

ELEVATE ADMIN USER GUIDE

Logging Into Admin Portal

Step-by-step guide to accessing the Elevate Admin Portal through Intermedia.

Updating User Programming

Instructions on updating user settings, including name changes and email updates.

Programming Keys

Guidance on programming and reprogramming keys for quick actions like speed dial and Busy Lamp Field (BLF).

Setting Hours Of Operation & Auto Attendant Changes

How to record, upload, and manage auto-attendant greetings for different time settings.

Changing Auto Attendant Greetings

How to record, upload, and manage auto-attendant greetings for different time settings.

Holiday Schedule Management

Steps to add, edit, or delete holiday events, including setting custom holiday messages.

Managing Groups & Ring Groups

Instructions on adding, editing, and deleting members in ring groups.

Running Reports & Analytics

Overview of call reports and analytics tools available within the Elevate platform.

Using Star Codes & Feature Access

Explanation of various star codes for feature access, such as call pickups and hunt group log-ins.

Paging & Intercom Codes

Details on paging group functions, intercom features, and related codes for quick communication.

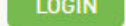
Call Park & Voice Mail Transfer

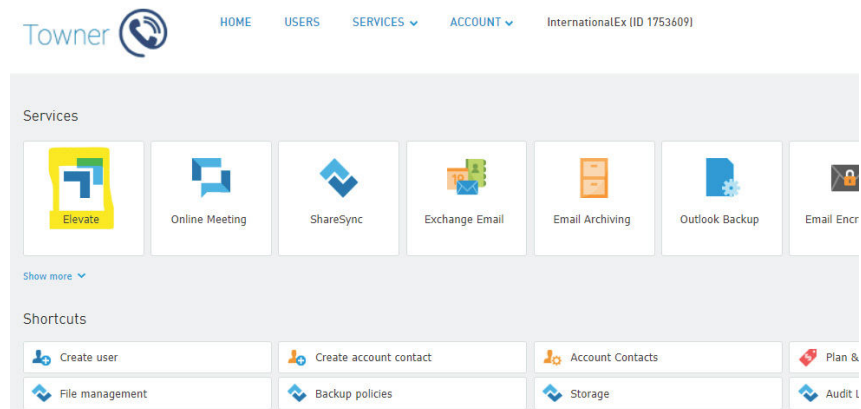
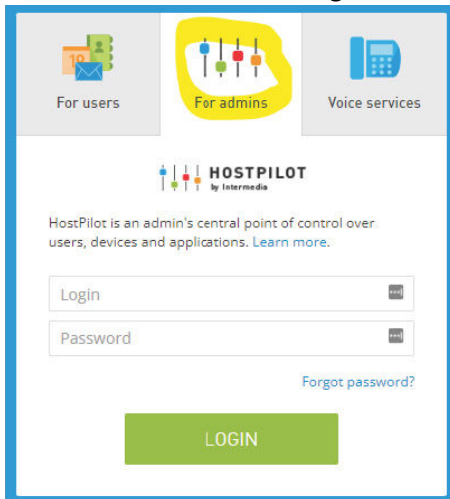
Steps for parking calls and transferring calls directly to voicemail using star codes.

Elevate Administrator User Guide

You will need to be set up with Elevate portal administrator access to the portal. You specified on your Operations Questionnaire who this should be. If you have any questions or need to know who your administrator is please email service@townerkc.com.

Logging Into Admin Portal

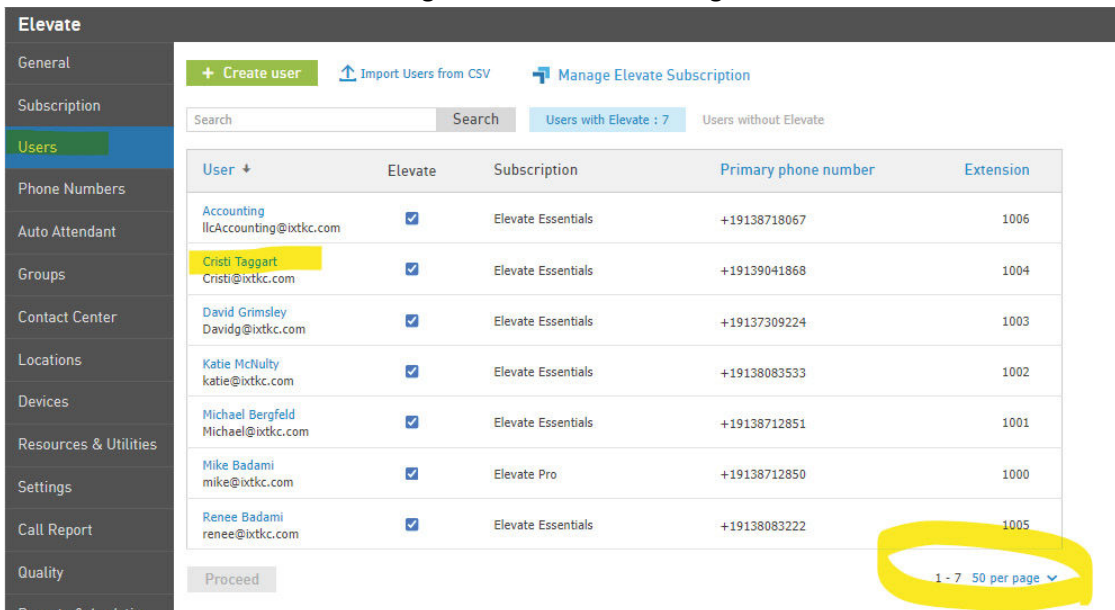
1. Go to intermedia.com and click the Green Log in button  in top right corner
2. Select Customer Login from the drop down
3. Click For Admin and enter your username and password
4. Once logged in Click the button for ELEVATE



Updating User Programming

If you have an employee leave, or change their name go in and edit these settings.

- Click Users on left hand side
- Note: you may have more than one page of users
- Click the blue name link to go into that user's settings



- Click on the User Info tab on left hand side
- Here is where you can update the name, email address, and reset password.

User Settings

[← To users](#)

Cristi Taggart [Cristi@ixtkc.com](#)

User Info

- Exchange
- OWA-Only Mailboxes
- ShareSync
- Elevate

Display Name: [Cristi Taggart](#)

Email address (Login): [Cristi@ixtkc.com](#)

Password was changed on 5/11/2022 10:36:16 AM

- [Reset password](#)
- [Edit user password settings](#)
- [Edit user info](#)
- [Set user permissions](#)
- [Disable user](#)

Programming Keys

How to program blank buttons or reprogram buttons on the Yealink phones. NOTE this will require you reboot the phone for changes to take effect.

- Click on Devices on the left hand side
- Click the Device Link of the user you want to program
- Note: you may have more than one page of devices

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- Contact Center
- Locations
- Devices
- Resources & Utilities
- Settings
- Call Report
- Quality
- Reports & Analytics
- Apps & Integrations

The Devices tab displays all of your hardware devices. Use this section as well to buy new devices from Towner Communications and activate devices you have purchased or supplied from another company for use with your Hosted PBX.

Note: as a best practice, assign each device to a User or Resource prior to connecting the device to your network. Assigning a User or Resource is required for the device to make and receive phone calls.

[+ Purchase device](#)
[+ Setup your own device](#)
[Order history](#)

Brought by: [All](#) [All owners](#)
[Export devices](#)

<input type="checkbox"/>	Device	User	Warranty	MAC	Serial number	Note
<input type="checkbox"/>	Yealink T54W	Katie McNulty	Apr 20, 2023	805E0C4E8438	301081D101221167	
<input type="checkbox"/>	Yealink T54W	Accounting	Apr 20, 2023	805E0C926061	201081D111204491	
<input type="checkbox"/>	Yealink T54W	Michael Bergfeld	Apr 20, 2023	805E0C4E986E	301081D101219604	
<input type="checkbox"/>	Yealink T54W	David Grimsley	Apr 20, 2023	805E0C925FCF	201081D111200198	
<input type="checkbox"/>	Yealink T54W	Renee Badami	Apr 20, 2023	805E0C926093	201081D111202441	
<input type="checkbox"/>	Yealink T54W	Cristi Taggart	Apr 20, 2023	805E0C925FDB	201081D111202776	
<input type="checkbox"/>	Yealink T54W	Mike Badami	Apr 20, 2023	805E0C92606B	201081D111202783	
<input type="checkbox"/>	Serverdata Elevate (Android)	Michael Bergfeld				
<input type="checkbox"/>	Serverdata Elevate (Android)	Cristi Taggart				
<input type="checkbox"/>	Serverdata Elevate (iOS)	Katie McNulty				

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- Click on the Line Keys tab on left hand side
- Click the Action link for each button
- Busy Lamp Field is for other employees extensions so you can press the button to call or transfer to them
- Speed Dial is for Outside numbers you want to be able to dial quickly Townerkc.com
service@townerkc.com 913.780.3166 press 3 for service

Elevate

General [← To devices](#)

Subscription **Yealink T54W**

Users General

Phone Numbers Audio

Auto Attendant Display

Groups **Line keys**

Contact Center Expansion panels

Locations

Devices


Resources & Utilities

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Call Report

Quality

Line keys



Use this page to manage your phone line keys functionality.

Button 1 Make all calls by default as Michael Bergfeld 1001 and display on phone as 1001

Button 2 **Action**

Button 3 [Action](#)

Button 4 [Action](#)

Button 5 [Action](#)

Button 6 [Action](#)

Button 7 [Action](#)

- Choose which type of button you want under Action Drop down
- Display on phone is editable and is what the key will be labeled on phone display.


[← To devices](#)

Yealink T54W


Set line key # 3


Choose the desired function of the key below.


You can only assign 16 Remote-line keys

Action Busy Lamp Field 

Displays the current status of another User's phone, allows remote answering of calls ringing on the User's phone and acts as a speed dial for that User.

User 

 You will not be able to set Speed Dial for selected user.

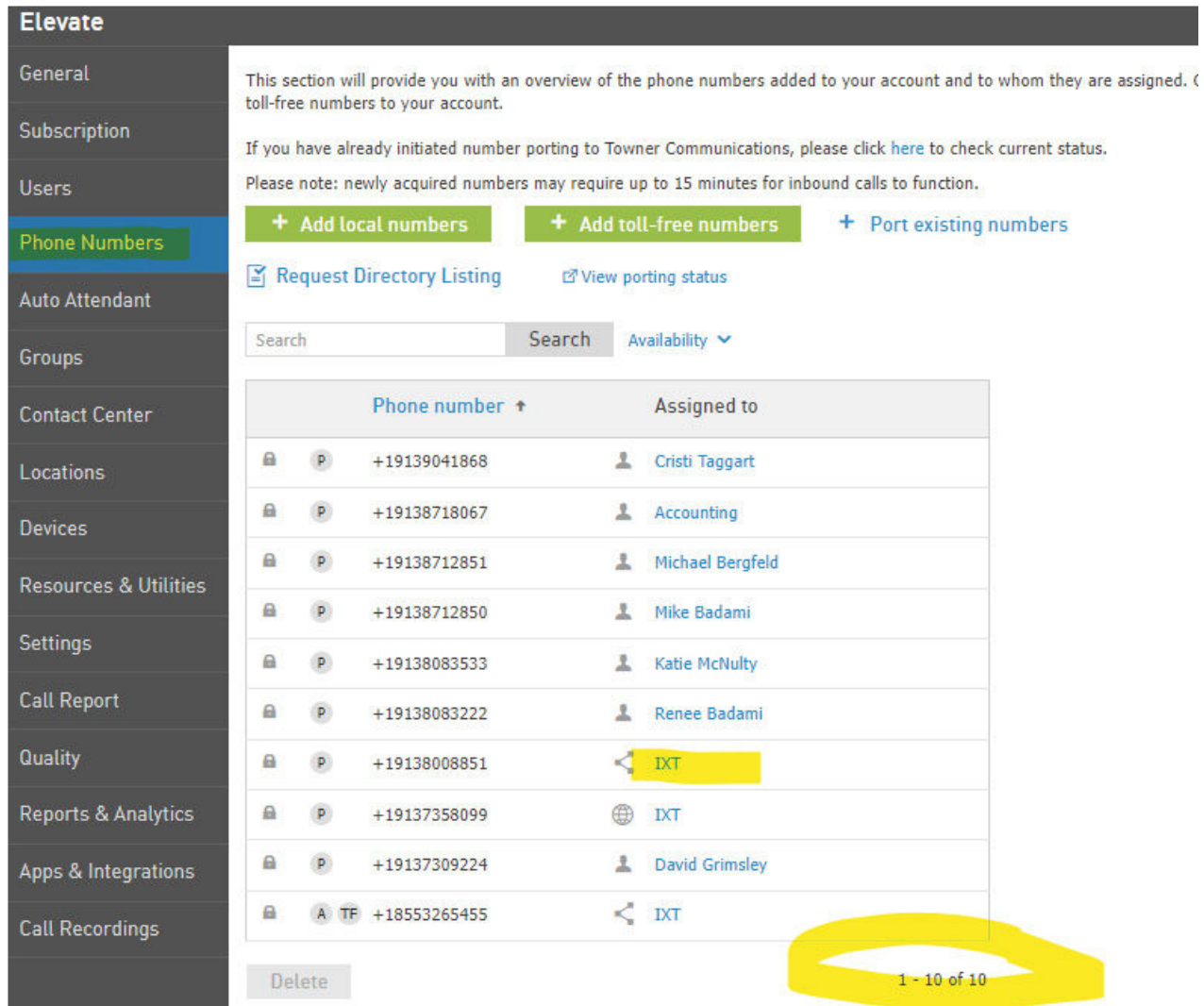
Display on phone 

Save changes

Hours of Operation & Auto Attendant Changes & Holidays

You already have this programmed but if you need to make changes to the time calls ring in or changes to your dial options in your main Day/Afterhours Auto attendant greetings this is where you change it.

- Click Phone Numbers on left hand side
- Find your main number on the List
- NOTE: you may have more than one page
- Click the Blue link next to your main line this will take you to where your line is pointed to under Auto Attendant



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Call Recordings

This section will provide you with an overview of the phone numbers added to your account and to whom they are assigned. (toll-free numbers to your account.

If you have already initiated number porting to Towner Communications, please click [here](#) to check current status.

Please note: newly acquired numbers may require up to 15 minutes for inbound calls to function.

[+ Add local numbers](#) [+ Add toll-free numbers](#) [+ Port existing numbers](#)

[Request Directory Listing](#) [View porting status](#)

Search Search Availability ▼

		Phone number ↑	Assigned to
		+19139041868	Cristi Taggart
		+19138718067	Accounting
		+19138712851	Michael Bergfeld
		+19138712850	Mike Badami
		+19138083533	Katie McNulty
		+19138083222	Renee Badami
		+19138008851	IXT
		+19137358099	IXT
		+19137309224	David Grimsley
		+18553265455	IXT

Delete

1 - 10 of 10

- You will see a graph with your Business Hours your working hours are when calls will ring in, and Afterhours is when you are closed.
- You can click Working Hours to adjust the hours if you need to by clicking the three dots ••• and click edit
- You can also edit the Menu options here. (i.e. Press 2 for Sales etc.)

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[To Business hours](#)

IXT

[Business hours](#) [Events](#) [Receptionists](#) [Settings](#)

Edit Business hours

Utilize this section to edit basic information for this Business Hours menu. Please ensure the schedule is set for the times when this menu should route calls. You may also disable this menu, which will remove it from call routing until it is enabled again.

Name:

Schedule: **08:00 AM — 05:00 PM, weekdays**

Status: **Enabled**

Menu options

✓ Dial by Extension enabled

Greeting: [DXT_Open.ogg](#)

- Not setup
- Not setup
- Not setup
- Not setup

Holiday Schedule

- Your system is set up to automatically close for the holidays you set up. If you want to edit this list or add a day you can do so by going to **EVENTS** in Auto Attendant.
- Click **Add Event** to add a new date you don't have listed
- NOTE:** if you close at Noon one day you can Add event at noon and save and it will close your system immediately.
- If you need to edit an existing date click the blue dots **•••** and choose edit.
- You have a default holiday message that says you are closed in observance of the holiday already loaded in your system.

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[To Auto Attendants](#)

IXT

[Business hours](#) [Events](#) [Receptionists](#) [Settings](#)

Events are menus that contain call routing instructions like Business Hour menus but may be scheduled as one-time events or recurring events on a monthly or yearly basis. Events are ideally suited for recurring meetings, weather events and holidays. For more information, please see the [knowledge base](#).

+ Add Event

Future events: 7 Past events: 0

Search

All Current month Date range

- Memorial Day**
All day, Mon, May 30, 2022
- Independence Day**
All day, Mon, Jul 4, 2022
- Labor Day**

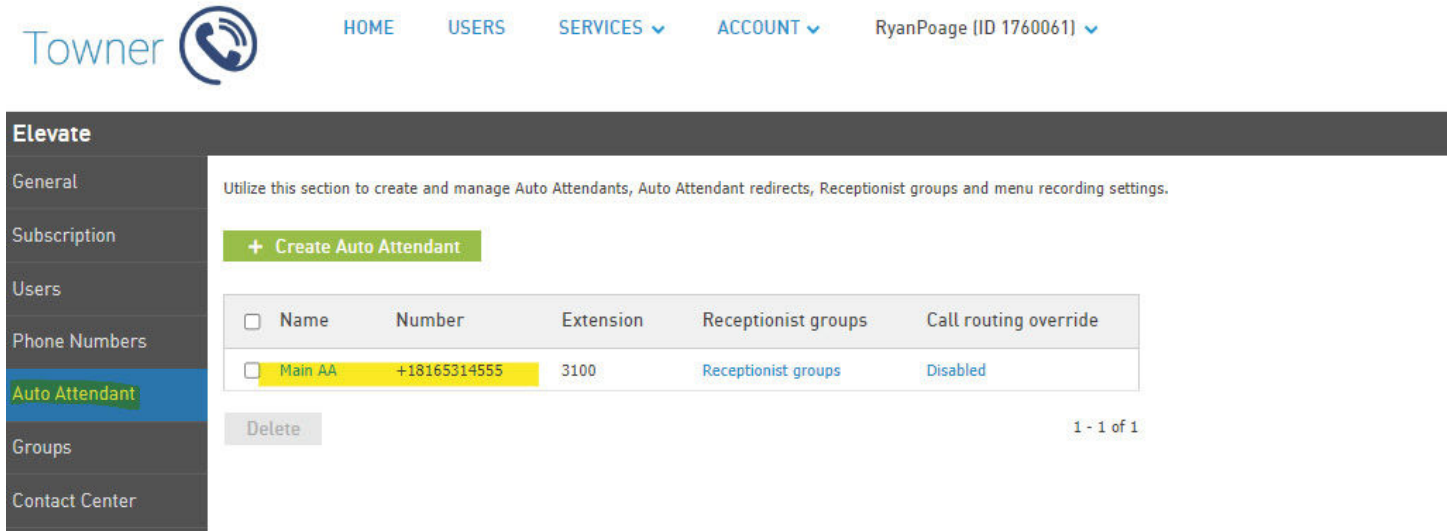
May, 2022

MON	TUE	WED	THU	FRI	SAT	SUN
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

Changing Auto Attendant Greetings

Click Auto Attendant on the left

Click into your Main AAA link



Elevate

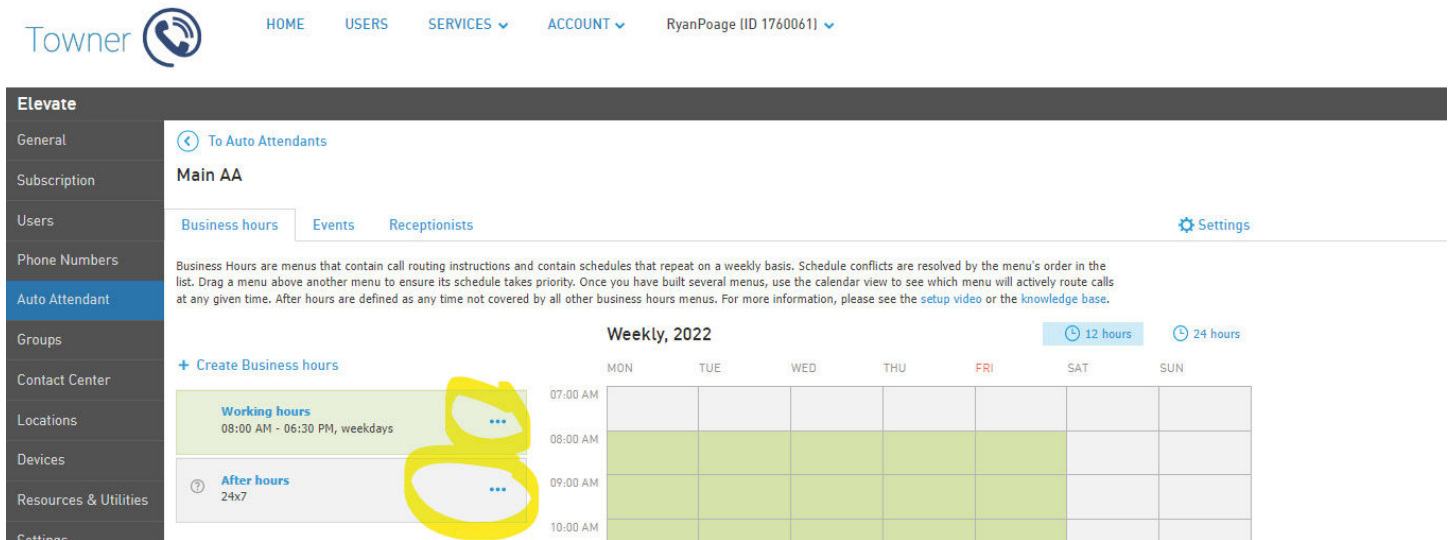
General Utilize this section to create and manage Auto Attendants, Auto Attendant redirects, Receptionist groups and menu recording settings.

Subscription [+ Create Auto Attendant](#)

<input type="checkbox"/>	Name	Number	Extension	Receptionist groups	Call routing override
<input type="checkbox"/>	Main AA	+18165314555	3100	Receptionist groups	Disabled

[Delete](#) 1 - 1 of 1

- To update Working hours click the blue dots ••• and choose edit.
- To update Afterhours click the blue dots ••• and choose edit.



Elevate

[To Auto Attendants](#)

Main AA

[Business hours](#) [Events](#) [Receptionists](#) [Settings](#)

Business Hours are menus that contain call routing instructions and contain schedules that repeat on a weekly basis. Schedule conflicts are resolved by the menu's order in the list. Drag a menu above another menu to ensure its schedule takes priority. Once you have built several menus, use the calendar view to see which menu will actively route calls at any given time. After hours are defined as any time not covered by all other business hours menus. For more information, please see the [setup video](#) or the [knowledge base](#).

[+ Create Business hours](#)

Working hours
08:00 AM - 06:30 PM, weekdays [...](#)

After hours
24x7 [...](#)

Weekly, 2022 [12 hours](#) [24 hours](#)

	MON	TUE	WED	THU	FRI	SAT	SUN
07:00 AM							
08:00 AM							
09:00 AM							
10:00 AM							

You can press the PLAY button to hear the current greeting
 OR when you put your mouse over the Name it will show an 'X' press this to delete
 It will prompt you to confirm delete.
 Then you have the option to RECORD or UPLOAD a new recording.
 REMEMBER to Confirm. If you navigate away from this page without hitting Confirm it will not save.

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←
To Business hours

Main AA

Business hours
Events
Receptionists

Edit Business hours

Utilize this section to edit basic information for this Business Hours menu.
 Please ensure the schedule is set for the times when this menu should route calls. You may also disable this menu, which will remove it from call routing until it is

Name

Schedule ? 08:00 AM — 06:30 PM, weekdays

Status ? ✔ Enabled

Menu options

✔ Dial by Extension enabled ?

Greeting ▶ Ryan_Poage_Day_8-4-22.wav

- 1 🔊 Company Voice Mail
- 2 Not setup
- 3 Not setup
- 4 Not setup
- 5 Not setup
- 6 Not setup
- 7 Not setup
- 8 Not setup
- 9 Dial by name
- 0 🔊 Company Voice Mail
- * Not setup

To change the Holiday Greeting

Click the Events Tab

Go to the Holiday you want to change and Click the blue dots ••• and choose edit. (complete the same as you would the Working hours or Afterhours)

Groups

Any ring groups that are set up you can go here to add or delete members.

- Click Groups from left hand side
- Click the link for Blue Group name you want to edit

<input type="checkbox"/>	Group ↓	Type	Extension	Phone number	Members
<input type="checkbox"/>	Default	Call park	9980-9988, 9989		7
<input type="checkbox"/>	Main RG	Basic Hunt	4200		7

- Click Agents on Left hand Side
- Click the check box next to the name you want to edit
- You will get more options like DELETE.
- **NOTE:** do not click Log Out. If someone logs out they will need to log back in to receive those calls again using a Star Code.

Elevate

General [To groups](#)

Subscription **Main RG**

Users General **Agents**

Phone Numbers Menu

Auto Attendant Greetings

Groups **Agents**

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Locations Voicemails

Devices Voicemail settings

Resources & Utilities Reports

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Agents

Add Agents to allow inbound calls to be routed to them when they are actively logged into the Group. Move Agents up and down in the list to determine their

Important: Agents must log into the Group in order to receive phone calls.

[+ Add new agent](#) [+ Add phone number](#)

<input type="checkbox"/>	Name	Ext	Phone number	Email	
<input checked="" type="checkbox"/>	Mike Badami	1000	+19138712850	mike@ixtkc.com	X Log out
<input type="checkbox"/>	Renee Badami	1005	+19138083222	renee@ixtkc.com	X Log out
<input type="checkbox"/>	Michael Bergfeld	1001	+19138712851	Michael@ixtkc.com	X Log out
<input type="checkbox"/>	David Grimsley	1003	+19137309224	Davidg@ixtkc.com	X Log out
<input type="checkbox"/>	Katie McNulty	1002	+19138083533	katie@ixtkc.com	X Log out
<input type="checkbox"/>	Cristi Taggart	1004	+19139041868	Cristi@ixtkc.com	X Log out
<input type="checkbox"/>	Accounting	1006	+19138718067	llcAccounting@ixtkc.com	X Log out

[Delete \(1\)](#)

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Reporting

- Call Report on the left hand side will give you a detailed call record of all calls in the system sortable by date.
- Reports and Analytics on the left hand side will let you run summary report, and also schedule reports

Elevate

General [Historical Reports](#) [Usage History](#) [Saved & Scheduled Reports](#)

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Historical Report

Call Reports [Call Summary Report](#) [May 23, 2022 \(Yesterday\)](#) [Run report](#)

Call Reports - Call Summary Report - Yesterday
May 23, 2022, 12:00 AM - May 23, 2022, 11:59 PM | CDT - Central Daylight Time

128 Total calls 94 Answered 34 Unanswered 3h 4m 33s Total call duration

Call count

24
18
12
6
0

12:00 AM 02:00 AM 06:00 AM 08:00 AM 10:00 AM 12:00 PM 02:00 PM 04:00 PM 06:00

● Inbound ● Outbound ● Internal

Star Codes

Feature access via code, can be dialed from keypad or programmed under a button.

Hunt group dialing codes

Once Agents are added to the list, they are able to log into the group from their VoIP device by using the correct dial code, assigning log in & log out buttons to their device, or by an administrator using CONTROL PANEL:

How to log in and out of hunt groups (Basic or Advanced) directly from your IP phone:

To log in the hunt group dial its extension and add '1'.

***XXX*1** (log into a hunt group with extension **XXX**).

To log out of the hunt group dial its extension and add '0'.

***XXX*0** (log out of a hunt group with extension **XXX**).

For example, if you need to log into a hunt group with extension **300**, dial ***300*1**. To log out, dial ***300*0**.

Call Pickup Codes

The **Call Pickup** feature allows a user at any phone to answer calls that are ringing on other phones in the company. To access the Call Pickup feature, the user dials a corresponding Call Pickup Code.

There are three types of Call Pickup:

Feature	Code	Description
Directed Call Pickup	*95 + extension (e.g. *95103)	Answers an incoming call on a specific extension
Any Call Pickup	*96	Answers an incoming call on any phone
Group Call Pickup	*97, or *97 + group ext (e.g. *97200)	Answers an incoming call to a Pickup Group that the User is an agent of.

You can view the KB article

[Directed Call Pickup](#)

for more information on the Call Pickup feature.

Paging Group dialing codes

When dialing to Paging groups, all idle phones in the group will have their speaker turned on and the caller's voice will be heard on all phones. For more information on paging refer to this

[article](#)

. Using a Paging Group as an

Intercom

While not a true Intercom feature, any member of a paging group can answer a page as a two-way interactive call by using the dial code ***80**; disconnecting any other members currently listening to the paging call.

Intercom dialing codes

In order to start an Intercom call, the user will need to dial ***90 + target user extension** (i.e. ***90100** will initiate the intercom call with the user ext 100).

Note: If the user has multiple devices assigned, the device that was added first will be considered an Intercom device.

In order to re-assign the Intercom role to another device, the user should dial ***91** from the phone which he wants to be used for Intercom in the future.

Important: when the device which currently has Intercom role will be removed from the user, the Intercom role won't be assigned to any other device by itself, it will be necessary to dial ***91** from another device in order to have it assigned to it.

For more information on Intercom feature please refer to this

[article](#)

. Call Park dialing

code

While devices auto-provisioned (purchased directly, or Enhanced BYOP) have a Park softkey programmed, you can manually park a call from any device by simply pressing #7.

Press #7 while on an active call

The call is put on hold and the operator will advise you of the parked extension the call is now holding on (always starting at 980 and incrementing by 1).

Note: Call Park extension range depends on the account's set extension length. 3-digit accounts are 980 to 989, 4-digit accounts are 9980 to 9989, 5-digit accounts are 99980 to 99989.

You can now dial the parked extension number from any device on the account to immediately pick up the call.

Elevate users may use a star code to call directly to another extension's voicemail box.

Dialing ***<extension number>** (e.g. ***103**) from any device will immediately call that extension's Voicemail. You can use this star code to transfer callers directly to a voicemail box.

Blind Transfer to Voicemail of an extension:

When on a phone call, press the **Blind Transfer** soft-key.

On different phone models this option can be accessed differently:

On **Cisco** and **Yealink** phones it is actually a separate soft-key, usually hidden under "More" options.

Dial ***<extension number>** (e.g. ***103**) and complete the transfer.

Note: on the Yealink phones * key needs to be pressed twice in order for * symbol to appear.

The caller will then be sent directly to that extension's voicemail.