Cox Business

MyAccount Portal Administrator Guide
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Introduction

The Cox Business MyAccount Portal provides a single web-based dashboard so our customers can perform multiple transactions as they relate to Voice, Internet, TV, Networking, and Security Solutions.

The purpose of this guide is to instruct MyAccount administrators on how to navigate through the Portal and perform tasks related to their role.

MyAccount Roles

There are three types of MyAccount users: Profile Owner, Administrators, and End Users. Each account can have one (1) Profile Owner, but multiple Administrators and End Users.

Profile Owner

- Super user and owner of MyAccount
- Add accounts to profile
- Create administrators for accounts

Administrators

- Create and edit users
- Create and manage unique roles and individual privileges
- Assign access rights and permissions
- Edit locations and names
- Update customer-specific information for technical, billing and marketing communications
- Login as a different user

End Users

End Users can navigate MyAccount according to the permissions that an administrator has assigned to them.

Technical Specifications

**Important:** For optimal performance in the MyAccount Portal, use Google Chrome.
First Step for All MyAccount Users

When your business's Profile Owner sets you up as an administrator in MyAccount, you will receive an email from Cox Business. The email provides your User ID and temporary password; and it contains a link to the MyAccount Portal.

Figure 1. Welcome Email (sample)

Dear Valued Cox Business Customer,

Thank you for choosing Cox Business. A profile administrator has created a User ID for MyAccount, our secure, online portal to manage your services and activate your features.

Please click on the link below to log in to MyAccount using the User ID and temporary password provided below. For added security, you will be asked to change your password to a new password during your initial login. Your new password must be at least 8 digits in length and contain alpha and numeric characters.

www.coxbusiness.com/myaccount

Your User ID: [redacted]
Your temporary password: snake8tooth

Please contact your profile administrator if you have questions about your access permissions.

For questions about Cox Business service, please contact our dedicated 24/7 support team at 866-272-5777.

Thank you,

Cox Business

Use the following steps to create your new MyAccount password.

1. Click the embedded link in the email.
   **Result:** You will be prompted to enter your User ID and temporary password that were provided to you in the email. (**Note:** You will also be prompted to change your temporary password. Use the instructions in the email to do so.)

2. Enter your **New Password** and **Confirm New Password** in the fields and click the **OK** button.
   **Result:** The MyAccount main page appears.
Accessing MyAccount

Use the following steps to log into the MyAccount Portal:

1. Enter coxbusiness.com in your web browser and click the Sign In MyAccount drop-down menu to access the Login screen.

   Figure 2. Sign In MyAccount

2. Enter your User ID (email address) and Password in the fields provided. (Note: If you forget your password, click the Forgot Password? link. If you forget your User ID, click the Need help? link.)

3. Click the Sign In button.
   Result: The MyAccount Welcome page appears.
Navigating the MyAccount Welcome Screen

When you log into the portal, the MyAccount Welcome screen appears.

**Figure 4. MyAccount Welcome screen**

<table>
<thead>
<tr>
<th>Area #</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1      | Displays:  
- phone number of the account  
- name of the package purchased for the account  
- level of permissions for the user logged in: User, Administrator, Profile Owner  
- drop down to login to the account as another user |
| 2      | “Quick Tools”  
- Click the Messages icon to view a list of notices that has been sent to the account.  
- Click the Business Email icon to sign into your Cox Business email.  
- Click the Voice Mail icon to view and listen to voice messages.  
- Click the More icon to access administrative functions, configure notifications, access Voice Mail tools and other voice features. |
| 3      | Displays buttons to pay your bill, view statements, and manage payment methods, view past and present support tickets, view equipment on the account; e.g., phones, cables, modems, etc., and see notifications/alerts about your account. |
| 4      | Click the + to view and manage any sub accounts associated to the primary account. |
# MyAccount Welcome Screen, (cont’d)

<table>
<thead>
<tr>
<th>Area #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Types of service on the account; e.g., voice, Internet, TV, security, etc.</td>
</tr>
<tr>
<td>6</td>
<td>Lists features and/or functions within the designated product line.</td>
</tr>
<tr>
<td>7</td>
<td>Displays images and/or details about Cox Business-provided equipment on an account. If there are multiple accounts, you need to select the account that has the equipment you want to review.</td>
</tr>
<tr>
<td>8</td>
<td>Access and view customer support documentation.</td>
</tr>
</tbody>
</table>
Paying My Bill

The MyAccount portal offers a robust billing function that allows users to:

- Make a one-time payment
- Manage auto payments
- View statements
- Manage paperless billing
- View recent transactions
- Manage payment methods
- View All Billing Tools

Figure 5. **My Bills panel**

Figure 6. **I Want To… drop-down menu**
Pay Bills

Click the Pay Bills button to make a one-time payment on statements for up to five accounts. You can also manage auto payments and paperless settings from the One-Time Payment screen.

To make a one-time payment:

1. Select the account and statement you want to pay.
2. Enter the amount you want to pay.
3. Set up your payment method.
4. Check and agree to the Terms and Conditions of the one-time payment.
5. View the payment details and submit the payment.
6. (Optional) Print payment transaction receipt.

Figure 7. Pay Bills button
Use the following steps to make a one-time payment.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the MyAccount Welcome screen, scroll to the My Bills panel and click the green Pay Bills button (See Figure 7).

   **Result:** The Billing Tools screen appears.

3. Click the black arrow to expand the account for which you want to make a payment. (If you have multiple accounts, expand the account that contains the statement you want to pay.) (See Figure 8.)

4. Click the box next to the statement you want to pay.

5. Enter the amount you want to pay in the payment field.

6. Click the Make a One-Time Payment button.

   **Result:** The Payment Method section appears. (See Figure 9.)

7. Set up the Payment Method you want to use (checking account or credit card) and populate the fields.

8. (Optional) Click to check the Save this payment method box.

   **Result:** The Make this my default payment method checkbox appears.
9. (Optional) Check the box to make that the default payment method.

10. (Optional) Click the Add Payment Method button to keep this information for future payments.

11. Click the Review & Pay button.

**Figure 9. Payment Method screen**

12. Check the box to agree to the Terms and Conditions.
13. Click the **Submit** button.
**Result:** A confirmation window appears and shows the statement details for the account you set up to be paid.

14. Click the **Continue** button to proceed to the next section.

**View My Statements**

You can view billing statements for one or multiple Cox Business accounts over the last 18 months.

![Billing Statements – selection screen](image)

Use the following steps to view statements and transaction history.

1. Login to MyAccount. (**Tip:** Follow the steps in *Accessing MyAccount* to login.)
2. From the MyAccount Welcome screen, scroll to the **My Bills** panel and click the **I want to** button.
**Result:** A menu of options appears. (See *Figure 6.*)
3. Click the **View My Statements** link. (**Note:** If there are multiple accounts, click the + icon to the left of **Select an Account** and choose the account you want to see.)
**Result:** The Billing Statements screen appears.
4. Click the drop-down arrow and select the month of the statement you want to view.
**View Recent Transactions**

The View Recent Transactions allows users to quickly locate transactions that have occurred within a specific month’s statement.

Use the following steps to view a recent history of transactions.

1. Login to MyAccount. *(Tip: Follow the steps in *Accessing MyAccount* to login.)*

2. From the MyAccount Welcome screen, scroll to the *My Bills* panel and click the *I want to* button.  
   **Result:** A menu of options appears. (See *Figure 6.* )

3. Click the **View Recent Transactions** link.  
   **Recent:** The Transaction History screen appears. *(Note: If there are multiple accounts, click the + icon to the left of *Select an Account*.)*

4. Click the **Select** link to choose the account that contains the transaction you want to see.)

5. Click the drop-down arrow and select the month for which you want to view transactions.  
   **Result:** The Transaction History screen appears. (See *Figure 11.* )

---

**Figure 11. Transaction History screen**

![Transaction History](image)
6. Click the blue arrow ▶ to the left of the transaction you want to review.  
   **Result:** Details of the transaction appear, including the:

   - Date the transaction occurred
   - Description of the transaction
   - Status of the transaction
   - Amount of the transaction
   - Name of the financial institution
   - Type of payment used
   - Confirmation number of the transaction
   - Statement in which the transaction occurred
   - Mode used for the transaction: Web, Print, [coming soon: Phone, Retail, Mail, Bank, Other]. (**Note:** Click the **Print** link under the **Paid Via** field to print a single transaction.)

   **Note:** You can also enter the amount of a payment, credit, or adjustment in the **Search** field to find a specific transaction; or enter a **Begin Date** and an **End Date** to find all transactions performed within that time period.

7. Click the **PDF** or **CSV** icon to export the data in either format.

**Manage Auto Payments**

Manage Paperless Billing

Paperless billing enables you to receive statements electronically. Each email has an associated contact so when you change the email address, the contact will change automatically.

Note: If you need to update the physical address for paper statements, contact customer support.

Figure 12. Paperless Billing screen

Use the following steps to update the billing contact’s email address.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the MyAccount Welcome screen, scroll to the My Bills panel and click the I want to button.
   Result: A menu of options appears. (See Figure 6.)

3. Click the Manage Paperless Billing link.
   Result: The Paperless Billing screen appears. (Note: If there are multiple accounts, click the + icon to the left of Select an Account and proceed to step 4.)

4. Click the Select link to choose the account for which you want to manage paperless billing.
   Result: A second Paperless Billing screen appears. (See Figure 12.)

5. From the drop-down menu, select the new email address to which statements will be sent. (Important: The new email address will also update the billing contact.)
   Result: The Delivery Method will automatically change to the new email address and a green message will appear at the top of the screen indicating the update is successful.
6. To turn off paperless billing, click the **Paperless** toggle so that it becomes gray.

**Result:** A message will appear that confirms your billing statements will be sent to the pre-defined physical address.)

**Figure 13. Paper Bill Details**

```
Paper Bill Details

Your paper bills for this statement will be delivered to the address below.

TDS DexRegacS 6305 Peachtree Dunwoody Rd, Sandy Springs, GA 30328
If you need to update this address, please call Cox Customer Service at 1-866-272-5777. If you would like to continue receiving your bills via email, click the Cancel button below.

Paperless Billing Unenrollment Terms of Service:
By unrolling from Cox's Paperless Billing, you acknowledge that you will no longer receive an e-mail notification informing you when your monthly bill is ready to view on CoxBusiness.com and you will receive paper bills in the mail.

[Cancel] [Continue]
```

7. Click the **Continue** button to save your changes.

**Result:** The Update Paper Billing address screen appears.

**Figure 14. Paper Billing Update screen**

```
Paperless Billing

If you need to update the billing mailing address for your paper statement(s), please contact customer support.

[Account Name]
[Account Alias]
[Account Number]
[Location Address]

Choose the statement(s) you would like to enroll in paperless billing. All of your paperless bills will be sent to the email address below.

Note: The email address selected here will also update the Billing Contact.

[Owner, Profile (80303470@mailinator.com)]

<table>
<thead>
<tr>
<th>Statement</th>
<th>Paperless</th>
<th>Delivery Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>TELEPHONE SERVICES 001-0110-803034701</td>
<td>[ ]</td>
<td>USPS mail to: TDS DexRegacS 6305 6305 Peachtree Dunwoody Rd, Sandy Springs, GA 30328</td>
</tr>
</tbody>
</table>

[Update]
```

8. (Optional) Click the **Update** link.

**Result:** The Paper Bill Details dialog appears. (See **Figure 15**.)
9. Modify the fields as necessary and click the Continue button. 
**Result:** A confirmation message will appear at the top of the window stating your changes have been updated successfully.

*Manage Payment Methods*

In development as of August 2020. Scheduled for release late Q3.
View All Billing Tools

The View All Billing Tools screen combines the individual billing components shown in Figure 6 (and below) into one area, as shown in Figure 16. This screen also allows you to modify or add up to five (5) payment methods.

Here, you can:

- make a one-time bill payment (Pay Bills)
- change or add a payment method (Payment Methods)
- manage auto payments (Manage Auto Payments)
- sign up for paperless (or paper) billing (Paperless Billing)
- view statements (View My Statements)
- view a history of transactions (Transaction History)

Use the following steps to access all billing tools.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)
2. From the MyAccount Welcome screen, scroll to the My Bills panel and click the I want to button.  
   Result: A menu of options appears. (See Figure 6 and to the left of Figure 16.)
3. Click the View All Billing Tools option.  
   Result: The Billing Tools screen appears. (See Figure 16.)
4. Click any of the icons and follow the prompts that will appear once you select an option.
Viewing Account Messages

The Messages panel displays notifications and alerts about your account, such as for maintenance, 911 calls, new sub account set up, and more.

Figure 17. My Messages

Use the following steps to view messages on an account.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. Click the Messages icon .

Result: The My Messages window appears with a list of messages received and details of receipt and account to which the message applies.

3. Click the Notification link to the right of any message you want to read. (Note: Click the column headings to sort the messages. You can also click the links to mark them as Read or Unread and Download them to a PDF or CSV file formats.)
Viewing and Managing Email

If your business has purchased Cox Business email service, you will be able to manage and configure certain components of the service. The Cox Business Email Admin Control Panel allows you to:

- Manage existing email addresses
- Allocate total storage unequally across existing email addresses
- Provision unassigned email addresses
- Request purchase of additional email addresses and storage
- Request assistance for email addresses

Logging into Email

Figure 18. Email Login screen

Use the following steps to access and manage your company’s email.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. Click the Business Email icon.

3. Enter your User ID and Password. (Note: If you have forgotten your username or password, click the Need help signing in? link and follow the steps.)

4. Click the Sign In button.

Result: The email main screen appears.
Adding an Email Account

Administrators can add email accounts for new users.

Use the following steps to add an email account.

1. Login to MyAccount. *(Tip: Follow the steps in *Accessing MyAccount* to login.)*

2. Click the **Business Email** icon.

3. Enter your User ID and Password. *(Note: If you have forgotten your username or password, click the Need help signing in? link and follow the steps.)*

4. Click the **Sign In** button.  
   **Result:** The email main screen appears.

5. Click the **Add mail account** link in the left navigation panel.  
   **Result:** The Add mail account dialog appears.

6. Enter the person’s email address and password and click the **Add** button.  
   **Result:** The user’s credentials are sent over a secure connection.
Managing Voice Mail in MyAccount

If your business has purchased Cox Business voice mail service, you will be able to view and listen to your voice messages and the general voice mail messages, as applicable.

Use the following steps to access and manage your company’s voice mail.

**Setting Up Voice Mail Tools**

1. Login to MyAccount*. *(Tip: Follow the steps in Accessing MyAccount to login.)*

   *Important: MyAccount administrators:

   To view/listen to your voice mail messages: Enter your User ID and Password in the fields and click the Sign In button. *(Note: If you forgot your password or user ID, click the Forgot Password or Need Help Signing In? links, respectively.)*

   Result: The MyAccount Welcome page appears.

   For MyAccount administrators who want to view/listen to the business/general voice mail messages:

   Login to MyAccount using the general voice mailbox user credentials, not your User ID/Password.

   Result: The MyAccount Welcome page appears.

2. Click the Voice Mail icon in Quick Tools.

   Result: The Voice Mail Tools window appears.
3. From the Message Center, check the box for the voice mail you want to hear. **Result:** The Message Center window appears.
Managing Voice Mail in MyAccount

Figure 22. **Message Center**

4. Press the **play icon** to hear the message. *(Note: Slide the volume bar to increase or decrease the hearing level.)*

5. (Optional) Press the **trash can icon** to delete the message.

6. Click the **Voice Mail Greeting icon**.
   
   **Result:** The **Voice Mail Greetings window** appears. *(See Figure 21.)*

**How to Configure MyAccount Voice Mail Tools**

Select the greetings your callers will hear when they reach your voice mail. Greetings can be recorded by calling your voice mail and adding a message or uploading an audio file on MyAccount.

When a greeting is uploaded, you may activate or deactivate the greeting under the **Activate Greeting** column. *(Note: Each greeting uploaded preempts the previous greeting.)*

**How to Record a Greeting via the Phone**

Use the following steps to configure greetings for all calls, no answer, and busy greeting.

1. From your desk or mobile phone, access your voice mail and go to the Greetings menu.

2. Press **1** for All Calls, **2** for No Answer greeting, **3** for Busy greeting.

3. Press **2** to start/stop using the greeting, **3** to re-record the greeting, **6** to erase the greeting. *(Note: For recorded name greetings, press **6** then **3** to record or re-record.)*
How to Record a Custom Audio File

This section instructs you on how to record an audio file on your Android or iPhone and upload to the Voice Mail Greetings function in MyAccount.

**Important:** Greeting files are limited to three (3) minutes in length and audio must be a .wav file in ulaw format. The maximum upload file size is one (1)MB.

For Android Users

1. For Android phone users, tap the Play Store icon and search for a voice recorder app.
2. Download the app and follow the prompts to record a greeting.
3. Email the greeting to yourself.

For iPhone Users

1. For iPhone users, tap the App Store icon on your phone and search for a voice recorder app.
2. Download the app and follow the prompts to record a greeting.
3. Email the greeting to yourself.
How to Upload an Audio File to MyAccount

Use the following steps to upload a custom audio file (greeting) in MyAccount.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. Click the Voice Mail icon in Quick Tools. (See Figure 23.)
   Result: The Voice Mail Tools screen appears. (See Figure 24.)

Figure 23. Voice Mail access icon

Figure 24. Voice Mail Tools screen

3. Click the Voice Mail Greeting icon.
   Result: The Voice MailGreetings window appears. (See Figure 25.)
4. Click the **Upload Greeting** link next to the type of greeting you want to use. 
**Result:** The Upload Greeting dialog box appears. (See **Figure 26**.)

**Remember:** Greeting files are limited to three (3) minutes in length and audio must be a .wav file in ulaw format. The maximum upload file size is one (1)MB.
Figure 26. **Upload Greeting**

- **Result**: Your file folders appear.
- **Result**: The file name appears to the right of the **Choose File** button.
- **Result**: The updated Voice Mail Greetings window appears.
- **Note**: When you upload and activate an **Extended Absence Greeting**, you have the option to turn on/off the **Receive Voicemails** feature. If you turn the feature on, you allow callers to leave a voicemail after hearing the greeting. If the feature is turned off, callers will be disconnected at the completion of the greeting.

This feature is included with the **Extended Absence Greeting** only. See Figure 27.
How to Replace, Play and Activate Greetings

When an audio file has been uploaded, you can replace, play, or activate the greeting.

**Figure 27. Voice Mail Greetings – Manage Greeting column**

Use the following steps to replace, play, and activate a greeting.

1. Login to MyAccount. *(Tip: Follow the steps in Accessing MyAccount to login.)*

2. Click the **Voice Mail icon** in Quick Tools. *(See Figure 23.)*
   **Result:** The Voice Mail Tools screen appears.

3. Click the **Voice Mail Greeting icon**.
   **Result:** The Voice Mail Greetings window appears. *(See Figure 27.)*

4. Locate the greeting you want to replace and click the **Replace Greeting** link.
   **Result:** The Replace Greeting dialog box appears. *(See Figure 28.)*
5. Click the **Choose File** button.
   **Result:** Your file folders will appear.

6. Select the .wav file you want to upload, then click the **Open** button in your file folder.
   **Result:** The file name appears to the right of the **Choose File** button.

7. Click the I have read and understand the disclaimer checkbox.

8. Click the **Continue** button.
   **Result:** The new greeting is uploaded.

9. *To play an existing audio greeting,* click the **Play** link. *(Note: The Play feature allows you to adjust the volume, play/pause the message, and delete messages.)* Messages can also be downloaded to any user's computer or device for additional review or sharing.

10. *To activate or deactivate a greeting,* click the switch in the **Activate** column.
    **Result:** The switch will toggle when enabled or disabled.

**Figure 28. Replace Greeting**

---

Replace Greeting

Once you have read and acknowledged your understanding of the disclaimer below, click Choose File to select and upload a voice mail greeting. For a description of each greeting type, please view the Greeting Type Description table. *(Note: Greeting files are limited to 3 minutes in length, and audio must be a .wav file in ulaw format. The maximum upload file size is 1 MB.)*

**Choose File** recording158612578348.ulaw.wav

**Disclaimer**

Because you'll be using Cox's VoiceManager custom media service to upload your own content, we wanted to remind you of your responsibility set forth in the Terms of Service *(available at)*

- **I have read and understand the disclaimer.**

**Cancel**     **Continue**
How to Configure Voice Mail Notifications

Each email recipient will receive an email when there is a new message in your inbox. You may also attach audio and/or readable voice mail files to your subscribed features.

Figure 29. Voice Notification Preferences

Use the following steps to set voice mail preferences.

1. Login to MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. Click the Voice Mail icon in the Quick Tools section. Result: The Voice Mail Tools screen appears.

3. Click the Voice Mail Notifications icon. Result: The Voice Notification Preferences window appears.

4. Check the boxes to select whether you want to attach a Voice Mail Audio File to your email and/or Attach a Readable Voice Mail to your email. (Hint: Hover over the question mark icon to read a description of the setting.)

5. Click the Save button.
**How to Set Voice Mail Preferences**

Specify how Cox Business MyAccount should route your voice messages. You can choose to send busy and/or unanswered calls to your voice mail and set the number of rings before an incoming call is considered answered.

*Figure 30. Voice Mail Preferences*

![Voice Mail Preferences](image)

Use the following steps to set Voice Mail Preferences.

1. Login to MyAccount. *(Tip: Follow the steps in Error! Reference source not found. to login.)*

2. Click the Voice Mail icon in the Quick Tools section. 
   **Result:** The Voice Mail Tools screen appears.

3. Click the Voice Mail Preferences icon. 
   **Result:** The Voice Mail Preferences window appears. (See Figure 30.)

4. Select the Voice Mail Status radio button to set whether you want VoiceManager to send a voice mail if you are unable to take a call.

5. Select the Voice Call Preferences radio button to identify when you want incoming calls to go to voice mail.

6. From the Number of Rings Before Greeting drop-down menu, select the number of rings you want before the call goes to voice mail.

7. Click the Save button.
Managing Voice Mail in MyAccount

How to Set Up Your Mailbox PIN Code

The voice messaging PIN prevents others from accessing your voice mailbox. Each time you attempt to access your mailbox from a phone outside of your office, you will be asked to enter your voice mailbox PIN.

**Figure 31. Voice Mailbox PIN Code**

Use the following steps to change your PIN in MyAccount.

1. Login to MyAccount. *(Tip: Follow the steps in Error! Reference source not found. to login.)*

2. Click the Voice Mail icon in the Quick Tools section. **Result:** The Voice Mail Tools screen appears.

3. Click the Mailbox PIN Code icon. **Result:** The Voice Mailbox PIN Code window appears.

4. Enter the new PIN in the corresponding field and re-enter it in the confirm field.

5. Click the Save button. **Result:** The new PIN is saved.

How to Access Support Guides on MyAccount

Use the following steps to access additional support material, including the Voice Mail User Guide and Voice Mail Quick Reference Guide.

1. Login to MyAccount. *(Tip: Follow the steps in Error! Reference source not found. to login.)*

2. Click the Voice Mail icon in the Quick Tools section. **Result:** The Voice Mail Tools screen appears.
3. Click the **Voice Mail Guides** icon.

   **Result:** A list of support materials appears.

4. Click the link of the document you want to view.
Understanding Administration Activities

There are two categories of administration: Account and Profile. The basic difference is the tasks administrators can perform in each type. Account Administration refers to account management overall. Profile Administration refers to user management for accounts. Specific details and instructions for all tasks are provided in this section.

**Account Administration**

The Account Administration section allows you to:

- Edit Account Alias
- Update Contacts
- Set Account Authorization
- Manage Account Access

![Account Administration options](image-url)

Figure 32. **Account Administration options**
How to Edit an Account Alias

An Account Alias is an easy-to-remember name that can be used as an alternate to reference the formal Account name or number. For example, in Figure 33, the Account Name is “IPC TEST ACCOUNT – SELECT SEATS”; however, the Alias “IPC Select Test” has been created and will allow easier search capability.

Figure 33. Account Administration section

![Edit Account Alias](image.png)

Use the following steps to access the Account Administration section in MyAccount.

1. Login to MyAccount. (Tip: Follow the steps in Error! Reference source not found. to login.)
2. From the Welcome page, click the More icon to expand.
   Result: A list of options appears.
3. Click the Administration link.
   Result: The Administration window appears.
4. Click the plus symbol to the left of Account Administration.
   Result: The menu expands.
5. Click the Edit Account Alias link. (Note: If the account has multiple subaccounts, click the plus symbol to expand and select the Account to which you want to create an alias.)
   Result: The Edit Account Alias window appears.
6. Enter an easy-to-remember name for the account in the Account Alias field.
7. Click the Save button.
   Result: The account alias can be used as alternate search criteria.
8. Click the Update Contacts link to establish which users to contact for different divisions in your company. (Important: Contacts in the Billing, Technical, and Legal departments are required.)
9. Click the Account Authorization Settings link to establish privacy parameters when a user calls a Customer Service agent on your behalf.
10. Click the **Manage Account Access** link to add or remove the ability for users in your company to access the account.

**How to Update Contacts**

The Update Contact Information screen allows you to add or edit an existing user for an account. This individual will receive notifications of planned maintenances, network upgrades, product enhancements, and marketing messages.

**Important**: Billing, Technical and Legal contacts are required, and you may use the same user for different contact types.

**Billing Contact**

The Billing Contact is responsible for a business’s financial department. In smaller businesses, the contact may be the owner.

**Figure 34. Update Contact Information (Billing)**
Use the following steps to edit or add a new Billing contact to an account.

1. Log into MyAccount. (Tip: Follow the steps in Error! Reference source not found. to login.)

2. From the Welcome page, click the More icon to expand. 
   **Result:** A list of options appears.

3. Click the Administration link. 
   **Result:** The Administration window appears.

4. Click the plus symbol to the left of Account Administration. 
   **Result:** The menu expands.

5. Click the Update Contacts link. (Note: If the account has multiple sub accounts, click the plus symbol to expand and select the account you want to update contacts.)
   **Result:** The Update Contact Information screen appears and defaults to step 1, Billing Contact. (See Figure 34.) (Note: To update another contact; e.g., the Technical or Billing individual, click on the tab and modify the information.)

6. From the Billing Contact Information section, select an existing user from the Username drop-down and populate the remaining fields. (Note: If the contact needs to be added, click the Add New User button. Refer to the Add a User section for instructions.)

7. If you need to add a new user, follow the steps to return to the Administration > Billing Contact Information screen before proceeding to step 8.

8. Click the Save and Continue button. 
   **Result:** The Technical Contact Information page appears.
Technical Contact

When you add the Billing Contact and click the Save and Continue button, the Technical Contact screen appears. The technical contact is responsible for IT-related issues.

**Figure 35. Update Contact Information (Technical)**

Use the following steps to edit or add a new Technical contact to an account.

1. Log into MyAccount. ([Tip: Follow the steps in Error! Reference source not found. to login.](#))

2. From the Welcome page, click the More icon to expand. **Result:** A list of options appears.

3. Click the Administration link. **Result:** The Administration window appears.

4. Click the plus symbol to the left of Account Administration. **Result:** The menu expands.
5. Click the **Update Contacts** link. *(Note: If the account has multiple sub accounts, click the plus symbol to expand and Select the Account for which you want to update users.)*

**Result:** The Update Contact Information screen appears and defaults to step 1, Billing Contact.

6. **Important:** If there is an existing Billing Contact, you can click the **Save and Continue** button to advance to the Technical Contact screen. *If a Billing Contact has not been identified, you must populate the fields for that contact before you can proceed to the Technical Contact.*

7. Select a technical contact from the Username drop-down menu. If the contact does not exist, click the **Add New User** button, set up the user in MyAccount, and click the **Save and Continue** button.

**Result:** The new user will be listed in the Username drop-down list.

8. Select the user and continue populating the fields.

9. Click the **Save and Continue** button.

**Result:** The Legal Contact screen appears.
**Legal Contact**

The Legal Contact is responsible for matters that pertain to a business’s laws and regulations. In smaller companies, this may be the owner of the business.

**Figure 36. Legal Contact**

Use the following steps to edit or add a new Technical contact to an account.

1. Log into MyAccount. (Tip: Follow the steps in Error! Reference source not found. to login.)

2. From the Welcome page, click the More icon to expand. **Result:** A list of options appears.

3. Click the Administration link. **Result:** The Administration window appears.

4. Click the plus symbol to the left of Account Administration. **Result:** The menu expands.
5. Click the **Update Contacts** link. *(Note: If the account has multiple sub accounts, click the plus symbol to expand and Select the Account for which you want to update users.)*
   **Result:** The Update Contact Information screen appears and defaults to step 1, Billing Contact.

6. **Important:** If there is an existing Billing Contact and Technical Contact, you can click the **Save and Continue** button to advance to the Legal Contact screen. **If a Billing and Technical Contact have not been identified,** you must populate the fields for that contact before you can proceed to the Legal Contact screen.

7. Select a legal contact from the Username drop-down menu and populate the remaining fields.

8. Click the **Save and Continue** button.
   **Result:** The Marketing Contact screen appears.

**Other Contacts**

When you have identified the (required) Billing, Technical, and Legal Contacts for your business, you may elect to continue defining the levels of contacts you want to be notified of planned maintenance, network upgrades, or product enhancements. If so, follow steps 1-5 in the **Legal Contact** section and populate the remaining fields. Click the **Save and Continue** button after to advance to the next contact level.
How to Set Account Authorizations

The Account Authorization Settings feature is designed to help keep your account information secure when someone contacts a Customer Service Agent on your behalf.

**Figure 37. Account Authorization Settings screen**

Use the following steps to manage your CoxPIN, Authorized (account) Users, and Secret Question and Answer.

1. Log into MyAccount. *(Tip: Follow the steps in Error! Reference source not found. to login.)*

2. From the Welcome page, click the More icon to expand. **Result:** A list of options appears.

3. Click the Administration link. **Result:** The Administration window appears.

4. Click the plus symbol to the left of Account Administration. **Result:** The menu expands.
5. Click the **Account Authorization Settings** link. *(Note: If the account has multiple sub accounts, click the plus symbol to expand and Select an Account for which you want to setup account authorizations.)*

**Result:** The Account Authorization Settings screen appears (See Figure 37.)

6. If you want to change your CoxPIN code, enter your **Current CoxPIN** number in the corresponding field.

7. Enter the **New CoxPIN CODE** in the field and re-enter it in the **Confirm CoxPIN** field.

8. Scroll to the Authorized Users section and select up to five (5) additional MyAccount users you want to allow to speak with a Cox Customer Service Agent on your behalf.

9. Scroll to the **Secret Question and Answer** section and choose a question from the drop-down menu.

10. Populate the **Secret Answer** field and click the **Save** button. *(Note: If you want to change or remove one of the assigned users, click the **Unassign** link to the right of their name.)*

**Manage Account Access**

Use the **Manage Account Access** screen to configure a user’s permissions within the account. Billing access allows a user to view and pay bills. Feature access such as Voice or Data are defined by the user’s role.

**Figure 38. Manage Account Access Permissions screen**

Use the following steps to grant permissions to users within an account.

1. Log into MyAccount. *(Tip: Follow the steps in Error! Reference source not found. to login.)*

2. From the Welcome page, click the **More icon** to expand. **Result:** A list of options appears.
3. Click the Administration link.  
   **Result:** The Administration window appears.

4. Click the plus sign to the left of Account Administration.  
   **Result:** The menu expands.

5. Click the Manage Account Access link. *(Note: If the account has multiple sub accounts, click the plus symbol to expand and Select an Account for which you want to assign users.)*  
   **Result:** The Manage Account Access Permissions page appears.

---

**Figure 39. Manage Account Access Permissions screen**

![Manage Account Access Permissions screen](image)

6. Click the plus sign next to the service type(s); e.g., Billing, Internet & Data Services, Voice, etc. to view a list of MyAccount users on the account. *(Note: The types of services that appear are based on the product/service your company has purchased.)*  

7. Click the checkbox next to the name of a user to grant access rights. *(See Figure 40.)*
**Figure 40. Select Individuals for Access**

Add or remove the ability for users within your organization to access this account. Their feature access permissions for this account will be defined by the roles with which the user is associated.

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Account Alias</th>
<th>Account Number</th>
<th>Location Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>IPC Test Account Terri’s Office</td>
<td>IPC Terri OFC</td>
<td>182-067615001</td>
<td>STE TERRI, 7401 FL...</td>
</tr>
</tbody>
</table>

**Billing Access**

**Call Detail Records**

**Internet & Data Services**

**Voice**

The permission allows the user to manage all subscribed User and Group voice settings such as Call Forwarding, Auto Attendant, Hunt Group, and E911 Address Management.

<table>
<thead>
<tr>
<th>Name</th>
<th>Username (Email)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aable, Tom</td>
<td><a href="mailto:marketing1@ipcstranlab.com">marketing1@ipcstranlab.com</a></td>
</tr>
<tr>
<td>Able, Cecily</td>
<td><a href="mailto:cisco525@cox.com">cisco525@cox.com</a></td>
</tr>
<tr>
<td>Brown, Leo</td>
<td><a href="mailto:pcom150@ipcstranlab.com">pcom150@ipcstranlab.com</a></td>
</tr>
</tbody>
</table>

8. Click the **Save** button.

**Result:** The user can access the service’s features and functions. *(Note: A user can be granted permissions in multiple services.)*
Profile Administration

Profile Administration allows you to:

- Add an account
- Delete an account
- Manage users
- Manage accounts
- Manage profile owner
- Log in as (another user)

Figure 41. Profile Administration Screen

Add Account

If you are a customer with service in multiple locations/offices, you can associate those accounts with your MyAccount username profile.

Note: If you need to activate service in other locations, contact your local Cox representative.

Use the following steps to add an account to the company’s profile.

1. Log into MyAccount. (Tip: Follow the steps in Error! Reference source not found. to login.)
2. From the Welcome page, click the More icon to expand.
   Result: A list of options appears.
3. Click the Administration link.
   Result: The Administration window appears.
4. Click the plus sign to the left of Profile Administration.
   Result: The menu expands.
5. Click the Add Account link.
6. Enter the Account Number.
7. Enter the Account Alias.
8. Enter the **4-digit PIN** for that account.
9. Click the **Save and Continue** button.
   **Result:** The Add Users window appears.
10. Populate the fields in the Add Users screen and click the **Save and Continue** button to advance to the Set Up Billing screen.
11. Populate the fields in the Set Up Billing window and click the **Save and Continue** button.
   **Result:** The Welcome to MyAccount page appears and the account is added.

**Figure 42. Add Account**

If you are a customer with service in multiple locations (offices), you can associate multiple accounts with your 'My Account' username profile.

If you do not have service in multiple locations, but would like to activate a new account, please contact our sales team: 1-866-958-9944.

**Account Information**

In order to complete your account registration, please enter your account information below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>XXXX XXXX XXXXXXXX</td>
</tr>
<tr>
<td>Account Alias</td>
<td>Ex: Location Name</td>
</tr>
<tr>
<td>4-digit PIN</td>
<td>4-digit PIN</td>
</tr>
</tbody>
</table>

[Save and Continue]
Delete Account

You can delete an account that no longer needs to be linked to another account. Removing an account from your profile will not cancel the service, halt billing, or disrupt the service. You can always add the account again by following the instructions in the Add Account section.

Figure 43. Delete Account

Use the following steps to delete an account from your profile.

1. Log into MyAccount. *(Tip: Follow the steps in Error! Reference source not found. to login.)*

2. From the Welcome page, click the More icon More to expand. Result: A list of options appears.

3. Click the Administration link. Result: The Administration window appears.

4. Click the plus sign to the left of Profile Administration. Result: The menu expands.

5. Click the Delete Account link. *(Note: If there are multiple accounts attached to the profile, click the plus sign to expand the Select an Account link and click the Select link in the bottom right corner of the account you want to delete.)* Result: The Remove This Account From Your Profile window appears. *(See Figure 43.)*

6. Click the Yes button in the confirmation dialog box. Result: The account is removed.
Manage Users

Profile Owners and Administrators can add, view, modify and delete users on an account.

Figure 44. View All Users Users

Add a User

Use the steps below to add a new MyAccount user.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Administration link. Result: The Administration window appears.

4. Click the plus sign to the left of Profile Administration. Result: The menu expands.

5. Click the Manage Users link. Result: The View All Users window appears.

6. Click the Add New User button. Result: The Manage Users screen opens. (See Figure 45.)
7. Enter the username (the user's email address), first and last name, primary telephone number, alternate email address, and the user's mobile number.

8. Scroll to the second half of the screen to set permission rights for the user. (See Figure 46.)
Set User Permissions
[cont’d from step 8 on the previous page]
This section instructs you on how to set up access rights for MyAccount users.

Figure 46. **User Permissions**

9. Click the radio button to designate whether the user will be an **End User** or an **Administrator** on the account. **(Remember:** An end user does not have full access permissions like an Administrator.)

10. Click the **plus sign** (+) to the left of each service on the account(s) that you want to assign permissions for the user.

11. Click the **Save and Continue** button.
**Result:** A second Manage Users screen appears.
Set Up Notifications
[cont’d from step 11 on the previous page]

**Option:** Use the following instructions to navigate to the Edit Profile Owner page directly and configure notifications.

Log into MyAccount. (Tip: Follow the steps in *Accessing MyAccount* to login.)

1. From the Welcome page, click the **More** icon to expand.
   **Result:** A list of options appears.
2. Click the **Configuration Notifications** link.
   **Result:** The Edit Profile Owner page appears.
3. Scroll to the bottom of the page to the Notification Category section and proceed with step 13 below.

12. Scroll to the **Notification Category** section. **(Note:** Configuring notifications enables you to receive automatic alerts via your email or text when your system will or has received maintenance, suffers device failures, or has had 911 calls placed. (See *Figure 47.*)

13. Click the **Mobile Number** and/or **Email Address** drop-down menus to enter the mobile number and/or email address that will receive alerts about scheduled maintenance, device failure, and 911 alerts. **(Note:** Your ability to select the type of alert [email or SMS] will only work if you have populated the corresponding fields.)
14. Click the plus sign to the left of **Maintenance Notifications** and/or **911 Notifications** headings to expand. (Note: **Maintenance** means that changes will be or have been made to the system. **Device Failure** notifications mean the device at the account has suffered a “hard down” event. **911 Notifications** mean that a 911 call has been placed at the location attached to the account number.)

15. Click the box at the left of any type of notification to add another level to the notice. (See **Figure 48**.)

**Result:** The account number(s) attached to the profile appears.
16. Click the **Email** and/or **SMS** toggle at the right of the notification category to apply that type of alert to **all** accounts in the list. (**Note:** To designate *individual* accounts for notification types, click the toggle at the right of **Email** or **SMS** for the specific Account Number.) Notice in the image above that an email will be sent to all accounts if a device failure occurs; however, an SMS will also be sent to two of the three accounts.

**Note:** Customers who have the add-on Device Failure Notifications (DFN) feature automatically receive an alert when a system fails. Follow-up alerts are also sent regularly and include links that provide more information about the issue and the status.
17. Click the **Email** and/or **SMS** toggle to activate which method(s) will be used to alert the user.

**Result:** A confirmation message will appear at the top of the screen stating the changes were saved successfully.

**DFN Email notification example**

![Image of an email notification example]

**DFN SMS notification example**

![Image of an SMS notification example]
Edit and Delete User

As an administrator, you can edit and remove existing users on an account.

Figure 49. View All Users (edit)

![View All Users](image)

Figure 50. Manage Users screen (edit/delete)

![Manage Users](image)
Use the following steps to edit or remove an existing user.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. 
   Result: A list of options appears.

3. Click the Administration link. 
   Result: The Administration window appears.

4. Click the plus sign to the left of Profile Administration. 
   Result: The menu expands.

5. Click the Manage Users link. 
   Result: The View All Users window appears.

6. Click the Edit link to the right of the user you want to modify or remove. 
   Result: The Manage Users screen appears. (See Figure 50.)

7. From the Existing User screen, modify any of the fields add new email addresses or mobile phone numbers, and then click the Save User button.

8. To remove a user, click the Delete User button. 
   Result: A second dialog box will appear and requests confirmation of the removal.

9. Click the Yes button. 
   Result The user is removed.

Manage Accounts

See the Add Account section for instructions.
Manage Profile Owner

The Profile Owner has the highest level of access available online for Cox Business Service Customers. **(Note:** The billing information or contact obligations for the service will not be impacted by the change.)

Figure 51. Manage Profile Owner

Use the following steps to change the profile owner on an account.

1. Log into MyAccount. (**Tip:** Follow the steps in *Accessing MyAccount* to login.)
2. From the Welcome page, click the **More** icon to expand.
   **Result:** A list of options appears.
3. Click the **Administration** link.
   **Result:** The Administration window appears.
4. Click the **plus sign** to the left of Profile Administration.
   **Result:** The menu expands.
5. Click the **Manage Profile Owner** link.
   **Result:** The Manage Profile Owner window appears.
6. Expand the **Select New Profile Owner** drop-down menu and click the user you want to assign the new permission.
7. Click the **Save** button.
   **Result:** A Warning dialog appears asking you to confirm the change. Click the **Continue** button. The new profile owner is assigned, and their contact information will appear when the page is refreshed or at the next login.
Log in As/Switch User

Administrators can log in as/switch to another on the account to change the user’s settings or configure features on behalf of the user. The Switch User drop down appears on multiple pages in MyAccount.

![Switch User/Log In As](image)

Use the following steps to log in as/switch to another user.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)
2. There are two ways to log in as another user. You can:
   - Click the More icon on the MyAccount Welcome page to expand the menu and click the Log In As option; then, click the radio button to the left of the person you want to log in as and click the Save button.
   - From the MyAccount Welcome page, click the Switch User drop-down, select the user from the menu (see Figure 52), and click the Switch User button.

Configure Notifications

Refer to the Add a User section for instructions.
Configuring Voice Tools

As an administrator, you are responsible for configuring more advanced features or components of features that users will rely on while managing their responsibilities. This section instructs you how to set up the following features:

- Music On Hold
- Call Pickup Group
- Simultaneous and Sequential Ring
- Incoming Calling Plan
- Hunting and Series Completion
- Group Directory
- Outgoing Calling Plan
- Auto Attendant
- Call Forwarding Select Rule
- Instant Group Call
- Greetings
- Schedules
- Call Detail Records
- Group Directory
- User Extensions
- User Feature Settings
- Privacy
- Manage Phone Numbers
- Manage E911

Set Up Music On Hold

Music On Hold allows you to play a customized audio file for callers on hold with Call Park, Call Hold and Busy Camp. Administrators can add and edit Music On Hold for an entire profile or for specific accounts on the profile.

Figure 53. Music On Hold screen
Use the following steps to configure the Music On Hold feature.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. 
   Result: A list of options appears.

3. Click the Voice Tools link. 
   Result: The Voice Tools main page appears.

4. Navigate to the Call Settings panel and click the View More Features> link. 
   Result: The Call Settings section expands.

5. From the Holds and Transfers category, click the Music On Hold link. 
   Result: The Music On Hold Rules screen appears. (See Figure 54.)

6. Click the Add Music On Hold Rule link. 
   Result: The Music On Hold Rule configuration screen appears. (See Figure 55.)

Figure 54.   Music On Hold Rule screen
7. Click the **On** radio button.

8. Check the boxes to the left of when you want Music On Hold to play. The options represent when a call is placed on hold, when a call is parked, and when a call is in a busy camp status. **(Note: Busy Camp** is a feature that enables designated users to see the availability status of a monitored user’s phone. When the party become available, the holding call is forwarded to the intended recipient.)

9. Click the radio button to define whether callers will hear the **System Default Music** or a **Custom** selection. If you click the **Custom** radio button, click the **Select Audio** link (if setting up for the first time) or click the **Change Audio** link to modify an existing audio file. **Result:** A Select Audio legal disclaimer appears. Read it and click the **I have read and understand the disclaimer** box.

10. Click the **Continue** button. **Result:** The audio file is uploaded.
Important: Pre-recorded audio files must meet certain requirements for them to be uploaded and used with VoiceManager features. To record a file, you will need a microphone and any off-the-shelf program that can produce an audio file with the following specifications.

- CCITT, u-law, or a-law codec
- WAV file format
- Sample rate = 8 KHz
- 8 bit
- Mono audio

Notes:
- There is a maximum file size of 5 Mb for recorded files. (Music on Hold is limited to five (5) messages.)
- If you already have a file, but it is in the wrong format, you can convert it by going to G711.org. For the Output Format, select BroadWorks Classic.
- If you do not have a way to record a message, but subscribe to the Voice Mail to Email feature, you can record your message as a voice mail and save it to your computer.

After the file has been created, you can upload it to any of the above applications when presented with the option.

11. (Optional) You may elect to set the music Type for Internal Calls. If so, click the Use Alternate Source for Internal Calls checkbox and repeat steps 9 and 10 to complete the setup.
Set Up Incoming Calling Plan

An Incoming Calling Plan manages the way incoming calls are received by groups or accounts. To define an Incoming Calling Plan, you can choose to allow calls from within a group and the action to take for calls received from outside the group. You can also allow collect calls. To manage existing phone numbers, you can search and edit their Incoming Calling Plan details.

Use the following steps to set up an Incoming Calling Plan for your business.

1. Log into MyAccount. (Tip: Follow the steps in Error! Reference source not found. to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Voice Tools link. Result: The Voice Tools main page appears.

4. Navigate to the User & System Management panel and click the View More Features link in the lower right corner.

5. From the Call Access category, click the Incoming Calling Plan link. Results: The Incoming Calling Plan page appears and presents two options: Incoming Calling Plan By Account and Incoming Calling Plan By User.
6. To configure an Incoming Calling Plan by Account, click the corresponding link. **Result**: The Incoming Calling Plan By Account screen appears.

7. Check the box to the right of the account(s) that you want to allow calls from within that group. **(Note):** In the figure above, the “Group Default” account allows calls from within the group, as denoted by the checkmark in the Inside Group column. The Account also allows calls from outside the group and collect calls. Other options for Outside Group calls include “Never [allow]” and “[only] Allow [outside group calls] to Transfer.”

8. Click the **Save** button.

**Figure 58. Incoming Calling Play By User**
9. To configure an incoming calling plan by user, click the corresponding link.  
   **Result:** The Incoming Calling Plan By User screen appears.

10. Locate the user you want to modify the calling plan for and click the **Edit** link to the right of their name.  
    **Result:** The [Edit] Incoming Calling Plan screen appears.

   **Figure 59. Edit Incoming Calling Plan screen**

   ![Edit Incoming Calling Plan screen](image)

   11. Uncheck the **Use Group Default Settings** box.  
       **Result:** The fields below become enabled.

   12. Make modifications and click the **Save** button.  
       **Result:** The User’s Incoming Calling Plan is changed.
Set Up Instant Group Call

Instant Group Call allows you to create and manage groups of users that can be called simultaneously for a conference call.

Figure 60. Instant Group Call screen

Use the following steps to set up an Instant Group Call.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)
2. From the Welcome page, click the More icon to expand. Result: A list of options appears.
3. Click the Voice Tools link. Result: The Voice Tools main page appears.
4. Navigate to the Advanced Call Settings panel and click the View More Features > link in the lower right corner.
5. From the Team Calling category, click the Instant Group Call link. Result: The Instant Group Call screen appears. (See Figure 60.)
6. Click the Add Instant Group Call Group link. Result: A second Instant Group Call screen appears. (See Figure 61.)
Figure 61. **Instant Group Call screen**

7. Enter an **Instant Group Name** in the text field.

8. Enter the **Extension number** for the group. *(Note: The Instant Group ID is automatically generated.)*

9. Select the **Time Zone** in which the Group resides from the drop-down menu.

10. From the Instant Group Call Numbers, set the maximum amount of time a call will go unanswered (in minutes). *(Note: The values are 1-60.)*

11. Enter the phone number that the call will then transfer to in the **Phone Number** field.

12. *(Optional): Click **Add Another Number to forward calls**. *(Note: You can add up to 20 numbers.)*
Configure Instant Group Call for Other Accounts
Administrators can manage group calls for multiple accounts.

1. To configure an Instant Group Call for another account, select it from the Account drop-down menu. (See Figure 61.)

2. (Optional) From the Incoming Calling Plan drop-down, you can keep the existing calling plan (Account Settings) or you can create a new Incoming Calling Plan (Custom Settings) for this Group. (Refer to the Set Up Incoming Calling Plan section on page 63.)

3. Click the Save button.

Result: A confirmation of the saved settings appears.

Set Up Call Pickup Group
Call Pickup allows you to define groups of employees that can answer phones for other users within that group. This feature is used with the Call Park feature.

Figure 62. Call Pickup screen

Use the following steps to configure a Call Pickup Group.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand.

Result: A list of options appears.
3. Click the **Voice Tools** link.
   **Result:** The Voice Tools main page appears.

4. Navigate to the Advanced Call Settings panel and click the **View More Features** > link in the lower right corner.

5. From the Team Calling section, click the **Call Pickup** link.
   **Result:** The Call Pickup screen appears. (See **Figure 62**.)

6. Click the **Add Call Pickup Group** link.
   **Result:** The Call Pickup screen appears.

**Figure 63. Call Pickup screen**

7. Enter a name for the group in the **Group Name** field.

8. From the **Available Users** panel, click the user you want to be a part of the call pickup group and click the **Add** button. (**Note:** To add all users to the group, click the **Add All** button.)
   **Result:** The selected users move to the Assigned Users panel.

9. Click the **Save and Return** button.
   **Result:** The main Call Pickup screen appears.
10. (Optional) Click the plus sign + to the left of My Call Pickup Group to view all members in your group.

**Set Up Hunting and Series Completion Rules and Groups**

Hunting and Series Completion allows you to route calls to a team of employees rather than a single person. Routing can be customized by the order in which phones ring; the number of rings prior to advancing calls, and the treatment for calls that cannot be answered.

**Hunting** allows incoming calls for a central phone number to route to members in a group according to a rollover order. **Series Completion** is used to create an ordered list of users which redirects calls from unavailable or busy members, so calls do not go unanswered.

![Hunting and Series Completion screen](image)

Use the following steps to set up a Hunt group.

1. Log into MyAccount. **(Tip: Follow the steps in Accessing MyAccount to login.)**

2. From the Welcome page, click the More icon to expand. **Result:** A list of options appears.
3. Click the Voice Tools link.
   **Result:** The Voice Tools main page appears.

4. Navigate to the **Advanced Call Settings** panel and click the **View More Features >** link in the lower right corner or the **Hunting and Series Completion** link on the Voice Tools main page. (Note: An account will have a specific number of Hunt licenses and Series Completion Licenses. If the allotted number of Hunt Group(s) has been set up, you can edit or delete the group. If there are multiple Series Completion Rules, but not all have been assigned, proceed to step 5 to add a new rule.)

5. Click the **Edit** link to the right of the Hunt group.
   **Result:** The General Hunt Group Rule Settings window appears.

Figure 65. **General Hunt Group Rule Settings screen**
6. Enter a Name for the Hunt Group. (Note: The Hunt Group Type and Phone Number settings are pre-defined and cannot be changed.)

7. Enter a Hunt Group Extension number.

8. Click the Account drop-down menu to select the Account to which the Hunt Group belongs.

9. Click the Time Zone drop-down menu and select the time zone in which the account resides.

10. From the Rollover Order drop-down, select how unanswered calls will over to members of the Hunt Group.

11. Select the Yes or No radio button to allow or prevent Allow Call Waiting.

12. Configure the No Answer Settings: Allow roll over after <X> number of rings or click the After checkbox and enter the number of seconds the phone will ring before it is forwarded to another extension.

13. From the Calling Line ID Settings section, select how you want to identify the Caller ID for the group.

14. Scroll to the Not Reachable Setting section and set how you want calls to be treated if you are unable to answer the call because the device is damaged, etc.

15. Click the Save and Continue button.
Set Hunt Group Users
As part of the Hunt Group configuration, you must select the users who will be included in the Hunt Group.

Figure 66. Hunt Group Users screen

Use the following steps to create Hunt Group users.

1. Click the plus sign to expand the Hunt Group Users.  
   **Result:** The Hunt Group Users panels appear.

2. Click the names of users you want to include in the Hunt Group and click the Add> button.  
   **Result:** The users move from the Available Users panel to the Assigned Users panel.  
   (Note: If you want to add multiple users, click the Ctrl key and select non sequential names from the list. If you want to add all Available Users, click the Add All>> button. Likewise, click the <Remove or <<Remove All buttons to unassign users.)

3. Click the Save and Continue button.
Add Series Completion Rule

Create or edit a Series Completion rule by entering a series name and selecting the order of the assigned users. You can search for available users by first or last name and add them to this Series Completion rule. You can also remove or reorder assigned users.

**Figure 67. Hunting and Series Completion Rule Settings**

Use the following steps to create a Series Completion Rule.

1. Enter the name of the Series Completion Rule in the **Series Name** field.
2. Click the names of users you want to include in the Series Completion and click the **Add >** button. **Result:** The users move from the Available Users panel to the Assigned Users panel. *(Note: If you want to add multiple users, click the Ctrl key and select non sequential names from the list. If you want to add all Available Users, click the **Add All >>** button. Likewise, click the **< Remove** or **<< Remove All** buttons to unassign users.)*
3. Click the **Save** button.
Set Up Auto Attendant

Auto Attendant is an automated receptionist with greetings that provide a menu of options to assist callers in routing their calls at different times of day and special events.

Use the following steps to set up an auto attendant for your business.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. 
   **Result:** A list of options appears.

3. Click the Voice Tools link. 
   **Result:** The Voice Tools main page appears.

4. Navigate to the Call Settings panel and click the View More Features > link in the lower right corner. 
   **Result:** The Call Settings section expands.

5. From the Call Receiving category, click the Auto Attendant link. 
   **Result:** The Auto Attendant screen appears. (See Figure 68.) (Note: Directly above the table, two line items describe the number of Basic and Standard Auto Attendants that have been purchased. Should you need additional, contact your local Cox representative.)

6. Click the Edit link. 
   **Result:** The Auto Attendant configuration screen appears.
General Auto Attendant Settings

Continuing from the steps above, proceed to configure the General Auto Attendant settings.

7. Enter a **Name** for the Auto Attendant.

8. The **Phone Number** displayed is the one to which the Auto Attendant feature is assigned.

9. Enter the specific **Auto Attendant Extension** of the general phone number to which the caller should be sent, if applicable.

10. Click the **Account Number** drop-down menu to select the appropriate account to associate to the Auto Attendant. *(Note: If there is more than one business location, there will be multiple accounts from which to choose.)*

11. Click the **Time Zone** drop-down menu and select the zone that associates with the location of the account.

12. Configure the dialing format for incoming calls.
   - Click the radio button that defines how you want to Allow Extension Dialing Within: For the entire **Group** or **This Account**?
   - Click the radio button that defines how you want to Allow Name Dialing Within: For the entire **Group** or **This Account**?
   - Click the radio button to select the **Name Dialing Format** customers will use when they search for a person. **Last name, First Name**? **Last Name or First Name**?

13. Click the **Save** button and proceed to the Auto Attendant Menu Options (Business Hours) section.
Auto Attendant for Business Hours

You can create an Auto Attendant and menu tree options for callers based on specific time schedules; e.g., during business hours and after business hours.

Continuing from the steps above, configure the Auto Attendant for Business Hours Settings. Remember: Business Hours use the Regular Schedule time.

Note: If you do not need a custom schedule, click the drop-down menu and select Every Day, All Day, or provide a specific time period.

Figure 70. Auto Attendant Menu Options (Business Hours) tree

Continuing from the steps above, proceed to configure the Auto Attendant for Business Hours Settings section.

14. From the Business Hours Greeting selection, click the Default or Custom greeting radio button to designate the messaging desired. (If you need to change an existing greeting, click the Edit link and follow the instructions outlined in the Set Up Music On Hold section on page 59.)

15. If you need to create a new greeting, click the Add link and follow the instructions on how to add a greeting, follow the instructions outlined in the Set Up Music On Hold section on page 59.)

16. Click the checkbox to accept the disclaimer.

17. Click Continue.
18. Click **Enable First-Level Extension Dialing** to allow the caller to dial the desired extension immediately following the greeting without waiting for the next level of audio prompts.

19. Enter the full (main) telephone number in the **Operator Number** field.

20. Enter an explanation of the menu tree option in the **Description** field for each number listed.

21. Click the **Action** drop-down menu for each Description entered.

22. Click the action desired.

23. Click **Save** button to return to the main screen.

**Result:** A message indicates the Auto Attendant settings updated successfully.

**(Note:** You need to provide dialing instructions to callers in your recording.)

**Auto Attendant Menu Options for After Hours**
Continuing from the steps above, proceed to configure the **Auto Attendant Menu Options (After Hours)** settings.

24. Click the **Business Hours** drop-down menu to choose a Business Hours schedule. If you need to create one, click the **Add a Business Hours Schedule** link and follow the steps outlined in the follow the instructions in the **Understanding Schedules** section on page 104.

25. Click the **Save** button.

**Auto Attendant Menu Options for Holidays**
Continuing from the steps above, proceed to configure the **Auto Attendant Menu Options (Holiday Hours)** settings.

26. Click the **Holiday Schedule** drop-down menu to choose a Holiday Hours schedule. If you need to create one, click the **Add a Holiday Hours Schedule** link and follow the steps outlined in the follow the instructions in the **Understanding Schedules** section on page 104.

27. Click the **Save** button.
Configuring Voice Tools

Set Up Sequential Ring

In addition to your phone number, Sequential Ring allows you to add up to five phone numbers that will ring in your preferred order when an incoming call matches certain conditions.

You can manage your phone numbers, settings and rules that will trigger sequential ringing. (Note: To activate Sequential Ring, you must have at least one rule turned on.)

Figure 71. Sequential Ring screen

Use the following steps to set up a Sequential Ring and Rule.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Voice Tools link. Result: The Voice Tools main page appears.
4. Navigate to the Call Settings panel and click the View More Features > link in the lower right corner.  
**Result:** The Call Settings section expands.

5. From the Call Forwarding category, click the Sequential Ring link.  
**Result:** The Sequential Ring screen appears.

6. Click the Ring My Phone Number First check-box to ring your phone number before routing calls to the next phone number in the list.

7. Click the Skip to Next Number if Busy check-box to ring the next number in the list if a number is busy.

8. Click the Allow Caller to Skip Sequence check-box for call to advance to the first available number in the list. **Note:** You may choose to route all or only selective incoming calls to your Sequential Ring List. To route only selective calls, you must add rules that will determine when calls are routed.

9. Click the Add Another Number link. You can enter up to 5 numbers.

10. Enter the Phone Number to where calls should be routed.

11. Choose Yes or No from the Answer Confirmation drop-down menu. (**Hint:** Select Yes to establish the Answer Confirmation setting for each number if you want the person answering the call to first verify that they want to receive the call. They will do so by pressing a key on the keypad. If you do not want to establish an Answer Confirmation, keep the setting to No.)

12. Click the Rings drop-down menu to select the number of rings before the call is forwarded.

13. Click the Delete link to remove any number from your list.

14. Click the Save button to complete the list.

**Add Sequential Ring Rule**

To activate Sequential Ring, you must have at least one Sequential Ring Rule turned On.

**Figure 72. Add Sequential Ring Rule link**

Continuing from the steps above to set up a Sequential Ring, use the following steps to add a Sequential Ring Rule.

15. Scroll to the Sequential Ring Rules section (**Figure 71**) and click the Add Sequential Ring Rule link.  
**Result:** The Sequential Ring screen appears.
16. Enter a description for the Ring Rule in the text field.

17. From the When Receiving Calls From drop-down menu, select the type of call you want the rule to apply: Any Phone Number or Specific Phone Number(s). (Note: If you select Specific Phone Number, configure whether the phone number is Any Private Number and/or Any Unavailable Number. Click the Add Another Number link to insert a maximum of 12 phone numbers.)

18. Click the radio button to the left of Call Sequential Ring List or Do Not Call Sequential Ring List to define the Action (route) the call will take.

19. Choose the Schedule the Sequential Ring Rule should follow for Regular (normal business hours) and Holiday hours. (Note: For instructions on how to set up both schedules, refer to the Understanding Schedules on page 104.)

20. Click the Save and Return button.
Configuring Voice Tools

Set Up Simultaneous Ring

Simultaneous Ring allows you to select up to 10 other phone numbers that will ring at the same time, or when the incoming call matches your rules. You can activate Simultaneous Ring or manage phone numbers that will ring at the same time. If you select On with Simultaneous Ring Rules, you must turn on at least one rule.

Figure 73. Simultaneous Ring

Use the following steps to set up a Simultaneous Ring.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Voice Tools link. Result: The Voice Tools main page appears.

4. Navigate to the Call Settings panel and click the View More Features > link in the lower right corner. Result: The Call Settings section expands.

5. From the Call Forwarding category, click the Simultaneous Ring link. Result: The Simultaneous Ring screen appears.
6. Click the radio button to define if or when you want the Simultaneous Ring active. The options are Off, Always On, and On With Simultaneous Ring Rules. (Note: If you click the On with Ring Rules option, you must select a rule.)

7. Check the Do Not Call My List If I Am On a Call box to prevent calls from routing to you.

8. Enter the Phone Number that will ring when your primary phone rings. You can add up to nine (9) numbers for a total of 10 telephone numbers that will ring.

9. Choose Yes or No from the Answer Confirmation drop-down menu. (Hint: Select Yes to establish the Answer Confirmation setting for each number if you want the person answering the call to first verify that they want to receive the call. They will do so by pressing a key on the keypad. If you do not want to establish an Answer Confirmation, keep the setting to No.)

10. If a Simultaneous Ring Rule does not exist, click the Add a Simultaneous Ring Rule to establish when the ring should be used.

11. Enter a description for the Ring Rule in the text field.

12. From the When Receiving Calls From drop-down menu, select the type of call you want the rule to apply: Any Phone Number or Specific Phone Number(s). (Note: If you select Specific Phone Number, configure whether the phone number is Any Private Number and/or Any Unavailable Number. Click the Add Another Number link to insert a maximum of 12 phone numbers.)

13. Click the radio button to the left of Call Simultaneous Ring List or Do Not Call Simultaneous Ring List to define the Action (route) the call will take.

14. Choose the Schedule the Simultaneous Ring Rule should follow for Regular (normal business hours) and Holiday hours. (Note: For instructions on how to set up both schedules, refer to the Understanding Schedules on page 104.)

15. Click the Save button.
Retrieve Call Detail Records

MyAccount enables you to view call detail records up to 119 days ago.

**Figure 74. Call Detail Records**

Use the following steps to filter and view Call Detail Records.

1. Log into MyAccount. (*Tip:* Follow the steps in *Accessing MyAccount* to login.)

2. From the Welcome page, click the More icon to expand. **Result:** A list of options appears.

3. Click the Voice Tools link. **Result:** The Voice Tools main page appears.

4. Click the View More Features > link in the User & System Management panel. **Result:** The Voice Tools main page appears.

5. From the Utilities category, click the Call Detail Records link. **Result:** The Retrieve Call Detail Records screen appears. (See *Figure 74.*

6. Enter search criteria for the Time Zone, Begin/End Dates, Account Number(s) [if applicable], and Phone Number(s).

7. Click the Retrieve Data button. **Result:** A list appears and provides generic calling information. You can view the data in a table view or reports view if you click the Table View or Reports View links, respectively. (See *Figure 75.*

8. Click the PDF or CSV link to export the data in either format.

9. Click the Filters button to modify the search criteria.
Configuring Voice Tools

Figure 75.  Call Detail Record list

Outgoing Calling Plan

An Outgoing Calling Plan manages outgoing or transferred calls by groups or accounts. To make changes to your Outgoing Calling Plan settings, contact Cox Business Customer Care. Administrators can view outgoing calling plan data for accounts and users on each account.

Figure 76.  Outgoing Calling Plan

Use the following steps to view calling plans for accounts and users.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Voice Tools link. Result: The Voice Tools main page appears.

4. Click the Outgoing Calling Plan in the User & System Management panel or click the View More Features link in the User & System Management panel to see more features. Result: The Outgoing Calling Plan page appears.
View Outgoing Calling Plan By Account

An Outgoing Calling Plan manages outgoing or transferred calls by groups or accounts.

**Figure 77. Outgoing Calling Plan By Account screen**

Use the following steps to view activity from an Account’s Outgoing Calling Plan.

1. Continuing from the steps in the *Outgoing Calling Plan* section, click the **plus sign** to expand the Outgoing Calling Plan By Account link.

   **Result:** Details for calls that Originated from this Group/Account, Transferred or Forwarded From This Group/Account, and Transferred or Forwarded To This Group/Account appear.

2. Expand each heading link to view corresponding data.
View Outgoing Calling Plan By User

The Outgoing Calling Plan By User screen displays the same information as seen in Outgoing Calling Plan By Account. The only difference is the plan pertains to a single individual, not a group.

Figure 78.  Outgoing Calling Plan By User

1. Continuing from the steps in the Outgoing Calling Plan section, click the plus sign to expand the Outgoing Calling Plan By User link.
   Result: Details for calls that Originated from this User, Transferred or Forwarded From This Group/Account, and Transferred or Forwarded To This Group/Account appear.

2. Click the View link to see details for each user.
Manage E911 Address

Voice services that support National 911 include an E911 Address feature that must always be kept current. By doing so, emergency calls can be routed to the proper call dispatchers and responders in your location. Users with a telephone handset or Unified Communications App (UC App) who relocate from their office to home or their vacation area must update their E911 address information.

Administrators can manage another user’s E911 address.

Figure 79. Manage E911 Address screen

Use the following steps to add a new E911 address.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand.
   **Result:** A list of options appears.

3. Click the Voice Tools link.
   **Result:** The Voice Tools main page appears.

4. Click the View More Features > link in the User & System Management panel.
   **Result:** The Voice Tools main page appears.

5. From the User Management category, click the Manage E911 Address link.
   **Result:** The Manage E911 Address screen appears.

6. Click the Add Address button.
   **Result:** New address fields appear.
7. Populate the fields as appropriate and click the **Continue** button.  
**Result:** A second Manage E911 Address appears.

8. Click the radio button next to the found address and click the **Save** button.  
**Result:** You will receive a confirmation message that the address was successfully updated.

### Manage Phone Numbers

Administrators assign and unassign phone numbers to new and existing MyAccount users, respectively. The phone numbers are associated with the voice services on the profile. Without a phone number, a user is unable to login to MyAccount and manage their individual calling features such as a call forwarding and voice mail.

#### Assign Phone Number

**Figure 80. Manage Phone Numbers – Assign Number**

![Manage Phone Numbers](image)

Use the following steps to assign a phone number to new and existing users.

1. Log into MyAccount. (**Tip:** Follow the steps in *Accessing MyAccount* to login.)

2. From the Welcome page, click the **More icon** to expand.  
**Result:** A list of options appears.
3. Click the **Voice Tools** link.  
**Result:** The Voice Tools main page appears.

4. Click the **View More Features >** link in the User & System Management panel.  
**Result:** The Voice Tools main page appears.

5. From the User Management category, click the **Manage Phone Numbers** link.  
**Result:** The Manage Phone Numbers screen appears. (Note: If there is more than one account, you must click the plus sign $+$ first to expand the profile and select the account.)

6. Click the **Assign Phone Numbers** tab. (See Figure 80.)

7. Click the **Name** drop-down menu next to the number you want to assign and select the user. (Note: If the user is not in the system yet, click the **Add a New User** button and follow the instructions in the **Add a User** section on page 48.)

8. Check the **Send Voice Welcome E-mail** box to inform the user of their phone number.

9. Click the **Assign Phone Numbers** button.  
**Result:** The phone number is assigned.

## Unassign Phone Number

![Manage Phone Numbers – Unassign Number](image)

**Figure 81.** Manage Phone Numbers – Unassign Number
Use the following steps to unassign a phone number.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand.
   **Result:** A list of options appears.

3. Click the Voice Tools link.
   **Result:** The Voice Tools main page appears.

4. Click the View More Features > link in the User & System Management panel.
   **Result:** The Voice Tools main page appears.

5. From the User Management category, click the Manage Phone Numbers link.
   **Result:** The Manage Phone Numbers screen appears. (Note: If there is more than one account, you must click the plus sign first to expand the profile and select the account.)

6. Click the Unassign Phone Numbers tab. (See Figure 81.)
   **Result:** A list of all assigned phone numbers and associated users appears.

7. Click the checkbox to the left of the phone number you want to unassign.

8. Click the Unassign Phone Numbers button.
   **Result:** A confirmation message appears.
User Extensions

Administrators can edit a user’s phone number extension within any account on the profile. Click any column heading to sort, or search for a user by entering a name in the Search field or filtering by an account.

Use the following steps to edit or search user extensions on accounts within the profile.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand.
   Result: A list of options appears.

3. Click the Voice Tools link.
   Result: The Voice Tools main page appears.

4. Navigate to the User & System Management panel and click the User Extensions link. If it doesn’t appear on the Voice Tools main page, click the View More Features link.
   Result: The User Extensions screen appears.

5. Modify the extension number of the user and click the Save button.
User Feature Settings

As an administrator, you can edit a user’s feature settings or search for a user and details of a phone number. (Note: If your feature package contains the Inventory Report feature, you can download more information than your on-screen view.)

Figure 83. User Feature Settings

Use the following steps to review or modify feature settings for users.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Voice Tools link. Result: The Voice Tools main page appears.


5. Click the Edit link to the right of the person you want to modify. Result: The Edit User Feature Settings screen appears. (See Figure 84.)
6. Navigate to the feature you want to change and make the necessary edits. For help on feature edits, refer to this guide or the *MyAccount Portal User Guide*. 
How to Set Up Privacy
The Privacy setting allows you to hide/exclude or show/state your name and dialing extension in the Group Directory, Auto Attendant and phone status.

Figure 85. Privacy window

Use the following steps to configure privacy settings.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand. Result: A list of options appears.

3. Click the Voice Tools link. Result: The Voice Tools main page appears.

4. Navigate to the User & System Management panel and click the Privacy link in the User Management category. (Note: If it doesn’t appear on the Voice Tools main page, click the View More Features link. Navigate to the User & System Management panel and click the User Feature Settings link.) Result: The User Feature Settings screen appears.

5. Expand the Group Directory drop-down menu and click the option to Show My Name and Number or Hide My Name and Number.

6. Expand the Auto Attendant drop-down menu and click the option to: Include Me in Extension and Name Dialing, Exclude Me from Extension Dialing, Exclude Me from Name Dialing, or Exclude Me from Extension and Name Dialing.

7. Expand the Phone Status drop-down menu and click the option to Show My Status (busy, available, etc) or Hide My Status.

8. Click the Save button. Results: A confirmation message appears stating your changes were saved successfully.
View Group Directory

The Group Directory displays users based on search/filter criteria you set. The figure below displays users in All Accounts sorted alphabetically. Click any of the column headings to change the sort.

The Export feature enables you to save or open the listing in a CSV format. This makes it easier to download in a spreadsheet for additional dissection.

Figure 86. Group Directory

Use the following steps to view a Group Directory.

1. Log into MyAccount. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand.

Result: A list of options appears.

3. Click the Voice Tools link.

Result: The Voice Tools main page appears.

4. Navigate to the User & System Management panel and click the Group Directory link in the Utilities category.


5. Enter search criteria, select an account to search, sort the list based on your preferences and click the Export button to open the CSV file or save.
**Call Forwarding**

Call forwarding allows you to forward a call to another phone number when the incoming call matches certain conditions. This section instructs you on how to set up all types of call forwarding.

![Call Forwarding screen](image)

**Figure 87. Call Forwarding screen**
**Forward All Calls**

Forward All Calls allows you to re-route every incoming phone call to another number until you deactivate the feature. Callers are not aware that the call is ringing a different number and you are less prone to miss calls.

**Figure 88. Forward All Calls**

![Forward All Calls](image)

Automatically forward all calls to another phone number. Use this rule to avoid interruption on busy days or when you're away from your desk.

Call From: Any Phone Number

Forward To: 555-555-8765

Options/Manage: Ring Reminder (Off)

Use the following steps to forward all your incoming calls.

1. Login to the MyAccount Portal. **(Tip: Follow the steps in Accessing MyAccount to login.)**

2. Click the Call Forwarding icon in the Voice tab on the MyAccount Welcome screen. **Result:** The Call Forwarding window appears. **(See Figure 87.)**

3. Click the On/Off toggle at the right of Forward All Calls to enable this feature. **(Note: Click the Edit link on the main Call Forwarding screen to modify the existing forward to number or Options/Manage field, as applicable.)**

4. In the Forward To field, enter the phone number to which you want all your calls sent.

5. (Optional) From the Options/Manage heading, use the drop-down menu to select whether you want your phone to alert you that you have the Call Forwarding Always feature activated.

6. Click the Save button to save your changes.
**Forward When No Answer**

*Forward When No Answer* allows you to re-route incoming phone calls when you are unavailable to answer your phone.

![Forward When No Answer](image)

Use the following steps to forward all your incoming calls when you are unable to answer your phone.

1. Login to the MyAccount Portal. *(Tip: Follow the steps in *Accessing MyAccount* to login.)*

2. Click the **Call Forwarding icon** in the Voice tab on the MyAccount Welcome screen. *(Result: The Call Forwarding window appears.)*

3. Click the **On/Off** toggle at the right of **Forward When No Answer** to enable this feature. *(Note: Click the **Edit** link on the main Call Forwarding screen to modify the existing forward to number or Options/Manage field, as applicable.)*

4. In the **Forward To** field, enter the phone number to which you want all your calls sent.

5. From the **Options/Manage** column heading, click the drop-down menu and choose the number of times the telephone will ring before the call routes to the number you specify.

6. Click the **Save** button to save your changes.
**Forward When Busy**

Forward When Busy allows you to re-route incoming phone calls to another number when you are on a call.

![Forward When Busy](image)

Use the following steps to forward all your incoming calls when you are on a call.

1. Login to the MyAccount Portal. *(Tip: Follow the steps in Accessing MyAccount to login.)*

2. Click the **Call Forwarding** icon in the Voice tab on the MyAccount Welcome screen.  
**Result:** The Call Forwarding window appears.

3. Click the **On/Off** toggle at the right of **Forward When Busy** to enable this feature. *(Note: Click the **Edit** link on the main Call Forwarding screen to modify the existing forward to number.)*

4. In the **Forward To** field, enter the phone number to which you want all your calls sent.

5. Click the **Save** button to save your changes.
Forward When Not Reachable

Forward When Not Reachable allows you to re-route incoming phone calls to another number when your device is not accessible, or your service is impaired.

Figure 91. Forward When Not Reachable

Use the following steps to forward all your incoming calls when your device is not accessible.

1. Login to the MyAccount Portal. (Tip: Follow the steps in Accessing MyAccount to login.)

2. Click the Call Forwarding icon in the Voice tab on the MyAccount Welcome screen. Result: The Call Forwarding window appears.

3. Click the On/Off toggle at the right of Forward When Not Reachable to enable this feature. (Note: Click the Edit link on the main Call Forwarding screen to modify the existing forward to number.)

4. In the Forward To field, enter the phone number to which you want all your calls sent when your device cannot be located.

5. Click the Save button to save your changes.
Add Call Forwarding Selective Rule

Call Forwarding Selective is the most commonly used manner to forward calls when a user is out of the office. This feature forwards calls that match specific criteria you define in a Call Forwarding Selective Rule.

Within the Rule is a Schedule (or multiple Schedules). There are two types of Schedules: Regular and Holiday. As the names imply, a Regular schedule comprises normal business hours and includes not only when the business is open, but also closed. A Holiday schedule is for any holiday a business observes or another event that is outside of Regular business hours. As you begin to create a rule, remember rules have schedules.

**Figure 92. Call Forwarding Selective**

Use the following steps to forward calls based on specific parameters.

1. Login to the MyAccount Portal. (Tip: Follow the steps in Accessing MyAccount to login.)

2. Click the Call Forwarding icon in the Voice tab on the MyAccount Welcome screen.
   **Result:** The Call Forwarding window appears. (See Figure 87.)
3. Click the **Add icon** at the right of **Add Call Forwarding Selective Rule**.  
**Result:** The configuration fields appear.

4. Enter a name for the rule in the **Selective Rule Name** field. In the example seen in the image below, we will use “Work from Home.”

5. From the **When Receiving Calls From** drop-down menu, select the type of phone number (**Any Phone Number** or **Specific Phone Numbers**) that you want to add as part of the Selective Rule. (Note: If you select Specific Phone Numbers, you will be prompted to choose if you want **Any Private Number** and/or **Any Unavailable Number** box to further define the type of call to which the rule will apply in the Call Forwarding Selective parameters.) You may add up to 12 numbers.

6. If you choose the **Any Phone Number** option, enter the number where you want to re-route calls in the **Forward to** field. (Note: Check the **Do Not Forward** box if you do not want to re-route any calls.)

7. From the **Rule Type** field, click the **Forward Calls** radio button to re-route calls to another number; or click the **Do Not Forward Calls** radio button to keep calls routed as they are currently.

8. Enter the phone number you want calls to be routed in the **Forward To** field.

9. Proceed to the next section for details on how to set up Regular and Holiday Schedules.

**Figure 93.**  **Call Forwarding Selective Rule window**
Understanding Schedules

Schedules are structured to address what, where, when, why, and how a rule is used. Schedules can be created for each account and/or each location of your business.

Below are the components of a schedule and a description of what they mean and how you use them.

- **Create a Name for the schedule.** In Figure 94, a Work From Home (WFH) schedule will be built (as part of the Work From Home Rule.)

- **Define when the schedule occurs.** The WFH schedule will be Mon, Wed, Friday from 8:00am until 5:00pm. It will recur every week.

- **Designate to whom the schedule applies:** Is it for one person or a group? Admins can configure both. Users can designate the event for themselves only.

- **Create a sub-category for the schedule, known as an “Event.”** The Work From Home Schedule has an Event named “MWF” for Monday, Wednesday, and Friday. (Note: Event names can be Schedule names, too; and one schedule can have multiple events.)

- **Set a Start Date and End Date for the Event.** In the example, the event occurs every week on Mon, Wed, and Fri from 8:00am until 5:00pm and does not change.

**Figure 94. Add Schedule/Event screen**

1. Select the date/time that denotes when the rule is active. In the example, we want office calls to forward to our mobile or home office number 555-555-5555 every Monday, Wednesday, and Friday from 8:00am until 5:00pm.

2. Click the **Save** button.

   **Result:** The Call Forwarding Selective Rule screen appears.

3. Click the **Save** button again to confirm the changes.
VoiceManager Ringdown

Ringdown is a feature for VoiceManager lines that allows a phone number to “ring down” to a different phone number, such as an elevator line, an intercom line, or a security gate line.

The line can be a “hot” line, which means there will be no wait time before the destination is dialed; or a “warm” line, which will result in a short delay (in seconds) before the destination is dialed.

![VoiceManager Ringdown](image)

Use the following steps to turn on the ringdown feature and make configuration updates in the MyAccount portal. (Note: This feature is normally configured by the MyAccount Administrator or Profile Owner.)

1. Login to the MyAccount Portal. (Tip: Follow the steps in Accessing MyAccount to login.)

2. From the Welcome page, click the More icon to expand.
   Result: A list of options appears.

3. Click the Voice Tools link.
   Result: The Voice Tools main page appears.

4. From the Call Settings pane, click the View More Features> link (if Ringdown does not display in the pane.)

5. On the VoiceManager Dashboard, scroll to the Dial/Redial category in the Call Settings section and click the VoiceManager Ringdown link.
To turn on the ringdown feature and to make configuration updates, click the **Edit** link next to the applicable telephone number.

**Result:** The Edit Ring-to Number dialog box appears.

7. Enter the **Ring-to Number**, select the **Status** of the number (Enabled or Disabled), and enter a number (of seconds) that you wish to delay the ring. If you do not want the ring to delay, keep the value at “0” [Seconds].

8. Click the **Continue** button.

**Result:** A Confirm dialog box appears.

9. Click the **Confirm** button.

**Result:** The Configuring dialog box appears. *(Note: If the configuration works, you will see **Success** in the Success/Failure column. If the ringdown set up doesn’t work, you will see **Failure**.)*
10. Click the **Continue** button.

**Result:** The newly configured Ring-to Number displays and the feature is set to **On**. *(Note: A message appears at the top of the screen that states the line is reset.)*

**Figure 98. Newly created Ring-to Number screen**

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**Timeout Warning Screen**

MyAccount has a timeout warning screen that appears after the portal has been inactive for 20 minutes. The session can be re-established if you click the **OK** button within 10 minutes after it displays. If you do not click the button within the allotted time, you will have to sign in to MyAccount again.

**Figure 99. Timeout Warning Screen**

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*End of Document*