OfficeSuite UC®
PUTTING ALL YOUR OFFICE SUITE® FEATURES TO USE TO BE MORE EFFICIENT
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For helpful videos, guides and other tools, visit: www.broadviewnet.com/support
For a list of recommended headsets, go to www.broadviewnet.com/ready
Administering and Using the System from the MyOfficeSuite Portal

http://MyOfficeSuite.broadviewnet.com
Administering and Using the System from the MyOfficeSuite Portal

The MyOfficeSuite portal is a revolutionary customer portal that enables you and your team to manage all the preferences and features of your OfficeSuite® system, including: email, fax, HD meeting and your toll-free service. You can quickly and easily set up your employees as users of the system by going to the Extension Manager under the Phone tab. Here, you will see an alert that says you have extensions without user names assigned. Click on the link to Create MyOfficeSuite User Accounts and a table will appear that shows all of the extensions in your organization that are not yet assigned usernames for the MyOfficeSuite portal. To create usernames, you may edit each row individually or you may elect to make changes in bulk by exporting the file, making changes off-line, and importing it later. Most customers use the person’s email address as the username for ease of management.

When ready to create users, check the appropriate rows and press the Create MyOfficeSuite User Account(s) button. You can save changes as you work by pressing Save for Later.

Once established, you will receive a welcome email instructing you and your users to activate your accounts and set your password and profile.

Once logged in, you are presented with the MyOfficeSuite Dashboard from which you manage the entire system and all of your services. Across the top of the Dashboard is a series of tabs with different functions and in the center of the Dashboard are widgets from which you can make changes to the system and services. Each widget has a video ➤ icon and information  icon describing its function to help illustrate how to use the widget.

**MYOFFICESUITE APPS**

Download the MyOfficeSuite app to use on your mobile device and desktop.

- Stay in complete control and never lose touch with your office or customers
- One click to call any other employee or any favorite contact
- Listen to voicemail messages, even find and forward important messages to anyone
- Get notified of important messages and respond in real time
**Administering the System**

As the Administrator, you have the ability to manage and access all aspects of your Officesuite® system. This section covers the functions and features you have the ability to manage and control for your company, from anywhere.

**SETTING UP HOW CALLS COME INTO YOUR BUSINESS**

All incoming phone calls are sent to a specific phone number in the system. Calls can be sent to individual phones, to an auto attendant, or to a call group. The first step is to make sure that your phones and phone numbers are set up the way you wish. To set up or change the incoming call routing for any phone number, click the **Configure** button on the **Incoming Call Routing** widget. On the left, you will see a list of all the phone numbers on your system. To add or update the call routing, simply click on the arrow on the left of the phone number listed. Next, assign that phone number a name, like main phone number or sales department and select the appropriate business hours profile. These profiles can be set or updated in the **Business Hours** widget (See pg.10 for Business Hours).

Now, simply move through the page to determine where you’d like the calls to go when that particular phone number is called throughout the day. You can have different call routes for when you are open for business, closed for the day or during lunch breaks or other special hours.

*Emergency override allows you to re-route your calls to a pre-determined business location, for example: mobile phones, other branch locations or a designated emergency override number to ensure that you do not experience any down time in the event of an emergency like a flood, storm or fire. Please make sure to complete the Emergency Override Routing for each phone number listed. Doing so will give you the ability to re-route calls with the single click of a button when it matters most.

**YOUR PHONE NUMBERS**

A list of your phone numbers and any temporary phone numbers assigned while your phone numbers are moving to your new phone system can be found by clicking **Phone Numbers**, and selecting **Porting Status** under the **Phone System** tab. The process of moving phone numbers from your previous telecommunication provider to us is called porting and can take up to two weeks to complete. You can add additional phone numbers on this page by clicking on **Get New Number**.
Administering the System

SETTING UP USERS IN THE PORTAL
Dashboard profiles allow you as an admin to set up what employees see and have access to on their own Dashboards. There are two standard profiles that come with your OfficeSuite® account, an Administrator profile and a Standard User profile. You also have the ability to customize your own user profiles as well, as you may have users who you want to have access to certain settings and permissions based off of their role and level of authority. To create new user profiles, go to User Manager option under the Settings tab and click Create New User Profile. Here, you can name the profile, for example, customer service or sales and then select the widget options that you would like them to have access to, be sure to click Save. Only the items selected will appear on their own Dashboard. After creating the new profile, you can assign it to select users via the drop-down list next to the user’s name.

RESET EXTENSION PINS AND PORTAL PASSWORDS
To reset a PIN or Password, simply click on the Signed in As drop-down on the top right of your dashboard and select the My Account Settings option. Here you can reset your portal password or phone pin.

Adding a New User
To get started, you first need to create a new user through the MyOfficeSuite portal. To do this, go to the Settings tab on top of the Dashboard and click on User Manager in the drop-down menu. Then, click on Create New User and enter their information.

Creating a New Extension
Once you have created a new user for the MyOfficeSuite portal, you will then need to create a new extension. To do this, go to the Extension Manager under the Phone System tab and click Add Extension. Enter the new employee’s information and assign them to the appropriate extension and phone number from the drop-down menu and click Save.
Administering the System

CREATING NEW CALLING PERMISSION PROFILES

You can create custom calling permission profiles for your team, just click on Profiles then Call Permission Profiles under the Phone System tab. Then, click on Create New Profile. Here you can select the types of calls you would like this employee or group to be able to make. Then, drag and drop employees below to add them to this profile, once complete, be sure to click Save.

SETTING CALL PERMISSIONS FOR MULTIPLE USERS

To easily set permissions for more than one of your users at one time, go to the Extension Manager under the Phone Systems tab. Here a list of all of your users will appear. On the right hand column, you will see Call Permissions, click on the field and a drop-down of options will appear, select the permission setting you’d like for each user, then click Save.
Administering the System

CREATING GROUPS OF EXTENSIONS OR CALL GROUPS

Setting up a Call Group is easy with MyOfficeSuite. Simply click the Manage button on the Call Groups widget. Next, from the Add drop-down menu, select the type of call group you would like to create.

OfficeSuite® allows you to create several different types of Call Groups:

**Broadcast groups** – Calls are routed to all members of the group simultaneously; all phones can ring or only those that are not in use.

**Call Pickup groups** – Calls to any member of the group can be picked up by any other member of the group.

**Hunt groups** – Calls to a linear hunt group are routed to each group member in turn, and always start with the first member listed; calls to a circular hunt group are routed in the same way, but the starting member role rotates among members.

**Monitor groups** – Members (secondary) can monitor the status of the phone and answer calls of another member (primary).

**Rollover groups** – A call rings the phones of a rollover group one at a time until the call is answered or sent to call coverage.

Enter a name for the group and choose an extension from the drop-down. Complete any other selections like Call Behavior in the general information settings to define how you would like calls routed. Finally, add members to the group by dragging and dropping them from the available column into the selected column or by clicking the plus sign. Then, scroll down and choose how you would like to forward calls that are unanswered by this group. Unanswered group calls can continue to ring or be sent to a voicemail box, to an auto attendant, another employee, or to any other phone number, anywhere. When you complete the details, click Save.

*Remember to update your company incoming call routing or employee call forwarding selections to take advantage of the new Call Group.*

**CREATING PAGE GROUPS**

Page Groups allows the creation of groups of users for paging purposes. This will allow you to page a specific group of coworkers who are at the same location.

First, you need to define the membership of the group via Call Groups under the Phone Systems tab. Click the hyperlink called, click here for Classic view, in the lower left-hand corner of the Call Groups page. A Call Groups window will then pop up. Choose Add Page Group from the Add drop-down list. Type in a name for the page group and choose an extension. Next, press the + sign across from each members name from the available box you wish to add to the page group. This will move the member’s name to the selected box. Then, click Save. Once defined, you can instruct your users to program a Page Group Key on his or her phone to page only members of this group.

To do this, have them click on Configure in the My Phones widget. Then, select any key labeled Unassigned and use the Feature drop-down menu to select Page. In the Details section, they will use the drop-down menu to select the Page Group that you created for them and they will label it accordingly.

**MAKING CHANGES TO SETTINGS FOR MULTIPLE USERS**

The MyOfficeSuite portal allows you to make changes like call permissions, outgoing caller ID, and enabling features like call twinning and more, for multiple users at one time. To quickly change the settings on more than one extension, go to Extension Manager under the Phone System tab and change the settings you need for the appropriate employees instantly. You can even add additional extensions. Also, you can edit the names assigned to extensions by selecting the First or Last Name of your coworker and selecting Reset. To change the names in the directory, click on Directory Settings and then edit the names individually or click Edit All to modify all the names in the directory. Press Save when done.

**ASSIGNING EXTENSIONS TO USERS**

OfficeSuite® is so flexible that any extension can be assigned to any users. To assign or change phones and extensions, go to the MyOfficeSuite portal, click the Phone System tab and choose Extension Manager. Here, you will see a list of each of the extensions on your system. You can customize the options for your employees, for example, their call permissions, music on hold, twinning and more.
MANAGING YOUR CORDLESS PHONES
If you’ve purchased cordless handsets or cordless desk phones, you can easily manage them right through the Cordless Phones Widget. Here you will see a drop-down with your business location(s), if you have more than one location, select the location that you would like to view from the menu drop-down and click on Change Configuration. You can then assign or change phones by dragging and dropping the phone image to the appropriate employee and extension.

SETTING UP YOUR BUSINESS HOURS FOR YOUR LOCATIONS
The OfficeSuite® system lets you pre-set your business hours so you can send callers to different extensions, groups, or auto attendants during open, closed, lunch and special times. This is very useful for departments that work varied hours like sales, customer service, and warehouses as opposed to corporate employees who work traditional business hours.
Click on Phone System then Business Hours. Click Add Business Hours Profile to get started. Give the new profile a name then define your business hours. Select which days and hours are operating hours, open for business, as well as any pre-defined lunch or special hours of operation. Special hours can be used for anything you would like. If this is your main location or the standard hours for most locations, check the Default Business Hours box. To associate incoming phone numbers or locations to this new profile, simply drag and drop any available phone numbers or locations into the profile, be sure to click Save when complete. Your changes will take effect immediately.

MANAGING YOUR CALLER ID
The number displayed to the parties you call can be set up from the My Outgoing Caller ID widget. Select the extension from the drop-down list and then select the Outgoing Caller ID you would like to use from the drop-down list. The Caller ID can be any phone number on your system. This is particularly helpful when you would like to present one number from all phones.

PLACING ANONYMOUS CALLS
To place anonymous outbound calls, locate the My Outgoing Caller ID widget on the My Account Dashboard, then select Private from the Outgoing Caller ID drop-down list for each extension you would like to designate as anonymous. All calls made from that extension will not send a calling number to other parties.
Administering the System

CREATING AN AUTO ATTENDANT TO ANSWER CALLS

An auto attendant can answer calls coming into any of your phone numbers, including your toll-free numbers. Many organizations use auto attendants to automate call routing, presenting options such as: Press 1 for Sales, Press 2 for Service, Press 3 to hear a company directory by last name and Press 4 to repeat this menu.

Each prompt can be assigned to an extension, call group, or another auto attendant.

Click the Configure button on the Auto Attendants widget to begin. Then, click Add Auto Attendant, select an extension and click Add.

A Default Auto Attendant at the new extension is then created in your list of auto attendants. Click Edit and rename it and then complete each of the tabs to define the menu keys and record your greeting.

RECORDING YOUR AUTO ATTENDANT GREETING

To manage and record your Auto Attendants, click on the Configure button on the Auto Attendants widget. Then, click Edit or the arrow to the left of the attendant you wish to modify and click on the Set Receptionist Greeting tab. There, you will see the options to create your greetings. With OfficeSuite®, there are three ways you can record your auto attendant greeting.

1. You can record your own greeting for the auto attendant by uploading a .wav or .mp3 file. To record a .wav file on most Windows PCs that have a microphone, open the Sound Recorder Program and click Start Recording. For Apple Macintosh, you can use Audacity or a similar program that can record .wav and .mp3 files. Both the Apple and Google app stores also have several apps that can record .wav or .mp3 files. Record and send yourself an email with the file, then save the file to your desktop. If you already have a professional recorded audio file, you can simply upload it. To upload any file, click the Upload a .wav file or .mp3 file radio button under Audio File Options on the Auto Attendants widget. Click Browse, choose your file, then click Use This Audio File.

2. To record your greeting right through your phone, just select the Call Me to Record Audio option and find your extension in the drop-down menu and click on Call. Your phone will start ringing. You will then be prompted to speak the greeting right into your phone.

3. You can even use the OfficeSuite® Text-To-Speech option to automatically record your greeting. Type your script in the Message Box (it may be helpful to spell words phonetically to ensure they are pronounced accurately) then click Create Recording. After the recording is complete, an option will be presented so you can listen to your recording. If you are satisfied, click the Use this Recording button. If you want to change the recording, modify your written text in the Message Box and repeat the steps above.

Once a new auto attendant has been created, you will configure each key (Press 1, Press 2, Press 3) with a result and if needed, an extension where calls will be sent. For example, callers that press 1 or 2 will be directed to user extensions, those who press 3 will go to the Last Name Directory and 4 will repeat the options.

Click the Save Menu Keys button when you are satisfied with the menu setup. The next step is to record what the callers hear when calling the auto attendant.

PHONE KEY PROFILES

Phone Key Profiles allow you to assign pre-determined speed dials to a group of users’ phones. This is helpful for groups of employees who frequently call the same phone numbers.

To do this, click on Configure on the Phone Key Profiles widget and click the Phone Key Profile name you want to assign users to or modify the name if necessary. Then, click the memory key you want to edit, label it accordingly and then click Save.
Administering the System

VIEWING YOUR ACTIVE LICENSES AND SERVICES
At anytime, you can view all of the active licenses for your company by clicking on Manage from the Voice Licenses widget on the Dashboard. Here, you can view how many you have of each feature, manage them and buy more at anytime.

ROUTING CALLS IN AN EMERGENCY
When a disaster strikes you need to move quickly. To re-route all of your calls during an emergency like a snow storm, power outage or connectivity loss, simply click the Configure button on the Incoming Call Routing widget. Now press the Enable All Overrides button. This will send incoming calls to the Override number previously set up. The best practice is to make the Override numbers extensions in another branch or location, or employees cell phones. Even if calls can't connect to the individual extension in an emergency, know that calls will still be answered by voicemail or be forwarded to other phones if the user programmed their call coverage to those destinations.

VIEWING COMPANY CALL HISTORY
As the administrator, you have the ability to view all the incoming and outgoing calls for your business as well as your personal call history for up to sixty days. Click on Call History under the Phone System tab, here a complete list of all the calls made and received, the times, dates and employees are displayed for your reference. You can also click-to-call contacts and export a list for further use.

BUILT-IN BUSINESS INTELLIGENCE THROUGH CALL HISTORY REPORTING
Beyond just viewing the incoming and outgoing calls for your business as a whole, MyOfficeSuite offers built-in business intelligence reporting so you can drill down to a granular level.

To access this, click on Call History under the Phone System tab. Here you can select from our built-in reports under the Select Report drop-down or customize your own. The various filters provided allow you to build reports based on dates, extensions, departments, call type and more. You can choose to view the information as a chart or data list and can even export it to excel for future use.

When building a new report that you want to use in the future, be sure to click Save As and name the report. Once saved, it can then be found in the Select Report drop-down for future use.

MANAGING YOUR ONLINE FAX
If you have purchased our OfficeSuite® Fax service, you can manage it through the MyOfficeSuite portal. On the My Online Fax widget, you will see your inbound fax numbers and there you are able to select from the drop-down menu which number you would like to set as your fax number.

ONLINE FAX LICENSES
If you’ve purchased OfficeSuite® Fax, you can quickly and easily manage your faxing licenses.

Click on Manage on the Online Fax Licenses widget. Here, you will see a list of your active fax numbers and can make changes to who they are assigned to or purchase additional fax numbers.
Administering the System

MANAGING HD MEETING
If you have purchased OfficeSuite HD Meeting®, our video conferencing service, you can manage your account through the MyOfficeSuite portal. The number of active licenses your company has purchased is conveniently displayed on the HD Meeting Licenses widget. To manage your accounts, click on Manage and a list of your active accounts and which users they are assigned to will be displayed for your reference.

To purchase more HD Meeting accounts or an initial account, click on Buy and enter your first name, last name and email address and click Submit Order. You will receive an email with instructions on how to complete the activation process.

For more information on how to get started and how HD Meeting works, click Support then Software to find the HD meeting software and Quick Start Guide.

MANAGING YOUR TOLL-FREE NUMBER AND SERVICE
If you have purchased a toll-free number for your business, you can manage it through the MyOfficeSuite portal. Here you can manage your numbers, repoint numbers and buy additional toll-free numbers at anytime.

You can change which phone number you’d like to have answer the toll-free calls. This is referred to as pointing. To do this, click on Repoint on the Toll-Free Service widget and enter the number you’d like to receive the calls, then press Save.

REVIEWING SERVICE CHARGES AND PAYING YOUR BILL
You can quickly and easily review all charges and pay your bill online by clicking on the Billing tab on the My Account Dashboard or by clicking on Details on the Billing Widget. Here you can download a copy of your bill, review your payment history and more.

ORDER STATUS
At anytime, you can view the status of your company’s orders in real-time through the portal. Just click on Orders to view and the status of each of your orders.
Using the System

LISTENING TO VOICEMAIL
To listen to your messages online, simply click Check Voicemail from the MyVoicemail widget.

Now, choose any message you would like to listen to and use the built-in controls to pause or stop the message. From here, you can download messages or delete them, flag messages for future use, or forward them instantly right from the portal. You can even find important messages by filtering for specific voicemails with just a few key strokes, just enter the date, name or phone number and press enter.

SETTING UP HOW YOU RECEIVE VOICEMAIL MESSAGES
Click on Voicemail Settings on the MyVoicemail widget and select how you would like to receive your voicemail messages in the notification section.

GETTING VOICEMAIL MESSAGES VIA EMAIL
OfficeSuite® can send your voicemail message to any email address. To enable this, click on Voicemail Settings on the MyVoicemail widget and click Enable Voicemail Settings.

Here, you can select to receive just an audio file of the message or the audio file with a transcript of the message. Then, enter the email address you would like to receive messages at and click Add Email and Save.

TURNING ON VOICEMAIL TRANSCRIPTION
Receive your voicemail messages via email along with a transcription of the audio. Check the box for Enable Voicemail Notification and then click the button to include audio file w/transcript. Monthly charges may apply, see the portal for details.

TURNING VOICEMAIL TRANSCRIPTION OFF
If you wish to turn off Voicemail Transcription, go to My Services on the top navigation. Select Voicemail from the drop-down menu and then click on My Voicemail Settings.

To turn off the email notifications, uncheck the Enable Voicemail Notifications at the top of the screen.

Then, click Save at the bottom of the screen to save your changes.

ACTIVATING AND USING YOUR VOICEMAIL APP
The MyOfficeSuite Mobile Voicemail App is available for free. The app allows access to your OfficeSuite® voicemail messages on your mobile device and displays a list of all of the messages in your voicemail box, indicating the time, caller and status. The app allows you to listen to your messages and features touch-controlled fast forward and rewind. It also allows callback, forwarding and general integration with the contacts on your smartphone. The app is integrated with the Message Waiting Indicator on your OfficeSuite® phone, so listening to a message in the app marks it as listened to and the message waiting light on your OfficeSuite® phone will go out.
Using the System

SETTING UP SPEED DIALS AND MEMORY KEYS
Your OfficeSuite® phone has memory keys that you can easily set up as one-touch speed dials or to access the powerful features of the system. Setting up your memory keys is easy. Click Configure from the My Phones widget. Scroll down and select any unassigned programmable soft key. From here, choose the feature you would like to assign to the memory key. You will notice that when you make a selection there is a description of what the feature does.

Enter a label for your new memory key and the details. For speed dials, remember to type a 9 + 1 followed by the 10-digit phone number. Some features you can choose to turn a feature on or off by selecting active or inactive from the state drop-down, be sure to click Save and the feature will be instantly saved to your phone and is ready to be put into action.

FORWARDING YOUR BUSINESS CALLS TO AN OUTSIDE PHONE
OfficeSuite® allows you to forward any of your calls to any outside number so you can work from anywhere. To program this, simply go to the My Phones widget on the MyOfficeSuite Dashboard and click Configure and program any unassigned key as Forward to Number and label the key as FWD to Home, or FWD to Cell as appropriate. Then, enter the phone number you wish to forward the calls to, be sure to enter the 10-digit phone number. Follow the simple instructions in the pop-up window to determine if you want this feature Active (all calls will automatically be forwarded to this number) or Inactive (forward incoming calls to this number only when you press the FWD to # memory key).

SETTING UP CALL FORWARDING FOR UNANSWERED CALLS
Unanswered calls can be forwarded to voicemail, an auto attendant, another employee on the system, or any another phone, anywhere. Use the My Call Forwarding widget on the My Account Dashboard to set up call forwarding. Select the extension you wish to forward from the drop-down list, then select the number of rings (from 1 to 10) and choose one of the forward options by clicking the appropriate radio button.

If you select Another Phone, either select an extension on the system from the drop-down list, or enter an external number starting with the area code. Press Save when done to save your call forwarding configuration.
Using the System

USING THE DO NOT DISTURB FEATURE
Do not disturb is a great feature to use when you do not want to be interrupted. All calls will be sent to your voicemail or other coverage and all intercom requests and pages will also be muted. To turn on Do Not Disturb, click **On** on the **My Phones** Widget. Do Not Disturb can be used on a per call basis to send individual calls to your coverage. Program a DND key on your phone and press it once while your phone is ringing to send that one call to your coverage. All subsequent calls will ring normally.

FORWARDING CALLS TO COVERAGE AND YOUR VOICEMAIL
You can pre-program your calls to go straight to your voicemail and other call coverage easily through the MyOfficeSuite portal. Just click on the **My Call Forwarding** widget and select **Voicemail**, then press **Save**. When you receive an unwanted call, press the key you programmed as **FWD to Voicemail** to forward the caller directly into your voicemail box.

INTERCOM YOUR COWORKERS
You can contact your coworkers quickly by programming an Intercom button. Go to the **My Phones** widget in the MyOfficeSuite portal and select **Configure**. Here you can program any empty "Unassigned Key" to be your Intercom button, just select the **Intercom to Prompt/Extension** option from the drop-down menu. You will then see that Intercom has been saved as one of your new speed dial buttons. To intercom a coworker, hit your Intercom button and then the person’s extension to intercom them.

VIEWING WHICH CALL GROUPS YOU ARE IN
You can quickly view which Call Groups you are a member of at anytime by selecting the extension from the drop-down list and clicking on the **Details** button on the **My Call Groups** widget.

NEVER MISS A CALL WITH TWINNING
OfficeSuite’s Call Twinning feature allows incoming calls to ring your office phone and any other phone simultaneously. This means you never miss an important call if you are away from your desk. From the **My Call Twinning** widget, select the extension from the drop-down list and enter the phone number you want to ring simultaneously. Slide the **Call Twinning** toggle to **ON** and click the **Save** button.
**RECORDING YOUR NAME FOR THE DIRECTORY**

You will want to record your own name for the company directory so that when incoming callers hear a name in the directory, they can hear your voice as their selection. To do this, first select the extension you would like to record from the drop-down on the **Phone System Directory** widget. Next, pick the phone number where you can be reached in order to record the name and click on the **Record Name** button on the **Phone System Directory** widget.

When you press the **Record Name** button, the system will call you and give you instructions on recording your name. When you are done, simply hang up and your recorded name will immediately be loaded on the system.

**SETTING UP MUSIC ON HOLD FOR YOUR COMPANY**

Use the **Music on Hold** widget to set up what music callers will hear while on hold when they call into your business. You can listen to and select from a wide range of music, including holiday instrumentals. Choose a music option from the drop-down list, then click the **Play** button to hear the music. Click **Save** after making your music selection.

You can also upload your own mp3 or .wav files to further personalize the music or messages callers hear when on hold. Click on the **Upload** button and then select the file you'd like to upload. Then click **Save**.

To set on hold music for individuals, you can do so through the **Extension Manager** option, see page 9 for details.

**SEARCHING AND ADDING CONTACTS**

To view or add contacts to your system, click on the **Contacts** tab on the top navigation of the site. Here you can create Favorites, view all your Coworkers and add and import new contacts. You can also see which coworkers are logged in and available for calls.

**QUICK CONNECT TAB**

Click on the **Person** icon on the top right-hand side of the portal to open the **Quick Connect** tab. From here you can click-to-call any of your coworker, personal, or favorite contacts as well as check voicemail, chat, and recent calls. To set your availability or presence status, click on **Settings** from the **Quick Connect** tab.

**COWORKER PRESENCE**

The **Coworkers** option under **Contacts** allows you to set your own presence and see who else is available in your company. To set your own custom presence, click on the settings key. Then, select **Set Presence Status** and choose from one of the pre-set statuses or select the **Custom** option to type in and set your own status. You can even initiate a call to your phone and another extension by clicking the phone icon next to a searched for extension.

Click on the gold star icon ✭ to set a favorite.

**CLICK-TO-CALL YOUR FAVORITE CONTACTS FROM THE CONTACTS TAB**

You can import your contacts from Outlook or Google via CSV or other services and initiate calls instantly with one click-of-the-mouse.
Using the System

DESKTOP APP
Get the best of MyOfficeSuite right on your Windows® desktop – no browser required. Chat, launch calls, check voicemail, even update your preferences in real time. Download the app from MyOfficeSuite today!

COMPANY-WIDE CHAT
Chatting in MyOfficeSuite is simple! To start an employee chat session, log into the MyOfficeSuite portal. Open the presence panel by clicking on the green person icon on the right-hand side of your screen. Then, click on the Coworkers tab and search by first or last name for the employee you would like to chat with.

TIP: You can add coworkers and personal contacts to your Favorites tab by clicking the gold star icon next to their name.

To start a chat, click the solid blue bubble next to an employee’s name. This indicates that an employee is logged into the portal. It’s important to note that a hollow bubble with a line through it means an employee is offline.

When new chat messages are initiated, a red bubble will appear indicating that you have a chat message from a coworker.

QUICK LINKS
With the MyOfficeSuite portal, you can bookmark and save your most frequently visited websites via the Quick Links feature for easy access. To do this, click on Quick Links under the My Services tab on the top menu and then click Create Quick Links.

TURNING OFF COMPANY-WIDE CHAT
If you’d like to turn off the company-wide chat feature for your organization, click on Chat Settings under the Account Settings page.

CUSTOMIZE THE DASHBOARD FOR YOUR PREFERENCES
To customize the presentation of your Dashboard, click on Customize Dashboard. Here you can add, remove, or reorder the widgets according to your preference. A helpful tip is to put the most used widgets near the top of the page for easy access.
Using the System

911 CALLS
OfficeSuite® is fully compliant with all E911 regulations. This means, in the event of an emergency, if 9 + 911 is dialed, the system will present authorities with location data about your system. If you move locations, you must call OfficeSuite® support to provide a new service address or your 911 function will not function properly. If you provide your own Internet access you can do so by clicking the Locations tab under the Phone System tab and then click on the field that says IP address and update, be sure to click Save. A copy of the E911 Policy can be found at www.broadviewnet.com/terms.

CHECKING EMAIL THROUGH MY EMAIL
If you have purchased our email service, you can check your messages right through the MyOfficeSuite portal. On the My Email widget, the number of new messages that you have is displayed for your convenience. To check your email, click on Check Email. The first time you check your email from the portal, you will need to login with your email credentials and password in order to view your messages.

CONFERENCING WITH HD MEETING
If you have purchased OfficeSuite HD Meeting®, you can start or join an HD video, audio or web conference right through the MyOfficeSuite portal. To join a meeting where you know the meeting ID, simply enter the meeting ID number and click Join. To start your own video meeting or share your screen, click on the appropriate button to start your conference.
Phones and Accessories

We offer a wide selection of phones, soft phones and accessories for your choosing.
Wireless DECT Headset
The ultimate in hands-free comfort and flexibility. 300-foot range!

Wireless or Bluetooth DECT Handset
Move around the office without missing calls. 300-foot range!

Programmable Key Modules (Sidecar)
Manage multiple lines with your corded phone by adding up to 96 extra buttons! Ideal for receptionists.

PoE (Power over Ethernet) Switches from Cisco®
Put phones anywhere, even places where you don’t have an electrical outlet. We offer PoE switches ranging from 8 to 48 ports.

Plantronics SupraPlus Wideband Headset
Features wideband capability and ultra noise-canceling microphone.

Check with your representative about compatibility and options.
Optional Features and Services

OfficeSuite® UC® and Windstream SD-WAN
Ensure your real-time communications have a network that can support them! Windstream’s Software Defined Wide Area Network (SD-WAN) is a cloud network that prioritizes real-time business communications services and optimizes application performance. By freeing up the bandwidth you already pay for, you experience better voice quality, more reliable connections and better performing applications.

OfficeSuite® PC Console
Give your front desk the ultimate tool to quickly and easily distribute calls to the right person, voicemail box or department promptly with the ability to monitor the status and availability of up to 400 employees from one desk. Advanced technology enables you to drag and drop calls to transfer or conference, schedule calls ahead of time and view co-worker’s Outlook® calendars for fast and accurate transferring.

OfficeSuite® Contact Center Services
We offer a complete Contact Center Service which includes: call evaluations, reporting, call queueing, live status dashboards and call recording. If you just need inbound and outbound call recording for quality assurance, training, or compliance, we also offer a standalone Extension Call Recording service.

OfficeSuite® Fax
OfficeSuite® Fax is a revolutionary online faxing service that allows your employees to send and receive faxes directly from their email and through a secure online portal called MyOfficeSuite without the need for hardware, software or phone lines. Faxes can be sent and received anywhere, from any device and are stored securely in the cloud for future use.

OfficeSuite® Dialer
OfficeSuite® Dialer allows you to initiate calls to any phone number on your Windows-based computer or device, creating tight integration with your OfficeSuite® phone system. The OfficeSuite® Dialer allows you to click-to-dial phone numbers from both offline and online programs, including Microsoft Office products, PDFs and more. When a phone number is selected, a call will immediately be launched to your OfficeSuite® phone.

To get started, click on Manage on the Voice Licenses widget.

OfficeSuite® HD Meeting®
With OfficeSuite HD Meeting®, you can host online meetings, HD video conferences and audio conferences for up to 100 people from virtually any device. Meeting organizers and participants can use any phone, any PC or Apple Macintosh computer, or even an iPhone®, iPad® or Android™ device to host or join a meeting.

To add or buy more HD Meeting accounts, click on Manage from the HD Meeting Licenses widget.

*Additional fees may apply for optional features.
Streamline Tasks with these Powerful Integrations

**Salesforce**
Integrate powerful unified communications features within Salesforce to increase productivity, improve customer service, save time and increase management visibility.

**Skype for Business**
Bring calling and phone presence functionality into Skype and Lync without any additional Microsoft licenses or charges.

**G Suite**
Click to call from any webpage or web app and bring unified communications to your Google Apps.

**Microsoft Office 365**
Make your contacts, email and calendar part of your unified communications.

**Microsoft Dynamics**
Streamline everyday functions and gain access to new unified communications features.

**Dentrix**
Know everything about your patients before you answer the phone.

**Web-based CRMs**
Maximize productivity by integrating calling with Hubspot, CRM 1, Apptivo, Clio Desk, Freshdesk, JobDiva Nutshell and Insightly.

Standards-based API allows you to connect third-party applications to OfficeSuite UC®.
Getting Help

We offer many ways to get help and support when using your OfficeSuite® system.

**MYOFFICESUITE PORTAL SUPPORT**

The MyOfficeSuite portal offers a comprehensive support section with complete guides and instructions, FAQs, helpful videos and a link to our online community with a plethora of information. Next to each widget on the Dashboard of the portal is also an instructional video on how to use that feature.

**ONLINE COMMUNITY**

Our online community offers a wealth of information where you can search by topic, feature, read how-to articles and even post questions where our staff members will answer for you. To access the community, go to the Support tab on the MyOfficeSuite Dashboard or visit [http://community.broadviewnet.com](http://community.broadviewnet.com).
**WHY DOES MY PHONE DISPLAY BAD LAN LINK?**

It is likely that there is a problem or issue in the LAN connection itself. To verify that the problem is not in the phone, take the phone to a desk/spot where all is OK and plug it in. If the phone reports no errors, the phone is not the problem. Have your IT check the jack connection and the connection at the switch to make sure everything is tight.

If the phone reports that same **Bad LAN Link** error again, we will replace the phone(s) as needed.

**WHAT SHOULD I DO IF MY PHONE DISPLAYS TFTP SERVER UNAVAILABLE?**

If you see this displayed, go to [www.broadviewnet.com/TFTP](http://www.broadviewnet.com/TFTP) for more information.

**WHAT SHOULD I DO WHEN MY PHONE DISPLAYS “USING OPTION 128+ OR USING OPTION 43”?**

There is nothing that you need to do if you see this message. This is a normal message and indicates that the phone’s firmware has been upgraded to the latest version so that you have access to all the latest features and functionality.

**WHAT SHOULD I DO WHEN MY PHONE DISPLAYS “NOT A VALID SITE” OR “INVALID SITE”?**

This error means that the wrong IP address was used to configure your phone. Follow the instructions that pertain to your circumstances at [www.broadviewnet.com/invalidsite](http://www.broadviewnet.com/invalidsite).

**WHAT SHOULD I DO IF MY PHONE DISPLAYS “OPTION 128 MISSING”?**

If you see this displayed, go to [www.broadviewnet.com/128message](http://www.broadviewnet.com/128message).

**CONNECTIVITY TESTS**

At any time, you can test the speed of your internet with the **Connectivity Test** widget on the MyOfficeSuite portal. Click on **Begin Test** on the **Connectivity Test** widget to get started.

The speed required for optimum performance is 88 kbps for each phone.
Safety and Regulation Information

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

1. This device may not cause harmful interference, and 2. This device must accept any interference received, including interference that may cause undesired operation.

Note: This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this device does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

Hereby, Polycom, Inc. declares that the products in this manual are CE marked and in compliance with all EU directives and regulations that apply to them including: R&TTE Directive 1999/5/EC. A full copy of the Declaration of Conformity can be obtained from Polycom Ltd., 270 Bath Road, Slough, Berkshire, SL1 4DX, UK.

In accordance with Part 15 of the FCC Rules, the user is cautioned that any changes or modifications not expressly approved by Polycom, Inc. could void the user’s authority to operate the equipment.

Operating Ambient Conditions:

- Operating temperature: +32 to 104°F (0 to 40°C)
- Relative humidity: 5% to 95%, non-condensing
- Storage temperature: -40 to +160°F (-40 to +70°C)

Installation must be performed in accordance with all relevant national wiring rules. Installation doit être exécutée conformément à tous les règlements nationaux applicable au filament électrique.

The outlet to which this apparatus is connected must be installed near the equipment and must always be readily accessible. La prise électrique à laquelle l’appareil est branché doit être installée près de l’équipement et doit toujours être facilement accessible.

This Class B digital apparatus contains with Canadian ICES-003. Cet appareil numérique de la classe B sera conforme à la norme NMB-003 du Canada.

To avoid electric shock, do not connect safety extra low voltage (SELV) circuits to teleconference station network (TNV) circuits. LAN ports contain SELV circuit, and WAN ports contain TNV circuits. Some LAN and WAN ports both use RJ-45 connectors. Use caution when connecting cables. This product is rate 48Vdc, 0.25A. When used with the optional external power supply (PSA15A-480PV, or similar rated PSU), the power supply shall be a Listed power supply with a LPS output, rated 48V, min. 0.25A.

Hearing Aid Compatibility (HAC):

This device is hearing aid compatible.

RoHS: All Polycom phones comply with the requirements of the EU RoHS Directive. Statements of compliance can be obtained from TypeApproval@polycom.com

Australia:

Warning—This equipment will be inoperable when mains power fails.

Copyright, Safety Notices

LIMITED WARRANTY: Polycom warrants to the end user (“Customer”) that this product will be free from defects in workmanship and materials, under normal use and service, for one year from the date of purchase from Polycom or its authorized reseller. Polycom’s sole obligation under this express warranty shall be, at Polycom’s option and expense, to repair the defective product or part, deliver to Customer an equivalent product or part to replace the defective item, if either of the two foregoing options are reasonably available. Polycom may, on its sole discretion, refund to Customer the purchase price paid for the defective product. All products that are replaced will become the property of Polycom. Replacement products may or may not be new or reconditioned. Polycom warrants any repaired or replaced product or part for ninety (90) days from shipment, or the remainder of the initial warranty period, whichever is longer. Products returned to Polycom must be sent pre-packed and packaged appropriately for safe shipment, and it is recommended that they be insured or sent by a method that provides for tracking of the package. Responsibility for loss or damage does not transfer to Polycom until the returned items are received by Polycom. The repaired or replaced item will be shipped to Customer, at Polycom’s expense, not later than thirty (30) days after Polycom receives the defective product, and Polycom will retain risk of loss or damage until the item is delivered to Customer.

EXCLUSIONS: Polycom will not be liable under this limited warranty if its testing and examination disclose that the alleged defect or malfunction in the product does not exist or results from:

- Failure to follow Polycom’s installation, operation, or maintenance instructions.
- Unauthorized product modification or alteration.
- Unauthorized use of common carrier communication services accessed through the product.
- Abuse, misuse, negligent acts or omissions of Customer and persons under Customer’s control; or
- Acts of third parties, acts of God, accident, fire, lightning, power surges or outages, or other hazards.

WARRANTY EXCLUSIVE. IF A POLYCOM PRODUCT DOES NOT OPERATE AS WARRANTED ABOVE, CUSTOMER’S SOLE REMEDY FOR BREACH OF THAT WARRANTY SHALL BE REPAIR, REPLACEMENT, OR REFUND OF THE PURCHASE PRICE PAID, AT POLYCOM’S OPTION TO THE FULL EXTENT ALLOWED BY LAW. THE FOREGOING WARRANTIES AND REMEDIES ARE EXCLUSIVE AND ARE IN LIEU OF ALL OTHER WARRANTIES, TERMS, OR CONDITIONS, EXPRESSED OR IMPLIED, EITHER IN FACT OR BY OPERATION OF LAW, STATUTORY OR OTHERWISE, INCLUDING WARRANTIES, TERMS, OR CONDITIONS OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, SATISFACTORY QUALITY, CORRESPONDENCE WITH DESCRIPTION, AND NON-INFRINGEMENT, ALL OF WHICH ARE EXPRESSLY DISCLAIMED. POLYCOM NEITHER ASSUMES NOR AUTHORIZES ANY OTHER PERSON TO ASSUME FOR IT ANY OTHER LIABILITY IN CONNECTION WITH THE SALE, INSTALLATION, MAINTENANCE OR USE OF ITS PRODUCTS.

SERVICE AGREEMENTS. Please contact your Polycom Authorized Reseller for information about service agreements applicable to your product.

SOFTWARE SUPPORT: Polycom will provide support for software running on the product if all of the following conditions are satisfied:

- The product is under warranty or is covered by a Polycom service contract;
- The product software is the current major version or the next preceding major version (software revisions are labeled as ‘x.y’ with the first two digits designating major versions);
- The product software comes with 90-day software warranty, providing for software updates (minor releases/bug fixes) to continue to receive support, purchasing a maintenance contract is the most economical solution;
- Requests for software support should be made through the Polycom Reseller from whom the product was purchased.

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WE ARE HERE TO HELP! PLEASE CONTACT US AT:

Phone: 888.623.VOIP (8647)
Email: officesuitesupport@broadviewnet.com
Live Chat: Chat live with us via the portal.

Just click on Live Help on top of the MyOfficeSuite Dashboard
http://MyOfficeSuite.broadviewnet.com