



Allworx End-User Training

Date

Today's Agenda

Allworx 9308 IP Phones

My Allworx Manager

- > LAN IP Address of the Allworx server
- > Phone Functions Reference Guide

New Features

- > Contacts
- > Reach Remote Control
- > Headset Integration
- > Call Handoff
- > Self-labeling Programmable Buttons



My Allworx Manager



My Allworx Manager: Business users can access their Allworx phone information from anywhere

allvorx. Alworx Manager						Welcome, Jane E Smith (JSmith) Logou		
My Account	Phone Functions	Reference Card	<u>show</u> Allwor	x IP phones	<u>show</u>	ı analog phones		
My Call Details	Configuration							
My Conferences My Extension	To modify the phone configuration or the programmable buttons, use the soft keys and navigate to: Settings > Phone Preferences. Use the Up/Down navigation keys to highlight the preferences. Press Select to display the setting options. Choose a new setting option, and then press Select.							
My Presence	Verge ID Phon	e Function Buttor						
My Products	verge iF Flion	e runction Buttor	15					
My Reach Link Directory		icts. Scroll through the nen press Select to plac		0		/DND. Scroll through the available r press the DND/END DND soft key to e setting.		
istribution Lists		Toggles the microphor nt the caller from heari		n.		Access the message center. Lights solid new voicemail messages are available.		
Call Queues	Co Head	set. Switches the phone et	e audio to the	S	Transfer.	fer. Send the active call to another number.		
one Functions	() Speak	er. (er phone. Switches the er phone.	e phone audio to t	^{he} 000	Intercom two hands	. Intercommuncation system between sets.		
		Displays additional sof listing.	ft keys to manage	the	Hold. Tem	porarily drop from the active call.		
	System Extensions							
	Number			Access				
	0	ompany operator						
	3 + <extension> 400, 4301-4332</extension>	user's voicemail an		-				
	46#		ant - 400 is the default Auto Attendant o broadcast audio (# is a Page Zone number 0 through 9).					
	402 Connect to an Overhead Paging							
	402 Connect to an overhead raging system to make an announcement 403 Activate the door relay, if connected and configured.							
	45 + <extension> Forward calls to another extension. To disable, dial 450.</extension>							
	408 Access the Conference Center. To set up a new conference, use My Allworx Manager.							
	7 + <extension> Answer another ringing phone.</extension>							
	Message Cent	er						
	Press the Messages function button 🗹 once for the Visual Message Center or twice for the Audio Message Center. Additionally, dialing 6 - <extension> from any office phone or from within the Auto Attendant accesses the Audio Message Center. Audio</extension>							
	Message Center op		ione or from Withi	n the Auto Atter	iuant acces	ses the Audio Message Center, Audio		
	Setting			Sho	rtcuts avail	lable while listening		
	(press 4 from Ma					email message		
	 Presence se 	tting		REPLY to this me	-	*6 Play the NEXT message		
	 Name record 		*2 F	ORWARD this n	nessage	*7 REWIND the message 10 seconds		
	Presence gr Allwork PIN		*3 [DELETE the mes	sage	*8 FAST FOWARD the message 10 seconds		

My Allworx Manager makes it easy for end-users to learn about their phone features.

Access phone system information:

- My Call Details •
- My Presence
- Directory
- Call Queues
- Phone Functions

Schedule, modify, and monitor conference calls¹.

See eligible feature software licenses.

Configure Reach Link¹.

Call Queue Supervisors can set up agents and queues, and access basic queue statistics.

Enable business users to customize call routes².

1. Requires an additional advanced software license key.

Accept voicemail or not

2. Requires a user-level permission by the System Administrator.

*9 CALL BACK the user who left the



Today's Agenda

Enhancements and Updates

- > User Experience Enhancements
 - Color Scheme
 - Function Buttons
- Workflow Updates
 Call Transfer
 Conference Calls
 - ACD
 - Call History
 - Call Park
 - Call Queues Log in / Log out

Miscellaneous Updates

- > System Software 8.2
- > Verge IP Phone Series
- > Interact Professional Application

- Icons
- Programmable Buttons
- Call Queues Alarms
- Configurations
- Incoming Call Handling
- Visual Message Center
- Shared Call Appearance



Verge IP Phone Series Overview



Allworx Verge Key Specs

	Verge 9308	Verge 9312	Verge 9318Ex Expander
Display Screen	3.5″ Color	4.3" Color	4.3" Color
Self-Labeling Programmable Buttons	8	12	18
Gigabit Ethernet	Yes	Yes	-
Speaker Phone	Full Duplex	Full Duplex	-
Built-In Conferencing	Four-Way	Four-Way	-
Soft Keys	3	3	-
Bluetooth Integration	Bluetooth Integration No		-
Expander Support	No	Yes (up to three)	-

NOTE: the Power and Thermal Application Notes document is updated to include the Verge IP phones.

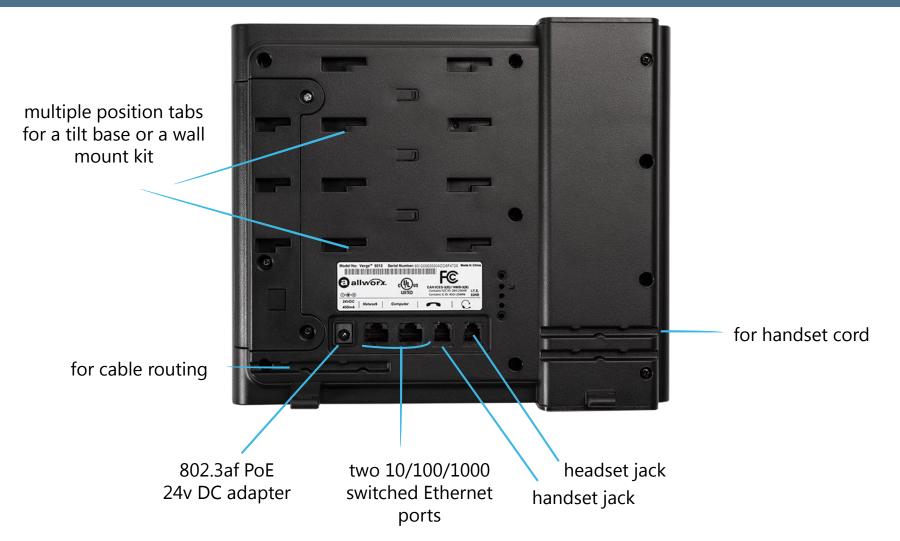


Allworx Verge 9308





Allworx Verge 9312: Back



Not Shown: beneath the handset is the handset retainer, which is shipped in the up position - recommended for wall mounting and desk mounting in the most upright position. Use a coin to adjust for lower positions.



Allworx Verge 9312: Phone Screen

the small red triangle denotes an Allworx user or system contact (versus a personal contact)

Allworx user status (active call, DND)





Allworx Verge 9308: "Sleep" Mode Screen





A **Function Button** is a dedicated physical button used to perform a single phone function.

Icon	Function Button
ይ	Contacts*
Å	Mute
G	Headset*
⊲ »	Speaker phone
	Messages
0	Presence / DND*
0()0	Intercom
S	Call Transfer
00	Hold
	More*
* New	function button



Function Buttons Verge IP Phone Only





Function Button Changes (Verge IP phones only)

New Function Button and New Behavior:

- **Contacts** (A) Immediate access to all contact types; use the Groups soft key to display only the selected contact types.
- Presence (
) Immediate access to the Presence/DND screen; use for presence or DND status management.
- **More** (*M*) Display additional soft keys, if available.

Existing Function Button and Updated Behavior:

- **Mute** (a) No longer supports the DND feature. DND is available with the Presence function button.
- **Hold** (II) No longer supports the Park feature. Park is available as a soft key and as a programmable button (if configured).



Soft Keys Verge IP phones only

The soft keys initiate actions; therefore, the names and behaviors of the soft keys are dependent on the current phone screen. If additional soft keys actions are available, the rightmost soft key displays the More (\checkmark) icon. Press the More (\checkmark) function button to see the additional soft keys.





Programmable Button Verge IP Phones Only

The Verge 9308 has 8 programmable buttons and the Verge 9312 IP phone has 12 programmable buttons. Verge IP phone users with permissions can assign features to the available programmable buttons for customized functionality.





Programmable Button Changes (new)

- New Programmable Buttons
 - > Bluetooth Hands-Free (available on the Verge 9312 IP phone only)
 - > Contact
 - > Park Monitor
- Verge IP phone users can assign a subset of the programmable button features (if the Allworx Server Administrator provides permissions) to any programmable button.
 - > Contact
 - > Release

> Park

> Hot Desk Login

- > Redial
- > Bluetooth Hands-Free (only available on the Verge 9312 IP phone)
- Programmable button descriptions changes require an a phone reboot (example: changing a Contact)



Programmable Button Examples Verge IP Phone Only

User or Allworx Server Administrator Configurable Programmable Button Examples

Allworx User Contact

Allworx System Contact Allworx Public Contact

Allworx User Personal Contact

Call Park

Bluetooth Hands-Free

12/19/16	*	🗲 3:05 PM
IN OFFICE Jane E 9 1214	Smith	≥ <mark>2</mark>
Bail Cha	ey, Irles V	ACD Press to log in
Cor Cen	iferen ter	Sales Line 1
Col Sus	ins, an	SCA - Northeast Line 01
Mor	m	Ś
Parked Ca	lls	Ś
Press * config		S
Parked Calls	s Ca	Ills Redial

Allworx Server Administrator Configurable Programmable Button Examples

ACD Login Line Appearance Shared Call Appearance Call Appearance Call Appearance Call Appearance



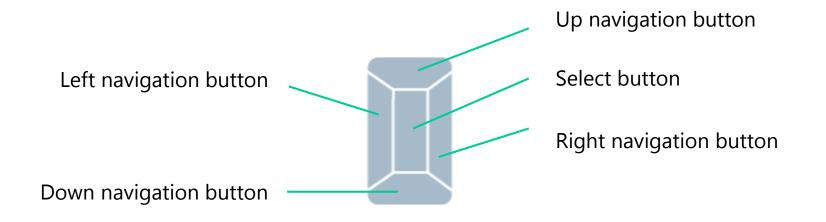
Navigation and Select Buttons Verge IP Phone Only

Navigation Buttons

Used to scroll through the various phone screen listings (press and hold to quickly scroll).

Select Button

Used to choose the highlighted option or open a new screen that provides more context of the highlighted option.





Contact versus BLF Programmable Buttons

Contact Programmable Button	BLF Programmable Button
Phone user OR Allworx Administrator assigns	Allworx System Administrator assigns
Assigned to specific phone number (up to 16 phone numbers per Personal Contact supported)	Assigned to a specific Allworx handset or analog phone ID
Routes calls to the assigned phone number	Routes calls based on the phone configuration (follows the user's call route)
User Contacts: Displays an Allworx user's status aggregated across all of the user's devices.	Displays call state and DND status of the assigned phone only
Transfers a call (quick, blind, attended)	Transfers a call (quick, blind, attended)
Places an immediate call.	Places an immediate call.



New Features



Contact Management





What are Contacts?





The Allworx System supports three types of contacts on all phone types – User, System, and Public Contacts. Allworx Connect servers and the Verge IP phone series support a fourth contact type – Personal Contacts.

- User and System contacts contacts with an internal Allworx extension assigned. The Allworx Server Administrator manages these contacts.
- **Public Contacts** system-wide contacts entered or imported (via .CSV file) by the Allworx Server Administrator with an Allworx extension assigned. When upgrading an Allworx server to system software version 8.2, the Allworx system automatically converts the speed dial numbers to Public Contacts.
- **Personal Contacts** contacts managed by the Allworx user.
 - > Allworx Personal Contacts
 - created from the Verge IP phone, the Interact application, or a Reach application.
 - imported from a .CSV file or vCard within the Interact application.
 - > External Personal Contacts
 - synchronized from a Reach device originating application (device app such as Contacts or People)
 - synchronized from an account such as Gmail email account or an Outlook email account.



How Do Personal Contacts Get Into Allworx?

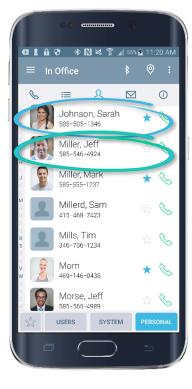
The Allworx system shares the User, System, and Public Contact types with the Allworx user's connected Allworx phones, Reach devices, and the Interact application. NOTE: The Allworx server is not a contact manager.

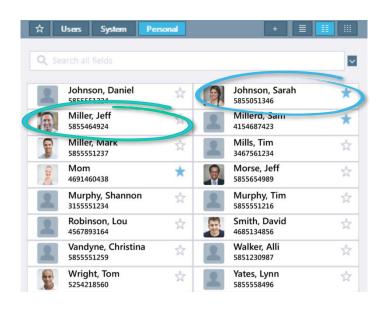




When you edit a personal contact, the changes are instantly available in all your Allworx devices and applications.







Verge

Reach

Interact Professional



Personal Contact Storage Capacity by Allworx Connect Server Model

	Max. # of Personal Contacts <u>WITH</u> Images Per User (approximate)	Max. # of Personal Contacts <u>WITHOUT</u> Images Per User (approximate)	Total # of Personal Contacts <u>WITH</u> Images Per Server (approximate)	Total # of Personal Contacts <u>WITHOUT</u> Images Per Server (approximate)
Connect 731	1,100	7,000	215,000	1,290,000
Connect 536/530	1,100	7,000	60,000	360,000
Connect 324/320	1,100	7,000	24,000	144,000

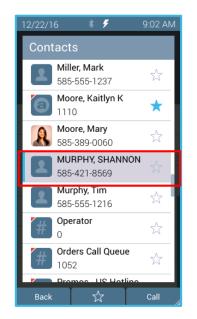
- The number of personal contacts that can be stored by each user is limited by the allocated flash storage available in the Verge IP phones. When the maximum storage limit is reached the user will be notified and given options to manage the storage space.
- The number of personal contacts that can be stored in a Connect server is limited by its total available storage space. Therefore, storing many large files such as voicemail messages or music on hold will reduce the storage available for personal contacts.
- The Allworx 6x, 6x12, and 48x servers only store and share Allworx User, Allworx System, and Allworx Public contact types.

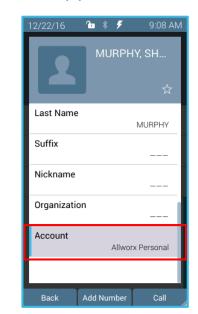


Identifying the Original Account Verge IP Phone

- 1. Press the **Contacts** function button, scroll to the Personal Contact, and press the **Select** button.
- 2. Scroll to the Account line to see the originating device/application. Press the **Back** soft key twice to return to the Idle screen.

This process can also be done in Reach (Contacts tab) or Interact Professional (Contacts window) to determine the originating device or application.





To scroll or change fields, press a navigation button. To select a highlighted option, press the center Select button.

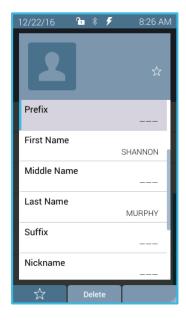


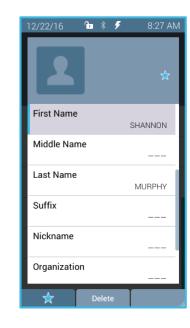


Managing a Contact Favorite Status Verge IP Phone

- 1. Add a contact or open any contact to edit.
- 2. Press the **More** function button.
- 3. Press the empty star soft key. The star soft key changes to filled to indicate a contact favorite.

12/22/16	ि∎ ∦ ∮	8:25 AM	
4		☆	
DETAILS			
Prefix			
First Name	9	SHANNON	
Middle Nai	me		
Last Name	2	MURPHY	
Suffix			
Nickname			
Cancel	Add Number	Save	





To scroll or change fields, press a navigation button. To select a highlighted option, press the center Select button.





But What About Privacy?

• Always your choice:

> Verge IP Phone Series

- Choose how to display the Personal Contacts on the Verge IP phone.
 - Unrestricted Contact matches are displayed in voicemail, call history, and ringing calls and require phone log in to view or modify details. Login is valid until the user leaves the Contacts screen.
 - **Restricted** Contact matches are displayed in voicemail, call history, and ringing calls and after authentication via soft key to see personal contacts including Contact programmable buttons. Log in is valid until user logs out via soft button on Contacts screen or automatically logged out when the phone is rebooted or enters Sleep mode. Contact lock status always displays on the Verge IP phone series status bar.



But What About Privacy?

> Reach for iOS and Reach for Android

- Choose which contact source accounts (e.g. Google Contacts, iCloud) to share with your Allworx devices and applications.
- Disconnect a contact source account from your Allworx devices and applications at any time.
- Choose to share the contact source account with the Reach app on your mobile device only or with all Allworx devices and applications.

> Interact Application

- Choose which contact source accounts (e.g. Outlook) to share with your Allworx devices and applications.
- Disconnect a contact source account from other Reach devices

• Data protection:

- > Only you have access to your personal contacts. No one-not even the Allworx administrator-can access them.
- > To prevent others from seeing the personal contacts on your verge IP phone, you can restrict access to your personal contacts by requiring a unique PIN to unlock your phone.



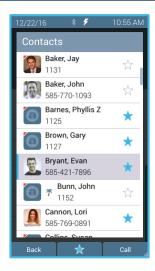
Contact Buttons Verge IP Phone

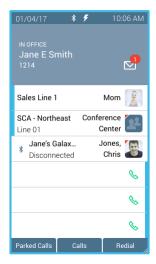
Contact Function Button (Ω)

Displays all contacts available on the Verge IP phone.

Contact Programmable Buttons

- Programmable buttons assigned to a specific contact.
- Allworx Server Administrator or user assignable.















Setup

- You can perform this action on a Verge 9308, Verge 9312 IP phone or Verge 9318Ex Expander.
- You must enter your Allworx PIN number, if the Personal Contacts are set to restricted access .
- You can only manage contacts labeled **Allworx Personal.**



Adding a New Allworx Personal Contact Verge IP phone

* 5

Elsewhere

7

7

7

R/

7

Missed

No Answer

Parked 701

Call

Ended

Ended

No Answer

Call History

Jones, Chris 01/03 2:48PM

Bailey, Charles V

01/03 2:24PM

Lane, Frank

Baker, Jay

01/03 2:16PM

avis, Sally H

1/03 2:07PM

Bailey, Charles V 01/03 10:39AM

Jones, Chris

Back

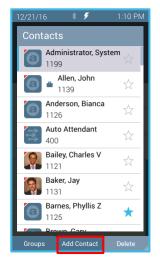
01/03_10:33AM

Details

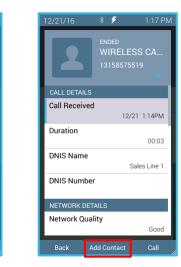
01/03 2:17PM

To access the Verge IP phone Add Contact screen, do one of the following:

Contacts Function button: Press the Contact function button on the Verge IP phone and select the Add Contact soft key.



Calls soft key: scroll to the call history listing you wish to add and press the **Details** soft key. Press the Add Contact soft key.



Active call: Press the **More** function button, and then the Add Contact

After the other party hangs up: immediately press the Add Contact soft key.

soft key.

* 4

9:39 AM	12/21/16	* 🗲	1:37 PM
ALL DRX 213850	1	CALL ENDED WINDSTI 915853621 00:15	REAM T 207
S			S
S			S
ALLWORX			S
	Dismiss	Add Contact	

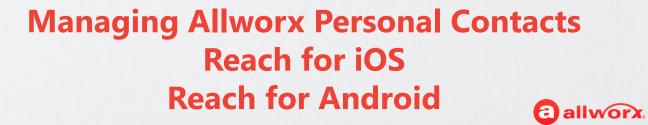
To scroll or change fields, press a navigation button. To select a highlighted option, press the center Select button.











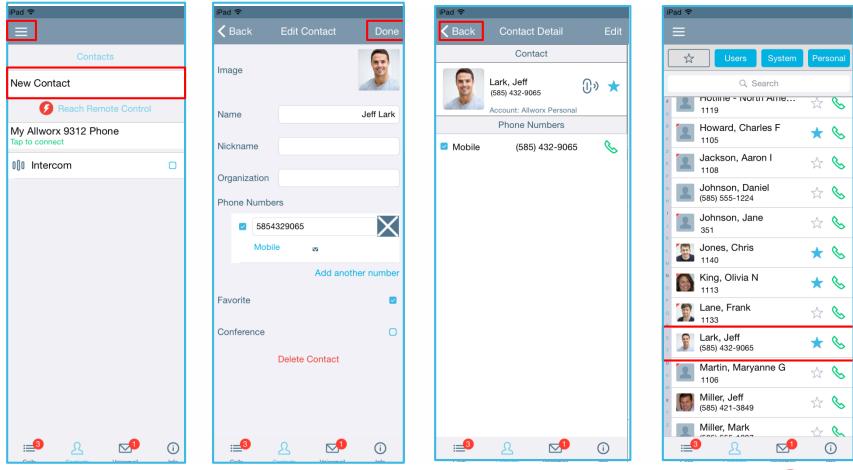


- You can perform this action on any Reach for iOS or Reach for Android device.
- You can only manage contacts labeled Allworx Personal within the Reach application. All other contacts must be updated in the Contacts (People) apps or the identified email account.
- Requires a Reach license.



Adding a New Allworx Personal Contact Reach for iOS

- 1. Tap the Drawer icon, and then **New Contact**.
- 2. Fill in the contact information, and press **Done**.
- 3. Tap **Back** to return to the Contact tab.



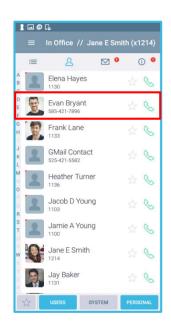
allworx.

Adding a New Allworx Personal Contact Reach for Android

- 1. Tap the **More Options** icon, and then tap **Add Contact**.
- 2. Fill in the contact information, and tap **Add**. Contact displays in the Contacts tab.

□ 1 1 0 ≡ In Office // Jane E Smith (x1214)				후 98% ∎ 10:16 AM 다 Add contact
E E E Egistered Network: WiFI / _QAEnterprise2.4	e	al	lw	Clear call log Settings Quit
My Server My Handset Settings Reach Link				×
Go Offline Report Problem	1	2 ^{ABC}	3 DEF	ی Mute
	4 ^{GHI}	5 ^{JKL}	6 MND	
	7 PQRS	8 TUV	9 wxyz	Link Park
allworx	*		#	Conference Handoff
Allworx Reach Version 3.0.3.355 172.16.10.254 SIP: Registered		Call		- Ring Volume +

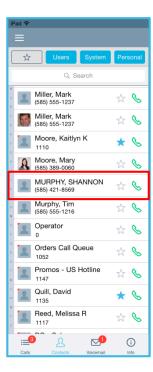






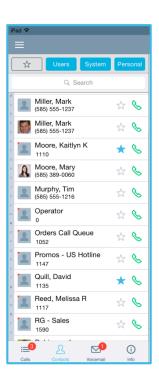
Deleting an Allworx Personal Contact Reach for iOS

- 1. Tap the Personal Contact in the Contacts tab.
- 2. Tap **Edit**, and then tap **Delete Contact**. The Personal Contact is no longer available in the Contact listings.



iPad ᅙ			_	
く Back	Contac	t Detail		Edit
	Cor	ntact		
2	MURPHY, (585) 421-8		()»	$\stackrel{\wedge}{\sim}$
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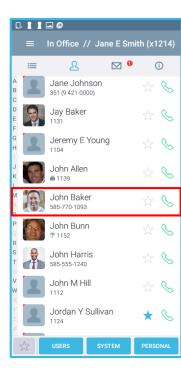
iPad 🗢			
〈 Back	Edit C	Contact	Done
Image			1
Name		SHANNON	I MURPHY
Nickname			
Organizatio	n		
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58	354218569		\sim
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	Contacts	Voicemail	Info

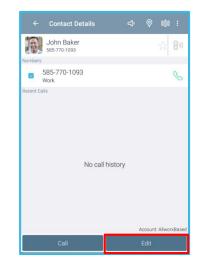




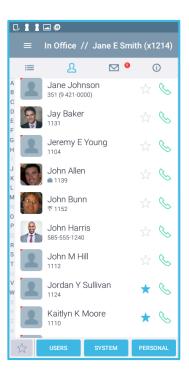
Deleting an Allworx Personal Contact Reach for Android

- 1. Tap the Personal Contact in the Contacts tab.
- 2. Tap **Edit**, and then tap **Delete**. Answer the confirmation pop-up. The Personal Contact is no longer available in the Contact listings.















Managing Allworx Personal Contacts Interact Professional





- You can perform this action using the Interact Professional application.
- You can only manage contacts labeled **Allworx Personal.** All other contacts must be updated in the identified email account.



Adding a New Personal Allworx Contact Interact

Do one of the following:

In the Contacts window, click the **Add Contact** icon.

Contacts	5				
¢ [Jsers System Personal			+ =	
Q Sea					
2	Administrator, System x1199	☆	2	ALLWORX	*
2	Anderson, Bianca x1126	☆	2	Auto Attendant x400	ž
	Bailey, Charles V x1121	샀	9	Baker, Jay x1131	24
E.	Barnes, Phyllis Z x1125	\$	A	Cannon, Lori 5857690891	*
	Clark, John 	\$	2	Conference Center x408	2
2	CONTACT, GMAIL 5854213580	\$	2	Cook, Louis U x1120	5
2	Cory, Robert 5856934596	\$	0	Davis, Sally H x1107	5
2	Dobbs, Mary Jane x350 (95854213870)	\$	2	Don's Taxi Reservations, Don's x352 (94215500)	5
2	Door Relay x403	☆	2	Ellis, Maryanne x1128	111 Å
2	Evans, Brian (585) 421-3850	☆	2	Flores, Scott Q x1116	2
_				Fostor Edward V	

In the Call History window, rightclick the call history listing, and then click **Add to contacts**.

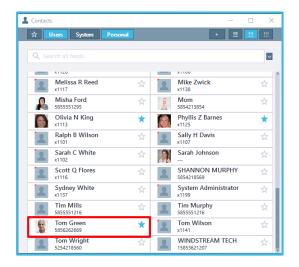
🔲 Call Hi	story		-	
				~
				Missea
	Charles V Ba	ailey 1/3/2	017 10:33 AM	M Nissed
2	Unknown 5689	1/3/2	017 Che	rck Number
9	Jay Baker 1131	1/3/2	017 10:22 A.	7 Ended
9	Frank Lane	1/3/2	017 10:22	L Elsewhere
2	ALLWORX 1585770109	12/2 Dial	1/2016 1:34 P	🖌 Ended
2	WINDST 1585362120	Intercom Add to contact		🖌 Ended
2	WIRELES 1315857551	Delete entry Delete all		Ended
2	ALLWOR.	Details	172010 1.15 P	🖌 Ended
2	ALLWORX 15854213850	12/2	1/2016 1:14 P	Ended



Adding a New Allworx Personal Contact Interact

- 1. Fill in the contact information.
- 2. Click **OK**. Contact displays in the tab.

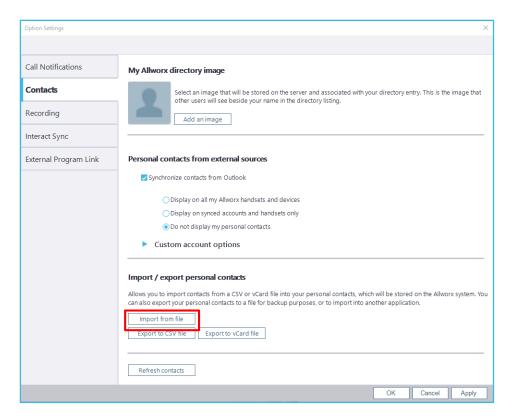
Edit contact details	×
Tom Green Is a favorite contact Change the image Clear the image Name Tom Green	
Organization	
Default Number type Phone Number Remove	
✓ Mobile ✓ 5856262669 X Add Home ✓ 5856262331 X X	phone number
	OK Cancel





Importing Multiple New Allworx Personal Contacts Interact

- 1. Create a spreadsheet using the required fields Description or Last name and One phone number. Optional fields First name and Middle name.
- 2. Navigate to Settings > Options > Contacts and click Import from file.





Importing Multiple New Allworx Personal Contacts Interact

- 3. Use the browser window to locate the file and click **OK**.
- 4. Use the drop-down arrows to select the column heading names, and then click **OK**.

fields	the CSV file will be mapped to contact
First row contains column	n headers
Last name	Last name 🗸
Login	Unused 🗸
first	First name 🗸
middle	Middle name 🗸
DID Number	Unused 🗸
DID DNIS Name	Unused 🗸
DID Prompt Language	Unused 🗸
message alias	Unused 🗸



Deleting an Allworx Personal Contact Interact

- 1. Right-click the contact listing in the Contacts window. Select **Delete contact** from the drop-down list.
- 2. Click **Yes** in the pop-up window. The Personal Contact is no longer available in the Contact listings.

L Contact	5				-		×
☆ 🕻	Jsers System Pers	onal		•	•		
Q Sea							
2	Edward X Foster x1123	\$	2	Elena Hayes x1130			\$
9	Frank Lane x1133	\$	(a)	Gary Brown x1127			*
2	GMAIL CONTACT 5854213580	\$	2	Heather Turn x1136	er		☆
2	Hotline - North Ame x4402	\$	2	Hotline - No x1119	rth Ame		☆
2	Jacob D Young x1103	\$	2	Jamie A Your x1100	ng		☆
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	Jay Baker x1131	\$		Jeff Lark 5854329065	Favorite		*
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Instantaneous Call Handoffs Mean Ultimate Mobility

• Instantly move your active calls between your Allworx Reach mobile application to your Allworx Verge IP phone.



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Active Call Handoff Use Cases and Exceptions



Call Handoff Use Cases



x Call Handoff Not Available...

If the active call is:

- From a Queue Appearance (via Allworx Automatic Call Distribution or Call Queuing)
- During Call Supervision
- A cellular call (via Bluetooth Hands-Free)
- A multi-party conference call on the Verge phone and you're the host
- On hold
- Being recorded via Interact Professional







Performing a Call Handoff Verge IP Phone Series Reach for iOS Reach for Android



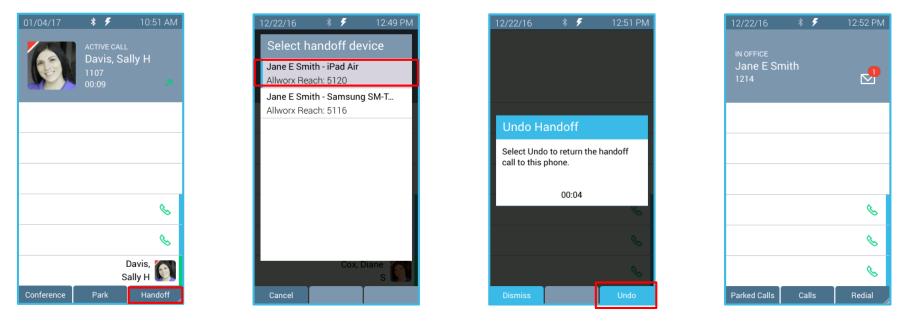
Setup

- You can perform this action using a Verge 9308 or Verge 9312 IP phone and a Reach for iOS or Reach for Android device.
- This feature is available with the following programmable button appearances:
 - > Call Appearance
 - > Line Appearance
 - > Shared Call Appearance
 - > Ring Groups
- Requires a Reach license.



Performing Call Handoff Verge IP Phone

- 1. Press the **Handoff** soft key during an active call. If more than one device is available to receive the handoff, scroll to and select the device to use.
- 2. (optional) To cancel the Handoff action, press the **Undo** soft key. The Verge IP phone returns to the Active Call screen. After the Call Handoff is complete, the Verge IP phone returns to the idle screen.



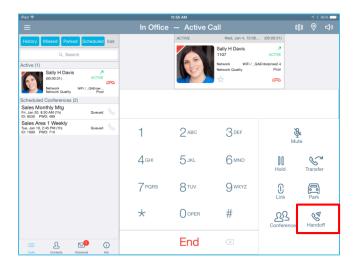
To scroll or change fields, press a navigation button. To select a highlighted option, press the center Select button.

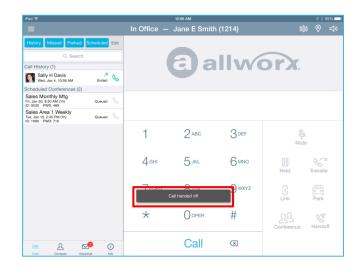




Performing Call Handoff Reach for iOS

During an active call , press the **Handoff** soft key. The Allworx user sees a message on the screen and hears audio tones to confirm the handoff is complete. The Reach for iOS returns to the idle screen.



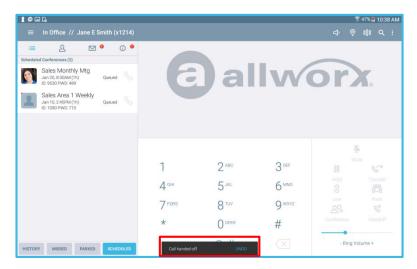




Performing Call Handoff Reach for Android

During an active call, press the **Handoff** soft key. The Allworx user sees a message on the screen and hears audio tones to confirm the handoff is complete. The Reach for Android returns to the idle screen. Tap UNDO to return to the call on the Reach device.







Reach Remote Control

Remotely Control Your Verge IP Phone Using the Reach Mobile App

- Smart use of the beautiful, larger real estate and touchscreen of iPads and other tablet devices
- More flexibility and options for users







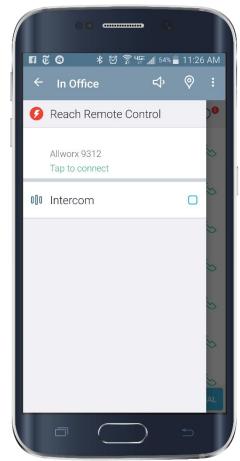
Reach "Remote Control" Mode

 Remotely control the functions of your Verge IP phone using the Reach application running on Android or iOS devices.

Key benefits of Remote Control:

- Smart use of the beautiful, larger real estate and touchscreen of iPads and other tablet devices
- More mobility and flexibility

NOTE: The audio still comes to/through the Verge IP phone (a headset is recommended). The Verge IP phone continues to respond to phone button presses.



Turning Reach into the Remote Control mode.







Performing a Reach Remote Control Verge IP Phone Series Reach for iOS Reach for Android

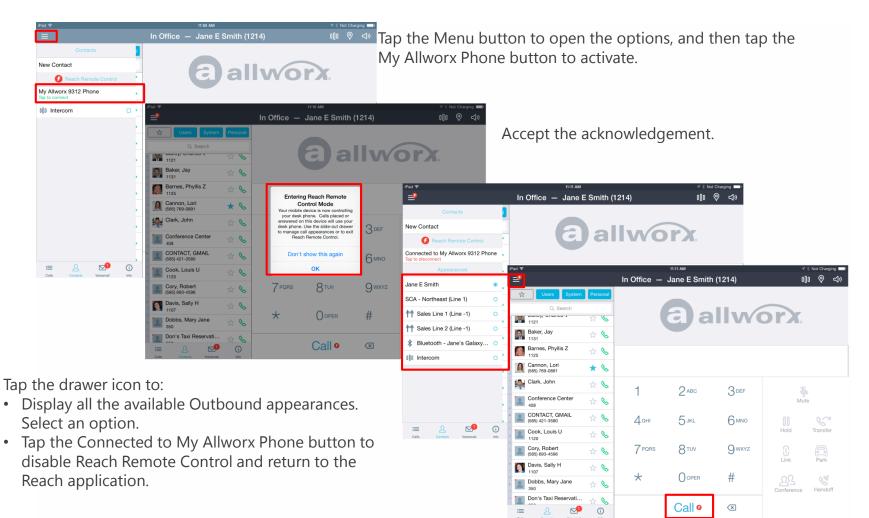


Setup

- You can perform this action using a Verge 9308 or Verge 9312 IP phone and a Reach for iOS or Reach for Android device.
- This feature is available with the following programmable button appearances:
 - > Call Appearance
 - > Line Appearance
 - > Shared Call Appearance
 - > Bluetooth Hands-Free
 - > Queue Appearance
 - > ACD Appearance
 - > Ring Groups
- Requires a Reach license.



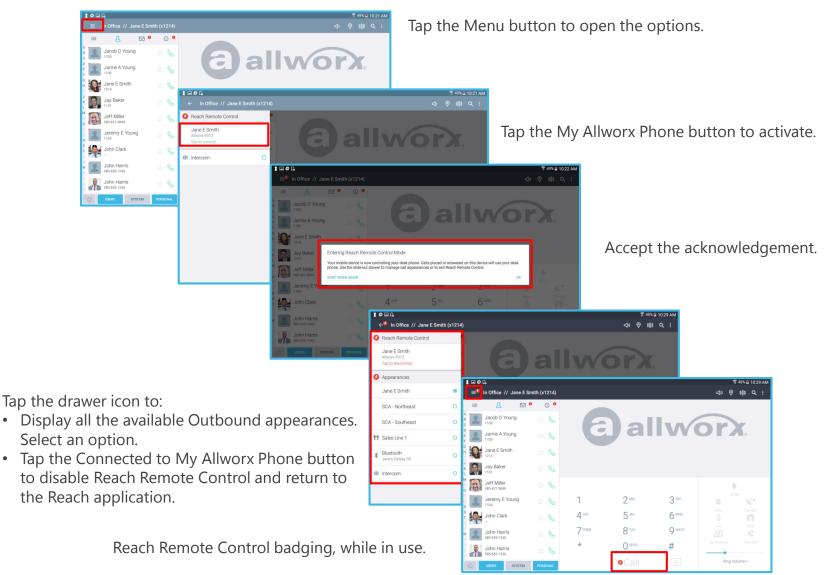
Activating Reach Remote Control Reach for iOS



Reach Remote Control badging, while in use.



Activating Reach Remote Control Reach for Android





Headset Integration

Electronic Hook Switch (EHS)

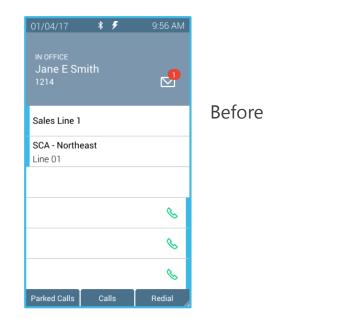
- Use the call control button on the wireless headset to answer and terminate calls without touching the Verge IP phone.
- EHS provides communication between a headset and a phone for call control, generally used with wireless headsets to answer and hang up calls. Previously, Allworx users with a wireless headset did not have to place the phone handset off hook or on hook to answer or terminate calls; however the user did not receive audible notifications. The EHS feature enables Allworx users to do the following remotely:
 - > receive an indication for an incoming call.
 - > tap the headset call control button to:
 - answer the call.
 - terminate the call.
- To enable the EHS two-way communication feature on the Verge IP phone, navigate to Settings > Phone Preferences > EHS Headset option. Disabled is the default value.
- If left disabled, the Verge IP phone behaves as the current 92xx IP phone series – one-way EHS.

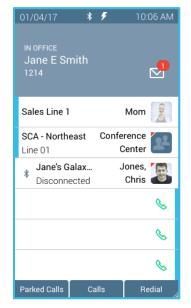


Self-labeling Programmable Buttons

Self-labeling Programmable Buttons Verge IP Phone

- Programmable button labels update, as necessary, after each Verge IP phone reboot.
- Examples (described in detail later):
 - > User or Allworx Server Administrator assigns a function to a programmable button.
 - > User adds or updates a contact programmable button.





After reboot with updated programmable buttons



User Experience Enhancements

User Experience Enhancements Color Scheme

Consistent color scheme across all Allworx devices and applications.

Verge IP phone screen example:



Reach for IOS tablet example:

Interact Professional screen example:

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Reach for Android smart phone example:



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3	Baker, Jay	± 6
	Barnes, Phyllis Z	46
6	Cannon, Lori 585-769-0891	* 6
10	Clark, John	26



User Experience Enhancements Icons

New or redesigned icons. Examples:

Common		Verge IP Phone		Reach App		Interact App	
•	Presence icon – Busy	0	DND Active	Ċ	Call the Contact	+	Add new Personal Contact
7	Outgoing call	â	Contacts locked	Ø	Reach Remote Control active	▦	Contacts Window – 2 lines
*	Contact favorite	0()0	Intercom	¢	Conference – Merge Calls		Record - stop
*	Bluetooth enabled or Bluetooth Hands-Free PFK	6	Send – cell phone dialing	٦ کیک	Reach Link - active	≎ ~	Options
	Contact or appearance is active or ACD log in indicator		Schedule active (Night mode)		Conference – Leave call		Parked Calls Window

NOTE: A comprehensive list of icons and descriptions for each device or application is available in the user guides, which are available at www.allworx.com.





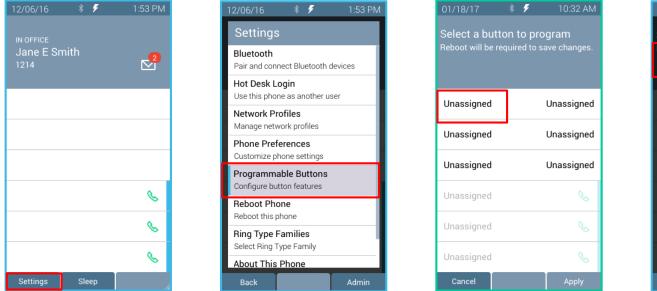


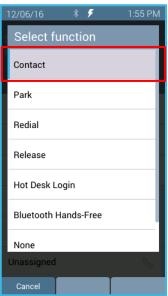
Managing Programmable Buttons Verge IP Phone Series



Configuring User Programmable Buttons Verge IP Phone

- 1. Press the **Settings** soft key. Shortcut : press an available programmable button and continue at screen 3.
- 2. Scroll to and select the Programmable Buttons option.
- 3. Press an unassigned user-configurable programmable button. Available buttons are in black text, unavailable buttons are grayed out.
- 4. Scroll to and select a programmable button function.



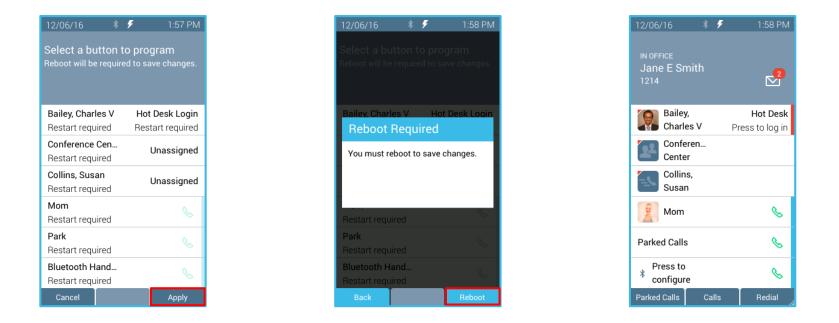


To scroll or change fields, press a navigation button. To select a highlighted option, press the center Select button.



Configuring User Programmable Buttons Verge IP Phone

- 5. Update all buttons (as necessary), and then press the **Apply** soft key.
- 6. Press the **Reboot** soft key to restart the Verge IP phone to save the updates.
- 7. Updated programmable buttons on the Verge IP phone IDLE screen.



NOTE: The Allworx Server Administrator must configure all other programmable button functions using the Allworx System Software (no change).



Workflow Updates





Call Transfer Changes Verge IP Phone Series



Workflow Changes Call Transfer

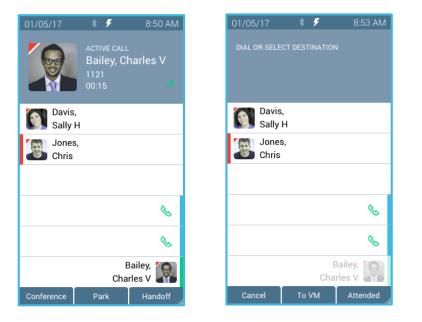
The Verge IP phones support the following transfer types using the **Transfer** function button, soft keys, and screen hints:

- **Blind Transfer** (default) user does not talk to the transfer recipient prior to transferring a call.
- Attended Transfer user talks with the transfer recipient prior to transferring a call.
- **To VM** user sends the call immediately to the assigned voicemail extension (new).
- **Quick Transfer** press one of the following programmable buttons:
 - > **BLF** sends the call to the assigned extension.
 - > **Contact** sends the call to the associated phone number.
- **Merge** user performs an Attended Transfer but then decides to join all callers into a Conference Call (new).

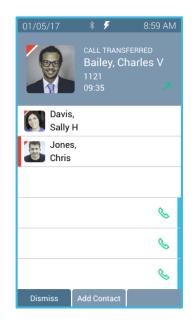


Workflow Updates Performing A Blind Call Transfer

- 1. During an active call, press the **Transfer** function button.
- 2. Select a recipient:
 - a. Dial the recipient's number contact matches display.
 - b. Press the **Contacts** function button all contacts display.
- 3. Call automatically transferred.



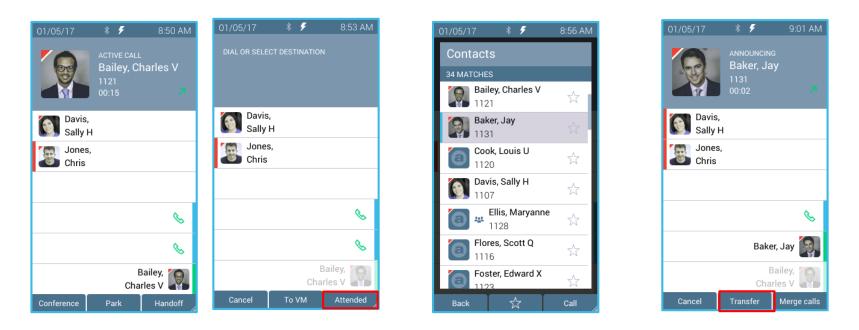






Workflow Updates Performing an Attended Call Transfer

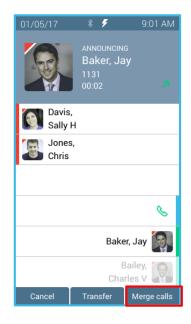
- 1. During an active call, press the **Transfer** function button.
- 2. Press the **Attended** soft key.
- 3. Select a recipient:
 - a. Dial the recipient's number contact matches display.
 - b. Press the **Contacts** function button all contacts display.
- 4. Speak to the recipient, and then press **Transfer** to complete the transfer.

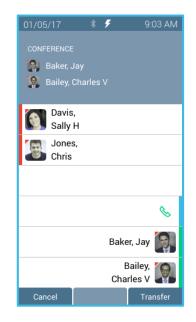




Workflow Updates Performing an Attended/Merge Calls Transfer

- 1. Perform the first three steps of Attended Transfer to talk to the recipient.
- 2. Press the **Merge calls** soft key. The transferred call becomes a Conference Call. If necessary, press the **Transfer** soft key to complete the call transfer.











Conference Call Changes Verge IP Phone Series



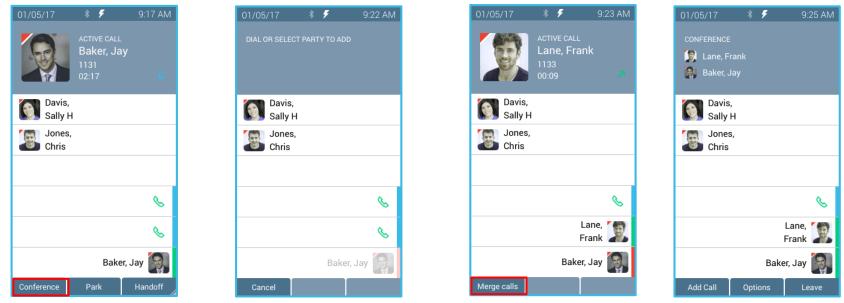
Workflow Updates Conference Call

- Connect up to four parties (including the originator) on one conference call on any Verge IP phone or using the Interact Professional application.
- Use the Merge Calls (see the Call Transfer option) to create a conference call during an attended call transfer.
- Exit the call:
 - > Hang up to end the conference call.
 - Press the Leave soft key to exit a three-way conference with the other two parties connected (Verge IP phone or Interact Professional only), which transfers the Call to the two remaining users.



Workflow Updates Performing A Conference Call – Verge IP Phone

- 1. During an active call, press the **Conference** soft key.
- 2. Call the second party. The first caller is automatically placed on hold:
 - a. Dial the recipient's number contact matches display.
 - b. Press the **Contacts** function and select a contact.
 - c. Press a **Contacts** programmable button
- 3. Press the Merge calls soft key. Calls merged. Begin conference call or press **Add Call** soft key to add a fourth participant.



Workflow Updates Conference Call – Verge IP Phone

Active Conference Call soft keys:

Soft Key	Description
Add Call	Add a fourth party to the three-way conference call. Repeat steps to create a conference call.
Options	Select a party to place on hold or to disconnect from the conference call.
Leave	Exit from the conference call while the other callers continue the conversation (performs a Call Transfer for the remaining parties). After selecting the Leave option, the Verge IP phone updates to Left Conference, and then returns to the main screen. This option is only available during a 3-way conference call.







Incoming Call Changes Verge IP Phone Series Interact Interact Professional



Workflow Updates Incoming Call Handling

Allworx devices and applications currently manage incoming calls using the soft key to manage the call while the Allworx user does not answer the incoming call:

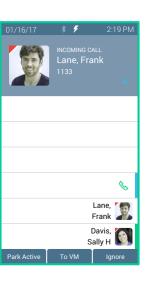
- Ignore ends the ringing, and the phone screen does not display the incoming call information. The Appearance programmable button LED continues to flash until the call is answered or the call transfers to the next step in the call route. The Silent option available on Allworx System Software 8.1 and lower is no longer available.
- To VM sends the caller directly to an Allworx User's voicemail (only available on the following programmable buttons: Call Appearance, Intercom, and ACD Appearance). The Messages (M) function button lights solid red if the caller leaves a message.
- Park Active is active during an active call when there is a second, incoming call. This places the first caller in a Parking Orbit so the user can answer the second call.
- Answer is active when there is an incoming call and you are not on the home screen.



Workflow Updates Incoming Call Handling

Verge IP phone Incoming Call Handling example:

01/09/17 12:39 PM



Available soft keys for the first incoming call. Available soft keys for the second incoming call. Available soft keys for an active call.

Conference

Park

Interact Professional application Incoming Call Handling example:

Allworx Interact		X
Ringing Sally H D 1107	Javis	
Answer	To voicemail	lgnore

Available buttons for an incoming call.



S

S

Davis, Sally H

Handof





Visual Message Center Changes Verge IP Phone Series



Workflow Updates Visual Message Center

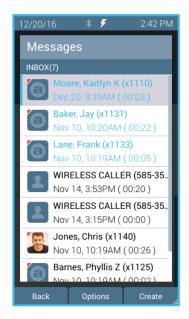
- Use the Options screen to Reply, Forward, Mark as Saved, Mark as New, or Delete a voicemail.
- Create a voicemail message.
- Delete a voicemail message.
- Switch User to manage multiple voicemail message inboxes.
- Each message listing includes the caller image and badge (if applicable) caller ID name/number, date/time of the call, and the length of the voicemail message.
- HPG setting is **Messages Button**: Display messages list.



Workflow Updates – Logging In to the Visual Message Center

- 1. Press the **Messages** function button or **Messages** PFK (if programmed).
- 2. Enter the PIN and press the **Done** soft key. The Messages screen displays.



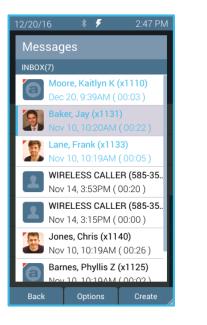






Workflow Updates Listening to a Voicemail Message

- 1. Log in to the Visual Message Center. Scroll to the message, and then press the **Select** button.
- 2. Follow the onscreen instructions to listen to the message.





Additional soft keys available:

- Reply record and send a response back to the originator.*
- **Delete** remove the message from the listings.
- Forward record a note and send the message to others.*
- **Call** place a call to the originator.

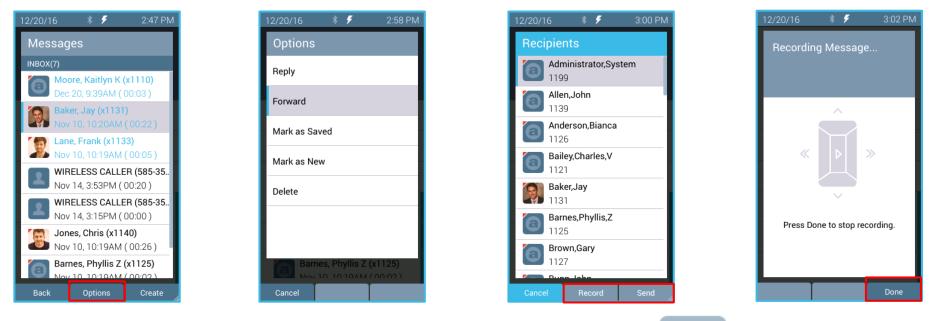
* See "To forward a voicemail message" for steps to record a message and sending the voicemail message.





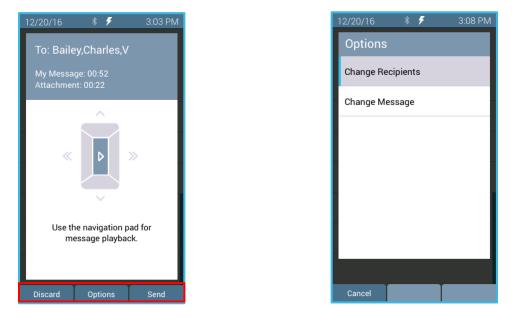
Workflow Updates Reply/Forward a Voicemail Message

- 1. Log in to the visual voicemail message center. Press the **Options** soft key.
- 2. Scroll to the **Forward** options and press the **Select** button.
- 3. Scroll to the recipient and press the **Select** button. Repeat as necessary.
 - To Record a message, press the **Record** soft key.
 - To Send immediately, press the **Send** soft key (no further action forward only).
- 4. Record the intro message, and press the **Done** soft key (continued on next page).



Workflow Updates Reply/Forward a Voicemail Message

- 5. Press one of the following soft keys:
 - **a. Discard** to cancel the option.
 - **b. Options** to cancel the forward/reply voicemail.
 - c. Send to forward the message (no further action).
- 6. Scroll to the option to update. Follow the previous steps.

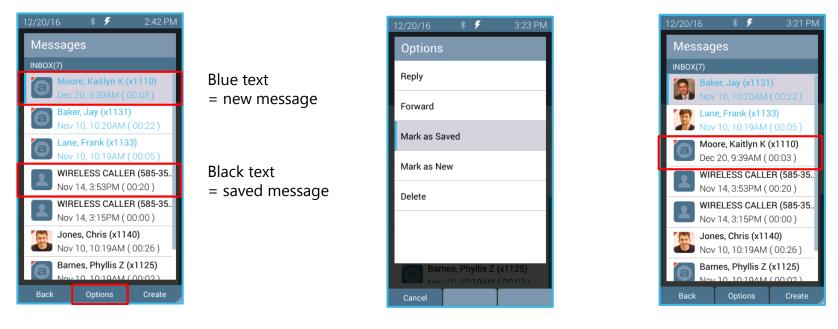






Workflow Updates Voicemail – Mark as Saved/Mark as new

- 1. Log in to the Visual Message Center to view the messages.
- 2. Scroll to the message.
- 3. Press the **Options** soft key.
- 4. Scroll to the Mark as Saved or the Mark as New option and press the **Select** button.





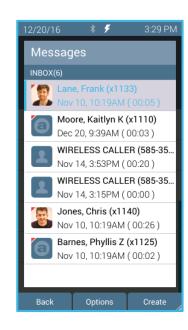


Workflow Updates Deleting a Voicemail Message

- 1. Log in to the Visual Message Center to view the messages.
- 2. Scroll to the message.
- 3. Press the **Options** soft key.
- 4. Scroll to the **Delete** option and press the **Select** button. Message is no longer available.

12/20/16 🛛 🕷 🗲 3:21 PM
Messages
INBOX(7)
Baker, Jay (x1131) Nov 10, 10:20AM (00:22)
Lane, Frank (x1133) Nov 10, 10:19AM (00:05)
Moore, Kaitlyn K (x1110) Dec 20, 9:39AM (00:03)
WIRELESS CALLER (585-35 Nov 14, 3:53PM (00:20)
WIRELESS CALLER (585-35 Nov 14, 3:15PM (00:00)
Jones, Chris (x1140) Nov 10, 10:19AM (00:26)
Barnes, Phyllis Z (x1125)
Back Options Create

12/20/16 🛛 🐐 🗲 3:27 PM
Options
Reply
Forward
Mark as Saved
Mark as New
Delete
Barnes, Phyllis Z (x1125)
Cancel

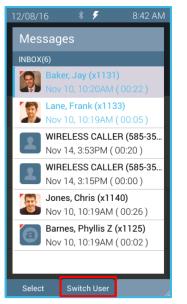




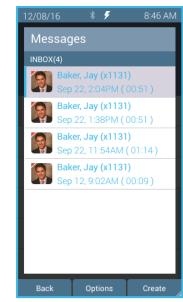


Workflow Updates Switching Voicemail Inboxes

- 1. Log in to the Visual Message Center to view the messages.
- 2. Press the **More** function button.
- 3. Press the **Switch User** soft key.
- 4. Enter the new extension and PIN, and then press the **Done** soft key. Press the **Next** soft key or the down navigation button to change fields. Messages in the new inbox display.















Configuration Changes Verge IP Phone Series



Workflow Updates Configurations Verge IP Phone

- **Phone Preferences** user-configurable phone functions
 - Contact Sort Order –select how to display the contacts (Last name, First Name or First Name, Last Name).
 - Sleep Mode Timer select the amount of inactive time (in minutes) that the Verge IP phone screen is active and the maximum timeout is 8 hours. NOTE: This feature is always active. In addition, if the Personal Contacts display is restricted, the sleep mode re-locks the contacts display.
 - Personal Contacts select access the Personal Contacts unrestricted or restricted.



Workflow Updates Configurations Verge IP Phone

• Phone Preferences (con't)

> Dial Modes

- Normal permits dialing a number and placing the call as soon as it matches the dial plan.
- Cell Phone Dialing permits viewing and editing an entered number before pressing Send (%) soft key. The appearance will time out if the call is not sent. This option is not available with Line Appearances.
- Sound and Notifications Volume control the various phone volumes (e.g. paging, speaker phone, handset, headset, etc.) in a single location by pressing the volume bar or pressing and holding the volume bar to quick adjust the volume.

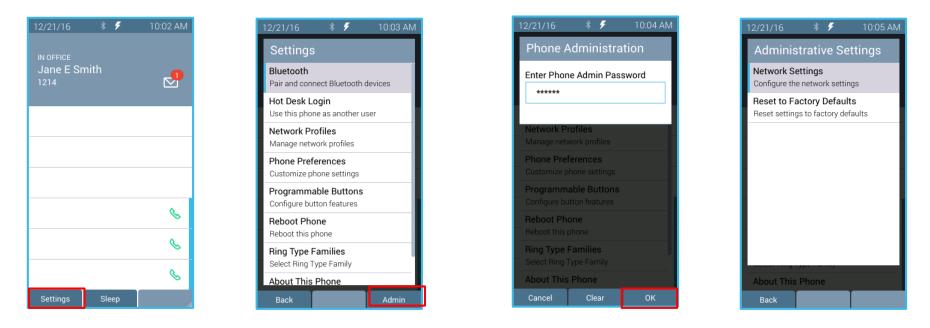
Ringtones

- > Expanded to include three recorded ringtone families.
- > Listen to a ringtone family before configuring it to the phone.



Workflow Updates Accessing the Verge IP Phone Settings Admin Menu

- 1. Press the **More** function button, and then press the Settings soft key. The Settings screen displays.
- 2. Press the Admin soft key to access the Admin settings.
- 3. Enter the Phone Admin Password, and then press the OK soft key.
- 4. Scroll to and select the option to use.









Configuration Changes Interact Professional



Setup

- You can perform this action using the Interact Professional application.
- You must be assigned an Interact Professional license.



Workflow Updates Configurations - Interact

Updates include:

- Adding a directory image that is stored on the Allworx server and associated with the user's directory entry.
 - > Other Allworx users see this image in any Allworx device or application contact list. JPEG and PNG formats accepted.
 - > Only Allworx Users can manage their Contact Image. The Allworx Server Administrator cannot control what images are or are not used.
- Adjust the BLF status visibility displayed in the contacts window.



Workflow Updates Updating User Contact Image - Interact

- 1. Click the **Options** icon.
- 2. Click the **Contacts** tab.
- 3. Click the **Add an image** button.

4. Use the browser feature to locate the image and select it.

5. Click the **OK** button. The image displays in the Contacts window.

allworx Interact					- 0	×
⊘	Jane E Smith	✓ In Office ✓				¢
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John 1139	Call Notifications	My Allworx directory image	\$			Dialpad
Frank	Contacts	Select an image that will be stored on the server and associated with your directory entry. This is the image that	☆			
John .	Recording	Add an image	\$			
Mom 158542	Interact Sync	Jacob D Young x1103	*			
	External Program Link	Contact integration with Outlook is enabled integrat will communicate with Outlook to monitor your contacts and make them	☆			
4301		Disable				
WIRE 158535		Disaule 1139	\$			
WIRE 158535		Contact Accounts Interact can display your personal contacts on all of your ulworx apps and devices. How would you like Interact to handle your	\$			
Olivia 1113		contacts?	\$			
Olivia 1113		Accounts on this device Louis U Cook x1120	\$			
Active System Call Start Time		Accounts on other devices				₽ ×
		Import / export personal contacts Allows you to import contacts from a CSV or vCard file into your personal curtacts, which will be stored on the Allworx system.				
		You can also export your personal contacts to a file for backup purposes, or to import into another application.				
Queue Status		Import from file Export to CSV file Export to vCard file				9 ×
					Launch Allworx View	_
Agent Chris Jones Diane S Cox		OK Cancel Apply				
Frank Lane Jane E Smith	idle Idle	00:16:10 00:14:32				
John Allen	Logged O	ut				₽ ×
Agent: JSmith						· ^
Login/Logo	out 🚺 Idle	`				

allworx,

Workflow Updates Adjusting the BLF status - Interact

- 1. Go to the **Contacts** window.
- 2. Click the drop-down arrow.

High Visibility option

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×1130		☆ 2	Frank Lane ×1133	* 🐻	Gary Brown ×1127	🌴 🚖
×1119		☆ 👔	X1150	* 2	Hotline - North Americ x4402	a 🛧
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John x1112	M HIII	*	Jordan Y Sullivan x1124	☆ 🙎	Kaitlyn K Moore ×1110	$\tilde{\Sigma}$
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×1114	: O Campbell	*	X1120	x 🔝	Maryanne G Martin ×1106	☆
Meag x1122	ghan W Price	*	Melissa R Reed x1117	☆ 🙎	Mike Zwick ×1138	$\stackrel{\wedge}{\sim}$
×1113		*	Operator ×0	☆ 🙎	Orders Call Queue x4407	$\tilde{\mathbf{x}}$
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3. Click **Display Visibility**.

4. Select the option to use.

Low Visibility option

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- x	Jeff P Collins	☆	Jeremy E Young x1104	😒 [John Allen x1139	
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- x	Karen L Green	☆	Key System Ring Delay x5099	😒 [Louis U Cook x1120	
×	Mark O Campbell	\$	Maryanne Ellis x1128	*	Maryanne G Martin x1106	
×	Meaghan W Price	☆	Melissa R Reed x1117	😒 [Mike Zwick x1138	
	Olivia N King (113	\$	Operator x0	😒 🙎	Orders Call Queue x4407	
	Paging Zone 0	☆ 1	Paging Zone 1	* 1	Paging Zone 2 x462	



Miscellaneous Updates



Miscellaneous Verge IP Phone Series

- Network Functionality
 - > The Verge IP phones support gigabit speeds on both the phone and PC ports.
 - > The Verge IP phones support port mirroring for troubleshooting purposes.
 - The Verge IP phones have a PC Port setting to disable the Verge phone PC port for increased security. This setting is located on the Verge IP phone Settings > Admin
 > Network Settings screen.





Thank you. Questions?