UCaaS Awareness Guide

Overview

As the administrative contact for your organization, it is important you understand we are not simply attempting to replicate or mirror your company's old systems or processes. Instead, you are choosing to implement a new "evolved" way of communicating.

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

Change Awareness

At the beginning of your implementation, your Evolve IP Project Manager will issue you a series of documents to complete. Chief among these is the Implementation Workbook. This document houses the vast majority of the information related to the configuration of your UCaaS services. Evolve IP directly translates the information you provide in the Implementation Workbook and uses it to build your services. Sending us a complete, accurate, and timely version of this document will help keep your implementation moving forward. If you have any questions about the information to be provided in the Implementation Workbook, contact your Project Manager for assistance.

If you are requesting new telephone numbers from Evolve IP, please remember your number choices will be based around the current availability of VoIP numbers in your area using any of Evolve IP's carriers.

In both on-site and remote cases, installation of the phones and equipment typically occurs 3-5 business days before your numbers port 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 port to Evolve IP, your Evolve IP phone will handle all incoming calls. Your services have officially been transitioned to Evolve IP following the completion of your port, and you can remove your old handsets.

Evolve IP provides technical forms utilized to outline your network needs for the implementation of your 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 any changes needed to your network, including, but not limited to, LAN, WAN, VPN, servers, wireless access points, work stations, DNS, routers, switches, or IP addresses.

Most importantly, please read and be familiar with the necessary customer responsibilities outlined in the Evolve IP statement of work (http://www.evolveip.net/paperwork/sow.pdf) relating to the readiness of your data network for your new UCaaS services. IP PBX deployments can experience problems as a result of lack of preparation in this area. If your company uses a third party to manage your data network, please involve them in this process as soon as possible.

Caller ID

By default, outbound calls from all users will show the primary name and number of your business to 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. Please let your Project Manager know if you require a different configuration.

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 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 your new services.

Voicemail Transition Planning

The Evolved Office includes a new voicemail service featuring Unified Messaging. Users with saved voicemail messages on your current voicemail system will lose access to those messages after it has been decommissioned. We recommend you advise your users of this fact at least a week ahead of turn up to allow them to retrieve saved messages before they are lost.

After the official service activation of your Evolved Office, users can expect a fully-functional phone already configured with a standard system voicemail greeting. Users desiring 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 on our Knowledge Base website (http://support.evolveip.net/).

Inbound Fax Messaging (vFax)

If you purchased fax messaging from Evolve IP, inbound faxes will be delivered as an email attachment to a given user. Evolve IP uses a newer, digital IP transmission medium that is generally not suitable for older, analog and/or mission critical fax services. It is your responsibility to ensure your fax machines continue to operate over traditional POTS lines or PRI's.

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 on our platform. These services should be placed over standard POTS lines or, if large enough, over analog T1 PRI facilities. Please ensure that these numbers do not port to Evolve IP to avoid service disruption.

Porting Telephone Numbers

Your Project Manager will supply you with blank Letter of Agency (LOA) forms to begin the porting process. These documents are required to port any local or toll free number to Evolve IP. When completing these, please take your time. The information you provide on the LOA's will be sent directly to carriers to process your ports. Any number you wish to port to Evolve IP needs to be listed on the LOA's. 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, please provide us with a full copy of the most recent invoice from your current service provider. Any number to be ported must be in-service and currently owned under your service provider's contract.

Porting telephone numbers is a successful and common practice. Taking into account the complexity of your order and the policies and intervals of your losing carrier, these orders can sometimes take 30 or more calendar days to fully-complete. It is not uncommon for us to encounter issues with port order acceptance from the current carrier. These issues are not service-affecting; only in very rare situations is service actually jeopardized. These issues typically only mean port dates will 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 awderlying carriers. Evolve IP does everything it can to port your numbers on the desired dates.

Your Project Manager will be in communication with you in the event any rejections are received on your port order.

OSSmosis Administrator and Personal Portal
One of the hallmarks of Evolve IP's UCaaS services is our OSSmosis portal. Available for both administrators and individual users, this powerful tool allows extensive management and support of your UCaaS services.

Business Continuity Plan for Evolve IP UCaaS Services
Because of the inherent value of cloud-based technologies, the Evolve IP's UCaaS services offer significant protection from potential service-threatening issues (power, carrier facility, building problems, natural disaster, etc.). In most cases, these issues can be mitigated with proper business continuity planning.

In the event any part of your organization experiences a service-affecting issue, your UCaaS services allow 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. Common emergency destinations include:

- An auto attendant
- Another remote location
- Cell phones
- An answering service

When Evolve IP provides your internet access via multiple circuits, we are often able to utilize different carriers to offer diversity against potential problems. If Evolve IP is only providing a single circuit or you if desire a higher level of diversity for your public internet access, we offer the Voice Continuity service. Voice Continuity enables your inbound and outbound traffic to be routed through a public IP service, such as broadband cable, in the event of a primary circuit failure. Additionally, the broadband service can be utilized as primary internet service if it fits bandwidth requirements for your organization.

A further layer of diversity is achieved using our Cloud Connect service. This network appliance takes circuits of different types/speeds and "combines" them into a single internet connection feeding your office. The aggregated bandwidth can then be used for both voice and data purposes. This product is tiered based on the total amount of bandwidth you have delivered to your office. Your Technology Advisor or Project Manager can help you select the correct product. *It is critically-important to note installing Cloud Connect will require changes to your existing network. These changes surround the public IP addressing of your network devices.* Your Project Manager or Technical Lead will advise of the specific changes you will need to make during your implementation.

If you would like to add any business continuity services to your order, please ask your Project Manager or Technology Advisor about the additional monthly and one-time configuration charges for any of the above solutions.

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. Please review the following options carefully as you will

ultimately need to decide which option best fits your business. Depending on the chosen option(s), additional charges may apply. Your Project Manager will advise you on what has already been selected and what may incur additional expenses.

Some older telephone systems, particularly those designed for smaller organizations, use "lines" rather than "extensions." This means that everyone has access to a shared pool of lines represented by a light on their telephone. Evolve IP's UCaaS services provide a better, more flexible way for your enterprise to handle call flow for main numbers as well as individual extensions and DID's. Because there are different ways to manage a single line or number, we do not support or recommend replicating legacy "keyset" environments.

Evolve IP's underlying platform is extremely diverse and fully-featured when it comes to call routing. Throughout your implementation, your Project Manager will work directly with your administrators to develop your ideal call flow. Some popular options for call routing include:

- **Auto Attendant:** An auto attendant plays a recorded greeting and allows your callers to select from a variety of pre-defined options. These options can include extension dialing, name dialing, transferring to somewhere else on your system, or transferring to an outside number. You can define different options for business hours and afterhours.
- **Receptionist:** This option involves an individual user answering incoming calls. When selecting this option, we recommend using The Evolved Web Receptionist. This is a feature-rich, web-based client with an easy to use interface that includes integrated queuing, directories, and call control. If you are interested in this product, please consult your Project Manager for pricing and availability.
- **Hunt Group:** A hunt group allows incoming calls to ring multiple users based on a pre-determined pattern. The hunt group ring patterns available are: circular, regular, simultaneous, and weighted. Consult your Project Manager for details on each and which one will be correct for your application.

Contact Center/ACD

The Evolved Contact Center allows calls to be placed into queues with designated agents handling calls using intelligent call routing and queuing. Call monitoring, reporting, and recording are all also available. Contact Center agents and supervisors can be centralized in one location or distributed across many.

Customers who choose the Evolved Contact Center gain the operational advantages of moving their ACD's to the cloud, increasing business continuity, agent mobility, and reduced overall cost. Every ACD achieves call distribution differently. Our Contact Center Subject Matter Experts will offer advice on how best to leverage the capabilities of our system to achieve your desired results. Your Project Manager and a Contact Center Subject Matter Expert will provide advice on how best to accomplish this migration.

It is also very important to inform your agents of the changes to how they will operate, how calls will be handled, the reporting/visibility available to leadership, and the reasons behind these changes. Agent expectation and opinion is often the root of difficulty when introducing a significant change like a new Contact Center solution. We strongly encourage you to clearly communicate with your agents multiple times in advance of the Evolved Contact Center rollout to promote agent adoption and alleviate the strain associated with such a significant change to their daily routines.

Occasionally our customers choose the Evolved Contact Center as a means to advance the capabilities of their existing hunt group configurations. The addition of call queuing, enhanced messaging, and other advanced routing provides a significantly-increased level of service and visibility in high-volume Contact

Centers. If you would like to add Contact Center services to your account, your Technology Advisor along with a Contact Center Subject Matter Expert can assist in determining requirements and the associated charges.

Call Reporting

Evolve IP offers a variety of reports in the OSSmosis portal so you may gain more information about your organization's incoming and outgoing calls. If you are migrating from another Contact Center service, please remember reports will slightly different and it may be difficult to compare data to previous reports. The "summary" report is an executive-level overview organized by extension and provides counts of calls in different categories as well as duration averages.   The "detail" report essentially replaces a Call Detail Record ("CDR") report from a traditional carrier. It includes all the information from the summary report but also provides an extension-by-extension accounting of every call within the period of time selected. "Custom" reports can be created for customers with specific needs. These require development and will incur additional charges based on the level of effort. Please consult your Technology Advisor or Project Manager for details.

Advanced User Features

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 these users can effectively utilize your UCaaS services to perform their job duties. If not already selected on the sales order, the Executive Assistant Upgrade will incur additional charges to your account. The Executive Administrator Upgrade provides:

- Support for executive assistant/call coverage personnel, including a handset upgrade. This provides additional space and buttons necessary for call coverage.
- Additional training tailored specifically to the needs of the executive administrator(s)
- Phone configuration for executive line management and line monitoring services, including handling of multiple incoming calls, mirrored extension view on multiple handsets, and a visual indication of executive/assistant call status.

When detailing user information, you will be asked to identify which employees provide call coverage, which employees they cover, and whether they need to manage or monitor a given user. Your Technology Advisor or Project Manager can recommend a particular solution based on your needs.

Soft Phone Integration

Evolve IP's UCaaS services are capable of integrating with a variety of third-party soft phone clients. If you would like to utilize these features, your Project Manager can provide credentials and integration instructions. Please remember, because Evolve IP does not directly provide the soft client application, our troubleshooting abilities are limited.

Remote UCaaS Users

Because of the inherent global nature of Evolve IP's UCaaS services, devices can be operated nearly anywhere with a stable internet connection. One common practice is to have users take their phones home or to remote offices to work. While this is possible, there are a few considerations to keep in mind. When taking a phone off an Evolve IP-managed network, a tremendous variety of individual factors enter

into play. Because we cannot be aware of every network configuration, you may find changes will need to be made to the remote network to allow the services to register back to Evolve IP's private cloud. These would include changes to the phone or device itself, changes to any firewalls on site, or providing Evolve IP with specific information to white list. Your Project Manager can advise on the specific settings and conditions that will need to be met for remote devices to work successfully.

Third Party UC Applications

Evolve IP's sophisticated UCaaS platform offers integration with a variety of third party applications. These "connector" products allow traffic to pass between Evolve IP and another application. Evolve IP will provide the credentials and setup information necessary for you to complete the integration. Because Evolve IP is simply providing a connection between our platform and another application, we are not able to provide specific technical support on the configuration of the third party application. Should the need for technical support arise, it may be necessary for you to engage outside support resources.

UCaaS Training & Support

Evolve IP provides a variety of training types so your employees can leverage the full features and benefits of your UCaaS services:

Remote Public Training: FREE
This option is included with every UCaaS order, and is a perfect fit for smaller organizations, those on budgets, those working with only basic UC features, or those who are already tech-savvy. Highlights of this package include:

- Unlimited, free access to our public training calendar. This contains our regularly-conducted training sessions on a variety of UCaaS topics.
- 24/7 access to our Knowledge Base website. This page contains a variety of quick-reference guides, data sheets, quick tip videos, and more. Please visit http://support.evolveip.net/kb/ for additional information.

Remote Private Training: Consult your Technology Advisor or Project Manager for pricing

Should you want a more dedicated, personal experience, one of our trainers will conduct private, web-based video training sessions with your users. This option works well if you have a larger organization all using similar features, you have high-touch users, or you have a strong internal support staff to assist with your transition. The topics of these training sessions are at your discretion and will be agreed to in advance with one of our training staff.

To gain the most from these sessions, we recommend you do not exceed more than 15-20 people per individual session to allow us to devote the proper level of attention to your users. We also require each training session cover the same applications and topics for all the users; cross-training within a session is not recommended.

On-Site Training (per day): Consult your Technology Advisor or Project Manager for pricing
Our most dedicated method of turn-up support, this option is ideally-suited for larger organizations, those using multiple UC applications, those without an internal training staff, or those who simply wish to have their users trained in person. *This option is also strongly recommended if you are deploying a Contact Center*. When selecting this option, your administrators and our training staff will coordinate specific sessions throughout the day for all your users. The breakdowns for these sessions should follow the Remote Private Training guidelines.

Please note, this option will only be offered to accounts with a $1,000+ monthly spend with Evolve IP, and in all cases the customer is responsible for travel expenses to and from the training site. If you have any questions about these training packages or which one is right for your organization, please contact your Project Manager for assistance.