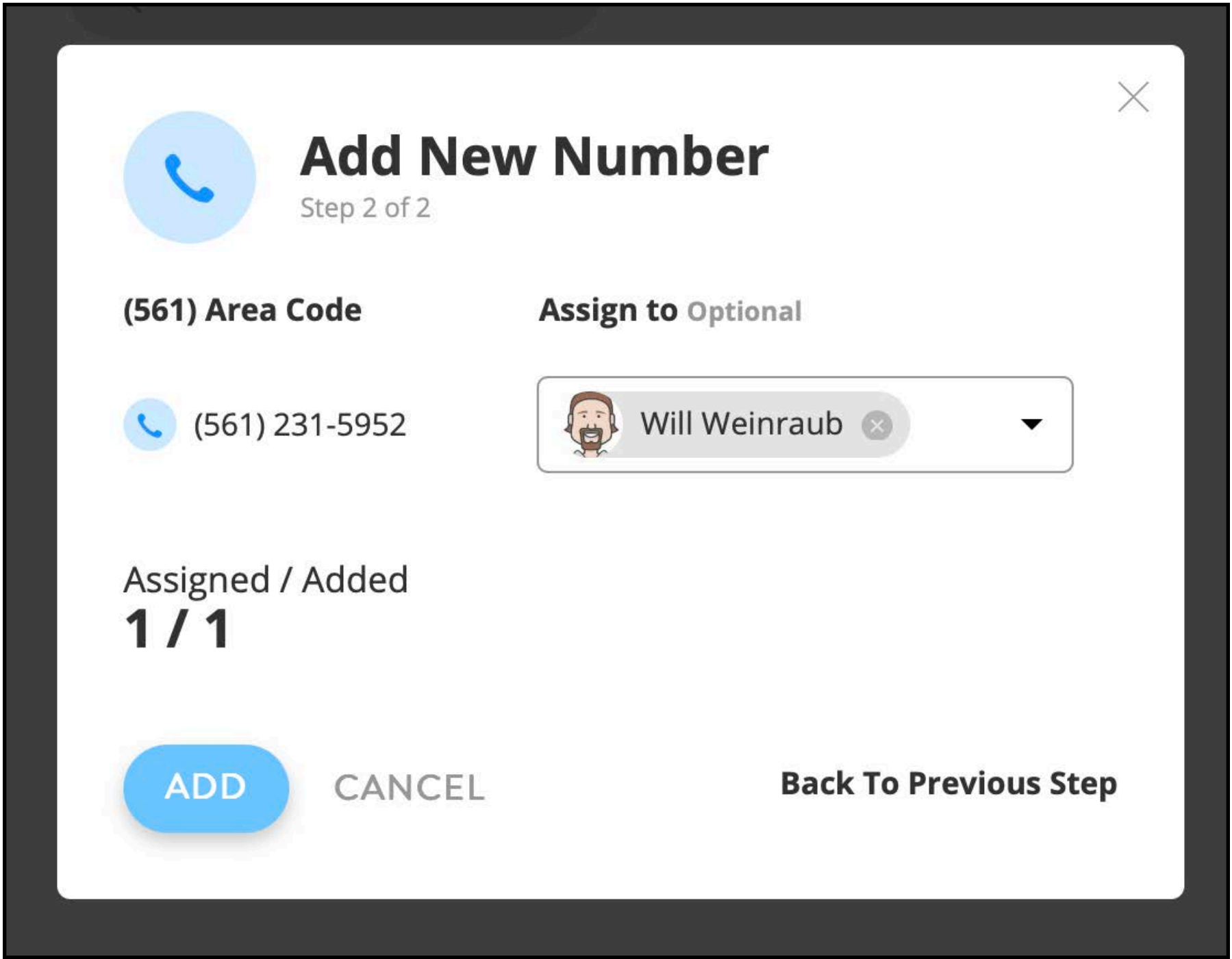
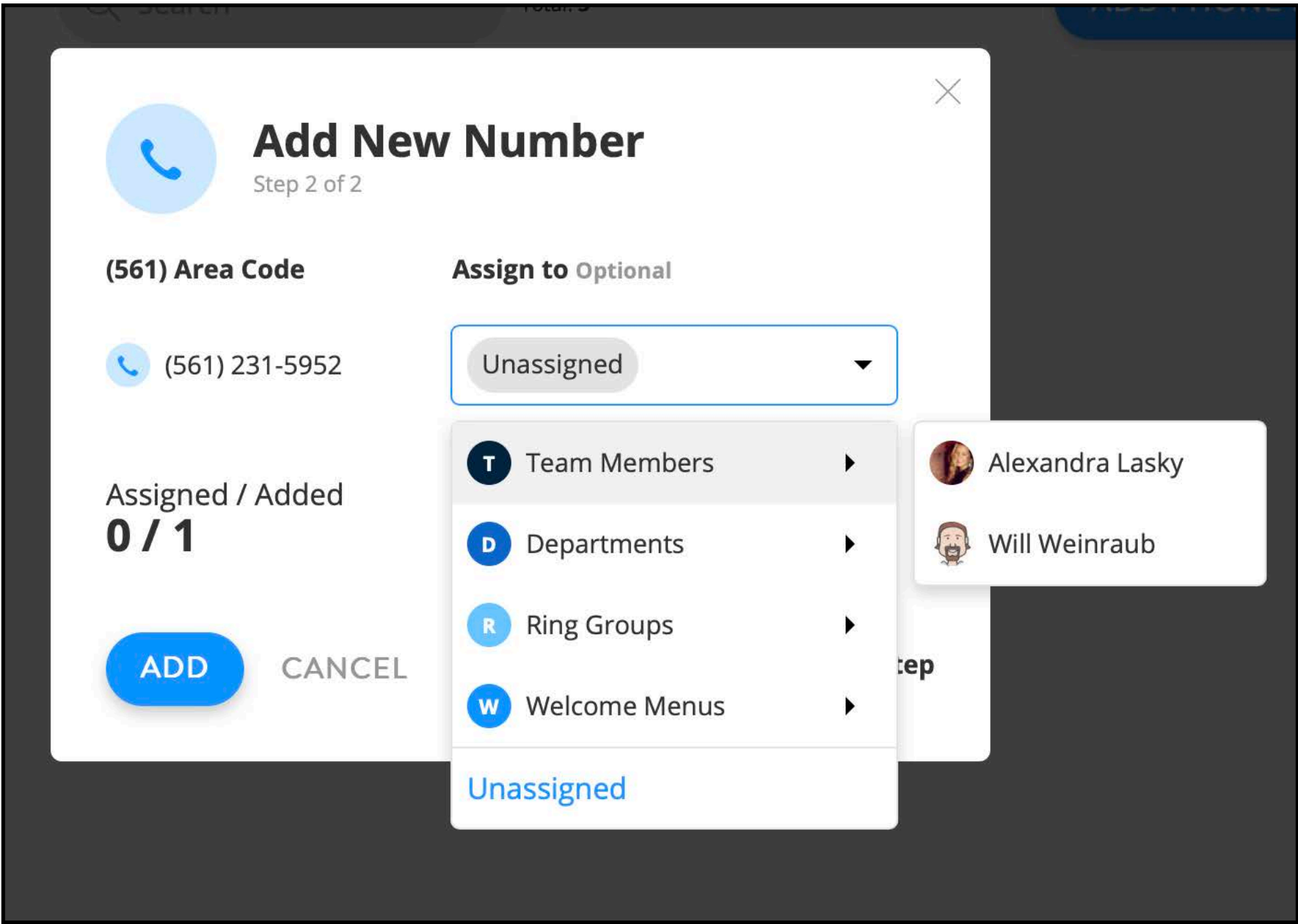
ADDING A PHONE NUMBER

The first step in adding a new number is to type in your desired area code. We support lots of different codes nationwide, however not all may be available. Enter in your desired area code to see various options available. For more options, click “More Numbers” at the bottom of the list. If you need consecutive numbers, that option is also available at the bottom right of the screen.



ADDING A PHONE NUMBER (cont.)

After you've chosen your phone number, you need to assign it and point it to where it should go. With net2phone, you have lots of options here and can point it to a team member, a department, a ring group, or a welcome menu (as seen in the image below). You can also choose to have this number unassigned and reserve it in your account for future purposes. Once you choose where you'd like the number to go, click the **ADD** button to complete the process.



REASSIGNING A PHONE NUMBER

With net2phone, reassigning a number is easy. Simply go to the Phone Number page and hover current assignee that you'd like to reassign. On hover, you'll be presented with the option to reassign the phone number to a team member, a department, a ring group, or a welcome menu.

net2phone

Company

Team Members

Departments

Ring Groups

Welcome Menus

Phone Numbers

Devices

Chat Channels

Company Profile

Term & Policies

PHONE NUMBERS

Search

Total: 4

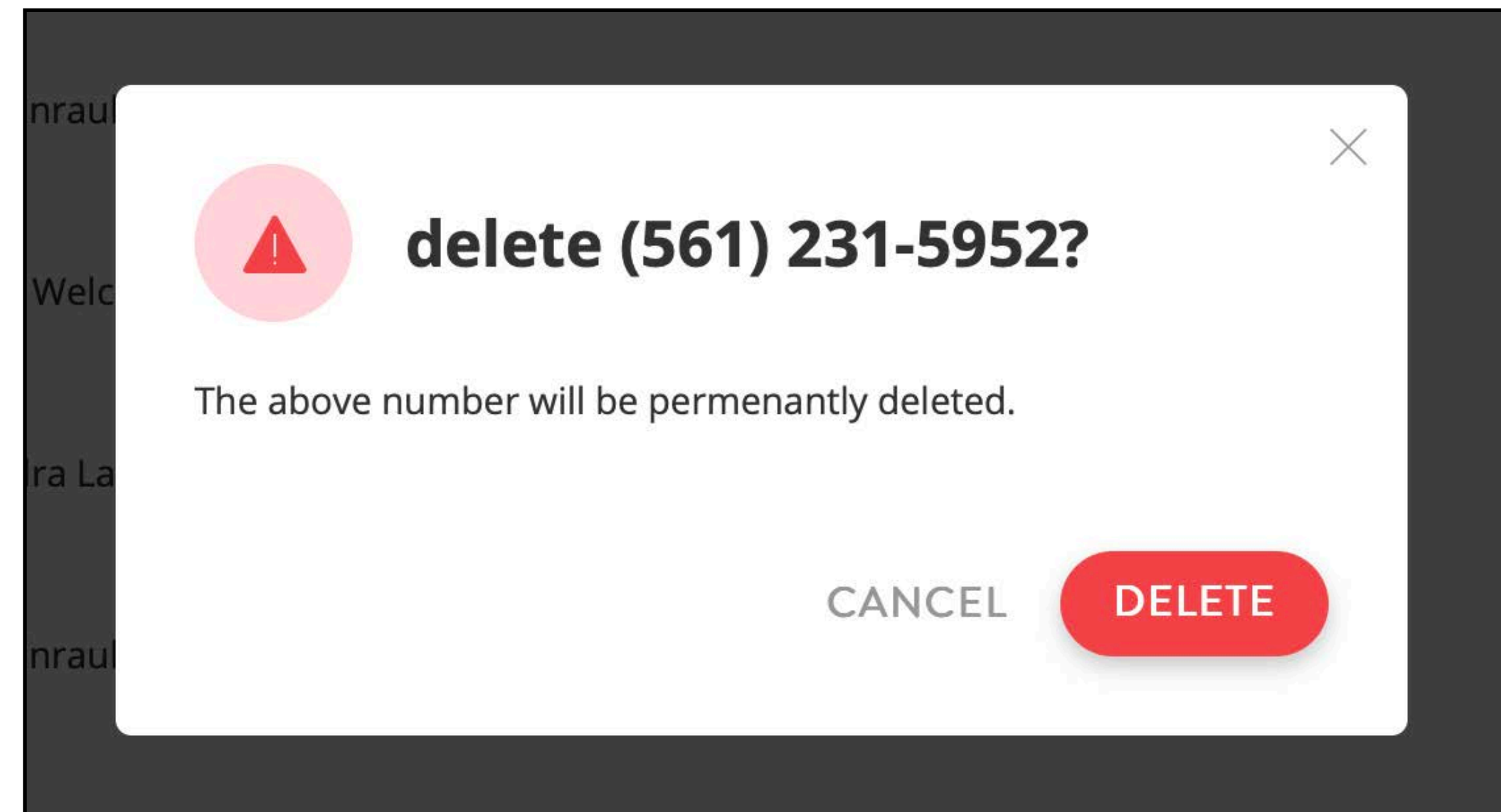
ADD PHONE NUMBER

NUMBER	ASSIGNED TO	
(973) 339-0103	Will Weinraub	<div><div></div><div></div></div>
(973) 933-1215	<div><div>T</div><div>Team Members</div><div></div></div>	<div><div>Alexandra Lasky</div><div></div><div></div></div>
(973) 933-1299	<div><div>D</div><div>Departments</div><div></div></div>	<div><div>Will Weinraub</div><div></div><div></div></div>
(561) 231-5952	<div><div>R</div><div>Ring Groups</div><div></div></div>	<div><div></div><div></div><div></div></div>
	<div><div>W</div><div>Welcome Menus</div><div></div></div>	<div><div></div><div></div><div></div></div>
	Unassigned	<div><div></div><div></div></div>

DELETE PHONE NUMBER

To delete a net2phone phone number, Simply go to the Phone Number page and click on the  icon next to the phone number you'd like to delete.


Follow the onscreen confirmation prompt and click the **DELETE** button to fully delete the number.



EDIT PHONE NUMBER

To edit a net2phone phone number, Simply go to the Phone Number page and click on the  icon next to the phone number you'd like to edit.

Then, enter the area code or toll-free prefix you'd like and select an available option from the drop down menu. Click the blue **CHANGE** button to complete the editing process.



Edit (561) 231-5952 ?

Change to


By area code: eg. 516, 718..

Local / Toll Free

CHANGE

CANCEL






Edit (561) 231-5952 ?

Change to

5184187217

Local / Toll Free



CANCEL

INSTALLING THE CHAT WIDGET

net2phone

Company

- Team Members
- Departments
- Ring Groups
- Welcome Menus
- Phone Numbers
- Devices
- Chat Channels**
- Company Profile
- Term & Policies

Site Widget

The site widget loads on the bottom-right corner of your website and allows visitors to message you and transfer the conversation to SMS. When turned off, even if the widget is installed on your website, it will not load. ☒

Widget Color

#1f72eb — rgb(31,114,235)

Welcome Greeting

We'd love to help. Start convos with us here... 47/300

Widget Code

```
<script>
(function(n,i,_n,j,a){
  n.addEventListener("DOMContentLoaded",
  function() {
    i['liveninja'] =
    ["https://messenger.net2phone.com/w/5bf451a9fcc16b6cab06d054?frame=true"];
  });
})
```

[Email a friend](#) [Copy Code](#)

LiveNinja

ACTIVE IN LAST HOUR

We'd love to help. Start convos with us here...

Danielle

Hello! Welcome to LiveNinja!

How can I help you today? 😊

Hello! I'm new to glasses Unite and am currently browsing around. Can you help me find a pair?

Not yet read

- To install the Site Widget, go to the “Chat Channels” section in Company tab.
- Here, you’ll be presented with multiple options.
- First, turn the chat widget on by clicking the main toggle at the top of the page.
- Then, determine your widget color, which is the color the buttons and chat bubbles will appear on your website. (We recommend matching it to one of your brand colors)
- Then, choose a Welcome Greeting. This is the initial message user’s will see on the Site Widget as it loads.
- At the bottom left, you’ll find your Widget Code. This is what you’ll need to copy and paste on your website for the widget to appear. We give you the option to code the code yourself, or e-mail the code to a friend or developer who can help you install it.