One Talk Admin Portal quick guide

About the Admin Portal

With the Verizon One Talk℠ Admin Portal, you can view your company's One Talk services, manage your accounts, create orders and much more. You can do it virtually anywhere, anytime, from any device.

You can add One Talk service to specific lines and devices. Remember, a maximum of eight devices can be added to each One Talk line. You can also add Hunt Group, Auto Receptionist and several other features to your One Talk account. There are search options for finding a telephone number or device quickly and making changes to account details.

This guide provides instructions for managing the call management of the One Talk service from the One Talk Admin Portal.

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Contents

Logging into the Admin Portal

The Admin Portal is accessible to an authorized Verizon Wireless account representative to manage the One Talk solution for business and user lines. The One Talk service admin for your company can perform the following self-serve functions for business and individual user telephone numbers.

The administrator has complete management capability over corporate-liable lines. *Corporate-liable lines are billed to the corporation.* Corporate-liable lines with One Talk service can be assigned by the administrator for employee Hunt Group or Auto Receptionist use. But employee-liable lines can only be assigned for employee use by the administrator after authorizing the line to join the business group.

- Add service:
  - New lines for employees
  - New lines for Hunt Group or Auto Receptionist
  - To existing lines
  - To new/existing devices

- Set up and enable business features:
  - Account Code
  - Automated Receptionist
  - Hunt Group
  - Group Forwarding
  - Calling Lines ID
  - Custom Ringback
  - Remote Group Pickup
  - Adding 911 Address to desk phones

- The One Talk service admin cannot enable the following on an employee-liable line:
  - Account Code
  - Group Forwarding
  - Calling Line Delivery
  - Custom Ringback
  - Remote Group Pickup

Admin managing capability is restricted on employee-liable lines. *Employee liable lines are billed to the employee.* The admin can do the following for an employee line:

- Authorize employee line for business functionality.

- Include the employee line in Group Forward, Hunt Group, Auto Receptionist and Remote Group Pickup.

**Access the portal from onetalk.com.**

1. Click **Sign in to My Business** under *Get started today.*

2. Under *Business sign in*, enter your user name and click **Sign In**.

3. Your security image will appear to the right of the screen. If this image does not appear when you log in, do not log in as there may be a security issue. Call Verizon to report the issue.

   Enter your password. Click **Continue**.
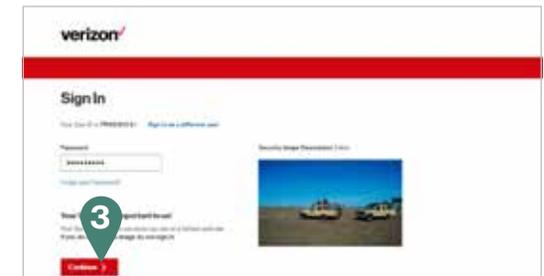
4. If you have previously registered your computer, you will have listed an answer to a secret question. If you use a different computer, you will be prompted to answer your secret question. Type your answer and hit **Enter.**
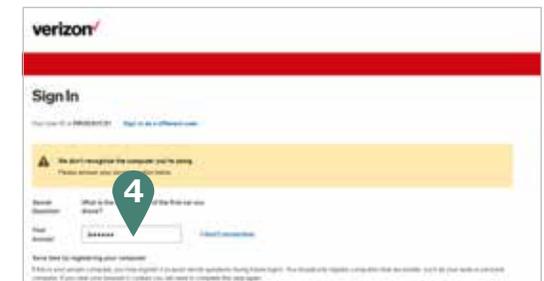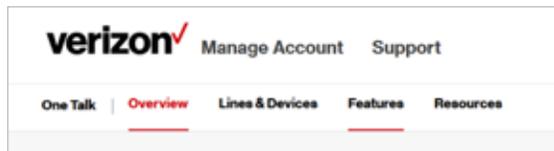
Admin Portal layout

Let's now get familiar with the One Talk Admin Portal. Upon successful login, you'll be in the Overview page. There are five upper tabs in the portal that link to various resources and functions to facilitate navigation between configuring and managing features and lines.
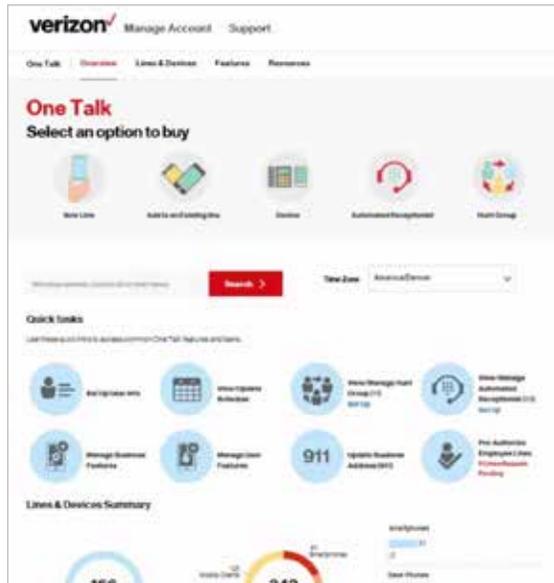
Portal Overview page

One Talk

This tab provides introductory product descriptions, benefits and videos.

Overview

This tab provides short cuts to purchase lines and devices, configure business preferences and rules, and view a summary of line/device counts.

Lines & Devices

This tab shows a complete list of the telephone lines and devices registered to the company account with One Talk service. You can click the appropriate line to view details, edit a profile and manage the features on that line.

You can choose to view by a line or device. Both views allow you to conduct a search based on the field names, and download the results into a CSV or PDF file for management. To change the default fields presented on this page, click the gear icon to customize by removing and changing the order of the fields.

If set to view by line, the table will show user number, extensions, user name, status, line type and the quantity of devices paired with the number.

- Refine the listing by using the filter to All, Active, Suspended, Corporate or Employee.

- Block the any/all user(s) from downloading the mobile app.

If view is set to device, the table will show all devices and types registered with One Talk service. It lists the device type, model, device ID, use line and name.

- Refine the listing by using the filter setting to select device type and or status.

- Update the 911 address for desk phones.
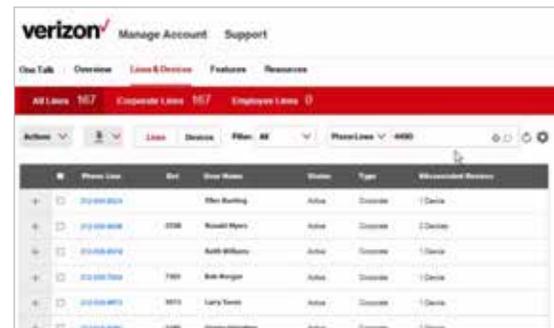
Features

This tab gives the service administrator access to view and set preferences for various call management capabilities on company-liable One Talk user, Hunt Group and Auto Receptionist lines. The service administrator has limited access to managing employee-liable resources, including the lines in Hunt Group and Auto Receptionist.
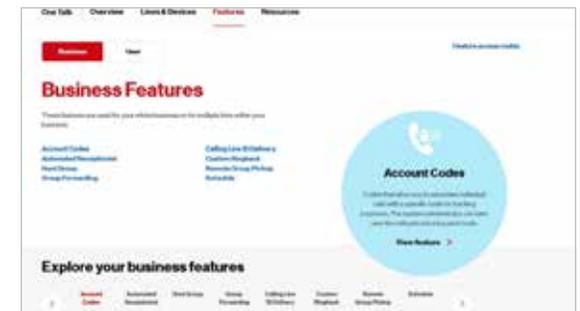
The service administrator can configure and enable features on corporate-liable lines assigned to an employee line, Hunt Group or Receptionist. However, on employee-liable lines, the service administrator can only configure the line as an option in Auto Receptionist, add into a Hunt Group and into a Group Calling Line. Enabling user features on employee-liable lines can only be completed by the account member in My Verizon.

Auto Receptionist and Hunt Group lines can only be managed by the service administrator in the Admin Portal. For employee user lines that are corporate-liable, financial responsibility rests with the company. These can be fully managed by the service administrator in the Admin Portal. The user also has access to manage these lines in the User Portal.

For user lines that are employee-liable, financial responsibility rests with the individual. These lines are fully managed by the user in the User Portal. The service administrator can configure some features, such as making the line an option in Auto Receptionist, a member in a ring cycle in Hunt Group and a member in Group Call forwarding.

Below is a listing of business and user features accessible through the Admin Portal:

- Account Codes
- Automated Receptionist
- Hunt Group
- Group Forwarding
- Calling Line ID Delivery
- Custom Ringback
- Remote Group Pickup
- Schedule

Resources

This tab gives you access to product support information through User Guides under Documentation, FAQs, a Get Started Q&A and How-to Videos about the One Talk service. A Contact Us link and Terms and Conditions for the service are also included.
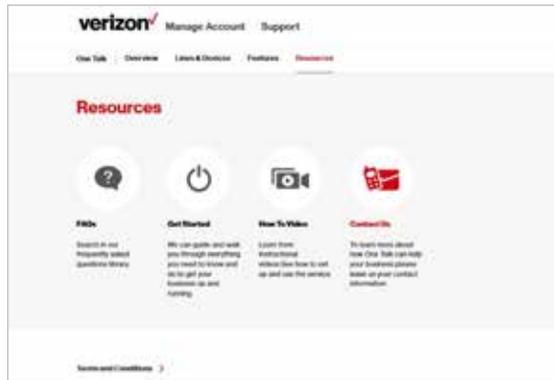
Shop One Talk

There are five icons below the tabs.

New Line

Use this selection to add a new One Talk line (phone number) for use on:

- Mobile app
- New or existing desk phone or One Talk dialer

Add to an Existing Line

- Add One Talk service to an existing corporate-liable line.

Automated Receptionist

Add a One Talk corporate-liable line to serve as an Automated Receptionist. Auto Receptionist lines are unique and cannot be paired with any devices (such as smartphones and desk phones).

Hunt Group

Add One Talk to a corporate-liable line to use a Hunt Group feature. Hunt Group lines are unique and cannot be paired with any devices (such as smartphones and desk phones).

Quick Tasks

There are eight links on this section of the Admin Portal Overview page that provide quick access to One Talk features and tasks. Some of the links also display a total number of that feature that the company has ordered (e.g., Hunt Groups, Automated Receptionist and Pre-authorized Employee Lines).

Lines & Devices Summary

At the bottom of the portal's Overview page is a summary of all lines and devices with One Talk service within your company. The first circle shows telephone lines divided into either corporate-liable or employee-liable. The second circle shows a breakdown of device types.

Managing lines

### Adding One Talk service to lines and devices

Click the **New Line** icon to add One Talk service.

You have several options.

**Activate an existing device by adding a
One Talk line.**

1. Click the **New Line** icon. Click **Mobile Client** for a One Talk mobile app user. For this smartphone user, the One Talk number will be different from their wireless number.

2. Click **Device** to order a One Talk number on a new smartphone dialer or a new or existing current One Talk desk phone. A smartphone dialer user will have the same One Talk number for their smartphone number.
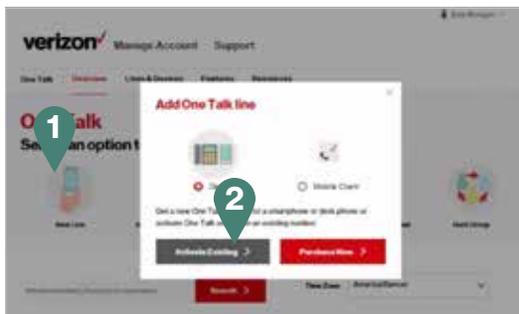
3. Enter device ID, then click **Continue**. Use this to create a line for a desk phone or smartphone dialer use.
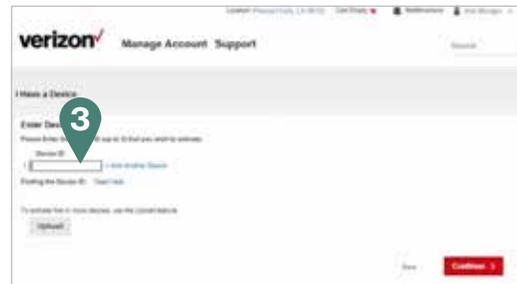
4. Choose **Create New Billing Account** or **Add to Existing Billing Account**. Select a billing account number in the drop-down menu or search for it. Click **Continue**.

   Note: When adding a new line, if your plan has a line limitation then all One Talk corporate-liable lines will count towards the maximum number. If you exceed the maximum allowable line count, you will not be able to add a line until the line limit is resolved. Once it is resolved (by either removing lines or adding to the maximum), you can create a new account.


5. Select a Plan Type and a Contract Term. Click **Continue**.

6. The Accessories page is displayed. Choose desired accessories. Click **Continue**.

7. Your Cart page is displayed. Here you can change quantity, plan type, features, accessories and shipping method. After your selections have been made, click **Continue** to checkout.

8. Enter user information. Select an NPA/NXX number. You can change the area code. Note that 911 Address must be checked.

   Here you can also transfer a number from another carrier to Verizon. If selected, enter the number, then click **Check Eligibility**.
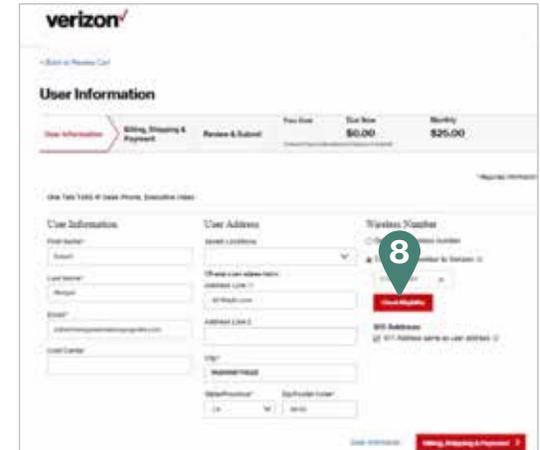
If you are bringing a line from another carrier, you must provide some additional information. Please enter the carrier information as listed on your bill. Click **Submit**.
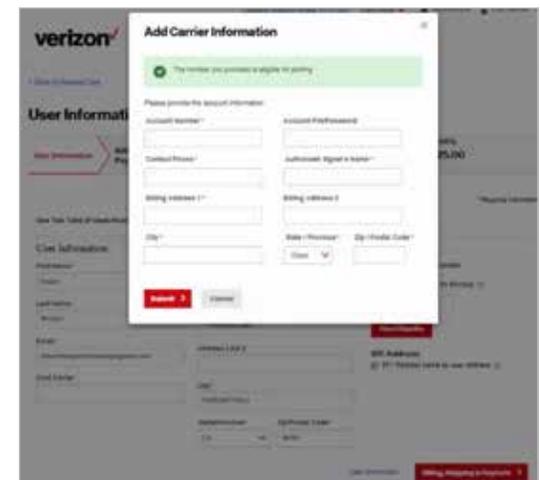
9. When all of the information on the page has been entered, click **Billing, Shipping & Payment**. The billing, shipping and payment information is displayed. The selected address is shown. The address may be changed by adding a new address. Billing information may also be changed.

10. Once the information is correct, click **Review Order**.
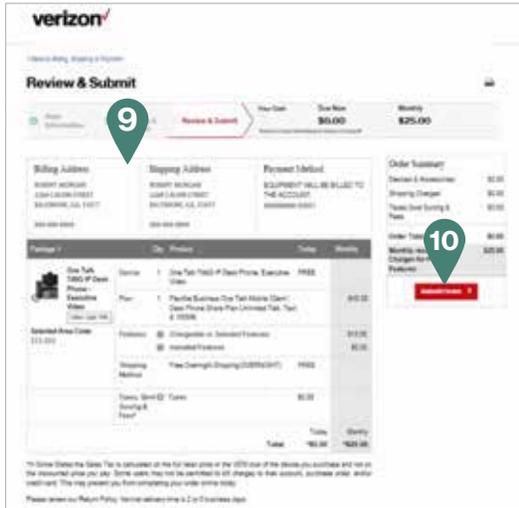
11. The Review & Submit page is displayed. Review your order. If everything is correct, click **Submit Order.**

Purchase a new device.

1. To add One Talk service to a new device (desk phone or dialer), click the **New Line** icon. Then click **Device** and **Purchase New**.
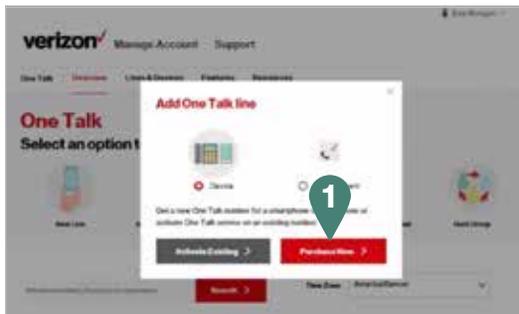
2. Select the device, then select the Payment Options (One Time payment). Then select a quantity and Add to Cart. Repeat for other desk phone models.

3. Click **Continue** at the bottom of the page. Enter the user information, select **Decline Device Insurance**, then select **Yes** if you have an existing number to transfer to Verizon. Then click **Continue to Plans**.

4. Follow steps 4 through 11 under Activate Existing Device.

Purchase a new mobile client.

1. To add a new One Talk line for use on a mobile device, click the **New Line** icon. Then click **Mobile Client** and **Purchase New**.

2. Click **Create New Billing Account** or **Add to Existing Billing Account**. Click **Continue**.
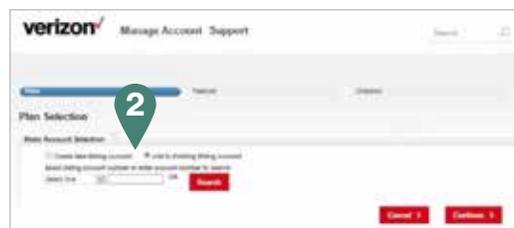
3. Click **Select** under the One Talk plan. Click **Continue**.

4. Select features on the next page. Click **Continue**.

5. Then follow steps 7 through 11 for Add Existing Device.

Adding One Talk service to an existing line

Use this selection to add One Talk to a current active corporate-liable line.

1. Click the **Add to an Existing Line** icon to add One Talk service.

2. A list of all existing lines associated with your account is displayed (including those that may already have One Talk service). Click the line or lines to which you want to add One Talk service. You can search by employee name or telephone number.
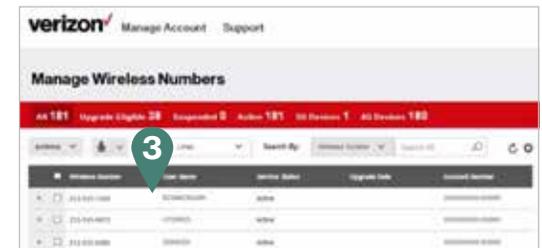
3. When you find the line to which you want to add One Talk service, check the box to the left of the number. Click **+** for details and edit as necessary.
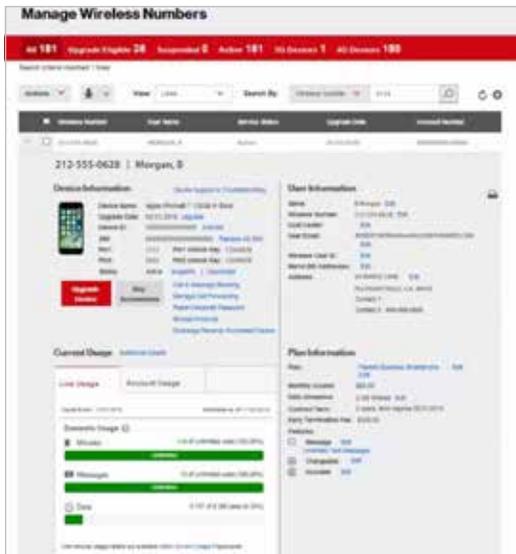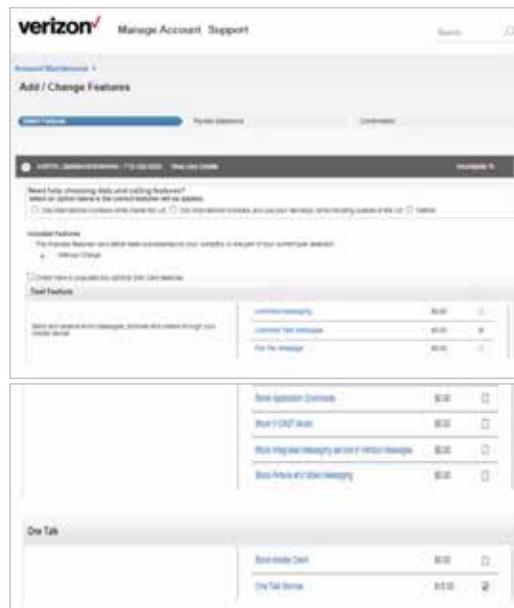

4. Click the **Actions** drop-down menu at the top left of the page.
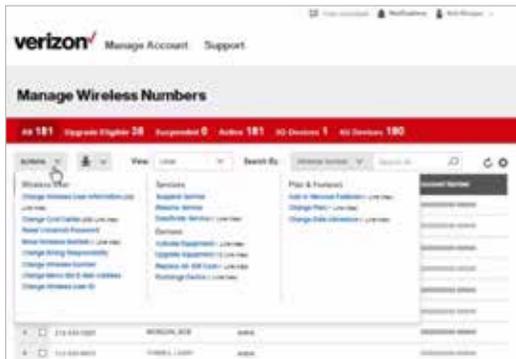
5. Under Plans & Features to the right, click **Add or Remove Features**.

6. On the Add/Change Features page, click **Decline New Equipment** and make sure that the One Talk service has been checked.

7. Then click **Continue** at the bottom of the page.

8. The Review Selections page is displayed. Click **Submit**.

9. Review your features and make changes if necessary. Click **Print Confirmation** to print a copy of your One Talk order, if desired.
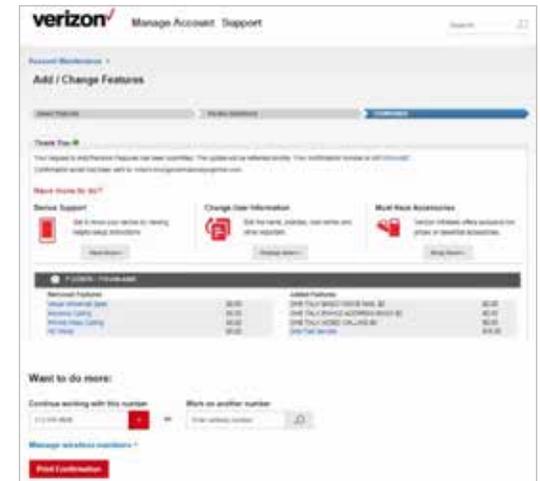
Manage business features.

The One Talk Admin Portal also allows the service administrator to configure and enable user features for the corporate-liable user lines.

Change time zone.

To change the time zone for your group and user features tied to your corporate-liable line, select your desired time zone in the drop-down menu on the Overview page.

View/Change business hours or after hours and holidays.

The One Talk service can route incoming calls based on your normal business hours, evening hours or holiday periods with these features:

- Desk phones, dialer and client-paired lines:
  - Pre-Alerting Announcement
  - Simultaneous Ring Service
  - Selective Call Forward
  - Group Forwarding
  - Selective Call Acceptance/Rejection
- Hunt Group line:
  - Selective Call Acceptance/Rejection
  - Selective Call Forward
- Auto Receptionist:
  - Selective Call Acceptance/Rejection
  - Selective Call Forward

To view business hours, after hours or holiday hours in a schedule:

1. Click the **View/Update Schedule** icon under Quick Tasks.

2. View the list of schedules. Select a schedule.
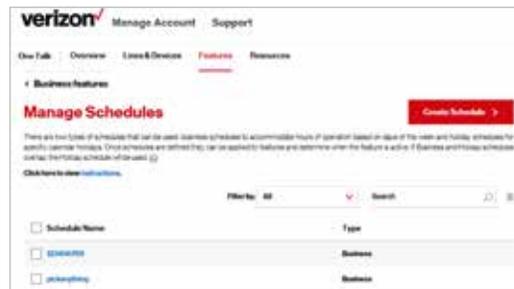
3. *Before editing a schedule, it is recommended that you dissociate its use by the features.* Once a desired schedule is selected you will be able to edit the schedule. You can edit the name, the time and the days. Once completed, click **Submit** and you can now use associate it in your feature configuration.

Change greeting on the Automated Receptionist.
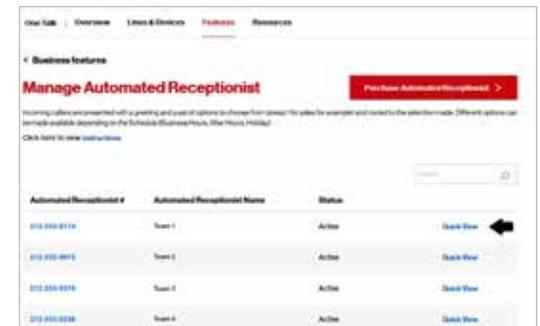
1. Access the Auto Receptionist configuration tool.

Alternately, you can access this through the **Features** tab under **Auto Receptionist.**

2. Click **Quick View** alongside the desired number for a summary of settings.

3. Click **Edit** in dialog box.

Editable items in this next screen include:

- Automated Receptionist name
- Caller ID name
- Time Zone
- Line Status (Disconnect, Suspend, Change Number)
- Change associated schedule

4. Click **Set Up Automated Receptionist**.

5. Select **Upload Custom Greeting**. Click **Upload** to upload custom audio file.

   Custom greeting: You can record your own announcement. We recommend downloading and using the Broadsoft Recorder from the Apple® App Store® or Google Play.™ The Broadsoft Recorder formats the recording for you, so it's easy to use. Or you can use other programs and applications. But make sure that the audio file you produce is no longer than two minutes and meets the following criteria:

WAV file format:

✓CCITT, u-law, or a-law codec
✓8.000 kHz (sampling rate/frequency)
✓8 bit mono
✓WAV file type
✓2MB or less total size

   Here is an example of a custom recording: "Thank you for calling Joe's Plumbing. For billing, press 1. To schedule an appointment, press 2. To speak to the manager, press 3. For immediate service, press 4."

Change Call Routing.

The One Talk Call Routing feature lets you define up to 10 options for callers. These options directly correspond with the phone keys 0 to 9. If a caller presses a key number that has been defined, the call will be transferred to the designated number.

1. To make changes to Call Routing that has already been defined, follow steps 1 to 3 for Change Greeting to get to the Set Up Automated Receptionist page.

2. Under the Keys column, define caller options.

   Note: Please set the # option to Transfer to Operator and enter the Automated Receptionist number.

3. When you have completed making changes to your routing rules for keys, click **Continue**.

4. You can also edit the After Hours and Holidays schedule and greeting, or set After Hours routing to the same as Business Hours. Click **Review**. Then click **Submit**.

To make changes to your Hunt Group

1. Click the **Hunt Group** icon from the Overview tab.

- Alternatively you can access Hunt Group through the Features tab. Then select the Hunt Group feature.
- Click the **Features** tab and select the Hunt Group feature.

2. Click **Quick View** alongside the desired number for a summary of settings.
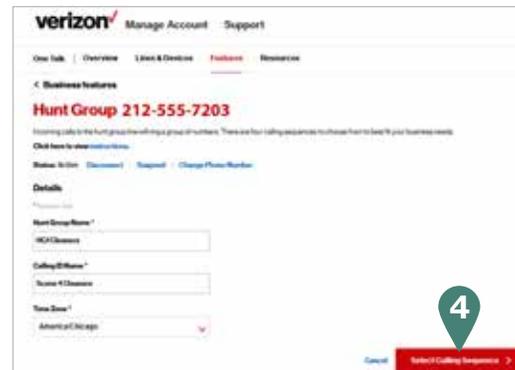
- Line status
  - Calling sequence
  - Lines included in sequence
  - The order in the sequence
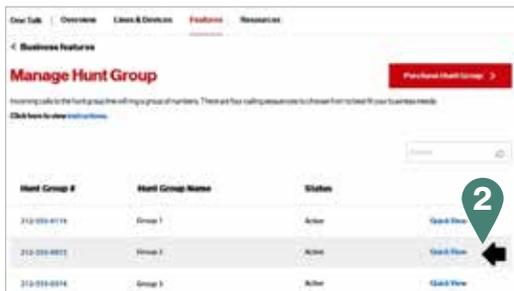
3. Click the **Edit on Hunt Group** dialog box to make changes.

4. Items that can be edited in the next screen include Hunt Group name, Caller ID name and time zone. Make the desired edits and then click **Select Calling Sequence.**

5. On the next screen, you can change status from Active to Disconnect, or Suspend or Change Phone Number. You can also select a different calling sequence. Additionally, using the < and > arrows, you can move numbers in and out of the Hunt Group.

6. At the bottom of the page, you can also change the calling sequence, add or remove the telephone number for the group, and change the time limit.
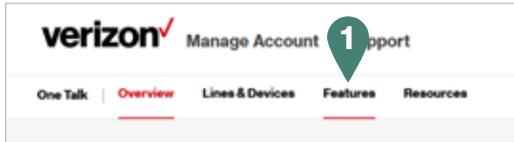

7. After making your changes, click **Submit** at the bottom of the page.

Group Forwarding

Group Forwarding allows you to quickly forward multiple user lines to the same destination/number. It is most commonly used for business continuity.
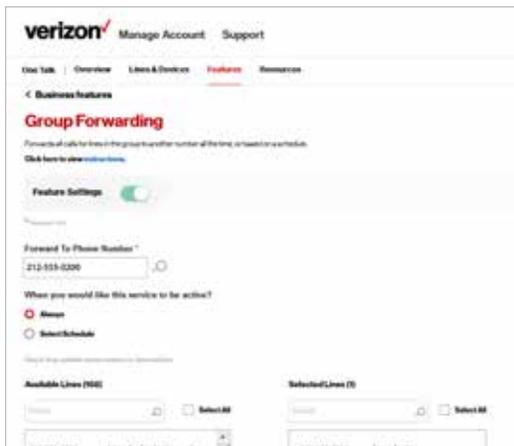
1. Click **Features.**

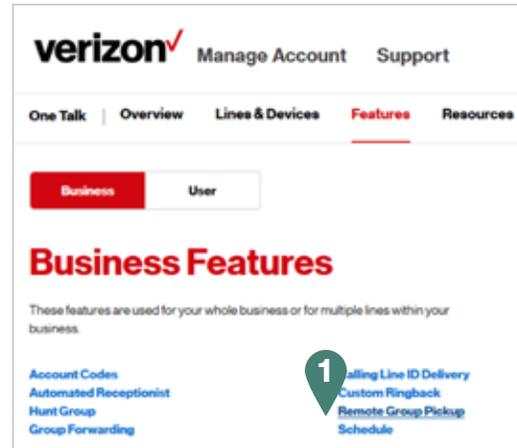2. Then click **Group Forwarding.**

3. Changes that can be made: Turn the feature on or off. Enter a number in the Forward to Phone Number field. Select when to activate (Always or Schedule). Use the < and > arrows to add or remove lines to and from Group Forwarding.
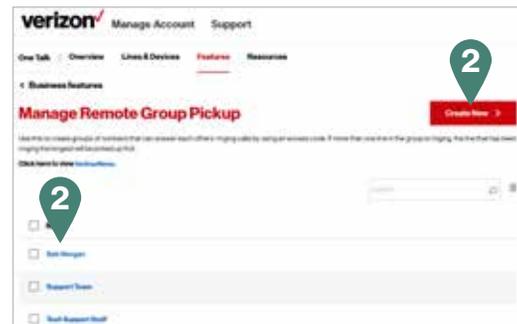

4. Click **Submit.**

## To set or change Remote Group Pickup

1. On the Features page, click **Remote Group Pickup.**

2. Select an existing group or create a new one. If you're creating a new Remote Group Pickup, give it a name. Then assign the lines to the group using the right-facing arrow or drag and drop to the Selected Lines box. To edit a Remote Group Pickup, click the desired name. You can search for available lines by name or number.

3. Select the Remote Group Pickup name. Once in the Modify screen, you will be able to enter or edit the Group Name or select One Talk numbers. One Talk numbers can only be included in one group for Remote Group Pickup.
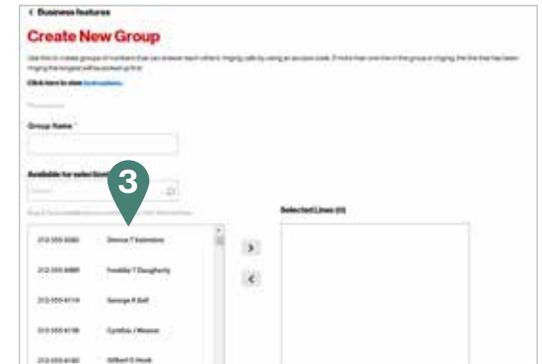
4. Click **Submit** to confirm your group settings.

To change or edit user information

1. From the Overview tab, click the **Set Up User Info** icon under Quick Tasks.

2. Optional: Filter the listing according to days since the last activity: 30, 60, 90 or 180 days, or one year. Search based on name or telephone number.


You can alternately edit user info by clicking the field and editing the entry or by selecting the Upload Spread Sheet tab. Then click **Download a blank template** or **Download a template with a list of phone numbers**. When you have entered the changes, click **Upload**.
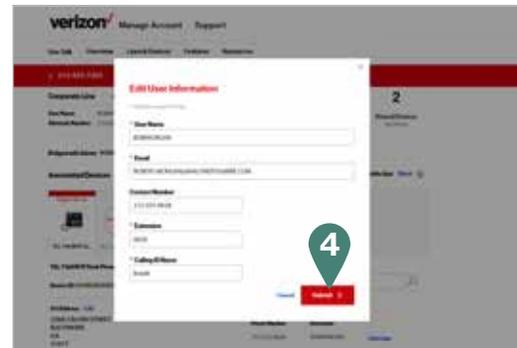

Another method for updating an individual user line is from the Lines & Devices tab. Enter the desired number in the search box and retrieve the corporate-liable line.

3. Click **Edit User Information** at the top of the page.
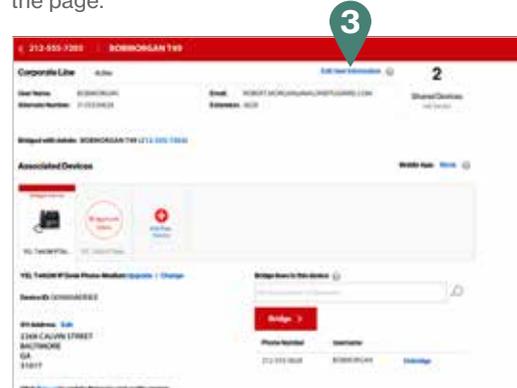
4. Edit user information, then click **Submit**.

To edit Call Forwarding settings

1. To set up the Call Forwarding feature, click the **Manage User Features** icon under Quick Tasks. (You can also access the Call Forwarding feature settings from the Lines & Devices tab.)
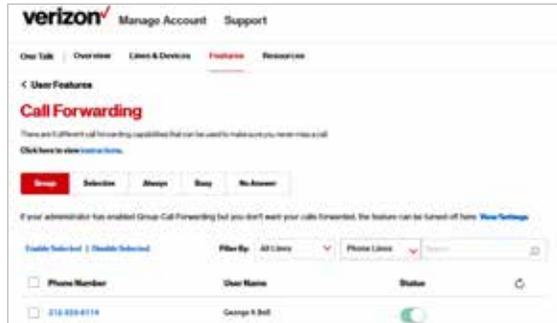
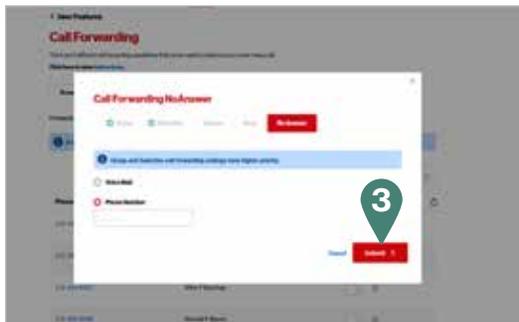

2. Click **Call Forwarding**.

There are five settings. Select from the following the Call Forwarding options:

- **Group** enables you to forward all calls for multiple lines in the group to another number all the time or based on a schedule.

- **Selective** forwards calls based on pre-defined schedule and phone numbers.

- **Always** forwards all calls to another destination.

- **Busy** forwards calls when your line is busy.

- **No Answer** reroutes a call if you don't answer after five rings.

Call Forwarding features can be turned on and off as needed. Turning on the feature will give you the option to forward to voicemail or to another phone number. Call Forwarding can be enabled with a schedule.

3. Choose the Call Forwarding setting you want, then move the status toggle to on (green) for the phone number you want to enable. Choose to forward your calls to another number or to your voicemail. Then click **Submit**.

You can adjust Call Forwarding settings by clicking on the gear icon next to the line to which changes will be made. The same Call Forwarding dialog box will appear. Make changes and click **Submit.**
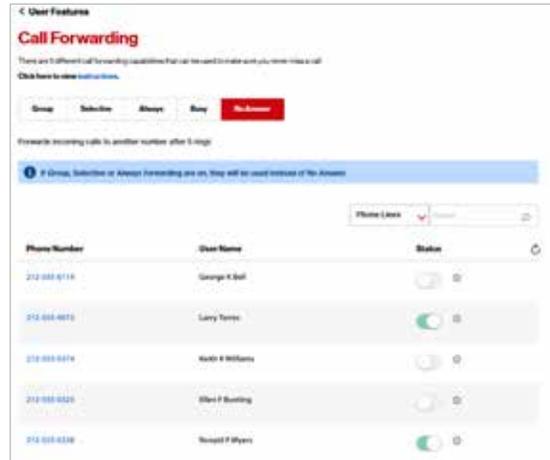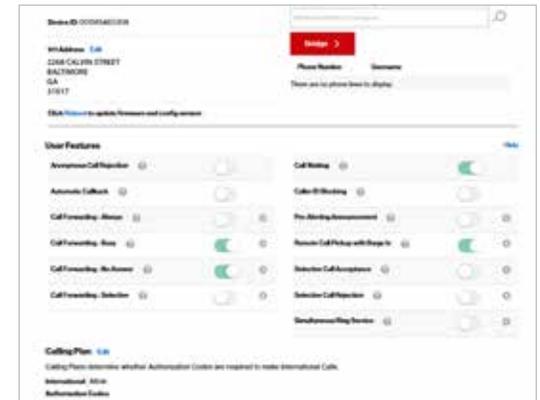

You can also use the Lines & Devices tab to set up Call Forwarding for a single line.

1. Select the Lines & Devices tab and choose the line you want to add Call Forwarding to by checking the box or clicking the phone number.

2. On the next page, scroll down to set or adjust Call Forwarding features.

3. The Call Forwarding dialog boxes will appear. Make the desired changes, then click **Submit**.
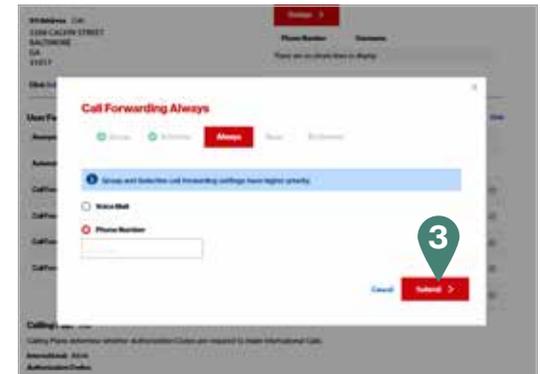
To edit the Remote Call Pickup with Barge-In, with or without tone

This feature allows other members of your business to remotely pick up your line while it is ringing to make sure no customer calls are missed, or to join your call in progress with or without a warning tone.

1. Select the Features tab and then click **Remote Call Pickup with Barge-In**.
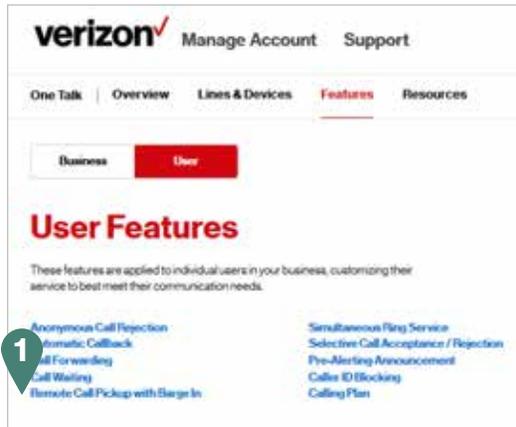
2. Click the gear icon to the right of the line you want to configure.
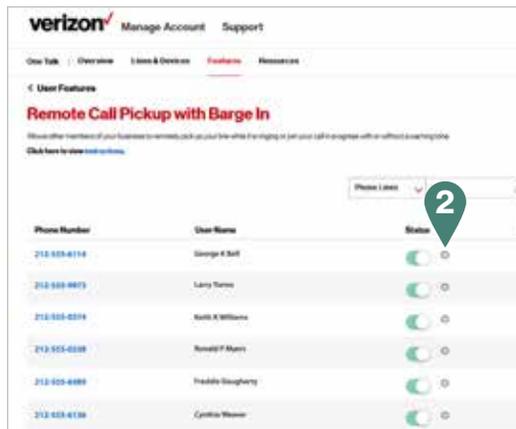
3. Slide the status toggle to on (green) to turn on the feature for that particular line. Click the gear icon to the right of the status toggle to select/deselect **Allow warning tone during barge in** or **Allow automatic selection for barge in**. Click **Submit**.
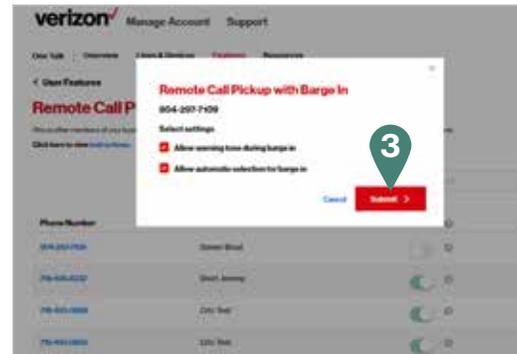

Selective Call Acceptance/Rejection—User Lines

This feature allows you to only accept specific calls based on conditions that you define or reject incoming calls based on pre-defined conditions you set. You can accept all calls or only calls from up to 10 specific phone numbers based on a pre-defined schedule (business or holiday). Up to five conditions/options can be configured. If you have both Selective Call Acceptance and Rejection activated, the settings for Acceptance will be used first.

1. To enable the feature, select the Features tab and then click **Selective Call Acceptance/Rejection**.
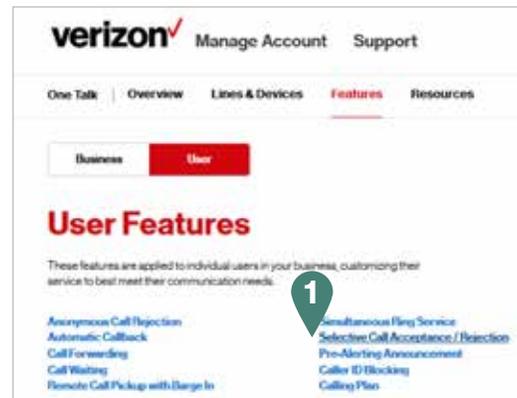
2. To turn on the feature for a specific phone number, slide the status toggle to on (green).
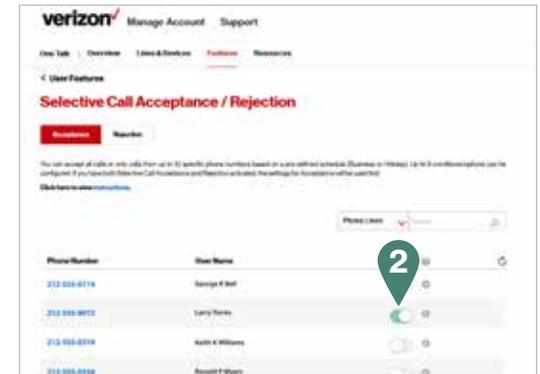
3. Click radio buttons to select/deselect **Accept Calls from Any Phone Number** or **Accept Calls from Specified Numbers (Up to 10 Numbers)**. If the latter is selected, enter the phone numbers. Choose already-configured business and/or holiday schedules, or turn feature to Always. You can also choose the **Add New Selective Call Acceptance** option. Click **Submit**.
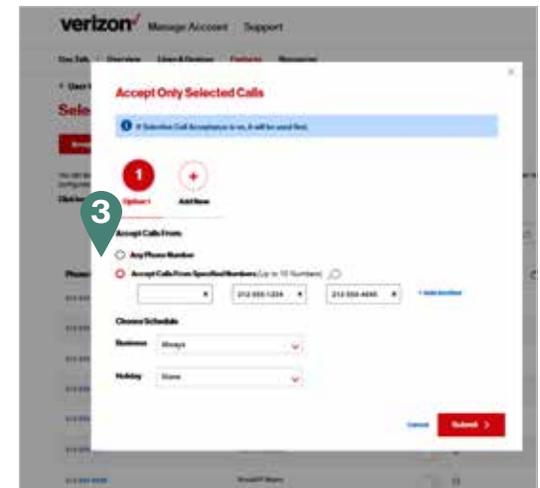
To change Selective Call Acceptance/Rejection—Hunt Group lines

The Hunt Group line can be set to Accept or Reject based on certain conditions (such as a schedule or list of callers).

1. Click the **Manage User Features** icon under Quick Tasks.

2. Click **Selective Call Acceptance/Rejection**. Then click the desired option: Acceptance or Rejection.

3. Search for the Hunt Group number.

4. Click for details.

5. Click the **Selective Call Acceptance or Rejection** gear icon and then edit.

To change Selective Call Acceptance/Rejection—Automated Receptionist lines

The Automated Receptionist line can be set to Accept or Reject based on certain conditions (such as a schedule or list of callers).

1. Click the **Manage User Features** icon under Quick Tasks.

2. Click **Selective Call Acceptance/Rejection**. Then click the desired option Acceptance or rejection.

3. Search Automated Receptionist for number.

4. Click for details.

5. Click the **Selective Call Acceptance or Rejection** gear icon and then edit.

Features impacted with changes to schedule

- Selective Call Forwarding
- Selective Call Rejection
- Selective Call Accept
- Pre-Alerting Announcement

Any changes made to a business schedule in use will impact the features listed above. To remedy this, create a new schedule and associate it with the features listed above.

Learn more.

For more information, visit
www.onetalk.com