



Setting up “Handle a Call Based on the Time or Day”

Soft Seat

Log into Comportal

Phone Status

You will have to set a schedule in order to put together a set of rules that would apply to that time frame. To do so, go to the “Weekly Schedule” tab.

Phone Status

Periods (max 3)	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

If this is your first time setting this up you have the option to start with 'An example schedule that you can customize' or 'A blank schedule' (shown on the right).





Click “Add New Period” and name the period you are creating. Once satisfied clicked 'OK'. You are able to repeat these steps for up to 3 periods.

Choose a name for this new period.

For example, you might choose "Lunch" or "Working Hours".

Name:

Click on the times you would like to make the rules apply for each period. To change from one period to another click on the period under 'Periods'. For this example I have chosen Working Hours, Non-Working Hours, and Weekend.

You are able to break down the time periods by 15 and 30 minute intervals by clicking 'Zoom in'.

Periods (max 3)	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Non-Working Hours							
Weekend							
Working Hours							
	1 am						
	2 am						
	3 am						
	4 am						
	5 am						
	6 am						
	7 am						
	8 am						
	9 am						
	10 am						
	11 am						
	12 pm						
	1 pm						
	2 pm						
	3 pm						
	4 pm						
	5 pm						
	6 pm						
	7 pm						
	8 pm						
	9 pm						
	10 pm						
	11 pm						

Once satisfied, click “Apply”. You will now need to set up rules that will be used for these specific times of day. Go to the “Rules” tab.

Phone Status

Summary Rules Weekly Schedule Special Days

Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.

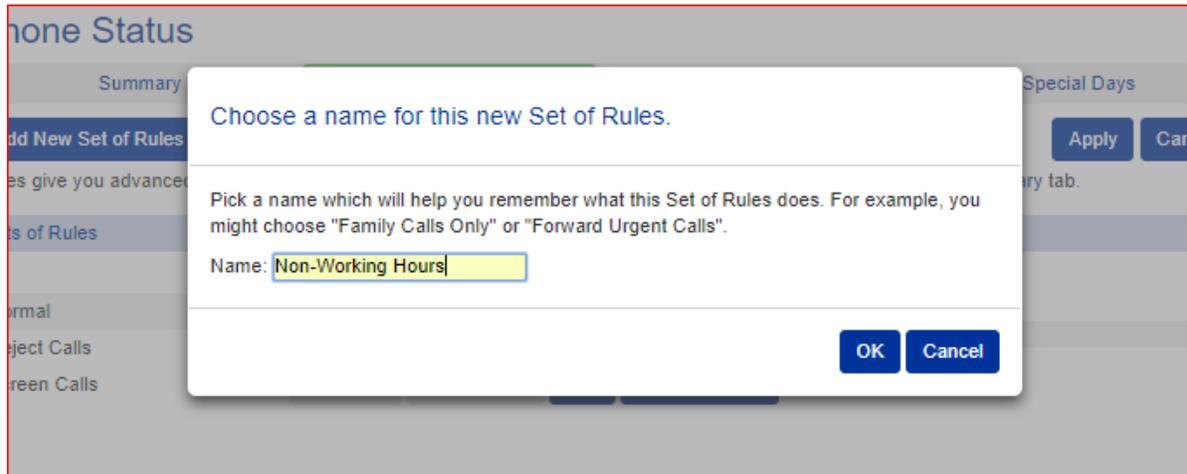
Sets of Rules	Screen Calls
Normal	
Reject Calls	
Screen Calls	When I receive a call from an anonymous number, ask the caller to say their name before I accept the call

Default: The call will ring your phone using the Standard Ringtone

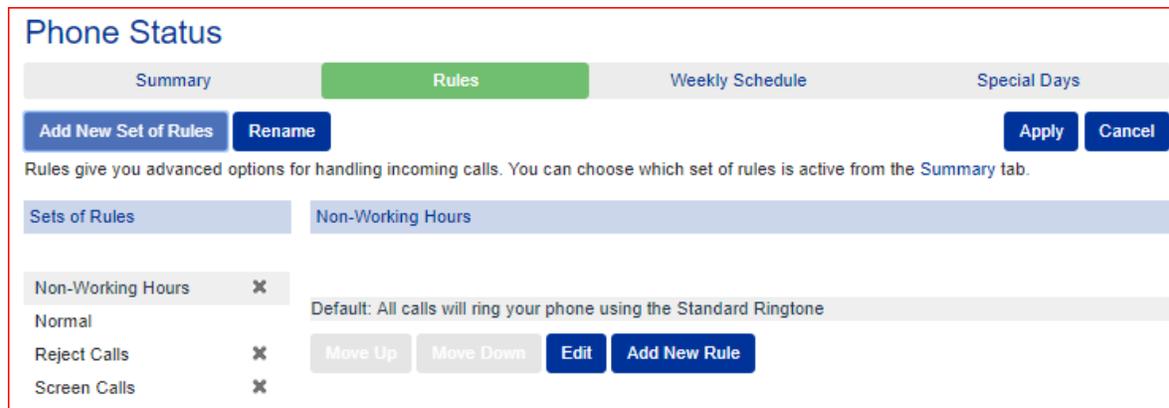




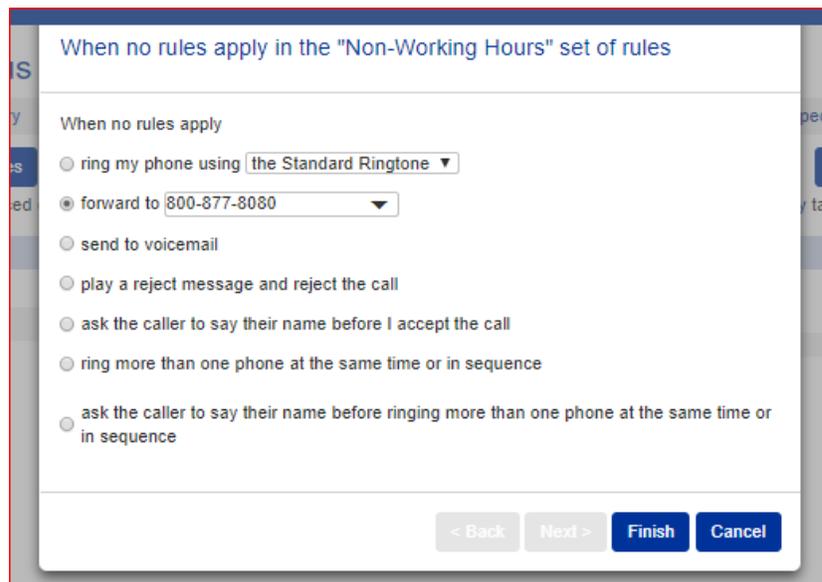
Click “Add New Set of Rules”.
Enter the name of the rules you would like to create.
Then click 'OK'.



Click “Edit” if you would like these rules to be something different than the default of ringing your phone. For this example we will have calls forward to another line during Non-Working hours.



Select the “forward to:” option and input the number you would like to have the incoming calls forwarded to during this time frame.





Once satisfied, click 'Finish' then click 'Apply'.

Phone Status

Summary **Rules** Weekly Schedule Special Days

Add New Set of Rules Rename Apply Cancel

Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.

Sets of Rules Non-Working Hours

Non-Working Hours ✕
Normal
Reject Calls ✕

Default: All calls will be forwarded to (800) 877 8080

Move Up Move Down Edit Add New Rule

You are then able to set rules for the other time periods as well by following the same steps. For this example I have chosen my calls to be sent to voice-mail during the 'Weekend' period.

Phone Status

Summary **Rules** Weekly Schedule Special Days

Add New Set of Rules Rename Apply Cancel

Rules give you advanced options for handling incoming calls. You can choose which set of rules is active from the Summary tab.

Sets of Rules Weekend

Non-Working Hours ✕
Normal
Weekend ✕
Working Hours ✕

Default: All calls will be sent to voicemail

Move Up Move Down Edit Add New Rule

You will now need to set which rules are used for which time period. Go to the "Summary" tab.

Phone Status

Summary Rules Weekly Schedule Special Days

Apply Cancel

When I receive a call Additional options

Ring my phone
 Forward to (401) 595 1069
 Send to voicemail
 Use my Normal rules (or set up new rules)
 Handle depending on the time or day

These options apply in all cases where you've chosen to have your phone ring.
If I don't answer:
 Forward to enter a number
 Send to voicemail
 Reject the call

If I'm in a call:
 Forward to enter a number
 Send to voicemail
 Reject the call

What audio should callers hear before their call is answered?
 Use default ringback
 Use custom ringback record





Select "Handle depending on the time or day" under 'When I receive a call'.

When I receive a call

- Ring my phone
- Forward to (401) 595 1069
- Send to voicemail
- Use my Normal rules (or set up new rules)
- Handle depending on the time or day

On normal days use my Normal rules during Working Hours

use my Normal rules during Non-Working Hours

use my Normal rules during Weekend

use my Normal rules at all other times

On Special Days use my Normal rules

From here you are able to drop down the menus to toggle which rules are to be used for which times.

Once satisfied, click 'Apply'.

When I receive a call

- Ring my phone
- Forward to (401) 595 1069
- Send to voicemail
- Use my Normal rules (or set up new rules)
- Handle depending on the time or day

On normal days use my Working Hours rules during Working Hours

use my Non-Working Hours rules during Non-Working Hours

use my Weekend rules during Weekend

use my Normal rules at all other times

On Special Days use my Non-Working Hours rules

If there are days, such as holidays, that will fall within the normal business days rule that may be considered the Weekend or Non-Working hours, you are able to set "Special Days" and decide which rules will be followed for those days.

To set special days, go to the "Special Days" tab.

Phone Status

Summary Rules Weekly Schedule **Special Days**

[Go To Today](#) [Clear All](#) [Add Public Holidays](#) [Apply](#) [Cancel](#)

Special Days are exceptions to your normal weekly schedule.

For example, vacations or business trips are special days, when you may want to handle calls in a different way. You can use the **Summary** tab to choose a different rule which applies for the whole of these days.

Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.

August 2018							September 2018							October 2018						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4	5					1	2	1	2	3	4	5	6	7
6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
27	28	29	30	31																





From here you are able to select days that are considered to fall outside the normal schedule. These days will highlight in blue when selected. You are able to add Public Holidays if needed. Once satisfied, click “Apply”. To set the rules that are going to be used on these days, go back to the “Summary” tab.

Phone Status

Summary Rules Weekly Schedule **Special Days**

[Go To Today](#) [Clear All](#) [Add Public Holidays](#) [Apply](#) [Cancel](#)

Special Days are exceptions to your normal weekly schedule.

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August 2018							September 2018							October 2018						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5						1	2							
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				

Under 'Handle depending on the time or day' find 'On Special Days use my _____ rules'. From here you are able to use the drop down to decide which rules are used at that time.

Once satisfied, click “Apply”

When I receive a call

- Ring my phone
- Forward to (401) 595 1069
- Send to voicemail
- Use my Normal rules (or set up new rules)
- Handle depending on the time or day

On normal days use my Working Hours rules during Working Hours

use my Non-Working Hours rules during Non-Working Hours

use my Weekend rules during Weekend

use my Normal rules at all other times

On Special Days use my Non-Working Hours rules

