


16 My Account

This screen is a directory to the various personal accounts pages on your website. These include options and settings that you can determine or change.

My Account Screen

My Account		Voice: 0/0 Fax: 0/4
		
Options and Security Options and Security : Determine how your assistant interacts with callers and notifies you about incoming messages. Set your current time zone. Also change your password and security code.	Personal Destinations Personal Destinations : Edit your contact data, such as phone and fax numbers, pager information and e-mail address.	
Call Transfer Call Transfer : Program where to accept phone calls: a specific phone number or contact, to the phone number you are currently calling from (follow me) or send calls directly to voice mail.	Personal and Billing Addresses Personal and Billing Addresses : Edit your personal information - name, street, and billing addresses.	
Web Preferences Web Preferences : Select formats and preferences for viewing faxes, hearing voice messages, reading and composing e-mails and other web site options.	E-mail Accounts E-mail Accounts : Specify account information (server type, user name, etc.) for the e-mail accounts that you wish to access over the phone and on the web.	
Advanced Rules Call Transfer Rules : Set call transfer rules, based on caller ID and current date and time. Fax Forwarding Rules : Set fax forwarding rules, based on caller ID and current date and time. Voice Mail Greeting Rules : Set the voice mail greeting played to callers, based on caller ID and current date and time.	Call Records Call Records : Review all the traffic on your account. Records can be exported to Microsoft Excel. Calls are listed by date, time, originating callers number, number dialed, length, and outcome (busy, no answer, connect).	

My Account Directory

From here you may jump to:

- Options and Security settings
- Call Transfer Settings
- Web Preferences
- Advanced Rules settings
- Personal Destination numbers
- Personal and Billing Addresses
- E-mail Account settings
- Call Records

To go to the desired page, click on its link.

Options and Security

My Account Voice: 0/0 Fax: 0/4

Save Back ?

Assistant Options

Call Screening: Ask Caller Name

Menu Offered to Your Callers: Voice/Touch-Tone Menu

Notification of Regular Messages: E-mail with attachment E-mail without attachment Pager
 Phone call

Notification of Urgent Messages: E-mail with attachment E-mail without attachment Pager
 Phone call

Message Indication Tone: Indicate new messages with a different ring tone

Message Report: Full

Time Zone: Central (GMT-06:00)
 Automatically adjust clock for Daylight Saving Time changes

Default Message Order: Newest to Oldest

Barge-Thru in Voice Mail: Disabled

Security

New Security Code: New Password:

Retype New Security Code: Retype New Password:

Options and Security Screen

Virtual Assistant Options

These options, while providing settings for some key functions, also contribute to the look and feel of your website. Use the drop-down boxes in this section to set these options:

- **Call Screening**—select from Off, Play Caller ID, or Ask Caller Name.
- **Menu Offered to Your Callers**—setting for offering your callers a menu or no menu.
- **Notification Type**—choose from several notification methods.
- **Message Indication Tone**—enabled by default. These tones indicate whether or not you have new messages in your mailbox.

When you have new messages. Two short tones (-- --) indicate that you have either new messages or new faxes in your mailbox. For example, no new messages, but a new fax will trigger the new messages indicator tone.

When you have no new messages. One long, uninterrupted tone (-----) indicates that no new messages are in your mailbox.

- **Message Report**—you may choose how much information CommuniKate will tell you about the messages in your mailbox. Default setting is Full.

The Message Report Options:

- o **None** (plays no message information): The caller receives no message report information. After entering a Security Code, the caller is immediately connected to CommuniKate’s “What would you like to do?” Main Menu prompt.
- o **Short** (plays new message information only): The caller receives a report about new messages only, and the current call transfer setting. CommuniKate provides the following information:
 - [number of] new voice messages (and the number of urgent messages)
 - [number of] new fax messages
 - Call transfer setting
- o **Full** (play full message information): This is the default setting and provides the caller with full information about the number of messages in his or her mailbox. CommuniKate provides the following information:
 - [number of] messages
 - [number] [is/are] new with [number] marked urgent
 - [number of messages] [is/are] old, and [number of messages] [is/are] saved
 - [number of] new faxes
 - Call transfer setting

Exceptions in the message report include:

- If any of the message categories has no messages, that portion of the message report will be omitted.
 - If the total number of messages is “1,” CommuniKate will say, “You have one [“new,” “urgent,” “old,” or “saved”] message.
 - If there are no messages, CommuniKate will say, “You don’t have any messages.”
- **Time Zone**—select your time zone. CommuniKate defaults to the Central Time zone.
 - Note:** CommuniKate is set by default to automatically adjust its clock for Daylight Savings Time changes. To “disable”, click on the checkbox and click Save to apply the setting.
 - **Default Message Order**—use to display the order in which your messages (including Urgent messages) will be listed – “newest to oldest” or “oldest to newest.”
 - Note:** The **Default Message Order** setting can only be changed through this option on your website. This setting applies to both the Web and phone message listings.
 - **Barge-Thru in Voice Mail**—Barge-thru while Listening to Messages is disabled by default. You may enable it only through this option on your website.

Security Settings

- **New Security Code**—use this field to enter a new **Security Code**.
- **Retype New Security Code**—the purpose of this field is to confirm the code you entered in the **New Security Code** field.

⇒ To change a Security Code, enter the new code into the **New Security Code** field. You must then re-enter the code in the **Retype New Security Code** to confirm it.

- **New Password**-- use this field to enter a new **Password**.
- **Retype New Password**-- the purpose of this field is to confirm the password you entered in the **New Password** field.

⇒ To change a Password, enter the new password into the **New Password** field. You must then re-enter the code in the **Retype New Password** to confirm it.

Personal Destinations

Personal Destinations Screen

My Account Voice: 0/0 Fax: 0/4

1 ?

Personal Destinations

		Number of rings	Security Level	Sensitivity
Home Phone:	<input type="text" value="555 481-1212"/>	<input type="text" value="5"/>	<input type="text" value="Normal"/>	<input type="text" value="Medium"/>
Office Phone:	<input type="text" value="555 481-5555"/>	<input type="text" value="5"/>	<input type="text" value="Normal"/>	<input type="text" value="Medium"/>
Cellular Phone:	<input type="text"/>	<input type="text" value="5"/>	<input type="text" value="Normal"/>	<input type="text" value="Medium"/>
Mobile Phone:	<input type="text"/>	<input type="text" value="5"/>	<input type="text" value="Normal"/>	<input type="text" value="Medium"/>
Operator Phone:	<input type="text"/>			
Fax:	<input type="text" value="555 481-1222"/>			
E-mail:	<input type="text" value="youname@yahoo.com"/>			
Pager Type:	<input type="text" value="Numeric Pager"/>			
Pager Data:	<input type="text"/>			

Personal Destinations Screen

Enter the phone numbers that apply to your personal communications network. You may also apply two additional settings to your Home, Office, Cellular, and Mobile phone numbers:

- **Number of Rings**—using the drop-down box, select the number of rings you want before you take the call.

- **Security Level Options**—you have the option of setting your account’s security access level.
- **Sensitivity Level Settings**—these settings regulate the sensitivity level of CommuniKate’s voice recognition system.

Security Level Options

You have the option of setting your account’s security access level. All destinations have “Normal” as the default setting, which requires a Security Code for logging in, but not for taking a call after you’ve logged in.

You may choose from one of the following security level settings:

- **“Secure”**— applies only to inbound calls, and requires that the person who answers the call enter a four-digit Security Code.
- **“Normal”**—requires pressing “*” and entering a four-digit Security Code to login. No Security Code is required for taking phone calls after you’ve logged in.
- **“Trusted”**—the caller will need to press “*” to enter the session. (There is no need to enter a four-digit Security Code following the “*.”) You will be required to enter your four-digit Security Code to access voice mail, E-mail, faxes, reminders, and to change your personal options.
- **“Quick Access”**—any of your destination numbers may be configured as a “Quick Access” number. The caller from this number is immediately connected to the Assistant. Anyone who accesses your account will be able to call a contact, make a conference call, send a message, broadcast a message, and page a contact—all without entering a Security Code. The caller still will be required to enter a four-digit Security Code to access voice mail, E-mail, faxes, reminders, and to change your personal options.

Caution: Please use discretion when enabling personal destinations as Quick Access numbers. Their security level allows outbound calls that will be charged to your account.

Note: An Automatic Number Identification (ANI) must be present for this feature to function properly.

Sensitivity Level Settings

Sensitivity Level settings regulate the sensitivity level of CommuniKate’s voice recognition system. The lower the sensitivity level, the louder you will need to speak; the higher the sensitivity level, the softer you can speak.

The available sensitivity settings are:

- **Low**—use in environments where noises could distract CommuniKate, causing her to have difficulty understanding you.
- **Medium**—the level that accommodates most normal user scenarios (the default setting)
- **High**—your Assistant’s voice recognition will have a heightened sensitivity.

Call Transfers

Call Transfer Screen

The screenshot shows a web browser window titled "My Account" with a status bar indicating "Voice: 0/1" and "Fax: 0/0". Below the title bar, there are "Select" and "Back" buttons and a help icon. The main content area is titled "Call Transfer" and contains the following text: "Currently, your assistant is set to transfer calls **directly to Voice Mail**." Below this, it says "Transfer your calls:" followed by four radio button options: "Directly to Voice Mail" (which is selected), "To a single telephone number", "To the current phone number in 'Follow Me' mode", and "Via Call Blast".

Call Transfer Screen

Use this screen to set your Call Transfer settings. Clicking on a radio button activates one of the four call transfer options. **Note:** Advanced Call Transfer Rules will override any of these Call Transfer settings (see pg. 132).

After you are finished, click on **Save** to save your changes or **Back** to cancel any changes you have entered.

Transferring Calls Directly to Voice Mail

Clicking on this option causes messages to bypass your phone and transfer directly to your voice mail inbox. It functions as a “Do Not Disturb” feature.

Transferring Calls to a Single Telephone Destination

Clicking on the **To a single telephone** number opens the **Call Transfer: Single Destinations** screen.

My Account Voice: 0/1 Fax: 0/0

Save Back ?

Call Transfer: Single Destinations

Select **one** phone number you want your calls forwarded to.
Please note that you can only select phone numbers you have entered on the [My Account: Personal Destinations](#) page.

Office
 Home
 Cellular
 Mobile
 Operator
 Current phone number
 Any phone number

 or contact

Call Transfer—Single Destination Screen

Use this screen to set the Call Transfer setting to a single destination. Clicking on a radio button activates a call transfer option. You may choose, as a destination phone number, your Office, Home, Cellular, Mobile, Current, a Contact's number, or a number of your choosing.

After you are finished, click on **Save** to save your changes or **Back** to discard any changes you have entered.

Follow Me

Follow Me Settings

My Account Voice: 0/1 Fax: 0/0

Save Back ?

Call Transfer: Follow-Me

Select the initial value for your current phone number:

Any phone number
 Any phone number

 or contact

Follow Me Screen

Use this screen to set the Call Transfer setting for the **Follow Me** command. Click on the “**Any phone number**” or the “**or contact**” radio buttons to activate this setting. You may select any contact from your contacts list.

After you are finished, click on **Save** to save your settings or **Back** to discard any changes you have entered.

Call Blast Settings

My Account Voice: 0/1 Fax: 0/0

Save Back ?

Call Transfer: Call Blast

Select all phone numbers (up to 4) you want your calls forwarded to simultaneously:
Please note that you can only select phone numbers you have entered on the [My Account: Personal Destinations](#) page.

Office
 Home
 Cellular
 Mobile
 Current phone number
 Any phone number

 or contact

Call Transfer: Call Blast Screen

Use this screen to set the Call Transfer setting for **Call Blast**. You may select up to four destinations, including your office, cellular, home, mobile, or Follow Me destinations.

Note: Setting Call Transfer for Call Blast automatically changes Call Screening to **Ask Caller Name**. It can be changed to **Play Caller ID** or **Off**, but must be actively changed via the options **Options and Security** screen.

After you are finished, click on **Save** to save your new settings or **Back** to cancel any changes you have entered.

Personal and Billing Information

My Account Voice: 0/0 Fax: 0/4

Save Back ?

Personal and Billing Addresses

Account Address	Billing Address
Salutation: Mr. ▾	<input checked="" type="checkbox"/> Billing Address is the same as Account Address
First Name: Joe	Billing Name: Joe Smith
Last Name: Smith	Attention Name: Joe
Company: ABC Telecom	Address 1: 123 Main Street
Address 1: 123 Main Street	Address 2:
Address 2:	City: Anytown
City: Anytown	State: Anystate
State: Anystate	Zip: 98765
Zip: 98765	Country: USA
Country: USA	

Personal and Billing Screen

For both your **Account Address** and **Billing Address**, enter the required information.

- **Salutation options**—the gender CommuniKate uses for your account is determined by the **Salutation** setting on the Personal and Billing Addresses screen. (i.e. “Hello, I’m the personal assistant for [subscriber’s name]. Please hold while I try to find [him/her/them].”

The available settings are:

“**Mr.**”—your Assistant will use the pronoun “him.”

“**Ms.,**” “**Mrs.,**” or “**Miss**”—your Assistant will use the pronoun “her”

Field left blank—Default setting. Your Assistant will use the pronoun “them” in your Assistant’s prompts.

When you have finished, click on **Save** to save your new settings or **Cancel** to cancel any changes you have entered.

Web Preferences

My Account Voice: 0/3 Fax: 0/3

Save Back ?

Fax

Preferred Display Fax Format: TIFF PDF
Preferred Forward Fax Format: TIFF PDF

E-mail

Messages Per Page: 15
Show BCC:
Send a copy to myself:
Attach signature to all outgoing emails:
Signature:
Have a great day!
Joe Smith

Web Preferences Screen

Use this screen to select your, **Fax** file format, and **E-mail** settings.

- **Fax** Settings—for displaying and forwarding your faxes, you may select either the TIFF or PDF format.
- **E-mail** Settings—for your E-mail, select how many messages you would like per page. The default is fifteen (15) messages per page. You can also choose to attach a signature to all outgoing E-mails. Check the box and type in the text of your signature (maximum of 255 characters). Refer to pg. 97 for complete instructions. After you are finished, click on Save to save your changes or Cancel to cancel any changes you have entered.

E-mail Account Settings

My Account Voice: 0/3 Fax: 0/3

Save Back ?

Main E-mail Account

User Name: Password: Password (again): Service Provider: Server Name:
Other

Additional E-mail Accounts

Name	User Name	Password	Password (again)	Service Provider	Server Name
Office				Other	
Home				Other	
Personal				Other	
Other				Other	

E-mail Account Screen

Use this screen to select your **E-mail Account** settings. This section must be filled out completely for you to access your E-mail over the phone or on the Web. To do this, your Virtual assistant needs the name of the computer that houses your E-mail (your Internet

Server Provider's E-mail server) and your login information. You will need to fill in the following fields:

- **User Name.** This is your E-mail user name given to you by your ISP. Frequently, it's the part of your E-mail address that precedes the "@" symbol.
- **Password.** This is your alphanumeric E-mail password from your ISP. (Please note that your website password is case-sensitive and must be entered with no spaces.)
- **Retype Password.** Re-entering your password in this field provides confirmation of your password.
- **Service Provider.** Select your provider's name (i.e., Yahoo). If your provider is not on the list, select Other.
- **Server Name.** If you selected Other in the Service Provider field, you need to enter your E-mail server name here. You will likely need to contact your Internet Service Provider (ISP) for this information.

Advanced Call Transfer Rules

Go to the **Advanced Rules** section and click on the **Advanced Call Transfer Rules** link. This opens the **Advanced Call Transfer Rules** screen.

My Account Voice: 0/1 Fax: 0/0

Edit Delete Move Up Move Down Add New Rule ?

Advanced Call Transfer Rules		
Condition	Action	Last Updated
If week day is Mon, Tue, Wed, Thu, Fri and time is 09:00am-05:00pm	Transfer calls to Office	11/14/2000 10:43AM

Advanced Call Transfer Rules Screen

Creating a New Call Transfer Rule

⇒ To create a new Call Transfer Rule, follow these steps:

1. Click on the **Add New Rule** button. This opens the **Create Rule** screen.

The screenshot shows the 'Create Rule' interface. At the top, it says 'My Account' and 'Voice: 0/1 Fax: 0/0'. Below that are buttons for 'Save', 'Back', and 'Delete'. The main area is titled 'Create Rule'. On the left, under 'Transfer incoming calls to', there are checkboxes for 'Voice Mail', 'Call Blast', 'Home', 'Office', 'Mobile', 'Current', 'Cellular', and 'Operator'. The 'caller ID' section has a dropdown menu set to 'doesn't matter if' and radio buttons for 'starts with', 'belongs to contact', 'belongs to list', 'belongs to any contact', and 'is not available'. The 'and weekday' section has a dropdown menu set to 'doesn't matter' and checkboxes for 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat'. The 'and time' and 'and date' sections have dropdown menus set to 'doesn't matter' and time/date pickers for 'From' and 'To'.

Create Rule Screen

2. For the **Transfer incoming calls to** section, select your desired destination option by clicking on its checkbox. (When the checkmark appears in the checkbox selected, you will see a checkmark.)
3. For the **caller ID** field, select from the “including calls when,” “excluding calls when,” or “doesn’t matter if” options to indicate that you are creating an exception rule.
4. Select one of the exceptions or inclusions listed by clicking on its radio button. (For example, to select **belongs to list** indicates that the caller ID needs to come from the list highlighted in the adjacent drop-down box.)
5. If you want to include or exclude a specific time period or recurring time frame for this rule to be effective, select from the **and weekday**, **and time**, and **and date** settings, using the drop-down lists and checkboxes provided.
6. If you want to delete the rule you are viewing currently, click on the **Delete** button. CommuniKate will delete the rule and return you to the **Advanced Call Transfer Rules** screen.
7. After you are finished creating your new Call Transfer rule, click on **Save** to save the rule or **Back** to cancel any entries you have made to the screen.

Editing a Call Transfer Rule

⇒ To edit a Call Transfer Rule, follow these steps:

1. From the **My Account** screen, click on the **Call Transfer Rules** link in the Advanced Rules section. This brings up the **Advanced Call Transfer Rules** screen.
2. Click on the radio button of the transfer rule you want to edit, and then click on the **Edit** button at the top of the screen. This brings up the **Edit Rule** Screen.
3. For instructions on using this screen, see “Creating a Transfer Rule” section above. *(This screen works identically to the **Create Rule** screen, except that you are changing the settings of an existing rule.)*

The screenshot shows the 'Edit Rule' screen within the 'My Account' interface. At the top, it says 'My Account' and 'Voice: 0/1 Fax: 1/1'. Below that are buttons for 'Save', 'Back', and 'Delete'. The main area is titled 'Edit Rule' and contains several sections:

- Transfer incoming calls to:** A list of checkboxes for 'Voice Mail' (checked), 'Call Blast', 'Home', 'Office', 'Mobile', 'Current', 'Cellular', and 'Operator'.
- Caller ID:** A dropdown menu set to 'doesn't matter if' and a text input field.
- Caller ID options:** Radio buttons for 'starts with', 'belongs to contact', 'belongs to list', 'belongs to any contact', and 'is not available' (checked).
- Weekday:** A dropdown menu set to 'is' and checkboxes for 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat' (checked).
- Time and Date:** Two columns of dropdown menus for 'and time' and 'and date'. Each column has 'From' and 'To' fields with time and date selectors.

Edit Rule Screen

Deleting a Call Transfer Rule

⇒ To delete a Call Transfer Rule, follow these steps:

1. Go to the **Advanced Call Transfer Rules** Screen.
2. Click on the rule's checkbox, and then click on the **Delete** button.
3. You can also delete a rule (Fax or Call Transfer) while in the **Edit** screen.

Assigning Priority to Your Call Transfer Rules

If you have more than one transfer rule listed on your screen, and two rules overlap, the rule entered earlier will be used. However, you can reorganize your list to make the later rule your active rule.

⇒ To give a particular call transfer rule a higher priority, follow these steps:

1. Click on the rule's checkbox.
2. Click on the **Move Up** button, which moves the rule up the list one line.
3. Continue clicking on the rule until you have assigned it the priority you want.

⇒ To lower a particular transfer call rule's priority level, follow these steps:

1. Click on the rule's checkbox.
2. Click on the **Move Down** button, which moves the rule down the list one line.
3. Continue clicking on the rule until you have assigned it the priority you want.

Advanced Fax Forwarding Rules

Go to the **Advanced Rules** section and click on the **Advanced Fax Rules** link. This opens the Advanced Fax Forwarding Rules screen.



Advanced Fax Forwarding Rules Screen

⇒ To create a new fax rule, follow these steps:

1. Click on the **Add New Rule** button. This opens the **Create Rule** screen.

My Account Voice: 0/1 Fax: 0/0

Save Back Delete ?

Create Rule

Store and forward incoming faxes to:

Fax Machine

E-mail

Contact

doesn't matter if caller ID

starts with

belongs to contact

belongs to list

belongs to any contact

is not available

and weekday doesn't matter

Sun Mon Tue Wed Thu Fri Sat

and time doesn't matter and date doesn't matter

From 12am 00 From January 01

To 12am 00 To January 01

Create Rule Screen

2. For **incoming faxes to** select either the “Store and forward” or “Forward and delete” option from the drop-down box.
3. Select the destination for your faxes by clicking on the destination’s radio button. Your options are a **Fax Machine** number, **E-mail** address, or a **Contact**’s name.
4. For the **caller ID** field, select from the “including calls when,” “excluding calls when,” or “doesn’t matter if” options to indicate that you are creating an exception rule.
5. Select one of the exceptions or inclusions listed by clicking on its radio button. (For example, to select **belongs to list** indicates that the caller ID needs to come from the list highlighted in the adjacent drop-down box.)
6. If you want to include or exclude a specific time period or recurring time frame for this rule to be effective, select from the **and weekday, and time, and date** settings, using the drop-down lists and checkboxes provided.
7. You may delete the transfer rule you are viewing by clicking on the **Delete** button. CommuniKate will delete the rule and return you to the **Advanced Fax Forwarding Rules** screen.
8. After you are finished creating your new fax rule, click on **Save** to save the rule or **Back** to cancel any entries you have made to the screen.

Important Note:

- Correct rules should be mutually exclusive. If two fax rules overlap, the rule entered earlier will be used.

Deleting a Fax Forwarding Rule

⇒ To delete a fax-forwarding rule, follow these steps:

1. Go to the **Advanced Fax Forwarding Rules** screen.
2. Click on the rule's checkbox, and then click on the **Delete** button.
3. You can also delete a rule (Fax or Call Transfer) while in the Edit screen.

Assigning Priority to Your Fax Forwarding Rules

If you have more than one fax rule listed on your screen, if two fax rules overlap, the rule entered earlier will be used. However, you can reorganize your list to make the later rule your active rule.

⇒ To give a particular fax rule a higher priority, follow these steps:

1. Click on the fax rule's checkbox.
2. Click on the **Move Up** button, which moves the rule up the list one line.
3. Continue clicking on the rule until you have assigned it the priority you want.

⇒ To lower a particular fax rule's priority level, follow these steps:

1. Click on the fax rule's checkbox.
2. Click on the **Move Down** button, which moves the rule down the list one line.
3. Continue clicking on the rule until you have assigned it the priority you want.

Advanced Voice Mail Greeting Rules

You can set up which greeting you want to present to your callers, and whether that greeting is a pre-recorded CommuniKate greeting or one you have previously recorded. The custom greeting settings are located on the **Greeting Management** screen on your website.

Go to the **Advanced Rules** section and click on the **Voice Mail Greeting Rules** link. This opens the **Advanced Voice Mail Greetings Rules** screen.

1. At the top of the **Advanced Voice Mail Greetings Rules** screen, click on the **Manage Greetings** button. This opens the **Greeting Management** screen.

My Account Voice: 0/0 Fax: 0/4

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Greeting management

1. Unavailable
 Use [standard greeting](#) Use custom greeting

2. Busy
 Use [standard greeting](#) Use custom greeting

3. Extended Absence
 Use [standard greeting](#) Use custom greeting

4. After Hours
 Use [standard greeting](#) Use custom greeting

Greeting Management Screen

Screen Features:

Configuration settings for each greeting category

- **Standard Greeting** setting
- **Custom Greeting** setting with an audio file field and **Browse** button

Command buttons:

- o **Save**—to apply your rule settings
- o **Back**—to discard any settings and return to the **Advanced Voice Mail Greetings Rules** screen.

Managing Your Greeting Configurations

For each greeting, you may choose whether to play a standard (pre-recorded CommuniKate) or custom (user-recorded) greeting. A custom greeting may be either a greeting you recorded or an audio file uploaded from a drive on your system.

⇒ To configure a greeting, follow these steps:

1. Under the greeting category you want to configure, click on the radio button () for either the “Use standard greeting” or “Use custom greeting” option. Clicking on a link for one of these options will play the recording currently configured for it.

Note: If you want to use an audio file from a drive on your system, click on the **Browse** button to locate the file. The selected file will appear in the audio file field” and will be used as your custom greeting.

2. Configure other greeting categories as needed.

3. When you are finished, click on the **Save** button to apply your settings. Or, click on the **Back** button to discard any changes and return to the **Advanced Mail Greetings Rules** screen.

Advanced Voice Mail Greeting Rules

You can be very specific as to which greetings you play and when. These elements are controlled by “greeting rules.” These rules and their settings determine which greeting plays and when. Greeting rules must be created or edited on your website. The **Advanced Voice Mail Greeting Rules** section is a page on your website dedicated to these settings.

Go to the **Advanced Rules** section and click on the **Voice Mail Greeting Rules** link. This opens the **Advanced Voice Mail Greeting Rules** screen.



Advanced Voice Mail Greeting Rules		
Condition	Action	Last Updated
If caller ID is not available and week day is Sun,Sat	Play Unavailable greeting	07/17/2001 02:31PM

Advanced Voice Mail Greeting Rules Screen

Screen Features

Greeting Rules display—this is a listing of all your active greetings rules, showing each rule’s **Condition**, its **Action**, and when it was **Last Updated**.

Command buttons:

- o **Edit**—use to access the **Edit Rule** screen
- o **Delete**—use to delete a selected rule
- o **Move Up**—use to give a selected rule a higher priority
- o **Move Down**—use to give a selected rule a lower priority
- o **Add New Rule**—use to access the **Add New Rule** screen
- o **Manage Greetings**—use to access the **Greetings Management** screen

Creating a New Voice Mail Greeting Rule

You can create new rules for any or all your greetings by using the tools provided with the **Create Rule** screen. Go to **Add New Rule**.

My Account Voice: 0/0 Fax: 0/4

Create Rule

Play greeting:

- [Unavailable](#)
- [Busy](#)
- [Extended Absence](#)
- [After Hours](#)

caller ID

- starts with
- belongs to contact
- belongs to list
- belongs to any contact
- is not available

and weekday

Sun Mon Tue Wed Thu Fri Sat

and time <input type="text" value="doesn't matter"/>	and date <input type="text" value="doesn't matter"/>
From <input type="text" value="12am"/> <input type="text" value="00"/>	From <input type="text" value="January"/> <input type="text" value="01"/>
To <input type="text" value="12am"/> <input type="text" value="00"/>	To <input type="text" value="January"/> <input type="text" value="01"/>

Voice Mail Rule—Create Rule Screen

Screen Features

- **Play Greeting** section—select the greeting for which you want to create a rule, or click on a greeting category link to hear the recording currently configured for it.
- **Caller Settings**—these include settings for caller ID, contacts, and distribution lists.
- **Day, Time, and Date** Settings—these include day of the week, time of day, and the active time/date frame for the rule.

Command buttons (located at the top and bottom of the screen):

- o **Save**—to apply your rule settings
- o **Back**—to discard any settings and return to the **Advanced Voice Mail Greetings Rules** screen
- o **Delete**—use to delete the rule you are currently viewing
- o **Manage Greetings**—use to access the **Greetings Management** screen

Creating a New Voice Mail Greeting Rule

⇒ To create a new voice mail greeting rule, follow these steps:

1. Click on the **Add New Rule** button. This opens the **Create Rule** screen. (See **Create Rule** screen shot above.)
2. For the **Play Greeting** section, select your desired greeting option by clicking on its radio button (). (When an option is selected, you will see a “dot” in the center of the radio button.)

3. For the **caller ID** field, select from the “including calls when,” “excluding calls when,” or “doesn’t matter if” options to create an exception rule.
4. Select one of the exceptions or inclusions listed by clicking on its radio button. (For example, to select **belongs to list** indicates that the caller ID needs to come from the list highlighted in the adjacent drop-down box.) **Note:** One of these rule conditions must be set for the rule to work.
5. If you want to include or exclude a specific time period or a recurring time frame for this rule to be effective, select from the **and weekday, and time, and date** settings, using the drop-down lists and checkboxes provided.
6. If you want to delete the rule you are currently viewing, click on the **Delete** button. CommuniKate will delete the rule and return you to the **Advanced Voice Mail Greeting Rules** screen.
7. After you are finished creating your new greeting rule, click on the **Save** button to save the rule, or click on the **Back** button to cancel any settings you have made to the screen.

Editing a Voice Mail Greeting Rule

While in the **Advanced Voice Mail Greeting** screen, click on the **Edit** button at the top of the screen. This brings up the **Edit Rule** screen.

My Account Voice: 0/0 Fax: 0/4

Save Back Delete Manage Greetings ?

Edit Rule

Play greeting:

- Unavailable
- Busy
- Extended Absence
- After Hours

including calls when

starts with
 belongs to contact
 belongs to list
 belongs to any contact
 is not available

and weekday

Sun Mon Tue Wed Thu Fri Sat

and time and date

From From

To To

Voice Mail Greeting—Edit Rule Screen

⇒ To edit a Greeting Rule, follow these steps:

1. From the My Accounts screen, click on the **Voice Mail Greeting Rules** link in the Advanced Rules section. This brings up the **Advanced Voice Mail Greeting Rules** screen.
2. In the “Play greeting” section, click on the radio button () of the greeting rule you want to edit. Each greeting category in this section is link. Click on the appropriate greeting link to hear the recording currently configured for it.
3. See steps 2 through 7 above for “Creating a New Voice Mail Greeting Rule.” This screen functions identically to the **Create Rule** screen, except that you are changing the settings of an existing rule.

Deleting a Greeting Rule

⇒ To delete a greetings rule, follow these steps:

1. Go to the **Advanced Voice Mail Greeting Rules** screen.
2. Click on the rule’s radio button, and then click on the **Delete** button.
3. You can also delete a rule while in the **Edit** screen.

Assigning Priority to Your Voice Mail Greeting Rules

When you have more than one voice mail greeting rule listed on your screen, should two rules overlap, the list shown at the top of the list will be used. However, you can reorganize your list to change priorities.

⇒ To give a particular voice mail greeting rule a higher priority, follow these steps:

1. Click on the rule’s radio button.
2. Click on the **Move Up** button, which moves the rule up the list one level.
3. Continue clicking on the move up button until you have assigned it the priority level you want.

⇒ To give a particular voice mail greeting rule a lower priority, follow these steps:

1. Click on the rule’s radio button.
2. Click on the **Move Down** button, which moves the rule down the list one level.
3. Continue clicking on the move down button until you have assigned it the priority level you desire.

Call Records

My Account Voice: 0/0 Fax: 0/0

View Export To Excel Close ?

Please select a period

Please remember that you can only view call records for the past 3 billing cycles.

For the day of: June 21 2001

For the week containing the date: June 21 2001

For the month of: February 2001

Call records for February, 2001							
Date/Time	Type	Source	Dir	Conference	Destination	Length	Outcome
02/23/2001 10:52AM	Call	(602) 296-3300	Inbound			00:00:40	Connect
02/23/2001 10:52AM	Call	(602) 296-3300	Outbound		Call Blast	00:00:11	
02/23/2001 10:53AM	Call	(602) 296-3300	Inbound			00:00:53	Connect
02/23/2001 10:53AM	Voice Mail	(602) 296-3300	Inbound			00:00:41	Connect

Call Records Screen

Using Call Records

Use this screen to view a summary of your **Call Records** for a specific time period. You must first select a time period by using the radio buttons drop-down boxes. Your Call Records listing shows the **Date** and **Time** of the call, **Type** of call, **Source** of the call, **Destination** numbers, **Length** of the call, **Direction** of the call, and the **Outcome** of each call.

⇒ To start a **Call Records** search, follow these steps:

1. Using the radio button and drop-down boxes, select the date ranges for you search.
2. When you are finished selecting those dates, click on the View button. Your Virtual assistant collects the call records for the time period you chose and displays them in the **Call Records** display.

Viewing Your Call Records

All traffic on your account is now displayed for your review.

Call Records Display

The Display Header—the header displays these items of information:

- **Date/Time**—the time and date of the phone transaction
- **Type**—indicates the transaction type
- **Source**—caller ID
- **Dir**—direction of the call: Inbound or Outbound
- **Conference**—If the call was a conference call, you will see the bridge number of the conference here.
- **Destination**—the number called (if applicable)
- **Length, min**—the call's length, in minutes and seconds
- **Outcome**—the call's status (i.e., connect, no answer, busy)

Export call detail records into Excel button—this feature enables you to export your call records directly into Microsoft Excel.

Exporting Call Records to Microsoft Excel

You may export your call records to Microsoft **Excel**. Click on the **Export to Excel** button, which opens Excel and exports the records from your page to an Excel spreadsheet. (**Note:** You must have Microsoft Excel on your system to use this feature.)

⇒ To export (or download) your **Call Records** into Excel, follow these steps:

1. Confirm that Microsoft Excel is installed on your system.
2. Click on the **Export to Excel** button. CommuniKate causes Excel to open a spreadsheet to and export a copy of your call records into the Excel spreadsheet.

Save your Excel spreadsheet and then exit Excel to return to your Virtual assistant. Use Excel to sort, print, or to transfer your **Call Records** to other Microsoft Office applications.