



# EVOLVE IP

**Evolved Office: HPBX**

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**AWARENESS GUIDE**

## Overview

As the administrative and/or technical contact for your organization, it is imperative that you understand that we are not simply attempting to replicate or mirror your company's old systems or processes. Instead we are implementing a new system and a new "evolved" way of communicating.

The first step is awareness of change, followed by a willingness to evolve, and finally careful planning and execution. If you have any questions about the topics covered below or are looking for advice on how to best share this information with your users, please contact your Project Manager and we'll be happy to assist.

## Change Awareness

### New System Configuration and Operation

Some older telephone systems, particularly those designed for smaller organizations use "lines" rather than "extensions." This means that everyone has access to a pool of lines that is represented by a light on their telephone. The Evolved Office provides a better, more flexible way for your enterprise to handle call flow for main numbers as well as individual extensions and DID's. Although there are different ways to manage a single line or number, we generally don't recommend replicating legacy "Keyset" environments. The Evolved Office provides solutions that provide numerous benefits and positive changes to your organization. Evolve IP will assist your organization in becoming acclimated with those changes and ensuring a positive transition, which in most cases requires a combination of improved technology and processes. .

By default, outbound dials from all users will show the primary name and number of your business name on the caller ID of the party you are trying to reach. Most phone systems are set up with that configuration; however you may require that individuals display their distinct caller ID on outgoing calls. Additional charges may be incurred to have the distinct called ID information appear for each of your telephone numbers.

If you are requesting new telephone numbers from Evolve IP, keep in mind that your number choices will be based around the current availability of numbers in your area, and in Evolve IP's current inventory. Although we make every effort to obtain contiguous blocks or specific telephone number ranges, in many cases this is not possible due to service provider limitations.

In cases where Evolve IP is providing On-Site Installation, installation of the phones and equipment will typically occur approximately 3-5 business days before your numbers are scheduled to port over to Evolve IP. During this time each user will have their current handset and the new Evolve IP handset on their desk at the same time. After your numbers have ported to Evolve IP, your Evolve IP phone will be the device used for all incoming calls. After this happens your service has officially been transitioned to Evolve IP, and you can remove your old handsets.

Evolve IP will provide technical forms which are utilized to outline your network needs for the implementation of Evolve IP services. These forms must be completed prior to the configuration and installation of any services, and are applicable for both remote (customer-provided technical personnel) and on-site (Evolve IP-provided technical personnel) installations. At the time of installation, you are required to have appropriate technical resources available to support changes that may be needed to your network, such as LAN, WAN, VPN, servers, wireless access points, work stations, DNS, routers, switches, and IP addresses.

Lastly, and most importantly, please read and be familiar with the necessary Customer responsibilities as outlined in Statement of Work (<http://www.evolveip.net/paperwork/sow.pdf>) regarding your data network (LAN, cabling, etc.) standards. Many IP PBX deployments have problems as a result of lack of preparation in this area. If you or your company does not directly manage your data network and instead use a third party, please get them involved in this process immediately.

## **Caller ID**

By default, outbound dials from all users will show the primary name and number of your business on the Caller ID of the party you are trying to reach. Most phone systems are setup this way. However, you may require that individual lines reflect a direct Caller ID. If this is the case, additional charges will apply if not already selected on the Sales Order.

## **Cancelling Services with Your Current Provider**

Evolve IP is not an authorized agent to cancel services with your existing provider. When your telephone numbers port over to Evolve IP, those numbers should be automatically removed from your previous service provider's account. It is your responsibility to audit your current provider's invoice after your services have been transitioned to Evolve IP. Any services that are no longer needed with that provider should be cancelled by you when your organization feels comfortable with the stability of new services.

## **Voicemail Transition Planning**

The Evolved Office includes a new Voicemail service that features Unified Messaging. Users with "saved" voicemail messages in their current voicemail system will lose access to those messages after you have decommissioned your current telephone system. We recommend that you warn your users of this fact at least a week in advance of turn up to enable them to retrieve "saved" messages before they are lost.

After the official service activation of your Evolved Office, users will come into the office to a fully functional phone that is already configured with a standard system voicemail greeting. Users who elect to utilize personalized greetings on their voicemail will have to record a new greeting. Quick Reference Guides for using your Evolved Voicemail platform and Evolved Office features can be found in our online Customer Support Center. Please feel free to download and distribute these documents as necessary.

## **Inbound Fax Messaging (vFax)**

If you have purchased fax messaging, faxes will be delivered to the email address of record for each user. A group fax message number can also be setup, which will send faxes to a group distribution list you setup on your mail server. Evolve IP uses a newer, digital IP transmission medium that is generally not suitable for older, analog fax services and/or mission critical fax service. These services should be placed over standard POTS lines or, if large enough, over T-1 PRI facilities. It is your responsibility to ensure that your fax machines continue to operate over traditional POTS lines or make arrangements for those lines to stay active if they are currently on a T-1.

## **Alarms, Credit Card, Postage Meter, and Outbound Fax Lines**

Evolve IP does not support standard analog lines for alarms, credit card machines, postage meters, or fax machines to our service platform. This service can be placed over standard POTS service or, if large enough, over analog T-1 PRI facilities. Please ensure that these numbers remain active with your current provider to avoid service disruption.

## **Advanced User Features**

The Evolved Office Assistant Toolbar provides advanced features and functionality to your end users, however like any new technology it requires training and time to learn. We recommend that you allow your users to familiarize themselves with the basic features of the phone and voicemail before introducing the advanced features of the system. Please make arrangements to install the Evolved Office Assistant on your users' machines a week in advance of your installation. The executable application and supporting documentation can be found in your OSSmosis portal.

## **Porting Telephone Numbers from Your Current Provider**

The porting of telephone numbers can take up to 30 calendar days or more given the complexity of the order and the carrier that we are porting the numbers from. Although this has a high success rate, we may encounter issues with your port order being accepted from the current carrier. This does not imply you will lose service; only in rare situations is service jeopardized, it only means that port dates may be delayed. Evolve IP does not have complete control over the acceptance of your port order - we are reliant on your current carrier and our underlying technology partners..

Your Project Manager will be in communication with you throughout the process in the event any "rejections" are received on your port order. The order will then be supplemented with further information to clarify the order. These things include, but are not limited to, customer name information, address accuracy, number accuracy, the correct Billing Telephone Number (BTN) on the account, freezes on your account, etc.

When we port existing telephone numbers to our service we are often queried by your current service provider and are asked to provide various pieces of information that can only be found on your current service provider's invoice to you. To help expedite your service activation, and to minimize the number

of times we will need to follow up with you throughout the process, we ask that you provide us with a full copy of your most recent invoice from your current service provider. You must currently own the numbers under your service provider contract in order for Evolve IP to port those numbers.

Although Evolve IP does everything within our control to port on the days you have requested, there may be delays in the porting of your telephone numbers. We anticipate it, communicate it, and work through it with each customer as it arises.

## **Business Continuity Plan for Evolved Office: HPBX**

As discussed during the sales process, because of the inherent values of cloud based technologies, the Evolved Office offers significant protection from potential service threatening issues (power, carrier T-1 facility, building problems, etc.). In most cases these issues can be mitigated with proper business continuity planning.

In the event that your office experiences a service affecting issue, such as a power outage, loss of internet connectivity, or other type of natural disaster, the Evolved Office allows for you to ***automatically*** reroute your company's inbound calls from the Evolve IP Private Cloud to various destinations. By default, calls to your user DID's will terminate into their respective voicemail boxes. You can decide to have your numbers forwarded to:

- An Auto Attendant
- An ACD (Queue)
- Another remote location
- Cell phones
- An Answering Service

Please take the time to plan where calls into your main numbers will ring in the event of service disruption. If your calls ring directly into an Auto-Attendant, they will continue to hit the auto-attendant because it resides in the Evolve IP Cloud. You will select these options in the Main Number Call Flow Guide below.

In instances where Evolve IP is providing your internet access over multiple T-1 facilities, in many cases we are able to utilize diverse carriers for access which provides protection from many potential problems. If we are only providing 1 T-1 or you if desire a higher level of service diversity, we offer Voice Continuity service. Our Voice Continuity service enables your inbound and outbound calls to be routed through a public IP service such as Broadband Cable in the event of a T1 failure. Additionally, the Broadband service can be utilized for primary Internet service which may fit bandwidth requirements for your organization. If Voice Continuity service has not already been selected, please ask your Project Manager or Technology Advisor about additional monthly and one-time configuration charges that will apply. Evolve IP offers a full suite of Continuity and Data Backup/Recovery services. If additional Continuity services are required, please contact your Technology Advisor to ensure products and services are accurate on the Sales Order.

Evolve IP also offers Data Back Up and Recovery Services as well should you be interested.

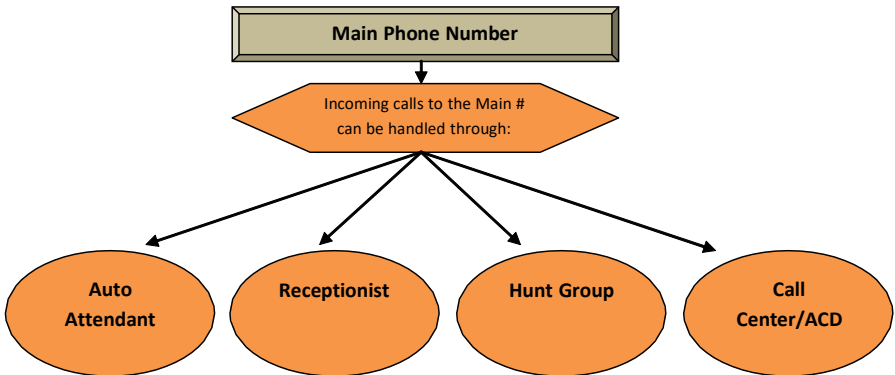
**It is imperative that you take the time to discuss, plan, and detail the business continuity needs for your organization.** Then, discuss the best implementation method for your business continuity needs with your Project Manager.

## Main Number Call Flow

### Overview

Properly planning how calls are handled within your business is one of the most important factors of any successful Evolved Office implementation. Careful decisions should be made for calls coming into your main number(s). Please review the following options carefully, as you will be asked to decide which option best fits your business. Depending on which option you choose, additional charges may apply. Your Project Manager will advise you on what has already been selected and what may incur additional expense.

Calls can be handled through the following options:



### Auto Attendant

An Auto Attendant (“AA”) is the most common selection for main number handling. An AA plays a greeting that you record and allows your callers to select from a number of options that you define. Pressing any option can forward to an individual, hunt group, another AA, or an external number. You can define different options in your AA for business hours and after-hours. You can also stack multiple AAs to provide further choices to your end users. Please note that there is an additional charge for each AA you elect to deploy.

### Receptionist

Receptionists can take calls directly from the main number as well. A Receptionist handling all calls into the main number is the second most popular option.



**The Evolved Receptionist** is a feature-rich desktop software client with an easy to use interface that includes integrated queuing, directories, and call control. Receptionists can pick up their standard phone or headset and control all incoming calls from multiple numbers and locations by the click of a mouse. Receptionists can see live status on all users in the enterprise and can forward directly to voicemail, forward to cell phones and camp a call on a line so that the caller will be patched through when a busy party becomes available. Calls are then transferred using a variety of methods.

## Hunt Groups

A Hunt Group allows incoming calls to ring multiple users. When a call is received, the call will ring all phones or ring based on a pre-determined pattern below. Hunt Group configurations can be modified directly through the OSSmosis Administrator portal. Hunt Groups can also be used for extensions that cover groups of people like accounting or a pool of executive administrators. The types of Hunt Groups available are as follows:

- **Circular** – Sends calls in a fixed order. The call is sent to the first available person on the list, beginning where the last call left off.
- **Regular** – Sends calls to users in the order listed by an administrator. Incoming calls go to the first available person on the list, always starting with the first person on the list.
- **Simultaneous** – Rings all of the users in the group simultaneously; the first user to pick up the ringing phone is connected.
- **Uniform** – As a call is completed, the user moves to the bottom of the call queue in a shuffling fashion. The next incoming call goes to the user who has been idle the longest.

## Call Center/ACD

The **Evolved Call Center** allows calls to be placed into “queues”, with agents and/or supervisors handling calls through intelligent call routing and queuing. Call monitoring, reporting and recording are all also available. Call Center Agents and Supervisors can be centralized in one location or distributed across many. If your organization requires Call Center functionality, your Technology Advisor can assist in determining requirements and the associated charges.

## Executive Administrators/Line Monitoring and Line Sharing

Executive Administrators often need the ability to monitor or manage phone calls for others and are among the most important Evolved Office users. We understand their important role, and that a project’s success often depends upon their level of happiness. Evolve IP offers our Executive Administrator Upgrade to ensure that these users can effectively utilize the features of the Evolved

Office with minimal disruption. If not already selected on the Sales Order, the Executive Assistant Upgrade will incur additional charges to your account.

When detailing information on your users, you will be asked to identify which employees provide call coverage, which employees they cover and which of the options below they wish to use.

The Executive Administrator Upgrade Provides:

- Support for Executive Assistant/Call Coverage personnel, including handset upgrades (this provides additional space and buttons necessary for Call Coverage)
- Additional 1 Hour Training tailored specifically to Executive Administrator/Call Support Personnel
- Configuration for Executive Line Manage and Line Monitor services, including:
  - Multiple incoming calls for Executives and Assistants
  - Mirrored extension view on multiple handsets defined by a support hierarchy that you provide
  - Visual indication of Executive/Assistant call status
- A direct Evolve IP support resource following implementation

## Evolved Office: HPBX Training and Support\*

*\*The items related to training are only applicable if a training package was selected on your sales order.*

If you selected a training package, Evolve IP will provide training to your employees so that they are fully aware of all of the features and benefits of the Evolved Office: HPBX. Our training packages are carefully designed to fit the needs of organizations of all sizes. In summary, the training packages we offer are as follows:

### **Standard Training - Evolved Office HPBX: FREE**

- Instructor led WebEx Training Session
  - Pre-scheduled, and available via user registration
  - Instruction on basic Handset features/functionality
  - Instruction on Evolved Assistant toolbar features/functionality
  - Advanced User call handling and advanced call flow
    - Receptionist Application training
    - Advanced Handset training
  - Call Center Agent Software and Unity Agent Software Training
  - Call Center Supervisor Software and Reporting Training
- Access to the Evolve IP Quick Tip Video Library
- Access to the Evolve IP Documentation Library
- Access to pre-recorded, on-demand full training videos
  - Instruction on basic Handset features/functionality
  - Instruction on Evolved Assistant toolbar features/functionality



## **Premium Training – Evolved Office HPBX: \$100/Hour**

- Private, customizable instructor led WebEx Training Session
  - Includes all features of the standard training, but will be dedicated to your organization and customized for your needs
  
- **On-Site Training & Live Support – Evolved Office HPBX: \$1,000/Day** Customizable training agenda tailored to user needs
- On-Site, Instructor led Training
  - Basic and Advanced Handset Feature/Functionality
  - Evolved Assistant Toolbar training (Premium Users only)
  - Custom Advanced User Training, including
    - Service Implementation and Call Flow Training
    - Line Monitor and Line Management Training
  - Custom Receptionist Training
    - Application Training (if selected on Sales Order)
    - Call Flow and Main Number treatment Training
- Live support for Evolved Office HPBX Handset use
- Live support for Evolved Office HPBX applications
- Access to follow-up Instructor led WebEx Training Session
  - Pre-scheduled, and available via user registration
  - Instruction on basic Handset features/functionality
  - Instruction on Evolved Assistant toolbar features/functionality
  - Executive
- Access to the Evolve IP Quick Tip Video Library
- Access to the Evolve IP Documentation Library
- Access to pre-recorded, on-demand full training videos
  - Instruction on basic Handset features/functionality
  - Instruction on Evolved Assistant toolbar features/functionality

## **On-Site Training & Live Support – Evolved Office Call Center: \$2,000/Day**

- Work with Group Administrator to finalize custom agenda and schedule for Evolve IP Instructor led on-site Training Session
- OSSMosis Group Administrator Training, including
  - Call Center Best Practices
  - Call Center ACD Moves/Add/Changes
  - Agent and Supervisor ACD assignments and relationships
  - ACD Call Flow Change Management
  - Overview of Evolve IP Call Center Reporting Guide, pre-scheduled and portal based
  - Advanced Administrator Functions
- Custom Call Center Agent Training, including
  - Call Center feature and product overview
  - ACD settings and Agent availability overview
  - Presence and Instant Messaging (if Unity Agent is selected on Sales Order)
  - Call Control and Call Handling best practices
  - Advanced Call Center Agent Software Training
  - Call Center Handset feature training
- Custom Call Center Supervisor Training
  - All Agent training functions
  - Evolve IP Call Center Reporting Training and Overview
  - Queue Management Dashboard training (if selected on Sales Order)

- Call Center Supervisor Software Training (if selected on Sales Order)
- Quality Assurance for Evolve IP ACD Implementation
- Change Management for ACD, Agent and Supervisor functions, post cutover
- Live support for Evolved Office Call Center Users
- Live support for Evolved Office Call Center applications
- Call recording Quality Assurance and Interface Training (if selected on Sales Order)
- Access to follow-up Instructor led WebEx Training Session
  - Pre-scheduled, and available via user registration
  - Instruction on Call Center Handset features/functionality
  - Instruction on Call Center Agent software features/functionality
  - Instruction on Call Center Supervisor software features/functionality
- Access to the Evolve IP Quick Tip Video Library
- Access to the Evolve IP Documentation Library
- Access to pre-recorded, on-demand full training videos
  - Instruction on basic Handset features/functionality
  - Instruction on Evolved Assistant toolbar features/functionality

In the event that you would like to upgrade from the training package that you originally selected, please contact your Project Manager and they will work with our Corporate Training staff to schedule your training.

## Call Reporting

### Overview

Call Reporting is a default feature of the Evolved Office and is included in every order without additional expense or the need to include it on the sales order. Call Reporting is provided via email to your designated contact(s) at a predefined interval. Reports are in HTML format and can easily be opened for review in a web browser or may be opened in Microsoft Excel for easy formatting and analysis. Reports can be delivered on a daily, weekly, or monthly basis. Please inform your Project Manager that you are interested in receiving these reports, and they will set you up with the reports that you desire.

### Report Options

#### *Call Summary*

Call Summary is an executive level overview that is organized by extension and provides counts of calls in different categories as well as duration averages. The fields provided are as follows:

- Group
- User
- Category
- Inbound Calls
- Inbound Average Duration
- Outbound Calls
- Outbound Average Duration

- Total Calls
- Total Average Duration

## ***Call Detail***

Call Detail is a detail level report which essentially replaces a Call Detail Record (“CDR”) report from a traditional carrier. It includes all of the fields above in the Call Summary report, but also includes an extension by extension accounting of every call within the period of time selected for the report. The fields provided in a Call Detail report are as follows:

- Call Date and Time
- Call From Number
- Call From City
- Call From State
- Call To Number
- Call To City
- Call To State
- Call Duration

## ***Account Code***

An Account Code report is a summary and detail level report organized by account code instead of internal extension. All report contents are the same as the reports above

## ***Custom Reports***

Customers with specific needs may request custom reporting be developed. Report development will incur additional charges based on the level of effort to create the report.