

Getting Started

A Step-by-Step Guide for D-Link VoiceCenter with Microsoft Response Point

What's in the Box?



Base Unit



IP Phones



Phone Line Gateway (optional)



CD with Software Installation, and Guides



Ethernet Cables



Phone Line Cable (optional)



Power Cords

Reseller Information

Blank area for Reseller Information.

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Important Considerations

Microsoft® Response Point™ offers many features, including the ability to manage your individual user preferences using Assistant. You should understand how various issues affect your privacy and the security of the phone system.

This section describes basic information that you should consider before using Response Point. All recommendations are based on a general configuration of the phone system. However, every small business is unique. As you use Response Point, please evaluate the specific configurations of your office. Use your own discretion as you follow the guidelines discussed in the following sections.

Emergency Considerations

Please read this information carefully, as it applies to calling for help in emergency situations.

Power, network, or telephone service outages: If there is an outage, disruption, or other degradation of the power, network, or telephone services at your location, Response Point will not work.

How to dial 000: Please inform all of your employees, visitors, and Response Point users that they can either dial **000** or **9-000** to access 000 emergency services.

Maintain an alternative means of calling 000: You should maintain a backup means of calling 000 emergency services (for example, by using a phone plugged into a standard telephone line or a cell phone) in case of a power failure, telephone service outage, or other problem that may inhibit you from using Response Point.

811 feature: By dialing 811, you can call back the last phone that was used to dial 000. This information will be stored for **only 24-48 hours** after 000 is dialed. **NOTE:** This feature may not work if the phone has not been registered with the Response Point base unit by your phone system administrator.

000 location obligations that may apply to certain owners of Response Point: Your telephone company may be required under applicable law to provide a telephone number and address associated with that telephone number to emergency services when a caller dials 000. Please note that certain Australian (state and/or federal) and foreign laws may require the owner of a **multi-line telephone system (MLTS)**, such as Response Point, to provide emergency services with the physical location/address of the **phone** that was used to call 000, in addition to the caller's telephone number. Compliance with such MLTS laws is your responsibility as the owner of Response Point. Response Point does not provide to emergency services the physical location/address of a **phone** that is used to call 000.

Privacy Considerations

The following information describes privacy issues related to Response Point.

Privacy of Users

The personal information that you enter in the **User Properties** dialog box is stored on the base unit and is not encrypted. Any user who has access to the base unit password (for example, the phone system administrator) can modify this information, which includes:

- Voicemail messages** that you configure to be retrieved by phone. (Voice messages sent as e-mail attachments are not stored on the base unit.)

- Names and nicknames** that you think external callers might use when speaking to the Automated Receptionist.

- Personal contact information** that you upload from your contact store.

- E-mail addresses** that you specify to receive voicemail attachments.

- Bypass Receptionist phone numbers** that connect directly to the extension numbers that you specify.

If you select the **Remember logon settings** check box when logging on to Response Point Assistant, your credentials are encrypted and are stored on the computer running Assistant.

The directory is available to external callers. You can choose to add or remove your name and extension number from this directory. However, the phone system administrator can override your choice without your consent—by either adding your information to the directory or removing your information from it.

Your user name and extension number are automatically added to the list displayed in Assistant; there is no way to override this feature. Any user who logs on to Assistant can view this list.

Privacy of Calls

Various components of the Response Point phone system must exchange data so that you can place and receive calls. Similar to many traditional phone systems, where people with access to the office phone network may be able to listen to phone calls, people with access to your office LAN may also be able to listen to phone calls that you place using Response Point.

Calls—which are comprised of data packets that pass between base units, phone line adapters, and phones—travel over the office LAN and are not encrypted. For example, the caller ID information that is exchanged between the phones and base unit is not encrypted. Likewise, a conversation that is transmitted from one phone to another phone is not encrypted. However, data that is exchanged between the base unit and Response Point Administrator or Assistant is encrypted.

Privacy of SMTP Servers

The information that is transmitted from the base unit to your SMTP server (such as, a Microsoft Exchange server on the LAN or your ISP's e-mail server on the Internet) will be encrypted or not depending on whether your SMTP server requires encryption. Information that may not be encrypted includes the user name and password for logging on to the SMTP server and voice messages sent as e-mail attachments. For more information about your base unit's connection to the SMTP server, contact the phone system administrator.

Privacy of Backups

The phone system administrator may choose to make a backup of the data on the base unit. Data saved in the backup file is not encrypted. Therefore, we recommend that the phone system administrator store backups on a removable hard drive that can be disconnected from the LAN and stored in a secure location (for example, on a disk that can be stored in a locked drawer).

Transfer of Base Units

Before transferring the base unit to another person—for example, if you give it to another small business owner or recycle it—you may want to permanently delete all information using the Erase Data program ("ResponsePointEraseData.exe") that comes on the installation CD.

Security Considerations

While Voice over Internet Protocol (VoIP) brings the power of the Internet to phone services, it also introduces some security issues. Unless your LAN is secure, employees or callers could change phone settings, listen to others' voice messages, and even access the public address system, if you have one.

Consider the following issues in creating a secure phone system:

Change Default Passwords

The first step toward securing Response Point is to change the default password of the base unit. The default base unit password is admin, which you use from Administrator to connect to the base unit.

Also, encourage your employees to change their passwords using Assistant. An employee is typically assigned to one extension number password, which is used to log on Assistant and to retrieve voicemail messages. The default extension number password is 9999.

System Vulnerabilities

Response Point runs on your office LAN, and your organization may have a wireless LAN. While convenient and popular, the security features in many wireless default implementations may not be adequate for your needs. Consider whether your LAN security configuration, especially your wireless LAN security configuration, is correct for your business.

Firewall Issues

It's a good idea to use firewalls to help protect your office LAN. A firewall blocks requests or communication attempts from any unspecified programs.

If you use a third-party firewall to provide security, instead of the default Windows Firewall, Assistant and Administrator will not be able to communicate with the base unit. To avoid this problem, create firewall exceptions in your firewall program for Administrator and Assistant. A firewall exception allows selected programs to connect with your computer.

If you are using a third-party firewall, refer to its documentation for instructions on creating firewall exceptions.

Security Certificates

When you first log on to Administrator and connect to a base unit, you are asked to establish a security relationship between the base unit and the computer running Administrator.

If you proceed to establish that security relationship, the base unit copies a certificate (a digital document) to the computer running Administrator. Once the two have the same certificate information, your computer automatically trusts that the base unit is legitimate.

Security certificates are put on the base unit when manufactured and have a 15-year expiration date. If you think you're near the 15-year limit, contact the manufacturer's customer support service.

Occasionally, when you log on, you might get a security error, which won't allow you to connect to a base unit. This can occur if the certificate exchange has been corrupted, for example. In this case, try connecting again, or restart the base unit so that the certificate can be reinitialized. If you still get an error, a program or other device on the LAN might be trying to fool you or intercept your base unit data. You will see explanatory messages when these conditions occur.

Security of Backups

Phone system data is not encrypted when a backup is created. Therefore, we recommend that the phone system administrator store backups on a removable hard drive, which can be disconnected from the LAN.

Introducing Response Point

Getting Started: A Step-by-Step Guide for Microsoft® Response Point™ introduces the Response Point phone system and gives instructions for setting it up, using both hardware and software. Specifically, it includes:

- A description of what's in the box.
- Explanations of the basic concepts that will help you understand how to set up Response Point.
- Instructions for installing and configuring both the hardware and software. You'll go back and forth between the hardware and software as you install and configure the phone system.
- How to test the initial installation and phone system configuration.
- How to configure options to customize Response Point for your business.

Basic Concepts of Response Point

In Microsoft® Response Point™, terms and basic concepts are used in specific ways, which are briefly discussed here. For a more thorough explanation, see the Response Point Administrator Help topics.

Users, Phones, and Extension Numbers

Some people might think that a Response Point user is just a person who uses a phone. For example, an individual person (say, an employee) is a user. In Response Point, however, a user can also be a job role (such as Receptionist), location (such as Warehouse or Front Office), or group (such as Sales).

While multiple users can be assigned to one phone, and an individual user can be assigned to multiple phones, each user is assigned to only one extension number. The extension number identifies the user, whether that user is a person, job role, location, or group.

Response Point phones include a button (called the **Response Point button**) for using Response Point features, such as voice dialing.

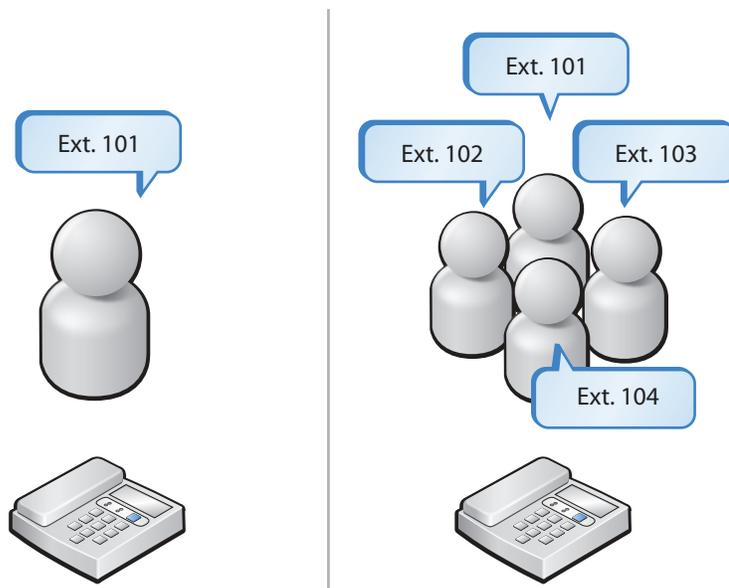


Figure 1: Users, phones, and extension numbers

Installing Hardware and Software

To begin, install the Microsoft® Response Point™ hardware (including phones) and software, configure options, and test two phones. Later, you can add phones to the phone system and make additional setup choices using Response Point Administrator and Response Point Assistant.

► To connect the base unit to the local area network (LAN):

1. Use one of the Ethernet cables to connect the base unit to your office LAN.
2. Connect the power cord to the base unit and then to an electrical outlet, as Figure 2 shows.

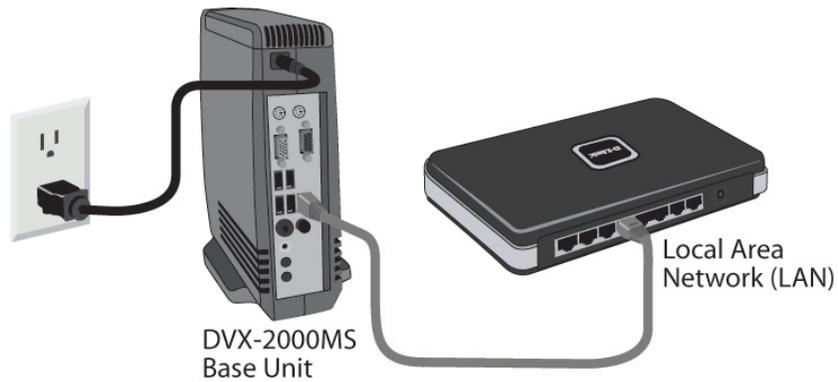


Figure 2: Installation of the base unit

You've done the important first step! Confirm that all cables and cords are properly seated into their respective ports and outlet before continuing.

Connecting Phones

Here you'll connect two phones. Microsoft® Response Point™ phones have a button that allows you to use Response Point features, such as transferring a call using voice dialing.

▶ **To connect two phones:**

1. Using one Ethernet cable for each phone, connect the phones to the LAN.
2. Using the power cord for each phone, connect them to a power source.

When you're done, your phone system should look like this:

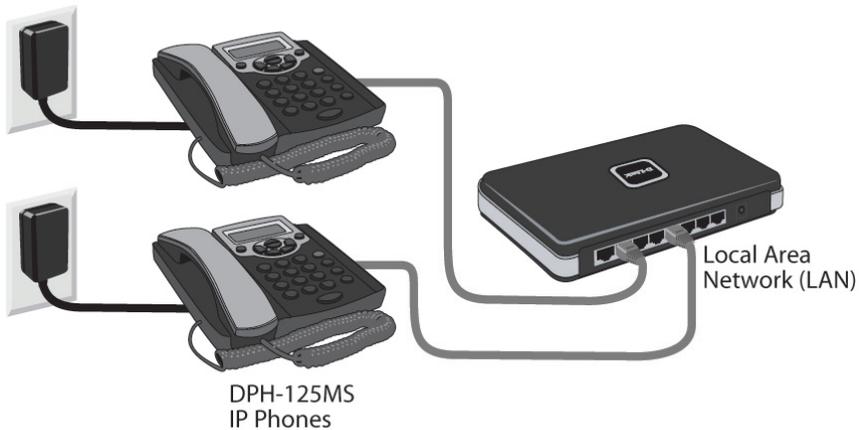


Figure 3: Connecting two phones

Next, you'll install the Administrator program.

Installing Response Point Administrator

Administrator is the program you'll use to administer and monitor Microsoft® Response Point™. With it, you can configure phones, users, and extension numbers, and set other options. You install Administrator on the computer of the person who will manage Response Point.

► To install Administrator:

1. Insert the Response Point CD.
2. Select **Install Microsoft Response Point Administrator**, and click **Next**.

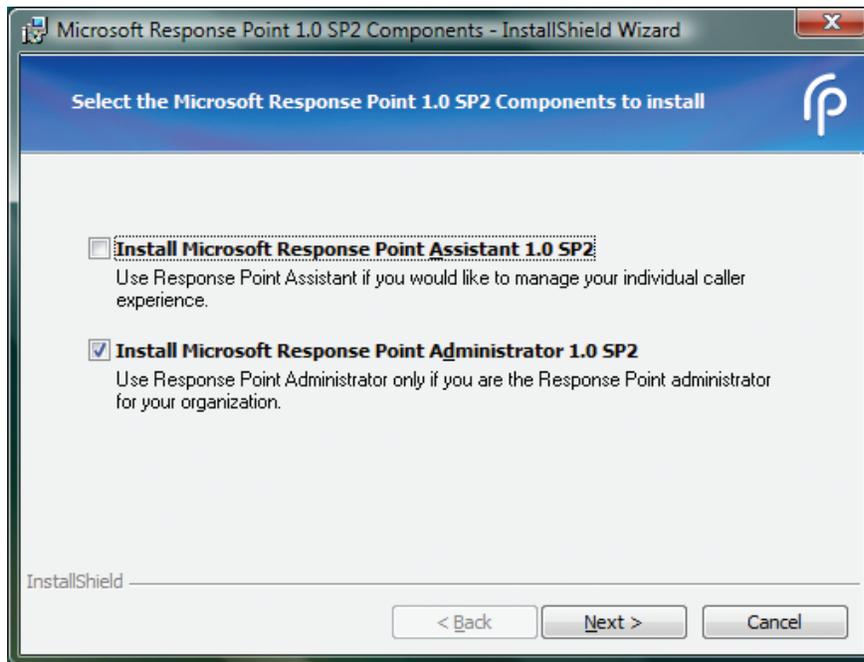


Figure 4: Setup wizard with the Administrator program selected

3. On each page, click **Next** when you are ready to move to the following page of the wizard.
4. When you reach the last page of the wizard, click **Finish**.

Starting Response Point Administrator and Logging On to the Base Unit

Next, you'll start Administrator and log on to the base unit.

► To start Administrator and log on to the base unit:

1. Click **Start**, point to **All Programs**, and click **Microsoft Response Point Administrator**.

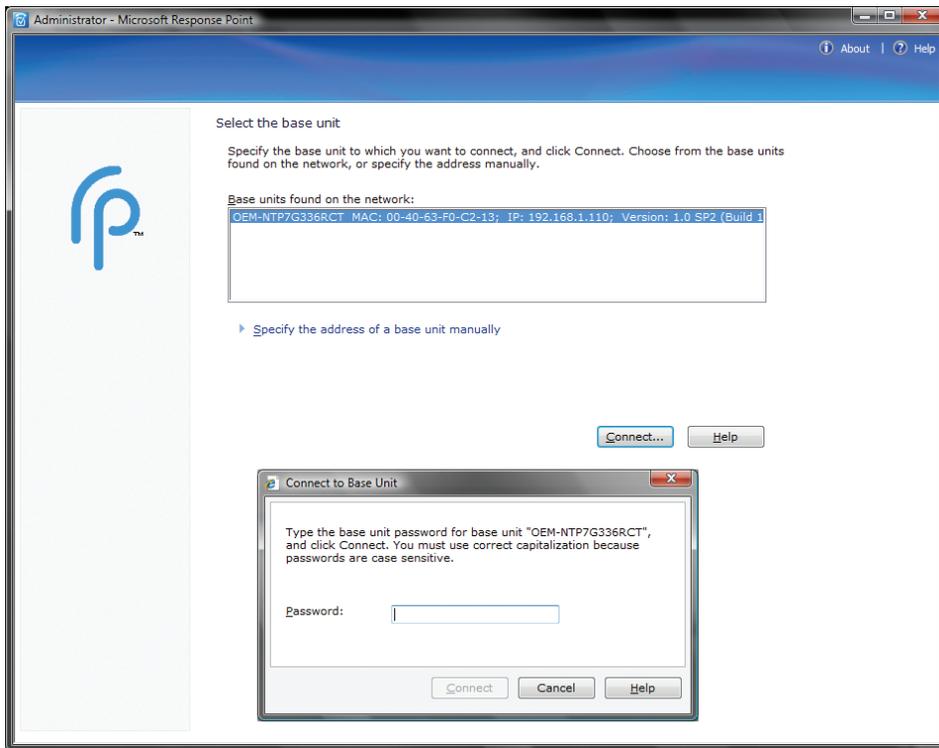


Figure 5: Response Point Administrator

2. Select the base unit that you just installed, and click **Connect**.

Note: A few seconds may pass. If you don't see the base unit listed, it's likely that the base unit or the computer on which Administrator is running is not connected properly to the LAN. Make sure all cables and power cords are connected.

3. When prompted to provide a password, type the default password, *admin*. It's recommended that you change this password as soon as possible for security purposes.
4. Click **Connect** again.

Before you configure your phones, it is important that you set the date and time on the base unit. If you do not take this step first, you may have to reconfigure any phones you have already set up.

► To set the date and time on the base unit:

1. In Administrator, click the **Base Unit** button.
2. In the **Tasks** pane, under **Properties**, click **Change Date and Time**.
3. In the **Set Date and Time on Base Unit** dialog box, enter the correct values for the date and time settings.
4. Click **OK**. The base unit will automatically restart. After it restarts, the base unit will display the new date and time.

Next, you'll configure the first two phones of your new phone system.

Configuring a Phone Using Response Point Administrator

The next step is to configure one of the phones you connected to the LAN, using the Configure Phone Wizard.

► To configure a phone:

1. In Administrator, click the **Phone System** button.
2. In the **Tasks** pane, under **Phone**, click **Add Phone**, which displays the Configure Phone Wizard.



Figure 6: Have you connected your phone page

3. Confirm that the phone is connected and plugged in, select the check box at the bottom of the **Have you connected your phone** page, and click **Next**.

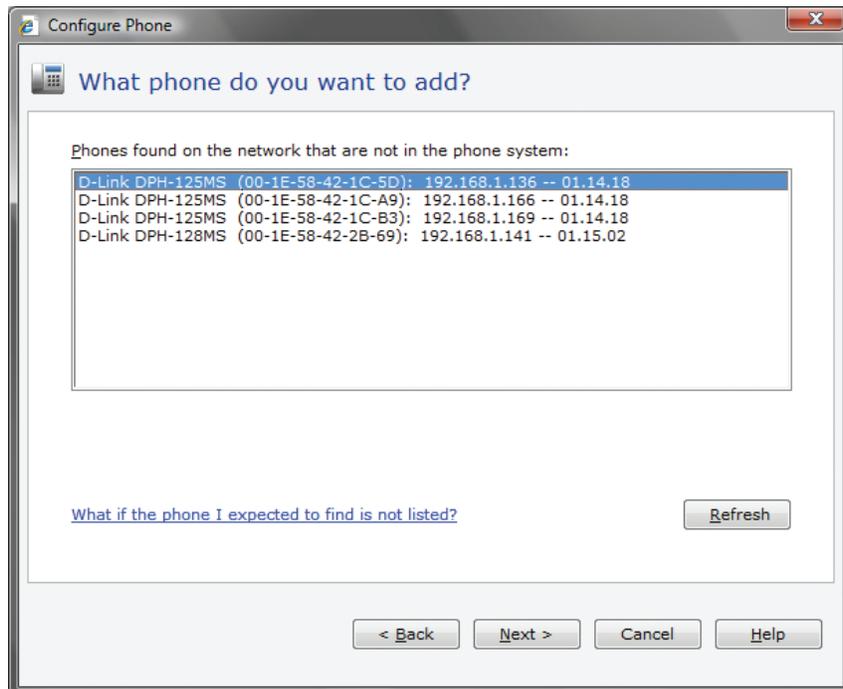


Figure 7: What phone do you want to add page

4. In the **Phones found on the network** list, click one of the phones you just connected, and click **Next**. See the next page for more instructions on completing this wizard.

Setting Up a New User on a Phone

For this step, you'll add a new user and assign that user to the phone you just configured, and specify a few mandatory settings in the **New User** dialog box.

► To configure a new user on a phone:

1. On the **Who will receive calls on this phone** page, click **Assign User**, and click **New User**.
2. On the **Identification** tab, in the **User type** box, click **Person** if it is not already selected.
3. In the **Name** boxes, type the first and last name, and optional nicknames and titles of the person who will use this phone. You should specify nicknames and titles if you think callers will use them when asking for this user.

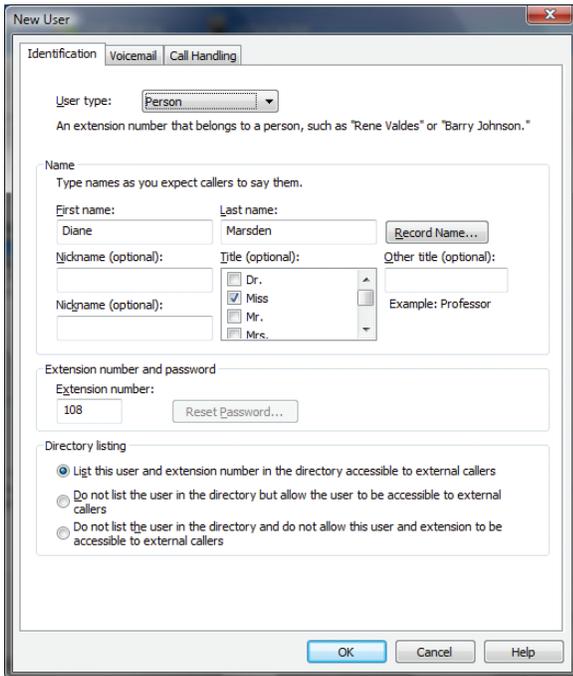


Figure 8: New User dialog box

4. In the **Extension number** box, change the extension number, if necessary, click **OK** in the **New User** dialog box, and then **OK** in the **Administrator - Select** dialog box.
5. Back on the **Who will receive calls on this phone** page, note that the person's name is assigned to Line 1 with the extension number you specified.

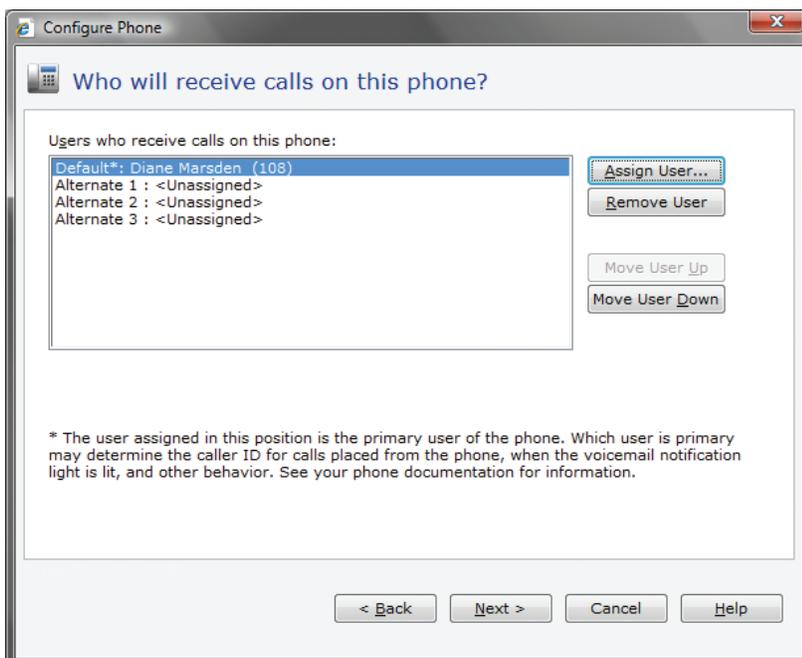


Figure 9: Who will receive calls on this phone page

6. Click **Next**.
7. Click **Finish**.

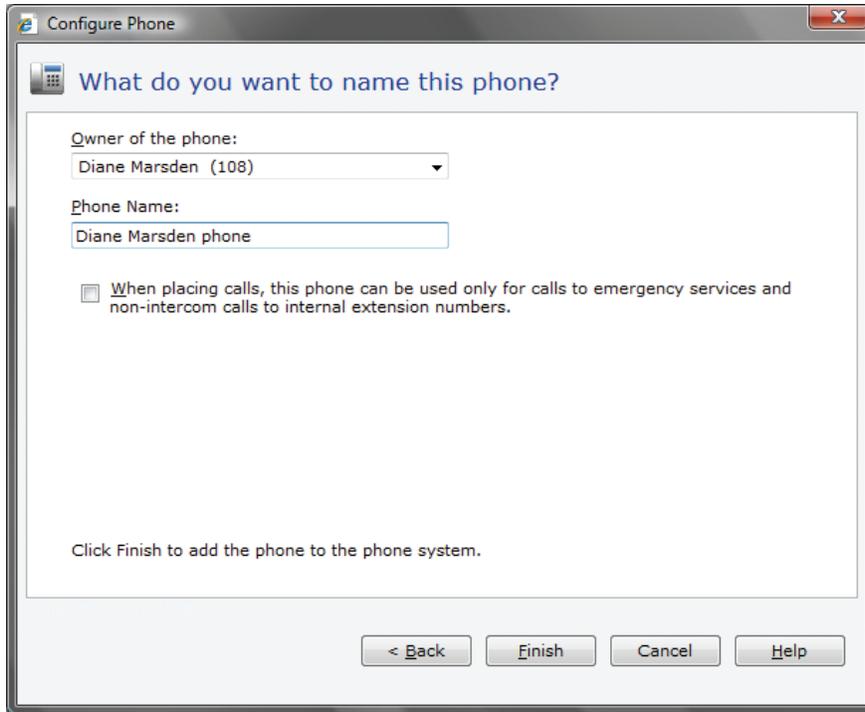


Figure 10: What do you want to name this phone page

8. When the configuration process is complete, click **Close**.

↻ Repeat the instructions on pages 11 through 13 for the second phone. It's a good idea to test these two phones and the voice services, as described in the following pages, before adding more phones to your new phone system.

Tip: If you plug in multiple new phones before configuring them, it's a good idea to write down the last four digits of the MAC address (usually located on the bottom of each phone), along with a name for each phone, such as "Diane Marsden phone." Having this information will help you recognize the phone and remember where each one is installed for future reference.

Testing Two Phones

Now that you have the phones connected to the LAN and configured using Administrator, it's time to test the connection and configuration to make sure they work.

Note: You can dial extension numbers in several ways:

- Dial the number manually using the keypad.
 - Press the **Response Point button**, and say the name of the person you want to call—in this case, the name of one of the users assigned to a phone that you just configured.
-

▶ **To test the phones:**

1. Using the first phone, dial the extension number assigned to the user on the second phone, and confirm that it rings.
2. Go to the second phone, and dial the extension number of the user on the first phone.

If the phones did not work, the likely cause is a loose connection. Make sure all cables and cords are properly seated into their respective ports, phone jacks, and electrical outlets.

Next, you're going to setup a voice service.

Setting up a Voice Service

The phone line gateway translates incoming phone calls so they can be sent over your office LAN, and translates outgoing calls into the format used by traditional phone service. If you are not going to be using a physical gateway to translate incoming and outgoing calls over your network and will be using a Voice over IP (VoIP) service please go to page 18 for further details.

Note: If possible, avoid disconnecting your primary phone line while setting up Response Point. If you have a secondary phone line available, use it to set up and test the phone system connection.

► **To connect the phone line gateway to the local area network (LAN) and to its power source:**

1. Plug a phone line cable into the Line or FXO port of the phone line gateway, and then plug the other end of the cable into the phone jack.
2. Plug an Ethernet cable in the LAN port, and then plug the other end into the LAN.
3. Connect the power cord into a nearby electrical outlet.

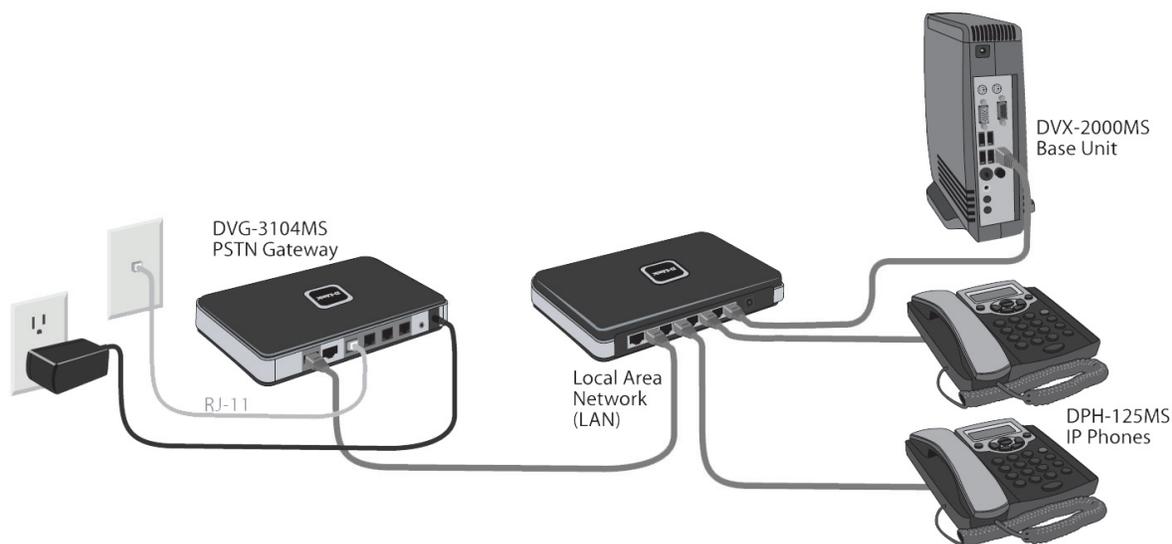


Figure 11: Installation of the phone line gateway

You're finished with your initial hardware installation! A representation of your phone system looks like this:
Next, you're going to configure a phone service, starting with configuring the phone line gateway.

Adding a Voice Service with the Phone Line Gateway

Go back to Administrator to configure the phone line gateway in the Configure Voice Service Wizard.

► To configure the phone line gateway:

1. In Administrator, click the **Phone System** button.
2. In the **Tasks** pane, under **Voice Service**, click **Add Voice Service** to launch the Configure Voice Service Wizard.

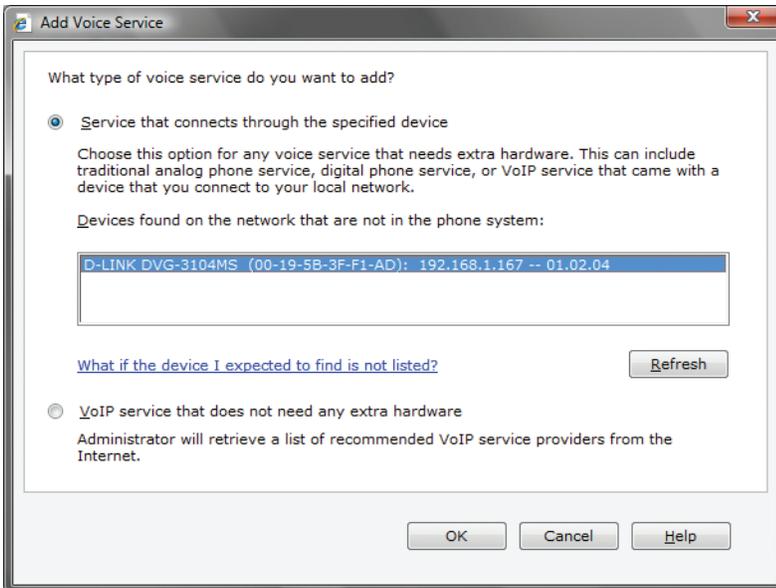


Figure 12: What type of voice service do you want to add page

3. Select the **Service that connects through the specified device** radio box and confirm that the phone line gateway is connected and plugged in.
4. Click the phone line gateway from the list which you just connected, and click **OK**.
5. Click **Next**, after you have confirmed the identity of the phone line gateway.

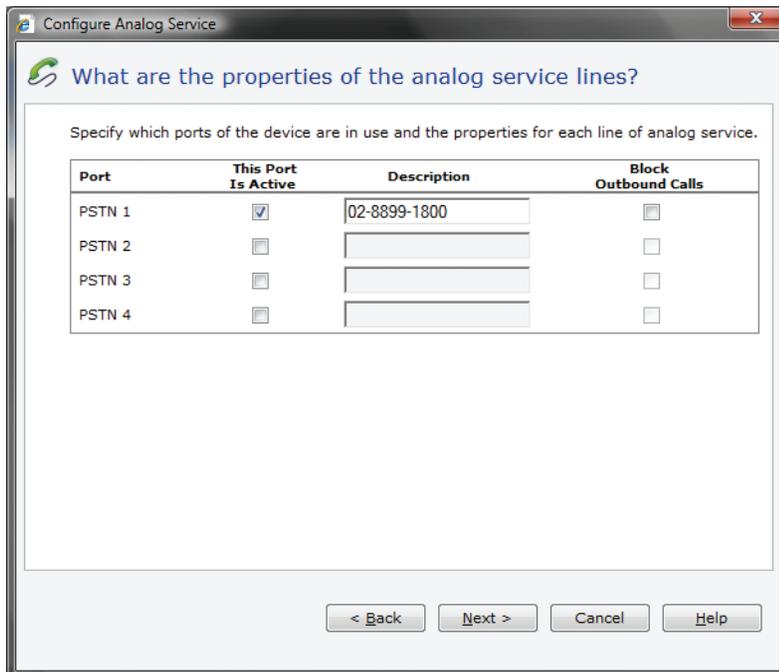


Figure 13: What are the properties of the analog service lines page

6. Select the **This Port Is Active** check box. In the **Description** box, type the phone number associated with this line, and click **Next**.

7. Type a name for the phone line adapter—for example, "Line 1" or the name of the provider to make troubleshooting at a later time easier and click **Next**.

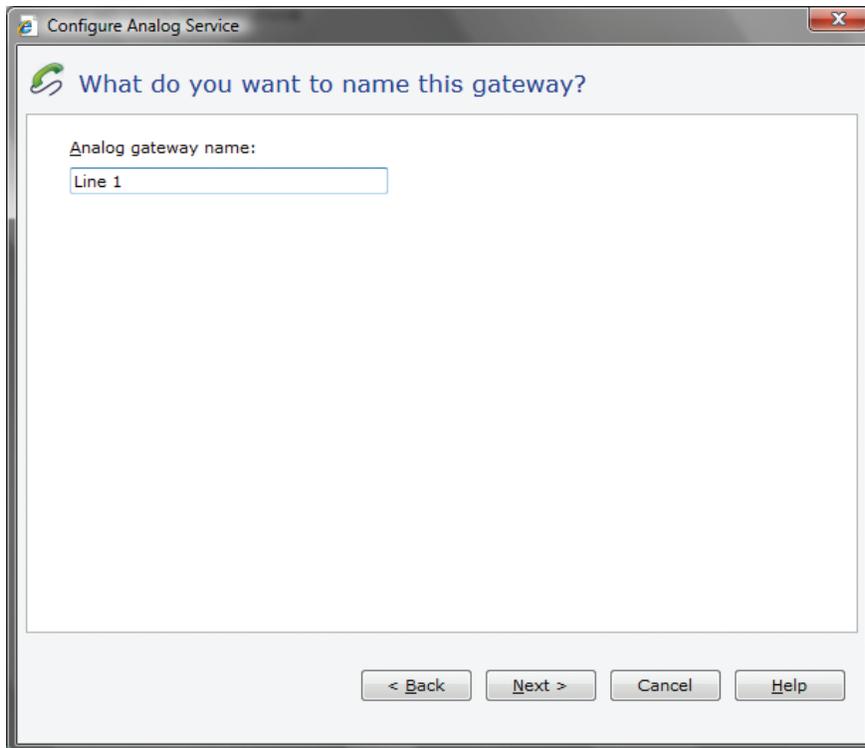


Figure 14: What do you want to name this gateway page

8. Select the **Allow calls through analog service** check box. Take note that if another voice service is configured first the Prefix may change.

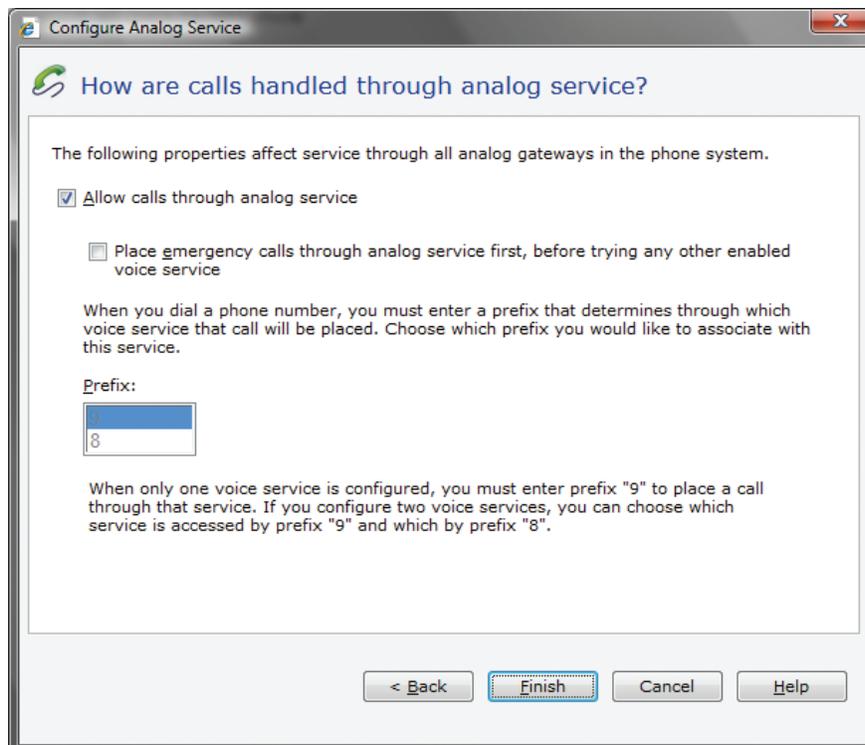


Figure 15: How are calls handled through analog service page

9. Click **Finish**, then after the configuration process is complete, click **Close**.

Next, you're going to test the phone system connection.

Adding a Voice Service with a Voice over IP Telephony Provider

Go back to Administrator to configure Voice over IP in the Configure Voice Service Wizard.

To configure a Voice over IP Telephony Provider:

1. In Administrator, click the **Phone System** button.
2. In the **Tasks** pane, under **Voice Service**, click **Add Voice Service** to launch the Configure Voice Service Wizard.

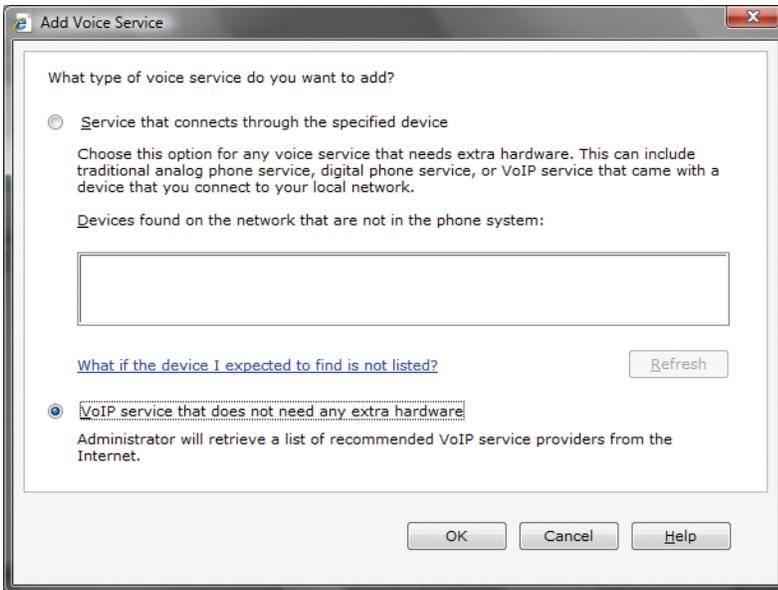


Figure 16: What type of voice service do you want to add page

3. Select the **VoIP service that does not need any extra hardware** radio box, and click **OK**.

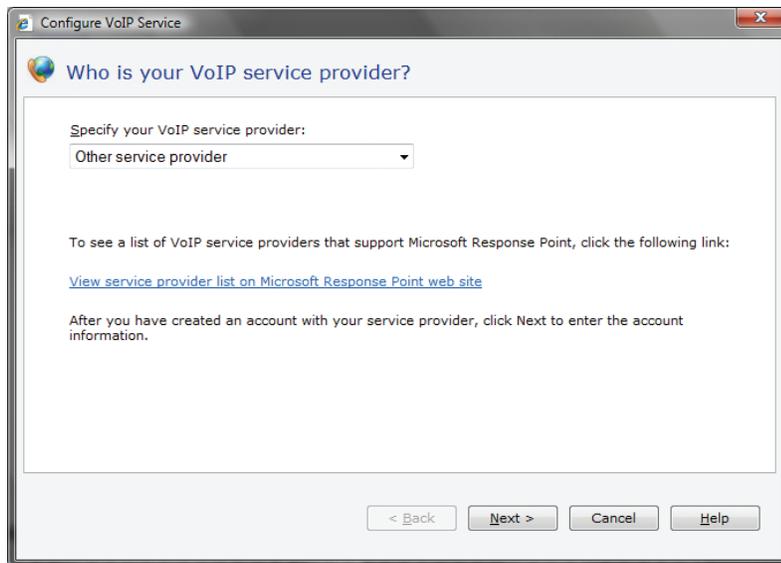


Figure 17: Who is your VoIP service provider page

4. Click the **dropdown list**, and select your VoIP Telephony Provider from the list or if the Provider is not listed, select **Other Service Provider** and click **Next**.

5. Fill in all of the information provided by your VoIP Telephony Provider into the **Address of record (AOR) or URI**, **Authentication ID or User ID**, **Proxy server address**, **Password**, **Confirm password**, **Default domain**, and **Registration interval (sec)** boxes.

The screenshot shows a window titled "Configure VoIP Service" with a sub-header "What information did your service provider give you?". Below the header is a paragraph: "Your VoIP service provider will give you the following information. Be sure you type an accurate entry in each box." The form contains several input fields and checkboxes:

- Address of record (AOR) or URI:** 0288991800@voice.mibroadband.com.:
- Authentication ID or User ID:** 0288991800
- Proxy server address:** byo.engin.com.au
- Password:** [masked]
- Confirm password:** [masked]
- Default domain:** voice.mibroadband.com.au
- Detect inband DTMF tones**
- Allow incoming calls through this service**
- Registration interval (sec):** 900

At the bottom are four buttons: "< Back", "Next >", "Cancel", and "Help".

Figure 18: What information did your service provider give you page

6. Select the **Detect inband DTMF tones** check box and the **Allow incoming calls through this service** check box, and click **Next**.
7. Click **Next**, on the Assign Direct-Dial Numbers page for now as we will cover this later on page 32.

The screenshot shows a window titled "Configure VoIP Service" with a sub-header "What caller information do you want to display?". Below the header is a paragraph: "If your service provider lets you choose what to display when people receive calls from you, enter the information below. Otherwise click next." The form contains:

- Caller ID display name or number:** My Business

Below the input field is a paragraph: "The information you type here might not appear in the Caller ID window the way you expect. For example, your service provider might:" followed by a bulleted list:

- Override your entry.
- Ignore your entry.
- Display nothing if you leave this box empty.

Below the list is another paragraph: "Test the configuration to make sure the display name and number appear correctly. If it does not, contact your service provider for help."

At the bottom are four buttons: "< Back", "Next >", "Cancel", and "Help".

Figure 19: What caller information do you want to display page

8. In the **Caller ID display name or number** box, type your phone number or your business name, and click **Next**.

9. In the **Service name** box, type a description for this service, and click **Next**.

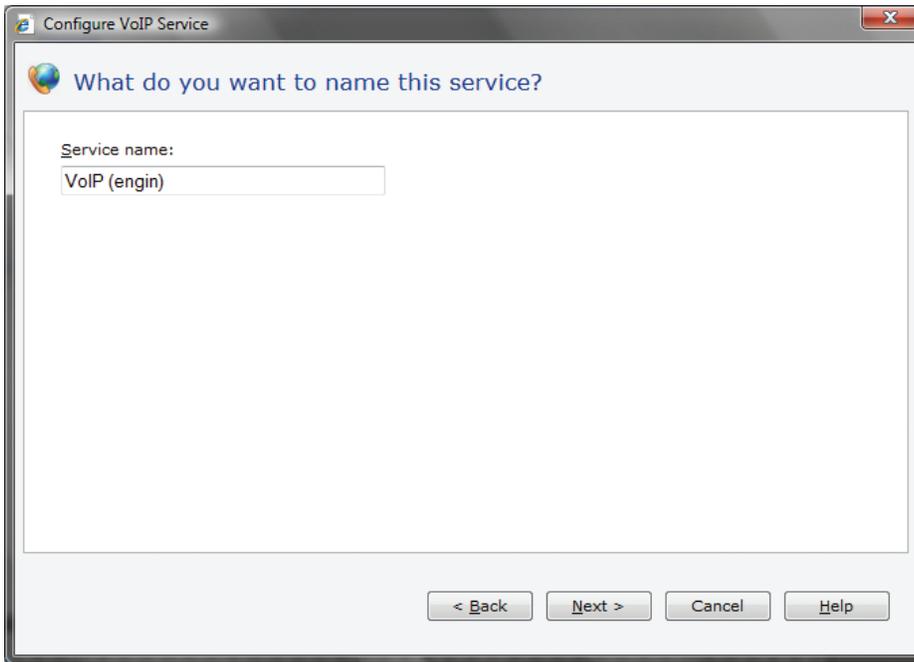


Figure 20: What do you want to name this service page

10. Select the **Allow calls to be placed through this voice service** check box. Take note that if another voice service is configured first the Prefix may change.

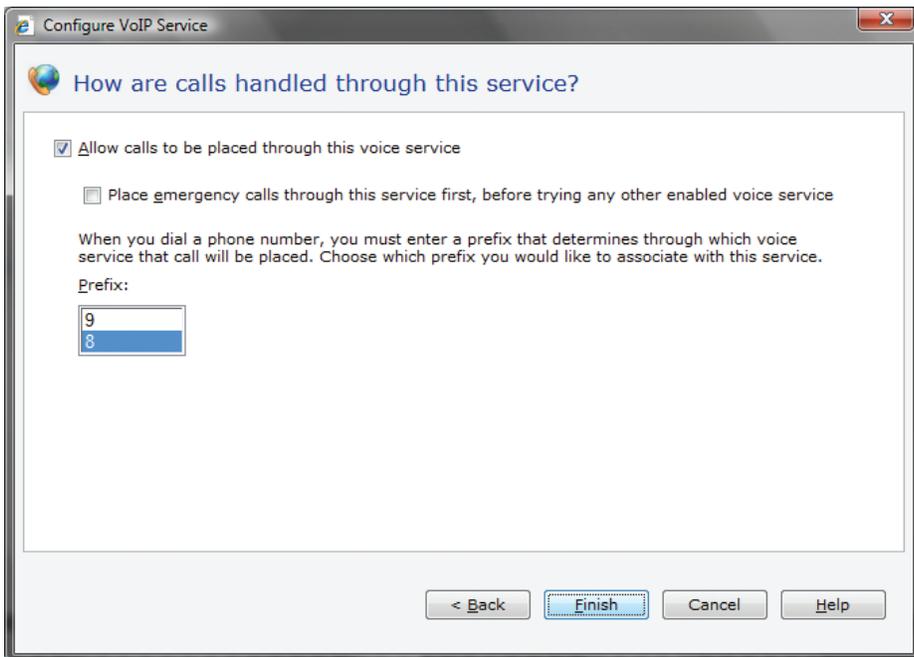


Figure 21: How are calls handled through this service page

11. Click **Finish**, then after the configuration process is complete, click **Close**.

Next, you're going to test the phone system connection.

Testing the Phone System Connection

Now that the hardware is installed and the phones and voice service are configured, it's time to test inbound and outbound calls.

► To test the phone system with an outbound call:

1. Using one of the phones you installed, dial **9** and then an external phone number.
2. Make sure the external phone number rings.

► To test the phone system with an inbound call:

1. Using a mobile phone or an outside phone line, place an inbound call to your office phone number.
2. When prompted, ask for the name of the user assigned to one of the phones you previously installed.

Note: If this step does not work, make sure all cables and cords are properly seated into their respective ports and outlet.

Now that both internal and external phone services are set up and working successfully, you can do one (or all) of the following:

- Install the Assistant program.
- Learn more about call routing plans and how you can specify who answers incoming calls (on page 24).

Installing Response Point Assistant

The Assistant program gives you, as an individual user, more options to configure Microsoft® Response Point™, including specifying how calls are forwarded, how voice messages are retrieved (either by phone or as attachments to e-mail messages, or both), how you are notified of incoming calls, and so forth.

► To install Assistant:

1. Insert the Response Point CD.
2. Select **Install Microsoft Response Point Assistant**, and click **Next**.

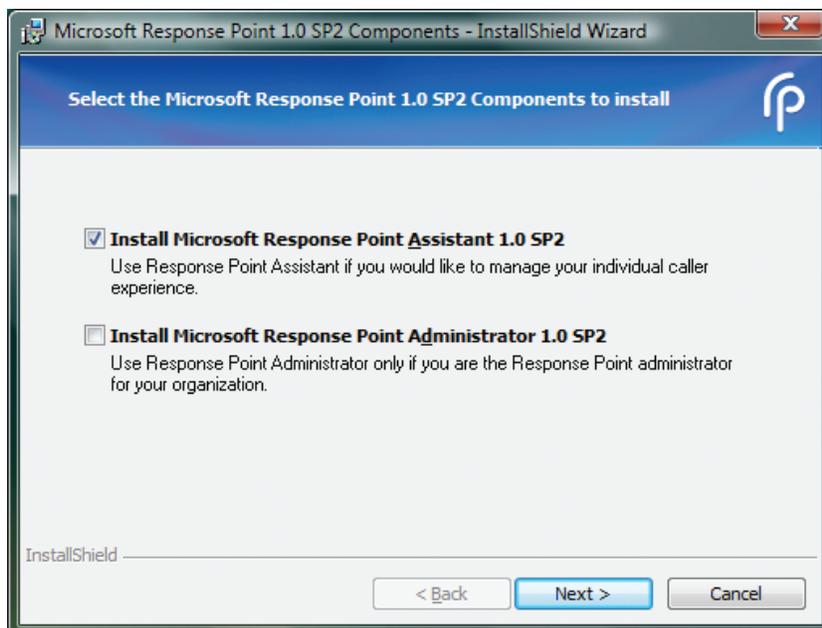


Figure 22: Setup wizard with the Assistant program selected

3. On each page, click **Next** to move to the following page of the wizard.
4. When you reach the last page of the installation wizard, click **Finish**.

► **To start Assistant:**

1. On the **Start** menu, point to **All Programs**, and click **Microsoft Response Point Assistant**.
2. In the **Extension number** box, type the extension number of the person who will use the Assistant program.
3. In the **Password** box, type the password of the user you specified. The default is 9999.
4. If necessary, select a base unit from the list.
5. Click **Log On**.

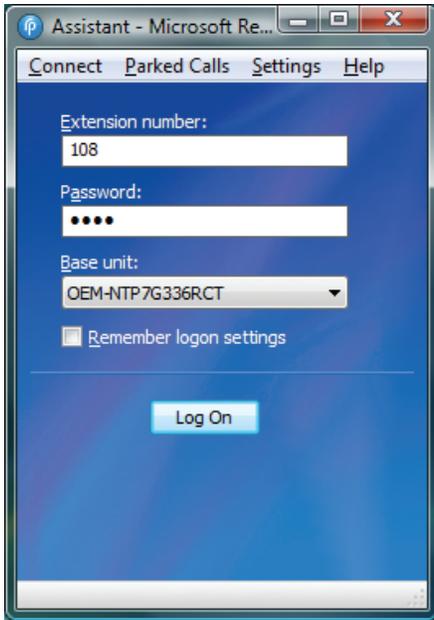


Figure 23: Response Point Assistant

6. Once you have logged onto the base unit you will see a list of users that are on the phone system along with their status.

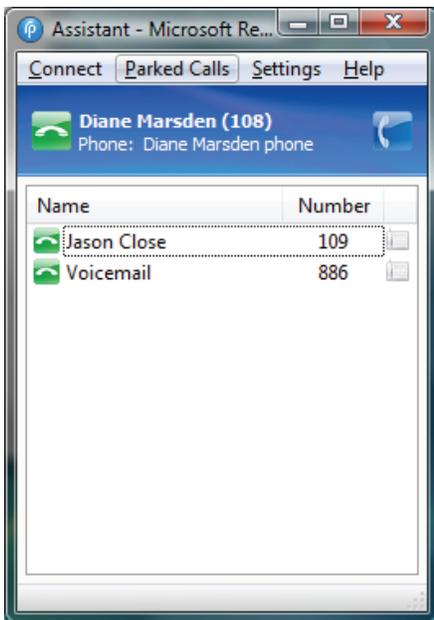


Figure 24: Response Point Assistant

7. The Assistant allows end users to configure personal settings for their account on the phone system while also allowing you to setup Call Forwarding and retrieve Parked Calls.
8. Users can also make a phone call without having to touch the handset, by simply clicking on a contact from the Assistant the handset will engage the Speakerphone and call the contact.

Click **Help** for assistance on the options available to you and other Response Point users.

Additional Response Point Features to Configure

Among the Microsoft® Response Point™ features you can configure, it's recommended that you start with some, or all, of these:

- **Choosing a Call Routing Plan**
A call routing plan determines how incoming calls are handled in your organization. You might have the automated voice answer calls (the Automated Receptionist Plan); designate that an employee answers calls (the Receptionist Plan); or setup most or all phones to ring and the first available person will answer calls (Multiple Phones Ring Plan, a type of Receptionist Plan). (Of course, the actual social agreement about answering calls among coworkers is at your discretion.)
- **Setting Up an Operator**
An employee in your office can be designated to take calls that cannot be understood by the automated voice (the Automated Receptionist).
- **Setting Greetings and Prompts for the Automated Receptionist to Use**
The Automated Receptionist Plan is useful for your organization if you want the Automated Receptionist to answer calls and transfer them to employees as requested.
- **Configuring the E-Mail Delivery of Voice Messages**
Voice messages can be retrieved by phones in the Response Point phone system, or delivered to users as e-mail attachments.
- **Changing the Base Unit Password**
An important step you can take to help make your phone system more secure is to change the default password.
- **Configuring VPN Access for Remote Users**
Enable Virtual Private Network (VPN) access so that users can use the phone system from remote networks.
- **Configuring Direct-in Dial Numbers**
Configure direct-dial VoIP or digital numbers so that you can give customers multiple business numbers without the hassle and cost of setting up new phone lines, while having this number directly calling a user or group.
- **Configuring External Access**
Permit specified external phone numbers (such as your mobile phone number) to access Response Point™ remotely.
- **Setting up Customizable after-hours schedules**
Schedule the Automated Receptionist to handle calls after-hours, on holidays, and during business closures.
- **Configuring Assistant Features**
Import batches of business and personal contacts, configure Caller-ID to look at your Outlook Contacts, Setup Call Forwarding and Voicemail.
- **Two-click Backup and Restore**
Protect important phone system configurations, voicemail files, and contacts using this simple method.

Instructions for configuring these features appear on the following pages.

Choosing a Call Routing Plan

Administrator gives you several options for setting up a call routing plan for your new phone system.

A call routing plan determines who answers calls when they come into your office. Possible call routing plans include:

- **Automated Receptionist Plan.** An automated voice answers calls and transfers them appropriately. This is the default plan.

Note: You can also specify an operator to receive calls if the Automated Receptionist cannot understand the caller's request.

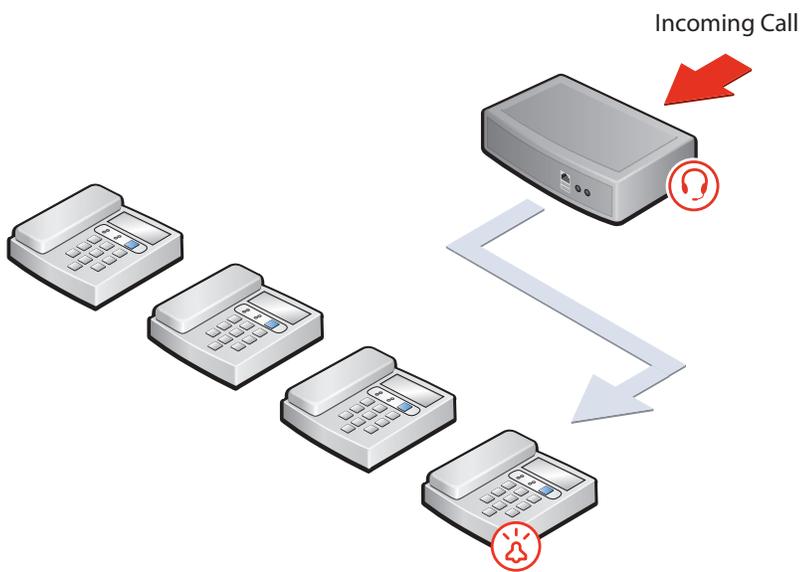


Figure 25: Automated Receptionist Plan

- **Receptionist Plan.** Someone in your office answers calls and transfers them appropriately.

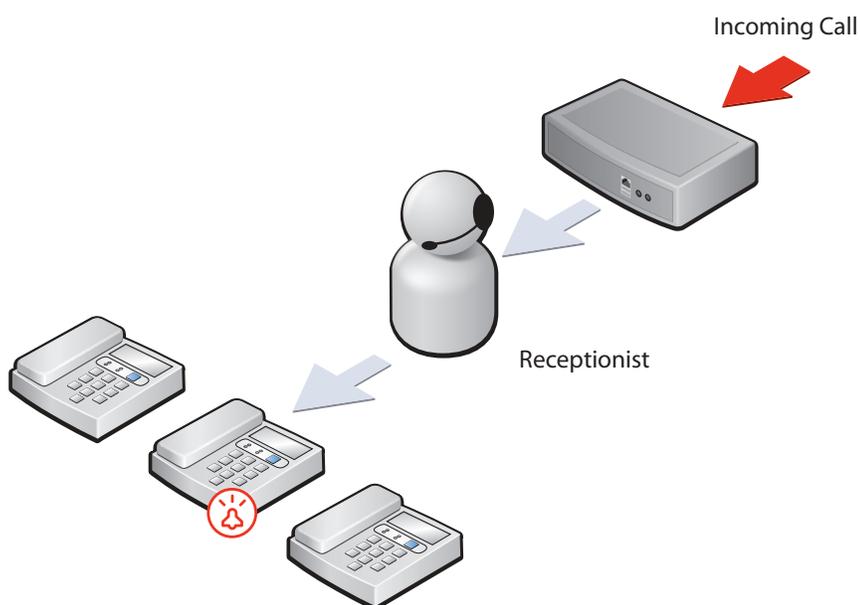


Figure 26: Receptionist Plan

- **Multiple Phones Ring Plan**, a type of Receptionist Plan. All, or most, phones ring and the first available person answers calls and transfers them appropriately.

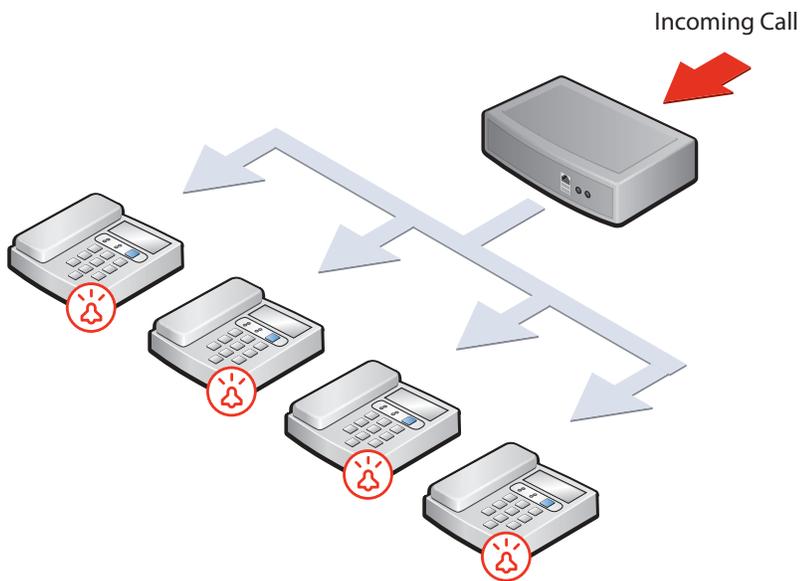


Figure 27: Multiple Phones Ring Plan

These basic call routing plans can be customized in various ways. For example:

- You can specify the Receptionist Plan but change it to the Automated Receptionist Plan during team meetings or before your office closes for the day.
- You can choose the Receptionist Plan and customize it so that if your receptionist is not available to answer, incoming calls are forwarded to another employee.
- You can specify that multiple phones ring when a call arrives, but exclude the guest phone in the reception area.

► **To choose and customize a call routing plan:**

1. In Administrator, click the **Call Routing** button.
2. In the **Tasks** pane, click **Choose How to Answer Calls**, and adjust settings for either the Automated Receptionist Plan or Receptionist Plan, as appropriate.
If you chose the Automated Receptionist Plan, see "Setting Up an Operator" on page 27.
3. Click **OK**.

For information on the Multiple Phones Ring Plan, see "Setting Up a Multiple Phones Ring Plan" on page 26.

Setting Up a Multiple Phones Ring Plan

The Multiple Phones Ring Plan is a manually configured plan, based on the Receptionist Plan. It allows many or all phones to ring when there is an incoming call. Both the Multiple Phones Ring Plan and the Receptionist Plan are configured so that a person answers incoming calls. However, the Multiple Phones Ring Plan may work better in your office if the following is true:

- Your receptionist is unavailable to answer the phone a significant amount of the time.
- You don't have a dedicated receptionist.
- There is a group of people who are assigned the task of answering incoming calls.
- Incoming calls are answered by the person who is available or gets to the phone first.

This plan usually involves some sort of social agreement among coworkers. For example, if the receptionist doesn't pick up an incoming call in three rings, someone else will answer one of the other phones.

Do the following to set up a Multiple Phones Ring Plan in your office. First, create a job-role user, for example, called "Receptionist." This user conceptually represents all of the people who perform the role of receptionist in your office. Then, assign the "Receptionist" user to the phone of each person who performs that role.

For example, Renee and Diane are assigned to answer phones in the office. After creating the user named "Receptionist," you configure Renee's phone so that it has two users: "Renee" and "Receptionist." Similarly assign "Receptionist" as a user on Diane's phone in addition to user "Diane." On the **Call Routing** page, you can specify that the "Receptionist" user receive incoming phone calls. When calls are sent to the "Receptionist" user, both Renee's and Diane's phones ring because "Receptionist" is assigned to both phones.

► To set up a Multiple Phones Ring Plan using the job-role user:

1. In Administrator, click the **Phone System** button, and click **Add User**.
2. In the **New User** dialog box, on the **Identification** tab, click **Job Role** as the **User type**, type the name for the role (in this example, "Receptionist"), and set other properties as necessary.
3. Click **OK** in the **User Properties** dialog box.

Next, you'll assign this user to the phones used by those people in your office who perform this role.

► To assign a job-role user to a phone:

1. In Administrator, click the **Phone System** button, and click **Edit Phone**.
2. Choose a phone used by someone who is assigned to answer phones, and click **OK** in the **Administrator - Select** dialog box.
3. On the **Confirm identity of the phone** page, click **Next**.
4. On the **Who will receive calls on this phone** page, click **Assign User**, and select the job-role user (in this example, "Receptionist") in the list.
5. Click **OK**.
6. Complete the wizard so that the phone is updated.
7. Repeat steps 1-6 for each phone that is used by someone who is assigned to answer calls.

Now you'll assign the job-role user to receive incoming phone calls.

► To assign a user to receive incoming calls:

1. In Administrator, click the **Call Routing** button.
2. In the **Tasks** pane, click **Choose How to Answer Calls**.
3. In the **Choose How to Answer Call** dialog box, click **Receptionist Plan**, and choose the job-role user (in this example, "Receptionist").
4. Click **OK** in the **Choose How to Answer Calls** dialog box.
5. Place a test call to your office.

Each of the phones that you edited should now ring when the call arrives.

Setting Up an Operator

Setting up an operator is a backup feature of the Automated Receptionist Plan. Sometimes the Automated Receptionist may not be able to understand a caller, or perhaps the caller may prefer speaking with a person. In these cases, you don't want to lose the call, so you can specify that an employee in your office take these calls and transfer them as appropriate.

► To set up an operator:

1. In Administrator, click the **Call Routing** button.
2. In the **Tasks** pane, click **Choose How to Answer Calls**.
3. Click **Assign an operator**, and select the user who will perform this role.
4. Click **OK**.

Setting Greetings and Prompts for the Automated Receptionist to Use

The Automated Receptionist Plan is useful for your organization if you want the automated voice (the Automated Receptionist) to answer calls and transfer them to other employees as requested.

Setting the welcome greeting, opening prompt, and answers to callers' questions is important because people hear these prompts each time they call your business and respond to them when they request to speak to an employee. Descriptions of each follow:

- Welcome greeting: The first words callers hear should be short, as in: "Thank you for calling Fourth Coffee."
- Opening prompt: "Please say the name of the person or group you would like to talk to." You must use this exact wording so that Response Point can detect the answer from callers.
- Answers to callers' questions—for example, "What are your hours?" and "What is your location?"

► Configure the welcome greeting and opening prompt:

1. Click the **Call Routing** button.
2. In the **Tasks** pane, click **Configure Automated Receptionist Properties**.
3. Select the **Welcome greeting** check box.
4. Click **Configure**, and decide whether you want to use the system greeting, record a custom greeting, or upload an audio file with the greeting you want.
5. When you're finished customizing the greeting, click **OK**.
6. Click **Configure** to record the opening prompt for the **Please say the name of the person or group** check box, which is automatically selected for you. This prompt is played immediately after the welcome greeting. It must say:
 - "Please say the name of the person or group you would like to talk to."
7. When you're finished specifying prompts, click **OK**.
8. Call your business to listen to your new welcome greeting and opening prompt. Make sure these recordings reflect the image of your business that you want to project.

Tips for Recording Greetings and Prompts

The quality of your greetings and prompts is important. These recordings are often the first impression that people have of your business. Review the tips in this section to help you understand how to create professional scripts and audio recordings that will best represent your organization.

Script, Audio Recording, and Test Tips

- Be polite and gracious. This is the cornerstone of a good voice interface. A system of greetings and prompts that are respectful of callers and their needs may help build your business.
- Be brief and concise. Make every word count. Avoid including additional information in a greeting, such as promotions, disclaimers, lists of employees, and so forth.
- Recording a greeting or prompt may take some practice. You can expect to record it several times before you have the final version.
- When recording, speak the entire phrase at a consistent, moderate speed. If you speak too quickly, your callers may have difficulty understanding what you said. If you speak too slowly, regular callers may get impatient waiting for the recording to finish before they can speak.
- Practice saying the phrase several times before you begin recording. You want your final recordings to sound as professional as possible, so practice helps you to find the right speed, tone, and delivery.
- When recording choose a tone of voice that matches the personality of your business. If your business is a neighborhood bakery, you may want a friendly, informal tone. If your business provides financial services, however, you may want a professional, formal tone.
- The final recordings should not have unintentional pauses or verbal stutters (such as "uh..."). If you are not happy with the recordings, do them again.
- Call your office phone number so you can experience the greetings and prompts as callers will experience them. Try to imagine how callers will react to them: Are they too short or too long? Are they easy to understand?
- Because these are the voice of your business, you may also want to ask a few callers their opinion of the recordings.

Configuring the E-Mail Delivery of Voice Messages

You can specify that voice messages are deliverable as e-mail attachments. To do that, you configure the e-mail server that the base unit will use for sending the messages.

Later, you specify voicemail settings for individual users by editing the settings in the **User Properties** dialog box. Likewise, employees can specify how they would like to retrieve their voice messages using the Response Point Assistant program—either as e-mail attachments or messages they can retrieve on their phones. For configuration of the **User Properties** see “Assistant Settings” on page 39.

► To configure an e-mail server for sending voice messages:

1. In Administrator, click the **Base Unit** button.
2. In the **Tasks** pane, under **Properties**, click **Configure E-Mail Server**, and make selections as appropriate.

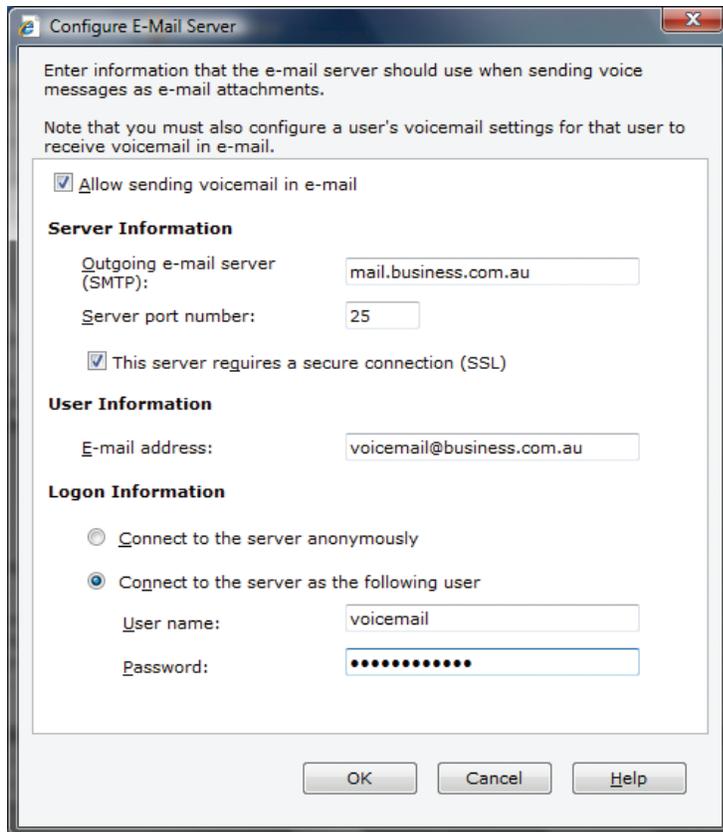


Figure 28: Configure E-Mail Server dialog box

3. Click **OK**.

Changing the Base Unit Password

It's a good idea to change the password of the base unit regularly to help maintain system security. This password is used by the person who manages Microsoft® Response Point™ using Administrator. Consider changing the default password (*admin*) right away.

Note: The password for the base unit can be a maximum of 256 characters. Password-cracking software, given enough time, can crack any password; however, it still can take months to crack a strong password. Consequently, it's a good idea to use and change your strong password regularly.

For a password to be strong, it should be at least seven characters long. Because of the way passwords are encrypted, the most secure passwords are 7 or 14 characters long. Your password should contain letters (A, B, C, a, b, c...) and numerals (0, 1, 2, 3, 4, 5, 6, 7, 8, 9) and symbols (` ~ ! @ # \$ % ^ & * () _ + - = { } | [] \ : " ; ' < > ? , . /).

For a password to be strong, it should:

- Have at least one symbol character in the second through sixth positions.
- Be significantly different from prior passwords.
- Not contain your name or user name.
- Not be a common word or name.

► To change the base unit password:

1. In Administrator, click the **Base Unit** button.
2. In the **Tasks** pane, under **Properties**, click **Change Password**.



Figure 29: Configure E-Mail Server dialog box

3. In the **Current password** box, type the current password (the default is *admin*).
4. In the **New password** and **Confirm password** boxes, type the new password, and make note of it for later use.
5. Click **OK**.

Configuring VPN Access for Remote Users

Virtual Private Networking allows for the Reponse Point phone system to reach much further than just a localized network in your office which can at times make your access to your employees difficult especially if they work from home or interstate. Employees can call imported contacts, edit settings and devices, and use voice commands from a home or satellite office, as if they were working from your office headquarters.

This feature also allows for remote networks not necessarily over a VPN connection to be able to access the phone system, but allow for you to segment your network so that your voice and data traffic is seperated allowing for a better quality of audio for the phone system.

► Configuring VPN Access :

1. In Administrator, click the **Base Unit** button, and click **Configure VPN Access**.

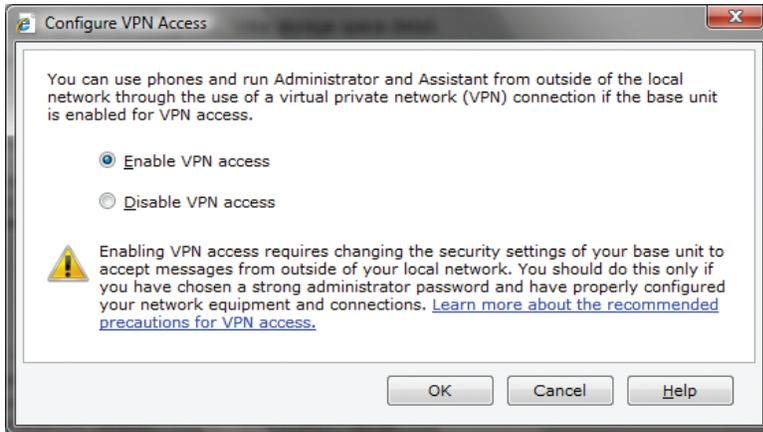


Figure 30: Configure E-Mail Server dialog box

2. Click the **Enable VPN Access** radio button.
3. Click **OK**. The base unit will automatically restart. After it restarts, the base unit will allow remote networks access to the phone system.

► VPN Limitations :

You can use the Response Point Administrator, Assistant, and phones from a remote network through the VPN. However, the base unit and any gateway devices must remain on the local network. Even though the VPN allows remote access to the local network, it doesn't allow you to do everything remotely that you could do if you were on site:

Configure phones on the local network only - Remote phones can be edited from the remote network but not added initially. You must configure phones on the local network so the base unit can discover the device for the first time. Once you configure a phone, you can manually deliver it to the remote location and plug it into the remote network. The phone's configuration is stored on the base unit locally and will apply as soon as the device is connected locally or remotely.

Perform firmware upgrades on the local network only – Therefore, you must bring all remote phones to your office headquarters to upgrade device firmware, and then return the devices to the remote location when you're finished.

Configuring Direct-in Dial Numbers

Direct-in dial numbers (DIDs) are virtual phone numbers that you can purchase individually or in bulk from your VoIP or digital service provider. DIDs allow your employees to have their own phone numbers, but don't require that you install a separate line for each number. Because a virtual phone number has no geographical limits, you can select any area code for the DID. This way, you can create a regional presence, even if your business is in another state, and help long-distance customers save on toll charges.

You can assign DIDs to Response Point users using the configuration wizards for VoIP or digital services. Calls to direct-dial numbers go directly to the assigned user without going through the receptionist or Automated Receptionist. Numbers that you don't specify as direct-dial numbers automatically go to your receptionist or Automated Receptionist, depending on which call-routing scenario is configured in your office.

► Configuring Direct-in Dial Numbers :

1. In Administrator, click the **Base Unit** button, and click **Edit Voice Service**.

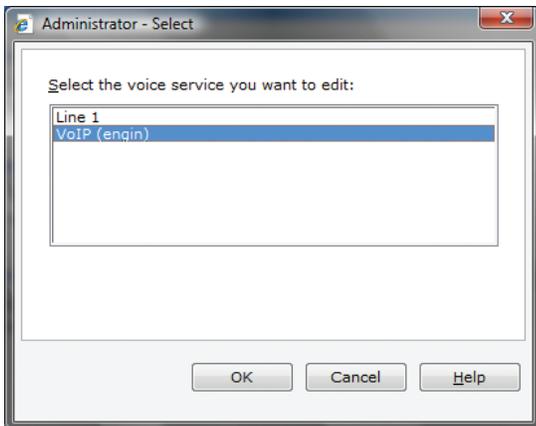


Figure 31: Select voice service dialog box

2. Select the **Voice Service** from the list that you would like to assign with Direct-in Dial Numbers.
3. Click **OK**.
4. Click **Next**, on the confirm identity of the voice service page.
5. Click **Next**, on the service provider information page.

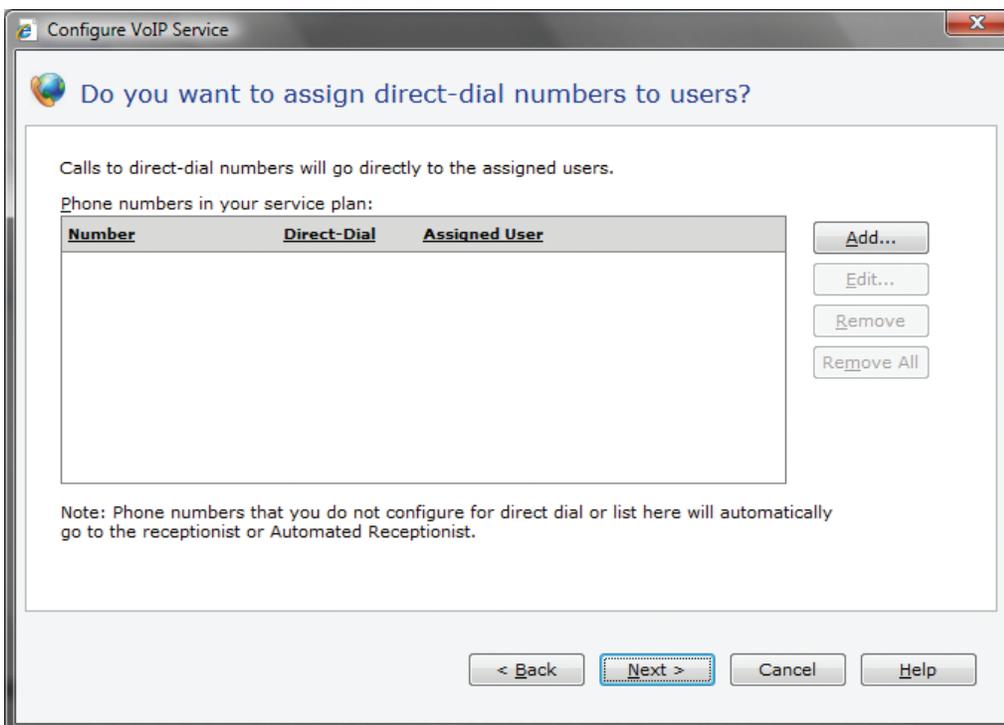


Figure 32: Do you want to assign direct-dial numbers to users page

6. Click **Add** to bring up the Direct-Dial configuration and assignment page.

7. Enter the additional number that is assigned to your VoIP or Digital voice service account into the **Phone number** box.

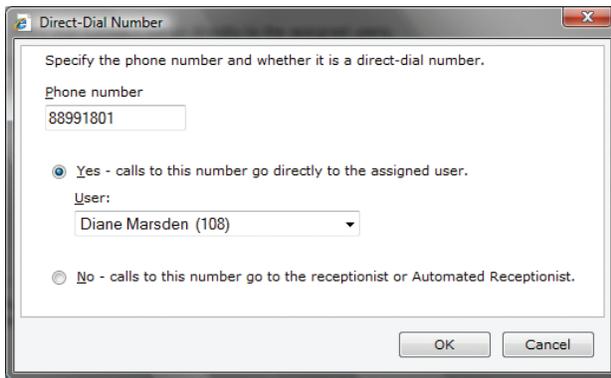


Figure 33: Select voice service dialog box

8. Select the **Yes - calls to this number go directly to the assigned user** radio button.

9. Select the **User** from the drop down list to be assigned to this number, this can be a group or a user.

10. Click **OK**.

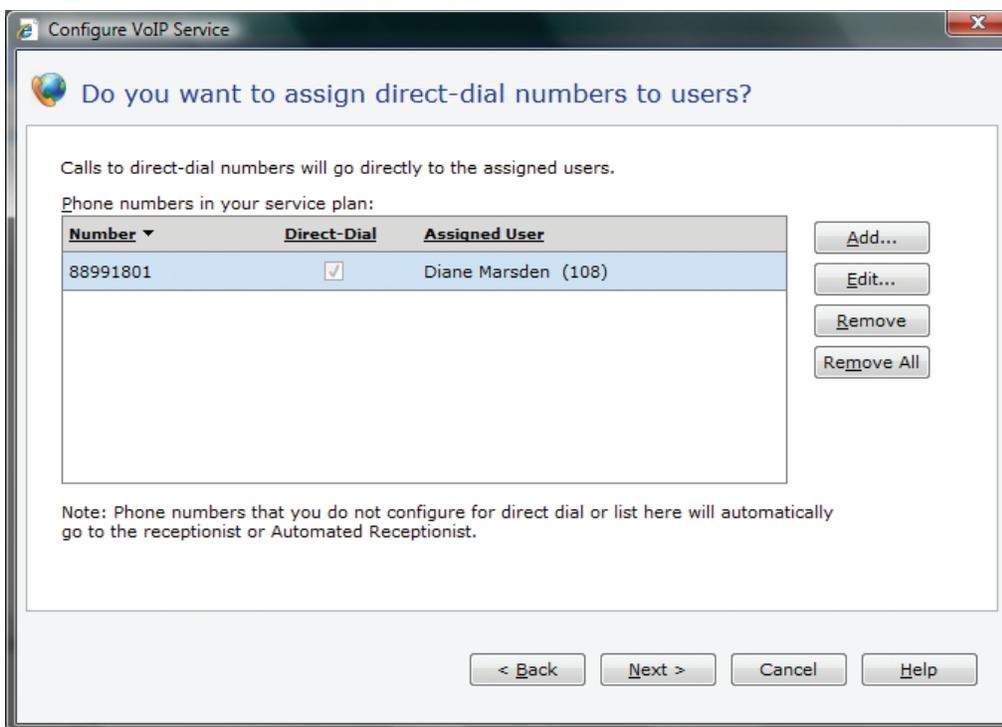


Figure 34: Do you want to assign direct-dial numbers to users page with direct-in dial numbers assigned

11. Click **Next**.

12. Click **Next**, on the Caller Information page.

13. Click **Next**, on the Name this Service page.

14. Click **Finish**, then after the configuration process is complete, click **Close**.

↻ Repeat steps 6 through 10 for additional Direct-in Dial numbers. It's a good idea to test these Direct-in Dial numbers by using a mobile phone, before giving the details to a customer.

Configuring External Access

Specify outside phone numbers of employees/users who use Response Point. When the user/employee calls the office from the specified phone numbers and enters their password, the Automated Receptionist answers as if the employees had pressed the blue Response Point button on a phone in the office. This allows employees to transfer their own calls, voice dial contacts, and check their voicemail from the specified phone numbers.

► To configure External Access:

1. In Administrator, click the **Call Routing** button.
2. In the **Tasks** pane, click **Configure External Access**.

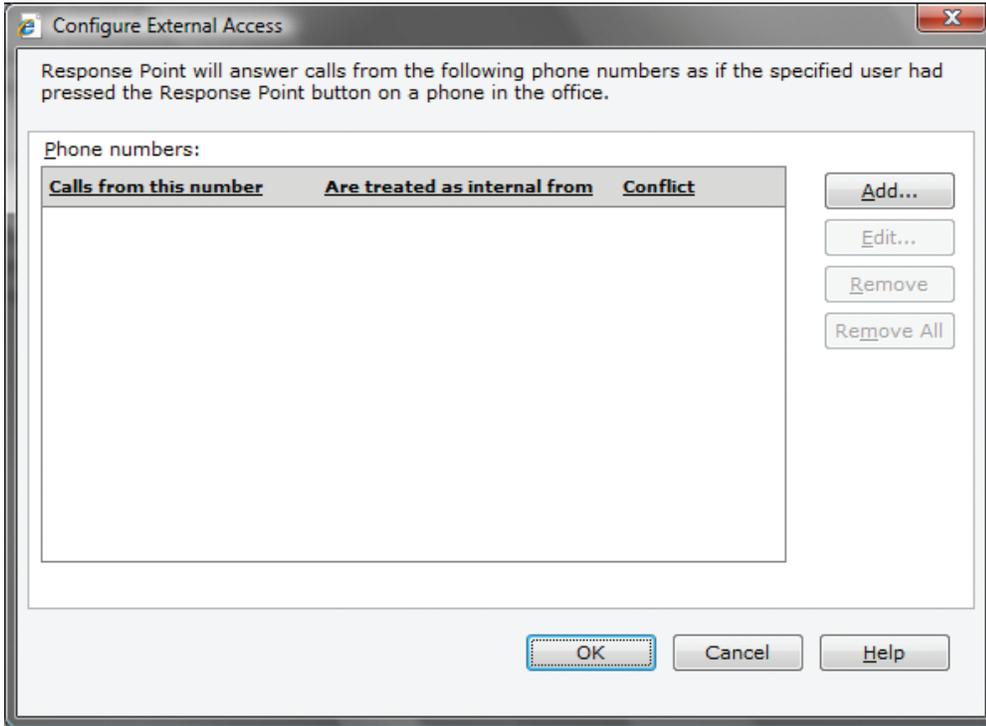


Figure 35: Configure External Access page

3. Click **Add** to bring up the External Access Numbers page.

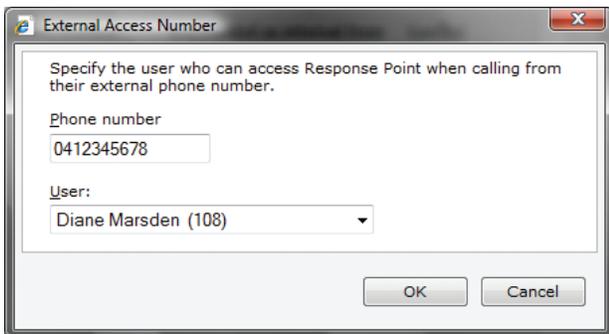


Figure 36: External Access Number dialog box

4. Specify the **Phone Number** which you would like to assign to an External user, then select the **User** from the drop down list.
5. Click **OK**, then Click **OK** again.

Setting up Customizable after-hours schedules

Plan in advance the routine hours and days that the official receptionist will be on duty. When this option is selected, the Automated Receptionist will handle calls when the receptionist isn't scheduled. Likewise, when everybody is away from the office, the Automated Receptionist will automatically answer calls all day when you specify the dates of holidays and business closures.

Set a custom schedule for the receptionists (human and automated) in your business. You can enter the official receptionist's standard office hours, any hours and days that you don't enter will be assigned to the Automated Receptionist by default. For example, if you specify that the receptionist will answer calls Monday thru Friday from 8 AM to 5 PM, the Automated Receptionist will automatically answer calls Monday thru Friday from 5:01 PM to 7:59 AM, and all day Saturday and Sunday. Additionally, you can add the dates of business closures to the calendar, enabling the Automated Receptionist to handle calls when everyone is out of the office.

► To configure After-hours Schedules:

1. In Administrator, click the **Call Routing** button.
2. In the **Tasks** pane, click **Choose Who Will Answer Calls**.

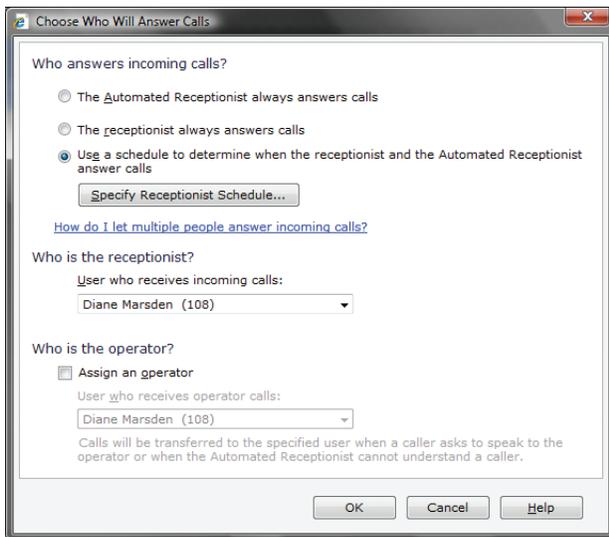


Figure 37: Choose who will answer calls page

3. Click **Specify Receptionist Schedule**.

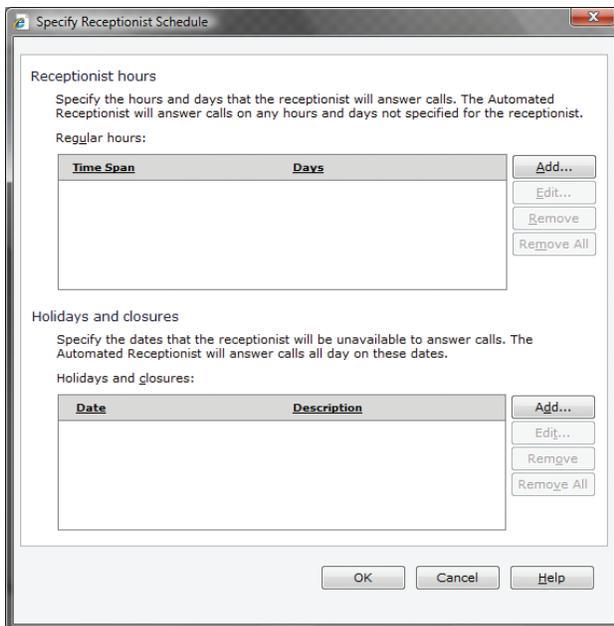


Figure 38: Specify receptionist schedule page

4. Click **Add** to create a Receptionist hours schedule.

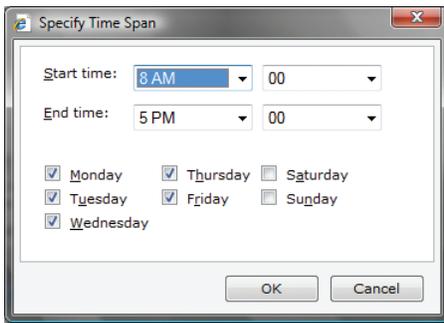


Figure 39: Specify time span dialog box

5. Select a **Start time** and an **End time** along with the days required to be used for this schedule, and Click **OK**.

6. Click **Add** to create a Holiday and Closure schedule.

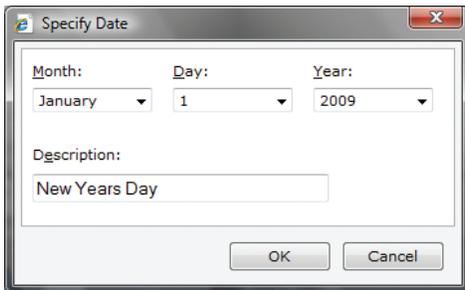


Figure 40: Specify time span dialog box

7. Select a **Month**, **Day** and **Year** along with a **Description** for the Holiday/Closure, and Click **OK**.

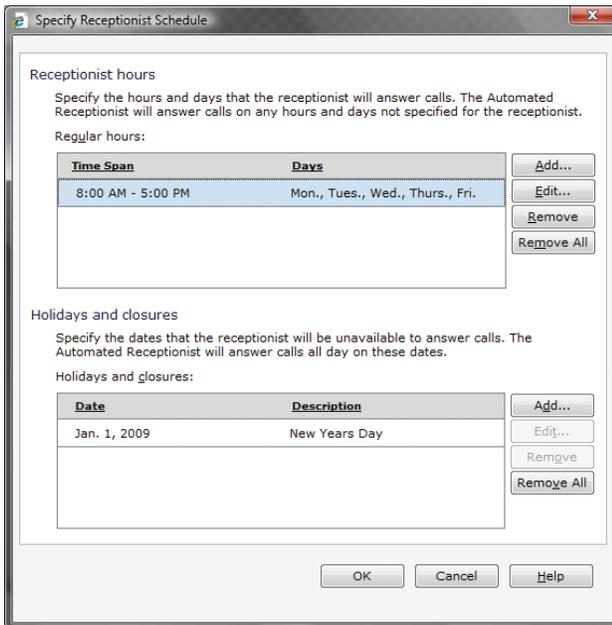


Figure 41: Specify receptionist schedule page

8. Click **OK**, and Click **OK** again.

Configuring Assistant Features

Microsoft® Response Point™ Assistant is the program that lets you administer Response Point from your personal computer. Whether you're an employee who works on site, at home, or in the field, you can manage your individual settings and configurations without help from the system administrator.

► To click-to-call by double-clicking a contact:

1. Choose a contact you want to call, and pause over that name using your mouse pointer.

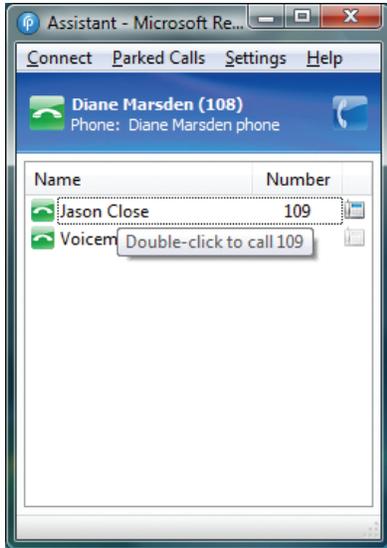


Figure 42: Assistant contact list

2. Double-click the contact after you see a screen tip appear, saying "**Double-click to call**" the extension number or phone number that you selected. Assistant remembers which phone number you previously used to call this contact and displays that number in the screen tip.

► To click-to-call by right-clicking a contact:

1. Choose a contact you want to call, and pause over that name using your mouse pointer.
2. Right-click the contact, and then do one of the following:
3. Click **Call** if you're calling a **Response Point user** or an external contact with only one phone number.

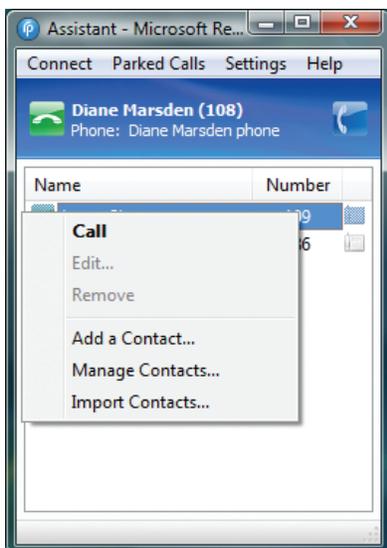


Figure 43: Assistant contact list

4. Hover over **Call**, and choose one of the phone numbers in the list. Assistant highlights the number (work, mobile, or home) you previously used to call this external contact.

► **How to import contacts from your contact store:**

1. On the **Settings** menu, click **Contacts**.
2. Click **Import**, and follow the steps listed in the **Import Contacts** dialog box.

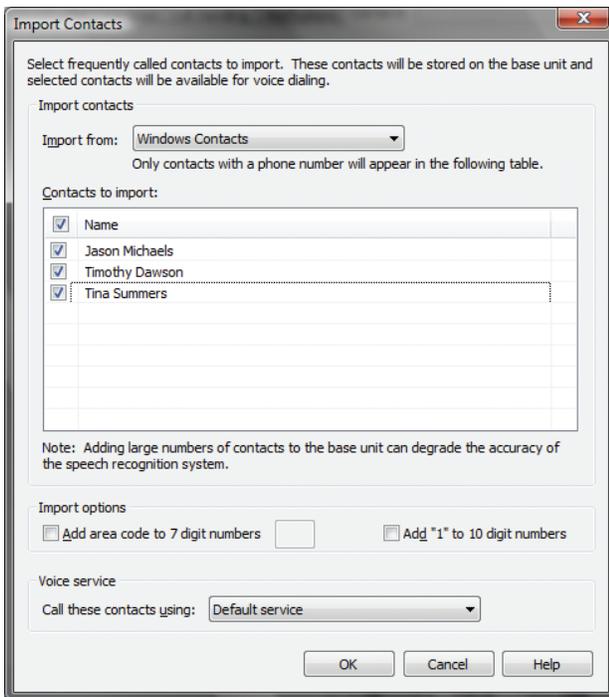


Figure 44: Import contacts dialog box

3. Under **Call these contacts using**, click **Default service** unless the phone system administrator specifically instructs you to choose either **Analog service**, **VoIP service**, or **Digital service** for this group of imported contacts.
4. Select the check boxes under **Import options**, if applicable. Some VoIP service providers might require the area code or a "1" when you place a call over the Internet. Ask the phone system administrator about the requirements of your VoIP service.
5. Click **OK**.
6. Click **OK** in the **User Properties** dialog box.

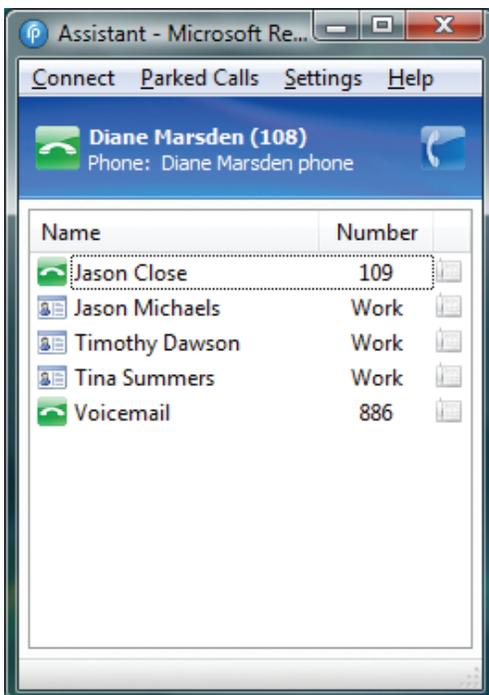


Figure 45: Assistant with new imported contacts list

► To configure voicemail:

1. On the **Settings** menu, click **Voicemail**.
2. Under **Message retrieval**, specify how you review your voice messages, either by phone or by e-mail attachment. If you wish to use e-mail attachment, ensure that your correct email address is entered.

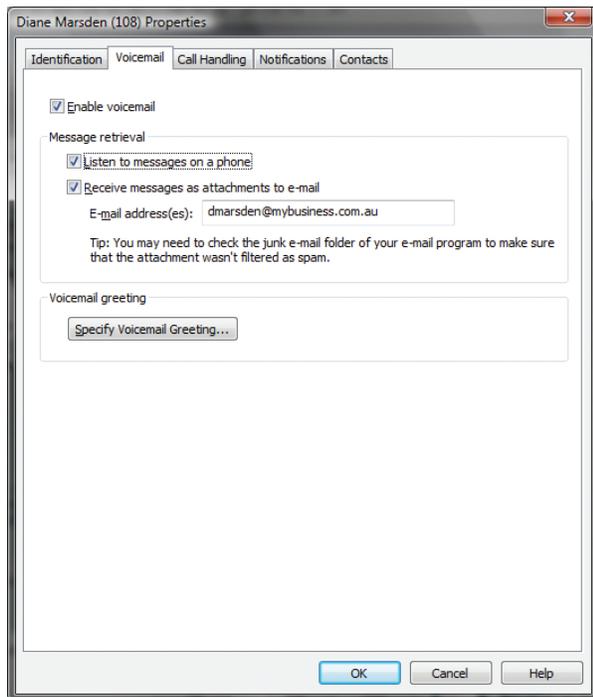


Figure 46: Voicemail settings page

3. Under **Voicemail greeting**, click **Specify Voicemail Greeting**, and then select the default greeting, record a custom greeting, or upload a sound file to use as the greeting.



Figure 47: Specify voicemail greeting dialog box

4. Click **OK** in the **Specify Voicemail Greeting** dialog box when you're finished configuring your greeting.
5. Click **OK** in the **User Properties** dialog box.

► To set up call-forwarding rules:

1. On the **Settings** menu, click **Call Handling**.
2. In the **Within** box, specify how many seconds and approximate rings should occur before the call is forwarded.
3. In the **Do the following** box, choose one of five rules to forward your calls:
 - Do nothing (call will go unanswered)
 - Go to voicemail for extension xxx.
 - Forward call to an external phone number.
 - Forward call to another internal user.
 - Forward call to the Automated Receptionist.

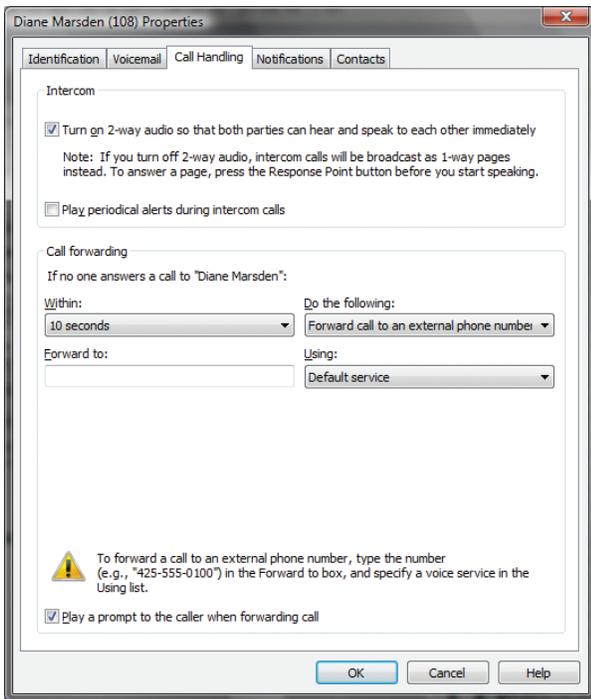


Figure 48: Call forwarding settings page

Configuring Assistant Features

Microsoft® Response Point™ Assistant is the program that lets you administer Response Point from your personal computer. Whether you're an employee who works on site, at home, or in the field, you can manage your individual settings and configurations without help from the system administrator.

▶ To click-to-call by double-clicking a contact:

1. Choose a contact you want to call, and pause over that name using your mouse pointer.
2. Double-click the contact after you see a screen tip appear, saying **"Double-click to call"** the extension number or phone number that you selected. Assistant remembers which phone number you previously used to call this contact and displays that number

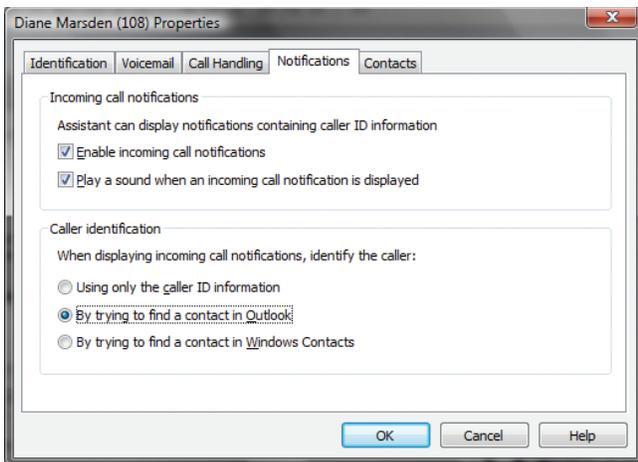


Figure 49: Call forwarding settings page

in the screen tip.

To click-to-call by right-clicking a contact:

1. Choose a contact you want to call, and pause over that name using your mouse pointer.
2. Right-click the contact, and then do one of the following:
3. Click **Call** if you're calling a **Response Point user** or an external contact with only one phone number.
4. Hover over **Call**, and choose one of the phone numbers in the list. Assistant highlights the number (work, mobile, or home) you

Two-click Backup and Restore

Back up the base unit regularly to save the configuration of the phone system and all the voicemail files stored on it.

Note: Both configuration settings and voicemail files may contain confidential information, such as the names of employees, personal phone calls, and so forth. So, it's important to store the backup file in a secure location on the LAN or elsewhere.

Also, consider copying the backup to a removable device that is not usually on the computer or LAN (such as an external hard drive). Another option is to copy the backup to the computer, burn it on a CD or DVD, delete the backup from the computer, and put the CD or DVD in a locked drawer.

► To perform a two-click Backup:

1. In Administrator, click the **Base Unit** button.
2. In the **Tasks** pane, click **Create Backup**
3. Select a location to save the backup on your computer or LAN, and click **OK**.

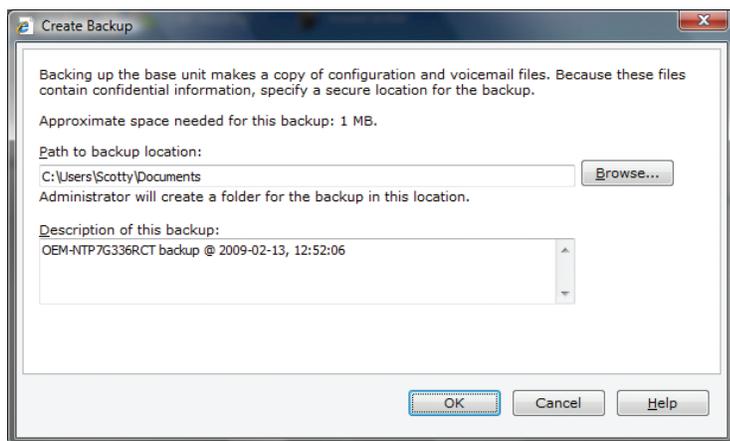


Figure 50: Call forwarding settings page

4. Click **Yes** to the Backup Information and Privacy dialog box.

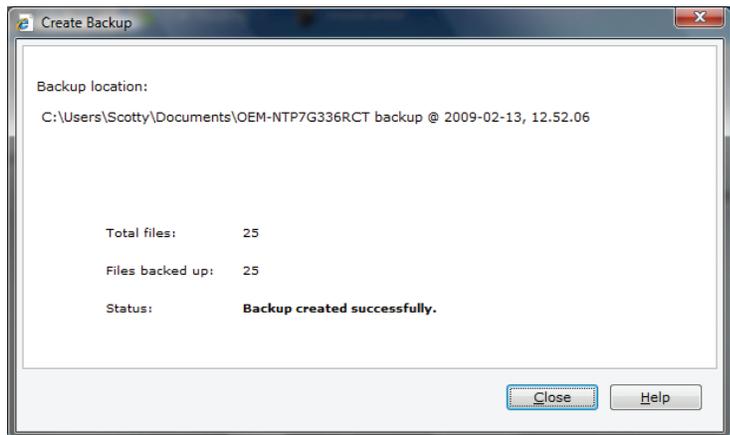


Figure 51: Call forwarding settings page

5. Click **Close**, when the backup has completed.

Specify the backup, its location, and which voicemail files to restore. When you restore a backup, you will lose all changes to settings and any new configurations on the base unit that you made since the backup. Voicemail that is older than 30 days will be not restored to the base unit.

► **To perform a two-click Restore:**

1. In Administrator, click the **Base Unit** button.
2. In the **Tasks** pane, click **Restore Backup**
3. Click **Browse** to select the location where the backup was saved.

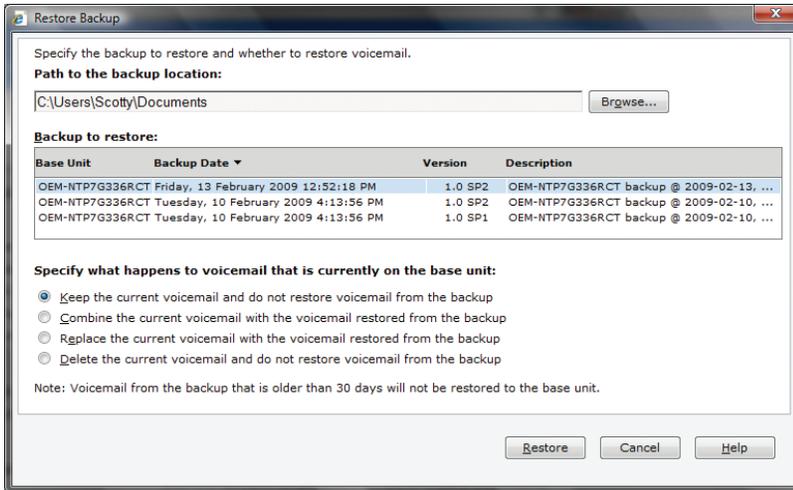


Figure 52: Call forwarding settings page

4. Select one of the voicemail restore options.
5. Click **Restore**.
6. Click **Yes** to the dialog box.

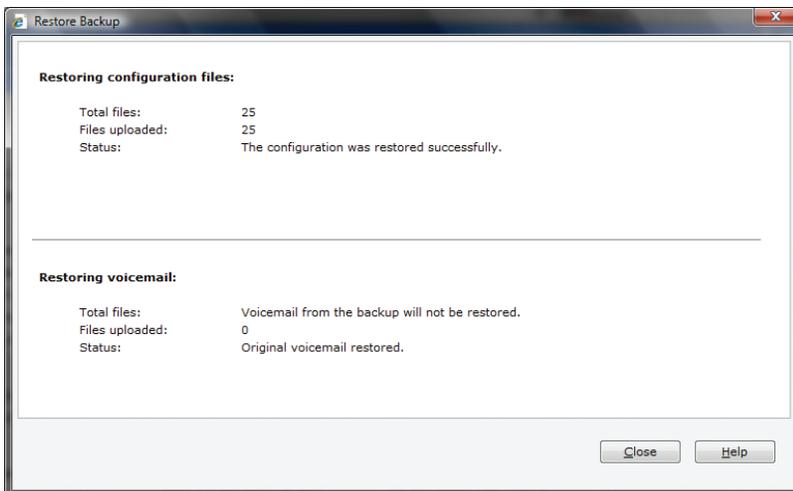


Figure 53: Call forwarding settings page

7. Click **Close** when the backup has been restored.