Getting Started

Logging In

To log into the Crexendo Web Interface, open http://www.crexendo.net and click the **Login** link in the far upper right corner of the screen.

The next screen you see will be the Welcome screen of the Keychain secure login process. You will be prompted to enter your Email Address. This must be a valid email address since correspondence could be sent to you at that address from Crexendo. Enter your email address and click the **Sign In** button to continue.

IMPORTANT NOTE: For any subsequent logins you should always use the email address you enter here.

The Sign In box will appear. Please enter the password that was issued to you with your License and click Continue.

Next is the Customer Info screen. Please confirm that the information displayed (Name – first and last, Address, City, State, Zip, Country and contact Phone Number) is correct. Make changes where necessary. Click Continue to move to the next screen.

You will be prompted to enter a new password and to confirm that new password. Passwords are case-sensitive, so be sure to repeat any capital letters or special symbols you may have included when you confirm your password. Click the Continue button in the bottom right corner to continue. You will use this new password whenever you log into the Crexendo Web Interface through the Keychain.

Security Verification

This second layer of security lets you customize the Sign In Screen (where you will enter your password each time you sign in) so that you can verify, at a glance, that you are logging into the correct website and have not been diverted to an imposter site.

You will be prompted to customize the Security Screen with a personal phrase. This can be any phrase or sentence or familiar series of significant words that you will quickly and easily recognize. Type in the phrase and click Continue.

Finally, the Terms and Conditions screen appears. Please read and signify you understand and accept the **Terms and Conditions** by clicking the **I agree** button.

A Messages screen may appear. Messages are sent to you periodically to update you on items of interest regarding the Web Interface software or devices. If there are available messages, click the box next to the "**I have read…**" statement and click **Next**.

The Keychain Services screen will display. Listed on this screen are the License(s) assigned to you categorized by the type of product. Here you can launch the License application or edit the Display Name so it is easier to distinguish one License from another. You may also add Licenses. Here are some quick navigation tips:

- The next time you click **Login** from the website all you need to do to reach the Keychain screen is to type in your email address in the Welcome box and enter your password in the Sign In screen.
- To exit Keychain, click on the **Options** dropdown menu and select **Logout**.
- To return to Keychain from within the Crexendo Web interface, select **Keychain** from the **Options** dropdown menu at the top right of any screen.

To log into the Crexendo Web Interface simply click the icon associated with your License.

Crexendo Web Interface Navigation

The Crexendo Web Interface functions are organized into six categories, which are listed in the Main Menu bar down the left hand frame of the screen.

- Messages
- Contacts
- Email
- Fax
- Account
- Phone

These Main Menus contain a set of Submenus below each Main Heading.

As you navigate through the Crexendo Web Interface, please avoid using your browser's navigation buttons (back and forward). Your information is saved whenever you click a Main Menu or Submenu. If you use your browser's navigation buttons, your information will not be saved. **Within every Submenu there is also a button pointing to the left with the name of the previous screen or current Main Menu heading. Throughout this guide and in all Help menus we refer to this as the Back button, it does not mean the browser's back button.**

Adding Users

Users are the people who will be making/receiving the phone calls, faxes, and emails. All users log into the same Crexendo License Key. User-specific logins are differentiated by the unique password belonging to each user. Additional users are able to create Keychain logins with their own email addresses, following the process explained at the beginning of this guide.

To add users, click on the Users Submenu under the Account Main Menu Menu heading. You will be automatically listed as the first user and have been defaulted to the Administrator role. Click the **Gear** button and select the **Add** option. You will be prompted to enter the new User's name and to make decisions about whether to assign this user a Personal Extension now (This allows the new employee to check their voicemail and can be done later); and whether or not to associate the user with existing Phone Numbers and Devices. Click the radio button associated with the appropriate selection and click **Next**.

Note: The following message will appear at the top of this screen: "A new employee has been created with password: aaaaaaa". Please note this password as it will disappear once you exit this screen. The user you created will use this first password to log into their personal settings. They will be able to change the password to one of their liking at that time. If you chose to automatically assign a new Extension to this employee the default Personal Extension number will also show in this information note.

Users can be inactivated by toggling the **Active** checkbox.

On this screen you may grant permissions to the user. For an explanation of each of the permission options, see the Help screen by Clicking on the Options dropdown and selecting Help from the menu.

There are three Email Options as well. You can opt to disable the Rich Text Editor, turn on the Out of Office function and designate the Default Email Folder.

Click the **Trash Can** in the upper right corner to delete the User record or click the Back button (in this case labeled **Users**) to save the changes. Note: The Administrator User record cannot be deleted.

Users without administrative permissions may edit their own parameters (create a Voice Mailbox PIN, add additional Personal Phone Numbers, turn on the Out of Office function, and record a personalized voicemail message) by clicking **Options > My Settings**.

Phone System Setup

Adding Extensions

The Extensions section lists all of the entities who will receive calls through your phone system. There are four types of extensions; the first three have been defaulted for you:

VM Pickup – This extension is the system voice mailbox. All voicemail messages left for any extension are directed to this one extension; therefore you will only have one extension designated VM Pickup.

Auto Attendant (Menu) – Also known as a phone menu, customers hear a recorded message which prompts them to select one of several options ("Press 1 for…") they are then transferred to the appropriate extension.

Hunt Group (Team) – Groups or teams made up of individuals/extensions.

The following Extension Types are also available and can be added as needed:

Personal – This extension is assigned to an individual person/employee. The first Personal Extension will be automatically created for the Administrative User if a device was ordered for the account.

Conference – Creates an extension that up to ten parties can connect to at once for conferencing. The Conference extension is created automatically when you complete the Activation setup wizard if you have ordered a device for your account.

<u>Directory</u> - Directory Extensions let your customers type all or part of either an Extension Number or a User Name in order to reach that exact individual. The Directory extension is created automatically when you complete the Activation setup wizard if you have ordered a device for your account.

It may be helpful to diagram the structure of your organization or review your existing phone system before you begin creating extensions.

Select the **Extensions** Submenu under the **Phone** Main Menu Heading.

To add an extension click the **Gear** button and select **Add**. Select the **Type** of extension from the dropdown list. Enter the **Name** of the extension. Enter the extension number and the Owner (chosen from the list of Users you just created.) You will be prompted to associate this new extension with a particular Device or Phone Number. Click Next. Choose the Outbound Caller ID from the dropdown list. (Outbound Caller ID may not show depending on the extension **Type** you have selected.)

If you are creating a Personal Extension you have the option of changing the Ring Timeout default. This is the amount of time the phone will ring before the call is either sent to voicemail or moved on to the next member of the Hunt Group in the sequence.

Note: Extension numbers must be unique; if you select an extension number that is already in use, you will receive an error message when you click Add.

Creating Hunt Groups

Now that you have created Users and Extensions you may want to set up a Hunt Group (also known as a Team.) A Hunt Group is a named list of extensions or phone numbers. For example, your Customer Support Hunt Group may contain the extensions for all of your support employees or you may just want a group made up of the various phone numbers for the same employee (cell, home, etc.). When a call directed to a Hunt Group is received it will step through the list (top to bottom) calling each extension/number in the order it is displayed on the list.

Click on the Extensions Submenu under the Phone Main Menu. An Extension with a Type of Hunt Group (Team) has been automatically supplied with the software. Double-click the desired Hunt Group or highlight it or click the **Gear** button and select the **Edit** option. You may edit the Name, the Extension, the Owner and the Caller ID fields.

Next are the voice prompts. There are three different types:

<u>Identify Prompt</u> – the Identify Prompt requests a customer say their name before passing the call along. This information will then be relayed to you when you pick up the phone. A standard Identify Prompt would read “Please state your name after the tone.” Please note: you do not have to use the Identify Prompt, but for the Hunt Group calling to function properly, you must have a Hold Prompt and a Voicemail Prompt.

<u>Hold Prompt</u> – the Hold Prompt is an automated message that plays while your customers are on hold. A classic example of a Hold Prompt is “Thank you for holding. Your call is very

important to us." Music will be played in the background.

Voicemail Prompt – the Voicemail Prompt asks your customers to leave a message on your voicemail system when none of the team members answer. "Leave a message after the tone" is a standard Voicemail Prompt.

To record any of these prompts, click on the **Ellipsis** (…) Button to the right of the prompt you wish to record. A new window will open. If you wish to record your own message in your own voice you can ask the phone to call you by selecting or adding your phone number and clicking the **Call Me** button. You will receive a phone call and be prompted to record the message.

If you would prefer an automated voice, enter the text of your message into the **Prompt Text** box, and then hit the **Record** button to convert the text into speech. You can choose a male or female voice in the dropdown menu below the box. (Note: If you change voices you will need to click the **Record** button again.)

If you are not satisfied with your first recording, make edits to the text and click the **Record** button again to save your changes. If the message doesn't play correctly, try using alternate spellings of words. For example, you could write Hunt Group A as "Hunt Group Ay" and Hunt Group B as "Hunt Group Bee".

If you decide that you no longer want a prompt, click the **Trashcan** button to discard it. To save the prompt and return to the Hunt Group you're working on click the **Back** button.

Once you've recorded your prompts you are ready to add extensions or phone numbers to the Hunt Group. Select a User phone number or an Extension from the "Add A Number…" dropdown menu. (Be sure they are added in the order in which they should be called.)

On the new page, select a schedule for this phone number. You can choose from the following four options:

Never – This number will never be called

Always – This number will always be called.

Period – Set the Start and End date and time using the dropdown menus. This number will only be contacted between the Start and End dates/times.

Repeat – This number will only call be called during certain hours of certain days of the week. It will then repeat that pattern for subsequent weeks. Check the boxes next to the days you want this number to be called. Then enter a starting time in the **Start** field and an ending time in the **End** field. Be sure to specify am or pm when entering times. If your schedule does not change frequently, this option is the most suited.

You may also reorganize the order in which numbers are called by dragging and dropping. Once you've added all of the phone numbers/extensions for the Hunt Group, click the **Done** button to return to the Hunt Groups Menu.

Users who are owners or team members within a Hunt Group have access to that Hunt Group's voicemails.

Creating Auto Attendants

Set up an Auto Attendant Extension in the same way you would a Hunt Group by editing the default Auto Attendant Extension automatically provided for you with the system. Double-click the desired Auto Attendant Extension or highlight it and click the **Gear** button and select **Edit**. You may edit the Name, the Extension, the Owner and the Default Menu.

An Auto Attendant Extension requires at least one Phone Menu--this is where you record the greeting and program the extensions to correspond to the phone's keypad numbers Double-click on the desired Menu under **Phone Menus** to make changes or click the **Gear** button and choose **Add** to create a new Menu.

The Prompts box lets you record what the customer will hear when they access this menu. You will need to welcome the customer to your business and clearly explain all of the options. An example would be "Thank you for calling [yourcompanyname]. Press one for Customer Service. Press two to Speak with Sales or if you have questions about your order. Press three to speak to a representative..."

Click the **Ellipsis** (…) Button to record a prompt for your menu. Record this prompt in the same way you recorded the prompts for your Hunt Groups. Once you have recorded the prompt, click the **Back** button.

The numbered boxes below the Prompts box represent a number key on a touch-tone telephone. Clicking on the dropdown menu for each number will let you select another Menu, a Hunt Group, a Personal Extension, or an additional Auto Attendant to associate to this keypad number. When a customer then presses that number the Crexendo Web Interface will either list new menu options, call the members of a team, call a personal extension, repeat the Auto Attendant, or go to Voicemail.

The **Default** dropdown menu lets you designate what the Crexendo Web Interface should do when the customer waits without pressing a button. You can have the customer automatically put through to a team by entering a Hunt Group Extension, repeat the options, or disconnect the customer. Leaving the default as "None" causes the Auto Attendant to repeat its menu options. You will also need to indicate the length of time (in seconds) the customer has to make a decision before the system runs the option you selected as the Default. If you plan on disconnecting customers when they don't respond to your menu items, be sure to set a long timeout length.

You can set up a schedule to regulate which Auto Attendant Greeting your customers will hear when they call you at specific times just as you did for your Hunt Groups. To set a schedule, highlight the desired Greeting in the Phone Menus section, click the **Gear** button and select **Schedule**.

Creating Personal Extensions

The Personal Extension Type is assigned to an extension that will be used by a particular individual. Enter the Extension Name, Extension Number, Owner (chosen from the dropdown list of your Users), the Caller ID number for the Outbound Caller ID, and the Ring Timeout interval. Click **Back** to save your changes.

Testing Your Phone System

Now that you've created your phone system, you can test it simply by calling your Crexendo phone number. This number is listed in the Numbers section of the Phone Main Menu. If you find something missing from your phone system, make the appropriate edits to your information. Feel free to call Cloud Communications Customer Support at (855/211-2255) for additional assistance.

Messaging System Introduction

Messages

Now that you have set up your phone system, you are ready to receive messages. Whenever you log in, the Crexendo Web interface will display the origin (incoming phone number for phone and fax transmissions, address for emails), the type of communication (phone, email, or fax), the date, the message size, and a junk probability for any new communications you have received.

Phone Messages

Phone calls are marked with a phone icon . "Missed Call" will appear if the customer opted out of the phone system before reaching a person or a Voice Mailbox (e.g., they hung up while on hold or timed out of the Auto Attendant.) To get further details, double-click on the message.

If the caller left a message on your voicemail during their call, you will see a speaker icon in the second column from the left. Double-click this icon to listen to your message.

Fax Messages

Fax messages are marked by an icon representing a page with a lightning bolt . The Crexendo Web Interface converts faxes to PDF attachments for you to forward, download, or print. To receive your fax, double click on the fax message. Click on the paper clip icon in the message window to open your fax attachment.

Note: If you have purchased the Crexendo Adaptor and chosen to attach a fax machine to one of the ports, faxes that come through will NOT be converted to PDF attachments, they will print directly from your fax machine. Within the Crexendo Web Interface these will register as phone calls displaying the number they are transmitted from.

Email Messages

Email messages are marked by an envelope icon .

You may set up customized Email addresses for your employees if you wish. Your customers could contact your Customer Service department at the address customerservice@crexmail.com, for example. The domain name “availmailbox.com” is supplied as a default.

Click on the **Addresses** Submenu under Email. Select a domain name for this address from the “Add a Permanent Email…” dropdown menu.

You can register a new Domain Name by clicking the **Gear** button and selecting **Register** or call Customer Support for information on how to link your current domain name to the Crexendo Web Interface.

Email addresses created using a brand new Domain Name may take three to four days to activate.

On the new page, type in the new address in the **Address** field. In the User Access section, select the user(s) from the dropdown list who will have access to messages sent to this email address. You may select a user and click the **Delete** option within the Gear button to remove a user’s access from a particular email address.

Signature

You can customize the messages sent from each address by creating a Signature. A signature is a section of text that will be attached at the bottom of each outgoing message. Usually this includes the sender’s name, Business name, and any contact information (address, phone numbers, fax number, etc.) Type the text of your signature into the **Signature** text box. There are standard formatting options to customize the signature as you like. Signatures are assigned to a particular email address, not a user. If you want all outgoing emails from a particular user to have the same signature, you must set up that signature in all email addresses the user will send out from.

Away Message

The away message will be automatically sent as a response to messages received when you are out of the office or unable to respond to your email. You can activate/inactivate the Away message by editing the users listed in the Account Main Menu Tab and clicking the Out of Office box. This option can also be accessed from **Options> My Settings**.

Contacts

You can add the contact information from an email message directly to your contact list. In the Messages tab, open the email message and mouse over the information in the **From:** field. Click on the plus icon that appears. You will be prompted to either create a new contact or add to an existing one.

To create a new contact, click that radio button. Enter first, middle, and last names and click **Add**. A new listing for this email address will be created in the Contacts Tab. Click the **Back** button to return to the Messages Screen.

To add to an existing contact click that radio button. A list of all your contacts will be displayed with an option to search for the appropriate contact (if it does not already appear on the screen.) Once you have located the record to which the email address is to be added, double click the contact.

The email address will be added. Click the **Back** button to return to the Messages Screen.

You can also add a contact directly in the Contacts Submenu. Click the **Gear** button and select **Add** to open a new window. Complete the name fields, title, company, and display name information as desired.

Next, click on the Contact Info Tab on the right and use the “Add Contact…” drop down menu to add a new field for additional contact information. From the dropdown menu you can select whether this information is an email address, a phone number, or a fax number. Then enter the appropriate info in the Contact field. Select the **Type** of contact from the dropdown menu (Home, Work, Other). If you have multiple methods of contacting this customer, you can select the preferred method by clicking the radio button. The Contact method you select as preferred is what will display in the overview Contact column when you view or search your Contacts.

Under the Addresses section on the right you can add a new address by clicking the **Gear** button and selecting **Add**. Fill in the Street, City, State, Postal Code, and Country fields. Select Home, Work, or Other from the **Type** dropdown menu. Select the preferred address by clicking the radio button to the right of the address. You can add multiple Addresses by continuing to select the **Add** option from the Gear button. Delete addresses by highlighting the entire address section and choosing the Delete option from the Gear.

When you have finished adding contacts and addresses, click **Back** to save your changes.

You are now ready to use the Crexendo Web interface! Feel free to explore the advanced options on the site. For further information, click the Options Menu at the top of the page and select **Help** for page-specific assistance; or contact Customer Support at 855/211-2255.