



BroadCloud – My Rules Quick Reference Guide

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Frontmatter information

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Acknowledgements

The content herein is based on the following document provided to Cloud Direct as a service provider and reseller of this product:

- BroadCloud – My Rules, ©BroadSoft, Inc.

The original document remains untouched, with the following exceptions which have been made to ensure a positive experience for customers of Cloud Direct:

- Where appropriate, contact details and web links amended to reflect Cloud Direct.

Contacting Cloud Direct

If you require advice or assistance regarding this product, then please contact Cloud Direct using the following contact details.

For	Phone	Email
Sales	0800 0315966	sales@clouddirect.net
Technical Services (support)	0800 0789438	Tech_Services@clouddirect.net
Customer Services	0800 0789437	

Feature Overview

In business today there are many different ways people want to treat incoming calls. An individual may want to make sure they don't miss a call from a certain number regardless if they are in the office or not. Other individuals may want to have their office phone ring simultaneously with their mobile phone between 8:00am and 5:00pm but transfer to voicemail after office hours. These settings and much more can be accomplished with My Rules. My Rules is where you can create different rules to forward, reject or accept certain calls based on the phone number of the person calling and/or time of day and day of the week when the calls are received. You can also add schedules that determine when your rules are active. It's recommended to add your schedule, or schedules before creating a rule.

Feature Prerequisites

Before the My Rules feature can be used the following conditions must be met:

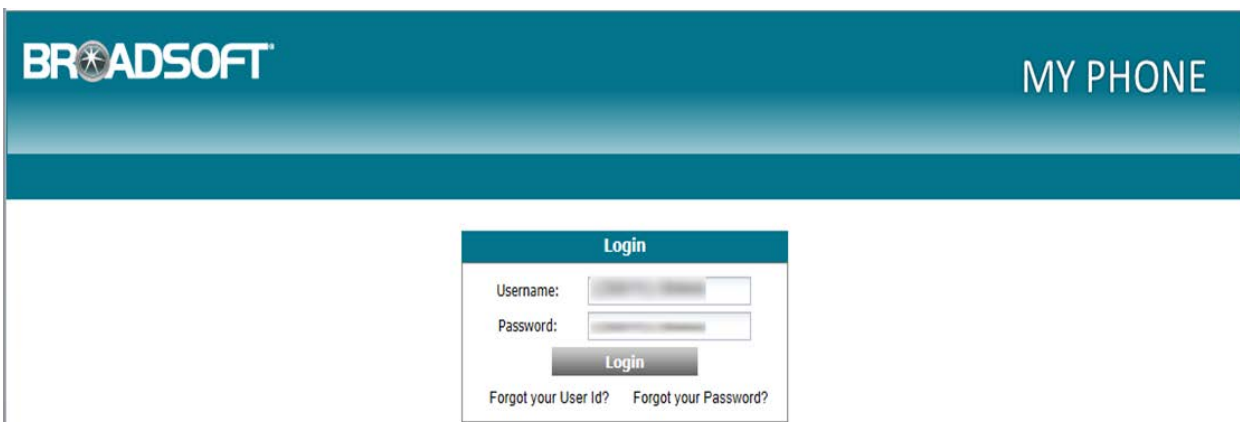
- At least one inbound number must be available to be assigned to a station with a user account (Premium, Hosted Key System, Hosted PRI - User, Standard, Conference Room, and Messaging)

Feature Setup

Let's create a **Schedule** and then a **Rule** for forwarding calls to your cell phone during designated after hours – which represent Monday-Friday from 6pm-8am and weekends.

Creating Schedules

Step 1. Log in to My Phone



The screenshot shows the Broadsoft My Phone login page. At the top left is the Broadsoft logo, and at the top right is the text "MY PHONE". Below this is a login form with the following elements:

- Login** (title)
- Username:
- Password:
-
- [Forgot your User Id?](#) [Forgot your Password?](#)

Step 2. Go to the My Rules tab



The screenshot shows the BroadSoft BroadCloud PBX User Dashboard. At the top, there is a header with the BroadSoft logo, user information (USER4, E911 address: 9737 Washington Blvd, Suite 200, Catonsville, MD 21039, 7387), and navigation buttons for Profile, Support, and Sign Out. Below the header is a navigation bar with tabs for Home, My Messages, My Features, My Rules, My Numbers, and My Call History. The 'My Rules' tab is highlighted, and a red arrow points to it from a callout box that says 'Select My Rules'. To the right of the navigation bar, the text 'MY PHONE' is visible. Below the navigation bar, the main content area is titled 'Welcome to the BroadCloud PBX User Dashboard'. On the left side of this area is a vertical image of a hand interacting with a PBX control panel. To the right of the image is a list of features with descriptions:

- This site** allows you full access into your personal phone service settings, allowing you to customize your service to fit your needs. The site is laid out with convenient tabs, allowing you to easily navigate to the desired feature.
- My Messages** — Make sure you get your messages, regardless of your location. By selecting to be notified of messages via text or email, or even receiving voice mails messages via any email address, you can ensure you stay in contact.
- My Features** — Access to user features like Call Forwarding, Call Waiting, and Anywhere. Click on this tab to activate/deactivate these features, as well as enter desired numbers to which calls can be forwarded based on your personal needs.
- My Rules** — Selected call handling based on the phone number of the person calling, the time of day, or both. By combining multiple common features into an easy to use interface, you can create unique solutions to handling calls from key people.
- My Numbers** — An easy to use inventory of numbers that can be selected for feature assignments. By adding your cell phone, home phone, or any other phone number, you will be able to select these numbers when managing your various features.
- My Call History** — A quick view of recent calls, whether they were made by you, answered by you, or missed altogether. The listing provides details of the called/calling party, as well as a simple click to dial option to initiate a call from your desk phone to the number listed.

Step 3. Define the schedule for the rule

USER4 3019440497
3019440497
E911 address: 9737 Washingtonian Blvd 350 Gaithersburg, MD 20878-7387 L

Profile Support Sign Out

MY PHONE

Home My Messages My Features My Rules My Numbers My Call History

My Rules
My Schedules

Manage your personal schedules from this page. To edit, select a schedule from the grid below and then use the form below to add new events.

Name	Type	Options
AUTOATTENDANT-BUSINESS-HOURS	Time	
AUTOATTENDANT-HOLIDAY	Holiday	
Mike's Schedule	Time	

Add New Schedule Here: New Schedule Name [dropdown] [plus] [refresh]

1 Select My Schedules to create a unique schedule

2 Enter the name of the schedule here

3 Select either Holiday or Time. Time is used for non holiday times and will be primarily used

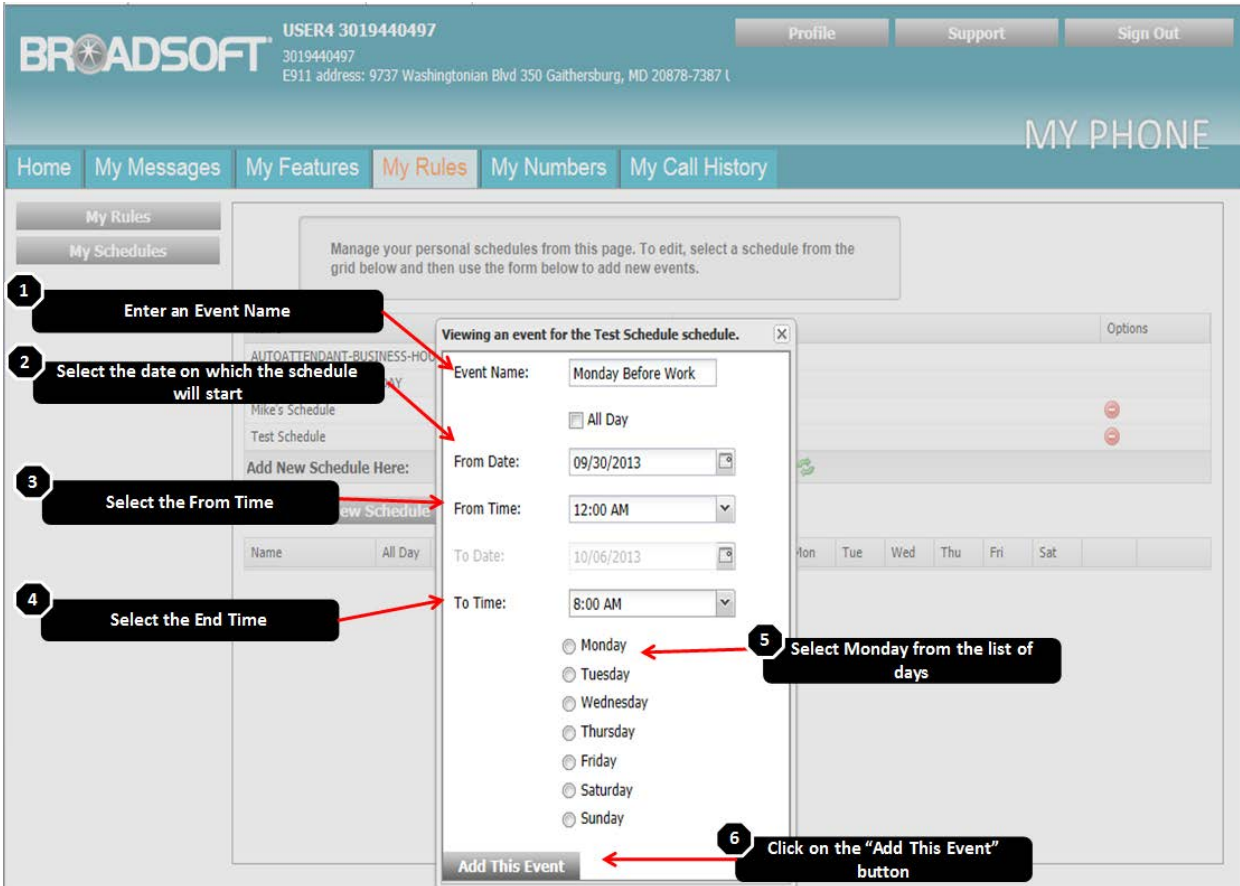
4 Click on the "plus" button to add the schedule

Name	All Day	Start Date	Start Time	End Date	End Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat

1. Select My Schedules to create a unique schedule. Any schedule that has already been added by the Site Administrator, will be displayed here. You can apply these schedules to your rules, or you can create a new schedule.
2. You can delete a personal schedule by selecting the red "Delete this line item" icon that is on the same row as the schedule you wish to delete. Note: If the schedule is assigned to a Rule, you cannot delete the schedule.
3. In My Schedule you can also view group level schedules that have been defined by your site administrator. You cannot modify or view the details of group level schedules. Please see your administrator to learn which days and times are included in the schedule.
4. There are two types of schedules you can create - 'TIME' and 'HOLIDAY'
 - Create a "Time" schedule to define events recurring based on the day of the week such as your normal off-hours work schedule. When you define a "Time" based event, define the desired time (either all day, or a start and end time) and day of the week. The "from date" is the first date this rule will be applied. It will recur weekly on the day of the week specified in the event.

- Create a “Holiday” schedule to define calendar date specific events such as a holiday or birthday. When you define [thea](#) “Holiday” based event, define the desired time (either all day, or a start and end time) and date; do NOT specify a day of the week. The “from date” is the date this rule will be applied.

Step 4. Define the date and times associated with the schedule



The screenshot shows the Broadsoft user interface for managing schedules. The top navigation bar includes 'Home', 'My Messages', 'My Features', 'My Rules', 'My Numbers', and 'My Call History'. The 'My Rules' section is active, and a modal window titled 'Viewing an event for the Test Schedule schedule.' is open. The form contains the following fields and options:

- Event Name:** Monday Before Work
- All Day:**
- From Date:** 09/30/2013
- From Time:** 12:00 AM
- To Date:** 10/06/2013
- To Time:** 8:00 AM
- Days:**
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday
- Buttons:** Add This Event

Numbered callouts indicate the following steps:

- Enter an Event Name
- Select the date on which the schedule will start
- Select the From Time
- Select the End Time
- Select Monday from the list of days
- Click on the “Add This Event” button

A schedule is a group of user defined events.

- A schedule may contain one or more events
- An event represents a single day. It may be based on the day of the week (every Monday) or specific calendar date (25 December - Christmas Day).
- An event can represent all or part of that day based on your event settings.
- Thus, events represent the days and times of the day that should be covered by that schedule.

As an example, we'll create a schedule called "After Hours Rule." We want this schedule to represent your normal off-hours time which is:

- Monday through Friday from midnight to 8 AM, and then 6PM to midnight.
- All day Saturday and Sunday

To add the new schedule, enter the name of the new schedule – in this case 'After Hours Rule.' Then click on the plus button to create the new schedule.

Now you need to create events that define the days and times you want your rule applied.

Let's add the first rule – for Monday morning before work. Note that this event only addresses your time off before work starts on Monday:

1. Enter an Event Name. In this example we used "Monday Before Work"
2. Select the date in which to start this schedule.
3. Then select the From Time, 12am.
4. Next select the To Time, 8am
5. Select Monday from the list of days.
6. Click on the "Add this Event" button

Example of a typical after hours schedule for a company with operating hours M-F from 8am – 6pm:

PLEASE NOTE – The default 15 minute time intervals in the Schedule creation screens can be manually overwritten by clicking into the box and typing a more specific time, i.e. instead of 11:45 pm, you could click into the box and type 11:59 pm.

Schedule Entry Name	All Day Event	Start Time	End Time	Reoccurrence	Reoccur on Day
Monday_Early	No	12:00 AM	7:59 AM	Weekly	Monday
Monday_Late	No	6:01 PM	11:59 PM	Weekly	Monday
Tuesday_Early	No	12:00 AM	7:59 AM	Weekly	Tuesday
Tuesday_Late	No	6:01 PM	11:59 PM	Weekly	Tuesday
Wednesday_Early	No	12:00 AM	7:59 AM	Weekly	Wednesday
Wednesday_Late	No	6:01 PM	11:59 PM	Weekly	Wednesday
Thursday_Early	No	12:00 AM	7:59 AM	Weekly	Thursday
Thursday_Late	No	6:01 PM	11:59 PM	Weekly	Thursday
Friday_Early	No	12:00 AM	7:59 AM	Weekly	Friday
Friday_Late	No	6:01 PM	11:59 PM	Weekly	Friday
Saturday_All	Yes	N/A	N/A	Weekly	Saturday
Sunday_All	Yes	N/A	N/A	Weekly	Sunday

The screenshot shows the BroadSoft user interface for managing rules. At the top, there's a header with the BroadSoft logo, user ID (USER4 3019440497), and navigation links (Profile, Support, Sign Out). Below this is a navigation bar with tabs for Home, My Messages, My Features, My Rules (selected), My Numbers, and My Call History. The main content area is titled 'MY PHONE' and contains a 'My Rules' section. A modal window titled 'Viewing an event for the After Hours Rule schedule.' is open, showing the following fields: Event Name (Monday After Work), All Day (unchecked), From Date (09/30/2013), From Time (6:00 PM), To Date (10/06/2013), and To Time (11:59 PM). Below these fields is a list of days with radio buttons: Monday (selected), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. At the bottom of the modal is an 'Add This Event' button. Numbered callouts (1-6) point to: 1. Event Name field, 2. From Date field, 3. From Time dropdown, 4. To Time dropdown, 5. Monday radio button, and 6. Add This Event button.

To address the second half of the day

1. Enter an Event Name. In this example we used "Monday After Work"
2. Select the date in which to start this schedule.
3. Then select the From Time, 6pm.
4. Next select the To Time, 11:59pm
5. Select Monday from the list of days.
6. Click on the "Add this Event" button

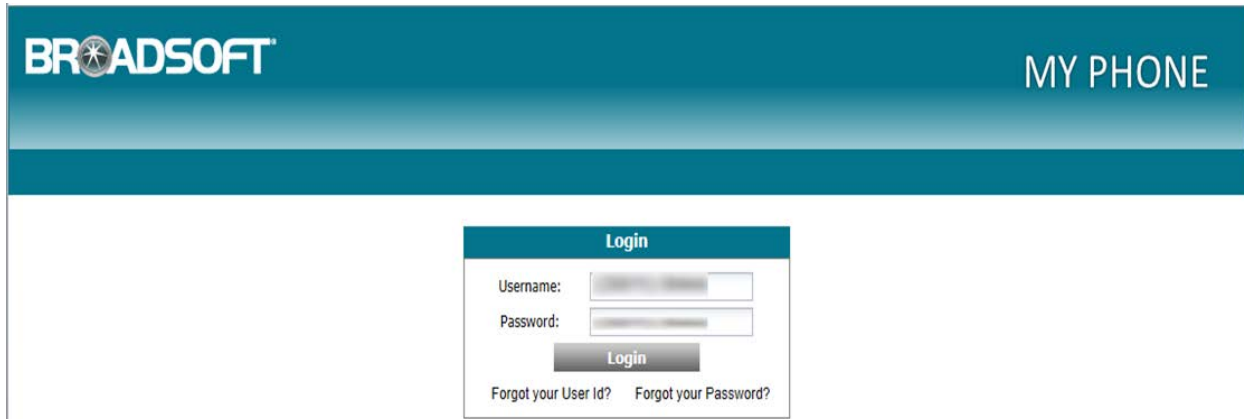
These two events will now repeat for each subsequent Monday unless they are removed, edited or overwritten by an additional schedule

For this example, you would continue adding similar events for Tuesday, Wednesday, Thursday and Friday. If desired, you can add events for Saturday and Sunday. On these days, you can select "All Day" rather than defining specific times which will apply from 12am-12pm on the specified days.

When finished, close out of the Event Add window.

Creating Rules

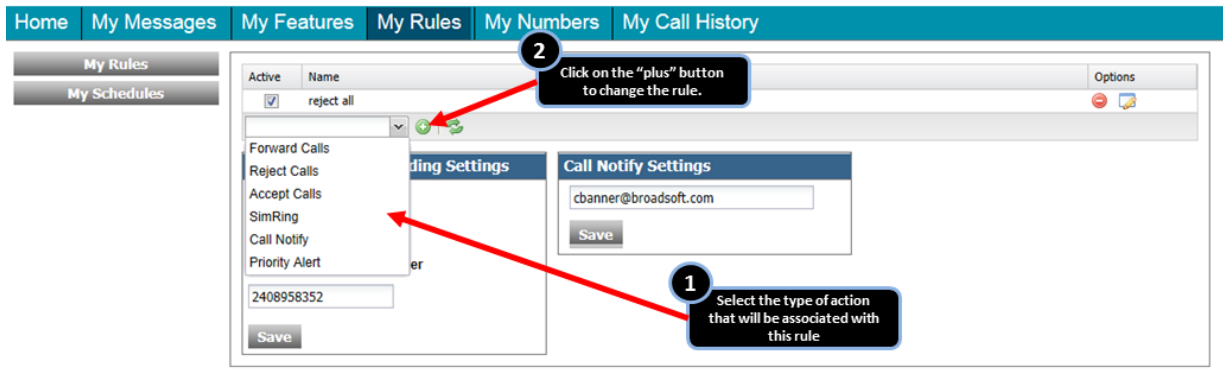
Step 1. Log in to My Phone



Step 2. Go to the My Rules tab






Step 3. To create a new rule click on the drop down box and select the appropriate action



Rules specify the type of action you wish to be taken, the type of call or phone numbers you want the rule to be applied to, and the schedule(s) defining when you want the rule to apply.

- A maximum of 99 rules can be created for each user
- If "Forward Calls" is selected, calls will be sent to the destination specified when you create the rule. .
- If "Reject Calls" is selected, calls from the numbers you have configured during the specified times will be rejected. For example, you could create a rule to reject calls from anonymous callers or a specific phone number you wish to block.
- If "Accept Calls" is selected, you can accept calls from the numbers configured during the specified times. For example, you might create a rule to only accept calls from a specific number on weekends.
- If "SimRing" is selected, calls from the numbers you have configured during the specified times will receive simultaneous ring treatment. See the *Simultaneous Ring QRG* for additional detail.
- If "Call Notify" is selected, calls from the numbers you have configured during the specified times will cause an email to be sent with caller information. The User will also need to enter an email address in the Call Notify Settings box. See the *Call Notify QRG* for additional detail.
- If "Priority Alert" is selected, calls from the numbers you have configured during the specified times will play a distinctive ringtone. See the *Priority Alert Notify QRG* for additional detail.
- If "Sequential Ring" is selected, calls from the numbers you have configured during the specified times will ring the defined numbers in sequential order until answered or sent to configured treatment (e.g. voicemail).

Active	Name	Type	Options
<input checked="" type="checkbox"/>	Notify	Call Notify	 

Call Notify + 

Selective Call Forwarding Settings

Active

Ring Reminder

Default "forward to" number

Call Notify Settings

Step 4. You can apply the rule to all incoming calls or just particular numbers

BROADSOFT USER4 3019440497
3019440497
E911 address: 9737 Washingtonian Blvd 350 Gaithersburg, MD 20878-7387

[Profile](#) [Support](#)

Home [My Messages](#) [My Features](#) [My Rules](#) [My Numbers](#) [My Call History](#) MY P

1 Name the rule

2 Enter phone number that will receive the forwarded calls

4 The rule may be applied to any number or selected numbers

5 Enter a specific number here and click on the "plus" button

3 Select the schedules to use with this rule

Forward Rule

Rule name:

Forward to phone number:

Time Schedule to use:

Holiday Schedule to use:

Calls from

Any phone number

Following phone number

Any private number

Any unavailable number

Number

1. Use this field to describe the new rule. For example, if you're creating a rule to forward all your calls after 5:00 p.m. to your mobile number, you could name the rule "After 5PM rule."
2. Enter the number to which calls will be forwarded

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3. Select either a Time Schedule or a Holiday Schedule that this rule will follow. (If both are selected, the time periods defined in both schedules must be true before rule is enforced). The rule will be active only during the time defined in the schedule. Time periods not defined under the schedule will not follow this rule.

The drop-down list may include time schedules created by your site administrator or by you the end user. Please see your administrator to learn which days and times are included in the schedule.

4. You may apply the rule to calls placed from any number or from selected numbers.
 - a. Select the “any numbers” option from the drop-down menu to apply this rule to any call placed to your number.
 - b. Select the “selected numbers” option from the drop-down menu to apply this rule to calls placed from selected numbers.
 - If you opt to apply this rule to “selected numbers,” there are additional options to choose from:
 - a. **Anonymous Caller:** Calls from an anonymous number.
 - b. **Unavailable Number:** Calls that do not have an identified caller ID are presented as unavailable numbers.
5. **Specific Number:** You may define and add a specific number (all digits defined) or a digit pattern (digits and one or more wildcards) to the list of numbers that will receive treatment.
 - a. A maximum of 12 numbers/digit patterns may be defined in a single rule.
 - b. To add a specific phone number, enter the phone number, then click the Add Number button.
 - c. To add a digit pattern, enter the desired string, then click the Add Number Button
 - For example, 240* would apply to any calls from phone numbers starting with 240. Users can also use the “?” wildcard character in specifying digit patterns.
 - The “?” wildcard character represents any single digit (0 through 9) and can be used multiple times anywhere within a digit string.
 - The “?” wildcard can be used with or without the “*” wildcard at the end of the digit string.
 - d. Digit pattern examples:
 - 123*: Specifies any phone number from Area Code 123
 - 12345678*: Specifies phone numbers 1234567800 through 1234567899
 - 12?456*: Specifies any phone number from area codes 120 through 129, where NXX=678