HelloSpoke **Notify** Customer On-Boarding Guide

Welcome to Notify! This guide is meant to provide training information to help you get off to a great and productive start.

LOGGING IN AND NAVIGATION

How to Log In

Email Notification

When added as a user to the Notify system you will receive an email containing important login information:

1. Your username
2. A temporary password
3. Your account name
4. A link to the Notify system

Follow the link to the Notify system (https://hsnotify.hellospoke.com), and log in using the information provided.

Resetting Your Password

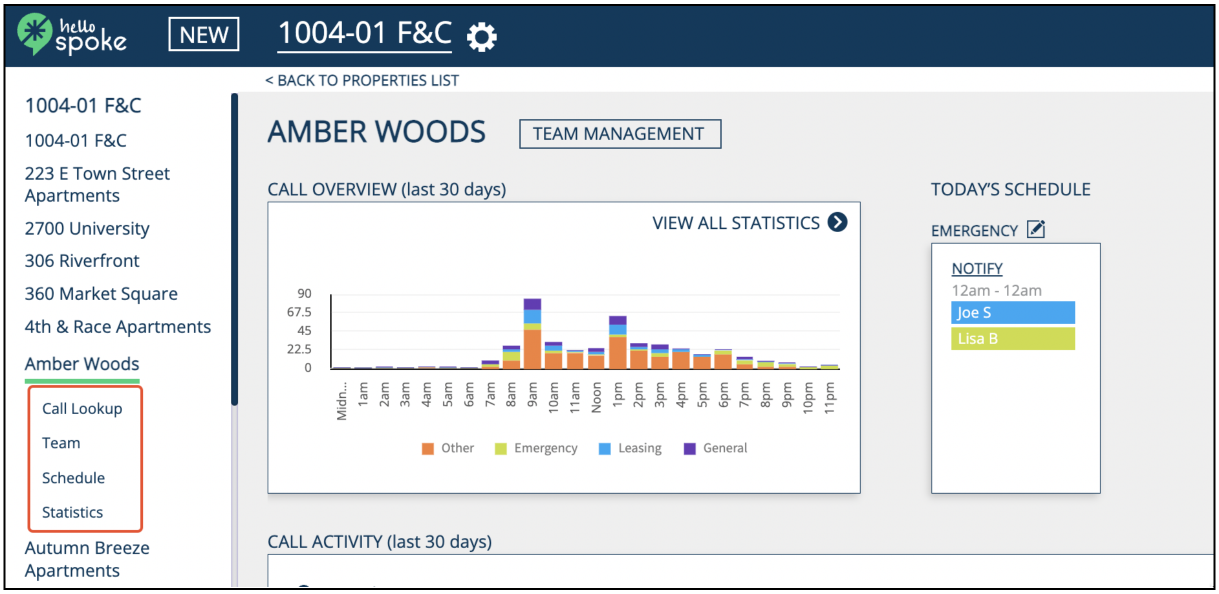
If this is your first time logging in, the password provided in the email will be a temporary password only. You are required to set a new password on your first log in.

If you have logged in before, but have forgotten your password, click “Forgot password?” to reset your password.

Passwords must be at least 6 characters with at least one uppercase letter and one number.

Navigating with the Side Panel

Users can navigate the Notify system by clicking on the options in the side panel under each property.



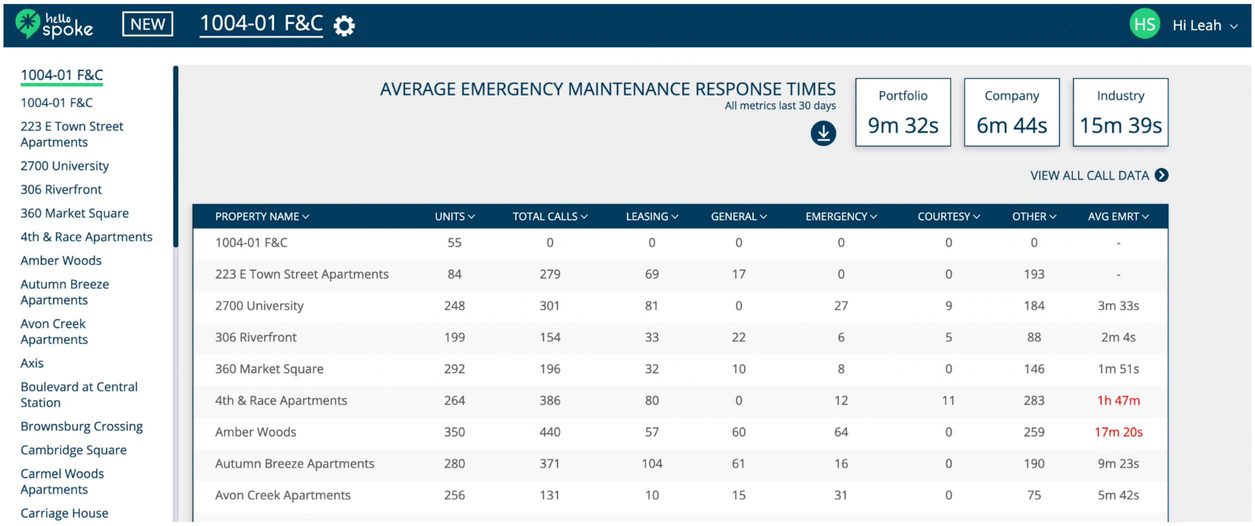
1. **Call Lookup** - Click this to view or download a log of all call activity.
2. **Team** - Click this to go to the **Team Management** page, where you can add, edit, or delete users.
3. **Schedule** - Click this to go to the **Schedule** page.
4. **Statistics** - Click this to view or download a bar graph of missed calls.

PROPERTIES

Properties List

Overview

The Properties List page is the first page that you see when you log into the Notify system. It contains a list of properties you are assigned to.



Properties List Headers

1. **Property Name** – A list of all properties that you are assigned to
2. **Units** – The total number of units at the property
3. **Total Calls** – The total number of calls that hit the Notify IVR for that specific property
4. **Leasing** – The total number of callers that hit the IVR and selected the Leasing option, if applicable
5. **General** – The total number of callers that hit the IVR and selected the General option, if applicable
6. **Courtesy** – The total number of callers that hit the IVR and selected the Courtesy Officer option, if applicable
7. **Emergency** – The total number of callers that hit the IVR and selected the Emergency Maintenance option, if applicable
8. **Other** – The total number of callers that hit the IVR and either failed to select an option, or selected an option outside of the predefined categories listed above

Average Emergency Maintenance Response Times

Located in the upper right-hand corner, you will notice three boxes containing emergency response times. These times have been calculated based on the emergency maintenance response time for the following categories:

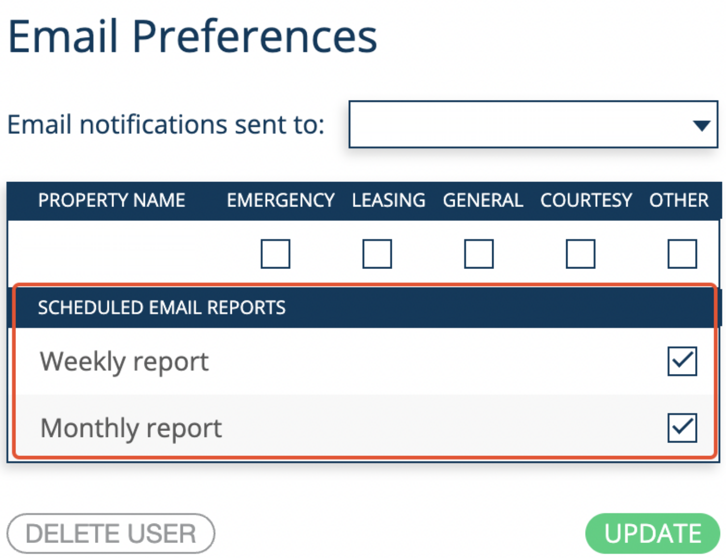
1. **Portfolio** is based on the average emergency response time for the last 30 days, specific to the properties you are assigned to. If you're only assigned to one property, the portfolio time will reflect this.
2. **Company** is based on the average emergency response time for your entire company or

management group for the last 30 days. This is calculated based on every property within your company, regardless of what you see or have access to.

3. **Industry** is based on the average emergency response time for all properties in the Notify system.

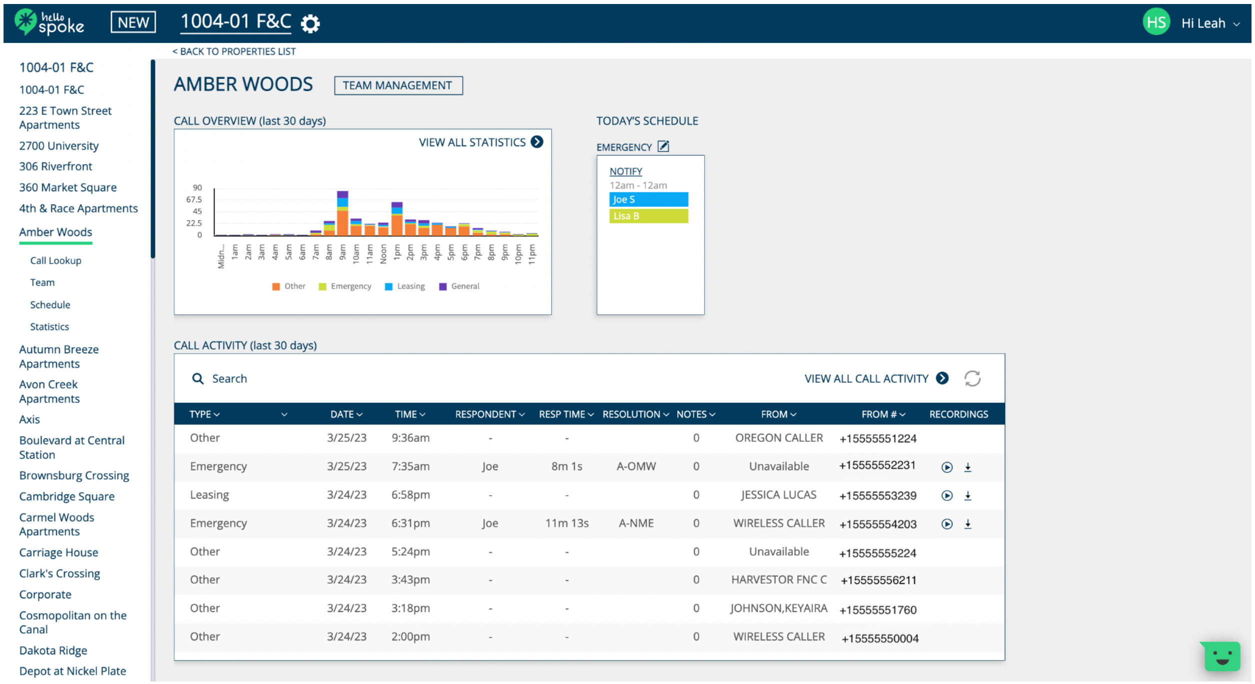
Properties List Report

When setting your email preferences in your user profile, you can choose to have the properties list, with updated stats, emailed to you on a weekly or monthly basis.



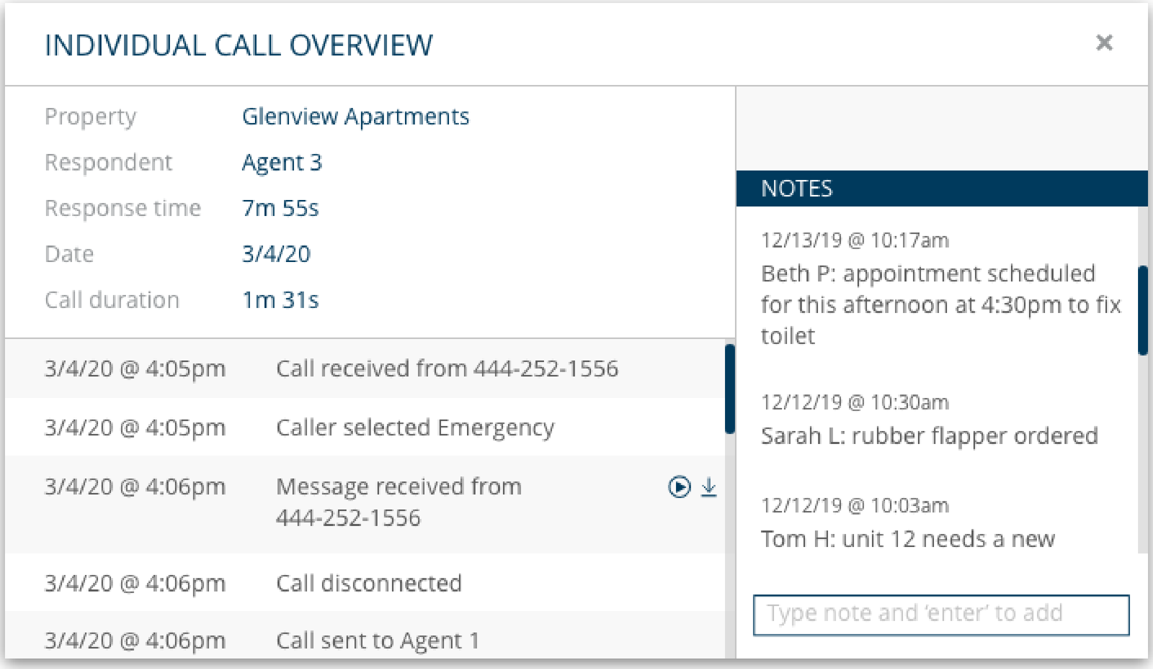
Property Dashboard

Click on a property name in the **Properties List** or in the left sidebar to get to that property's dashboard. The property dashboard displays call activity over the last 30 days, and today's schedule.



1. CALL OVERVIEW shows the last 30 days calls in graph form. You can select and deselect the categories in the bottom of the graph to show and hide them. If you click “View All Statistics”, it will take you to the **Statistics** page, so that you can filter and view the data as needed.
2. TODAY’S SCHEDULE shows all of the schedules for that property. If you need to edit a schedule, you can click the **edit symbol**, which will bring you to that schedule to edit.
3. CALL ACTIVITY shows up-to-date call history for the last 30 days. You can search and sort this data, and click a row to view the individual call overview window with more information. If you want to see more than just the last 30 days, click “View All Call

Activity.”

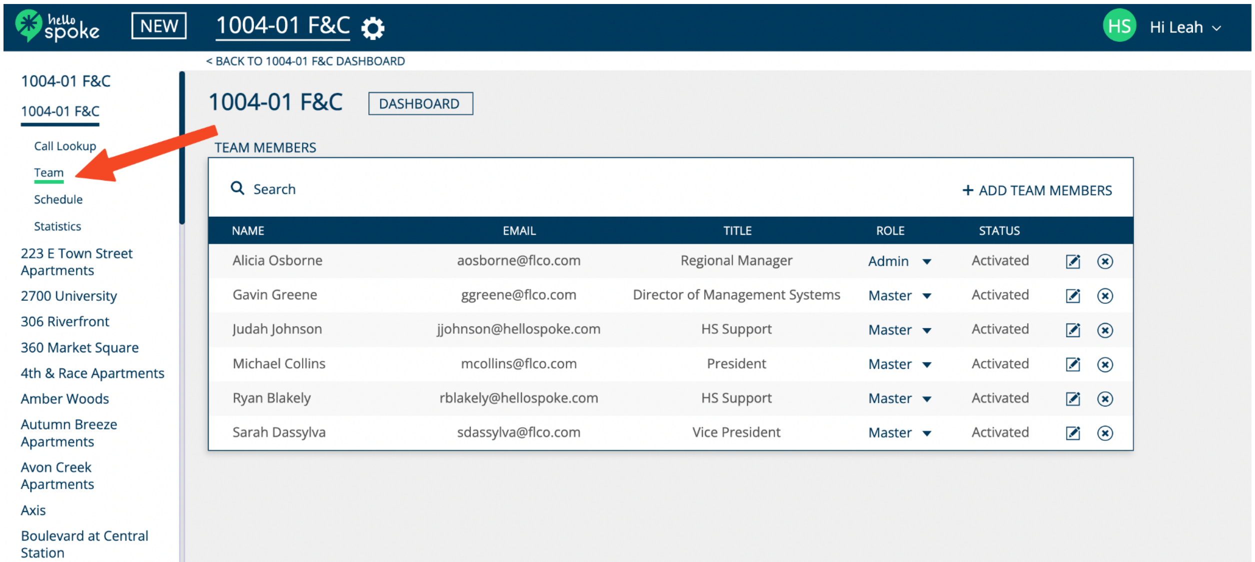


TEAM MANAGEMENT

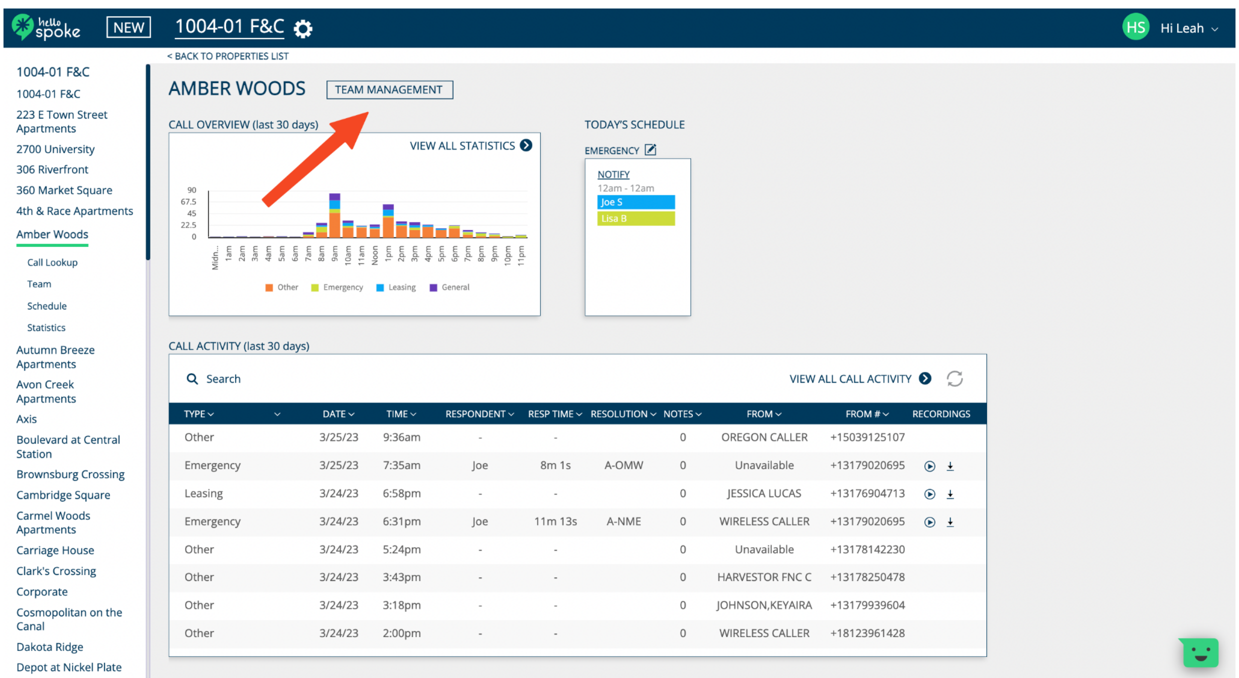
Team Management Page

> **Available only to Admins**

The **Team Management** page contains a list of users for your property. You can add, edit or delete team members here. You can access the page by clicking “Team” under the property name in the left side panel.



You can also click the TEAM MANAGEMENT button in the Property Dashboard.



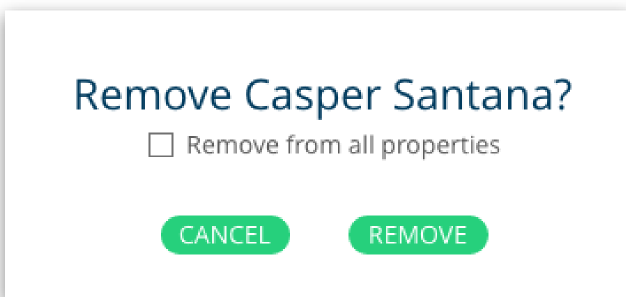
Team Management Features

Admins can set up or edit user profiles at any time by clicking the edit symbol. A window with their profile information, notification and email preferences will open.

TEAM MEMBERS

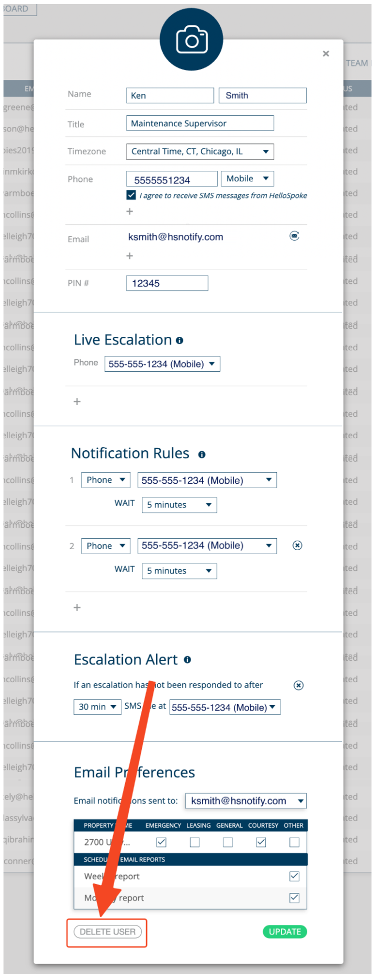
NAME	EMAIL	TITLE	ROLE	STATUS
Bob Ringwald	bob.ringwald@glenview.org	Maintenance Supervisor	Admin	Active
Casper Santana	casper.santana@glenview.org	Maintenance	Basic	Active
Gloria Smith	gloriagloria@gmail.com	Leasing	Limited	Pending
Manny Zimmerman	manny.zimmerman@glenview.org	Leasing	Admin	Active
Samuel Sidekick	Samuel.sidekick@glenview.org	Regional Manager	Master	Active
Tom Timmer	tommytimmer@outlook.com	Maintenance	Limited	Active

1. **Add -** Admins can add team members by clicking “Add Team Members” in the top right. Here, you can add an existing user, add a new user, or bulk import a CSV file of users.
2. **Edit** – Admins can edit or set up user profiles at any time by clicking the edit symbol. A window with their profile information, notification and email preferences will open.
3. **Remove** – To remove a user from a property, click the remove symbol. In the confirmation window, you can also choose to remove them from that particular property or all properties by checking the **Remove from all properties** box.



Removing a user does not delete them from the Notify system. It will only remove them from this or all properties, but the user profile will still exist in the system.

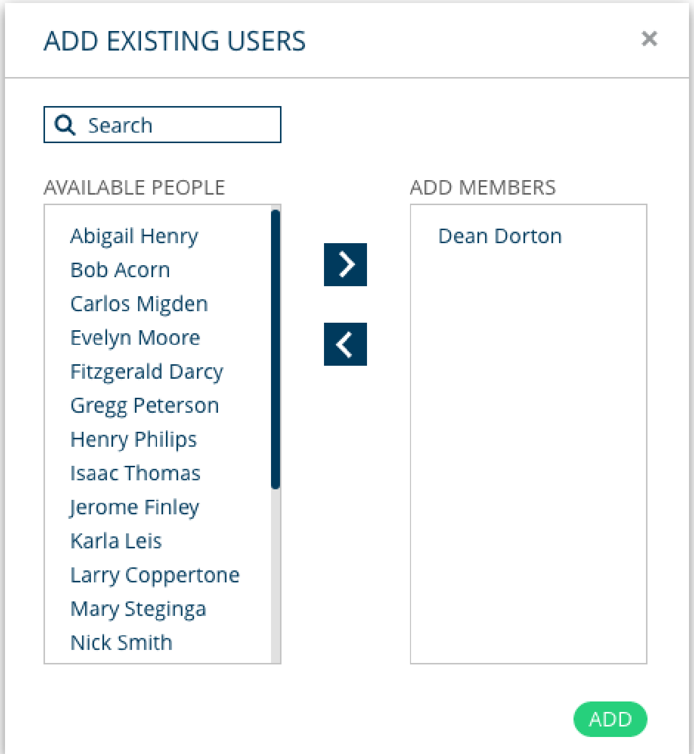
4. **Delete** - To delete a user completely from the Notify system, click “Delete User” in their user profile.



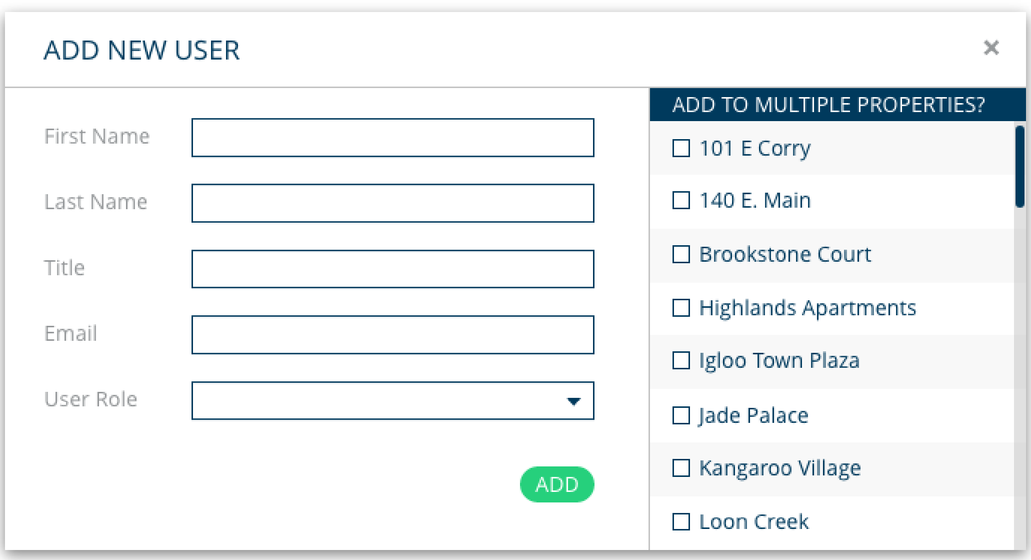
Adding Team Members

1. On the **Team Management** page, in the upper right there is an option to **+ Add Team Members**. You can add existing (they are already in the Notify system), add new, or bulk import.
    a. **Add existing** – If a person already exists in the Notify system (assigned to another property), choose **Add existing**. In the window, select people from “Available

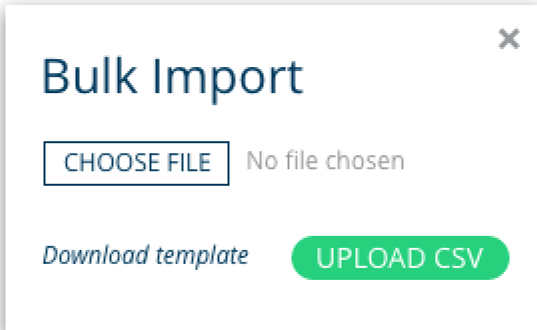
People" and add them (using the right arrow) to "Add Members".



b. **Add new** – When adding a new person to a property, you must enter their first and last name, title, email and user role (see below for a diagram on user roles). You also have the option to add them to multiple properties (if they are assigned to more than one).



c. **Bulk import** – Here you can find an Excel template to use when bulk importing. Fill in the spreadsheet exactly the way it is (don't move, remove or add any columns). Save it to your computer as a [CSV file](). Once ready CHOOSE FILE and select the file to import.



User Roles

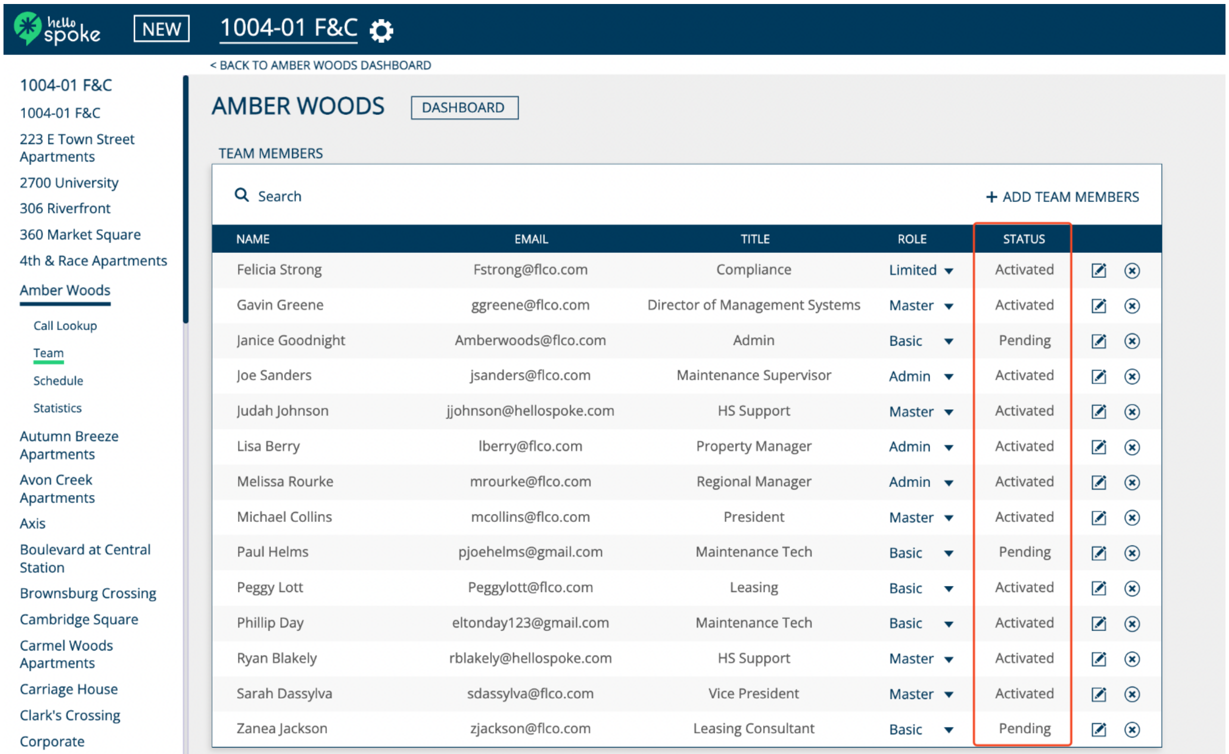
When adding a new user, each person will need to be assigned a user role. Here is what each has access to:

	BASIC	LIMITED	ADMIN
View schedules	X	X	X
View individual call overviews	X	X	X
View reporting	X	X	X
Edit schedules		X	X
Edit other user's profile data			X
Manage teams			X

Team Member Status

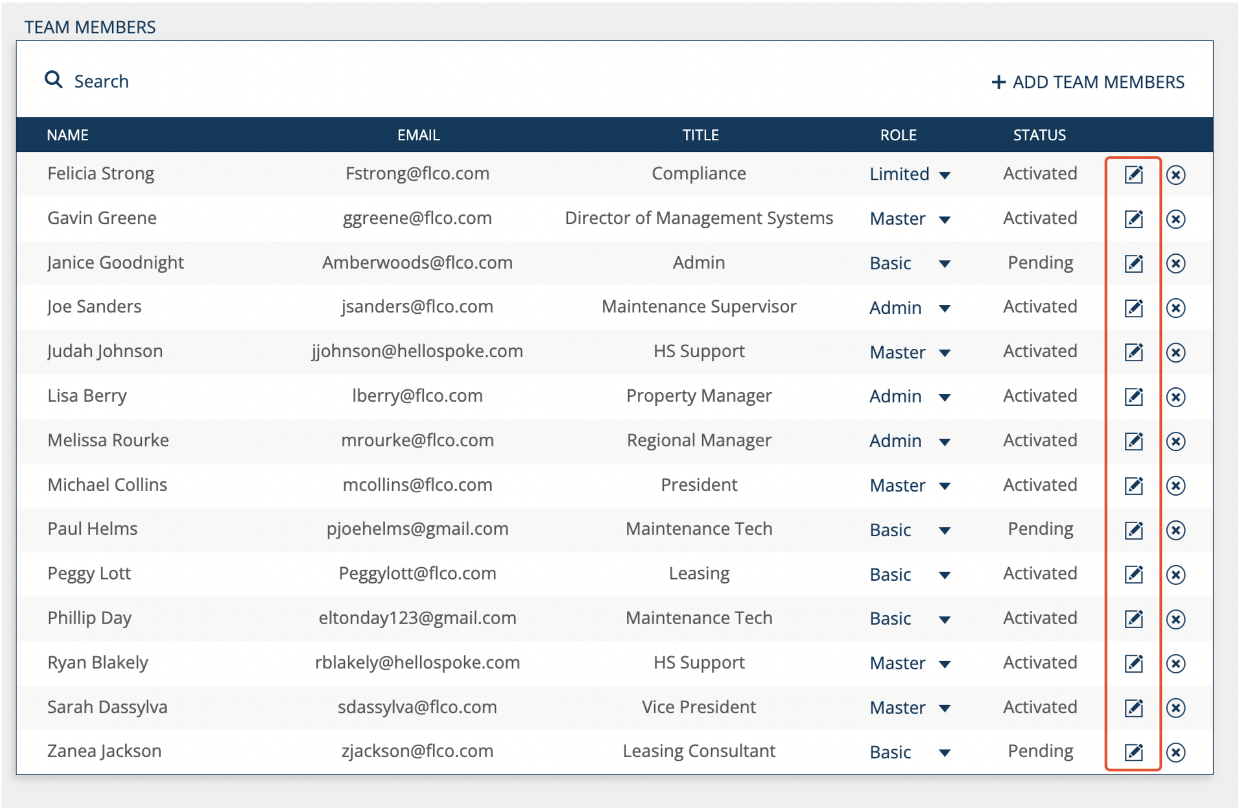
Once new team members are added to a property, they will be sent an email with login credentials and a link to set up their account. Their status will remain "Pending" on the Team Management page until they or their property's Admin have completed the set-up process by clicking the "Edit" button next to their status.

When their user profile is set up, the status will automatically change to “Activated.” Pending team members will not be available to put on a schedule until their status has changed to “Activated.”



Editing User Profile Information

Admins can set up or edit user profiles at any time by clicking the edit symbol in the **Team Management** page.



TEAM MEMBERS

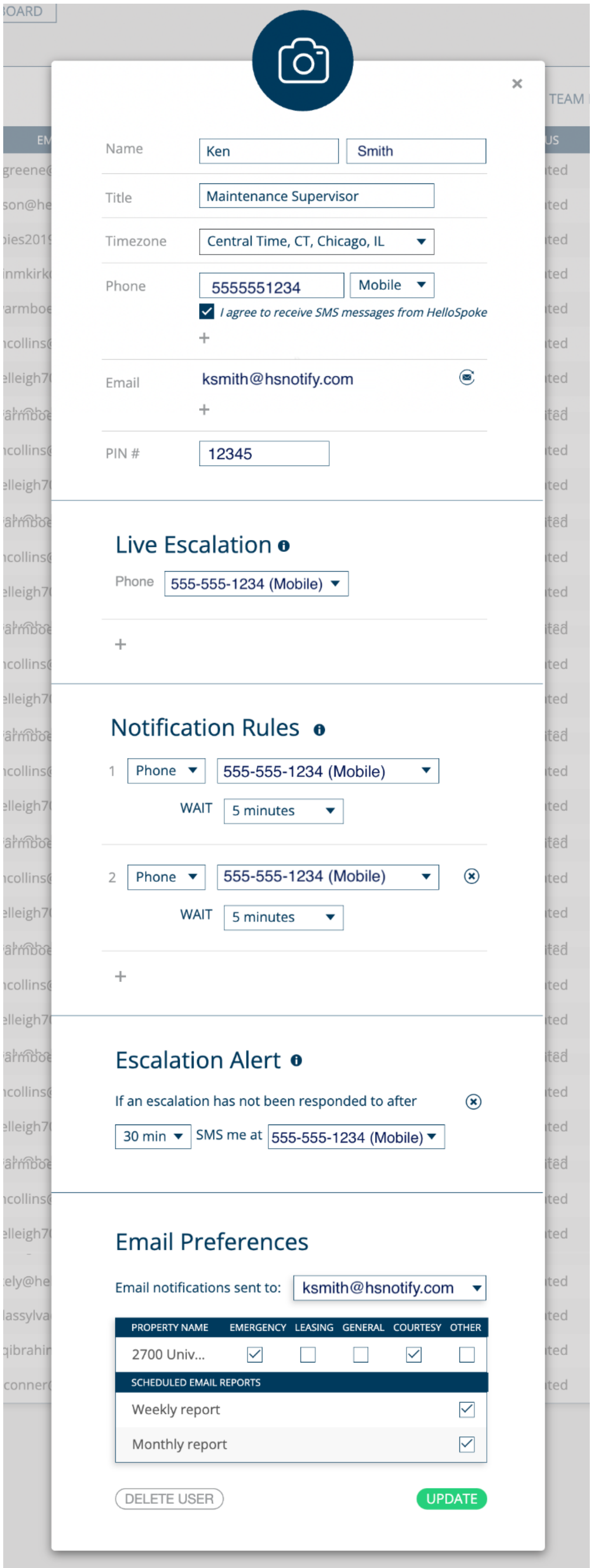
Search

+ ADD TEAM MEMBERS

NAME	EMAIL	TITLE	ROLE	STATUS
Felicia Strong	Fstrong@flco.com	Compliance	Limited	Activated
Gavin Greene	ggreene@flco.com	Director of Management Systems	Master	Activated
Janice Goodnight	Amberwoods@flco.com	Admin	Basic	Pending
Joe Sanders	jsanders@flco.com	Maintenance Supervisor	Admin	Activated
Judah Johnson	jjohnson@hellospoke.com	HS Support	Master	Activated
Lisa Berry	lberry@flco.com	Property Manager	Admin	Activated
Melissa Rourke	mrourke@flco.com	Regional Manager	Admin	Activated
Michael Collins	mcollins@flco.com	President	Master	Activated
Paul Helms	pjoehelms@gmail.com	Maintenance Tech	Basic	Pending
Peggy Lott	Peggylott@flco.com	Leasing	Basic	Activated
Phillip Day	eltonday123@gmail.com	Maintenance Tech	Basic	Activated
Ryan Blakely	rblakely@hellospoke.com	HS Support	Master	Activated
Sarah Dassylva	sdassylva@flco.com	Vice President	Master	Activated
Zanea Jackson	zjackson@flco.com	Leasing Consultant	Basic	Pending

User Profile Information

After clicking the edit symbol, a window with their profile information, notification, and email preferences will open. Admins can edit this information for each user on the property.


Name
Ken
Smith
Title
Maintenance Supervisor
Timezone
Central Time, CT, Chicago, IL
Phone
5555551234
Mobile
I agree to receive SMS messages from HelloSpoke
Email
ksmith@hsnotify.com
PIN #
12345
Live Escalation
Phone
555-555-1234 (Mobile)
Notification Rules
1
Phone
555-555-1234 (Mobile)
WAIT
5 minutes
2
Phone
555-555-1234 (Mobile)
WAIT
5 minutes
Escalation Alert
If an escalation has not been responded to after
30 min
SMS me at
555-555-1234 (Mobile)
Email Preferences
Email notifications sent to:
ksmith@hsnotify.com
PROPERTY NAME
EMERGENCY
LEASING
GENERAL
COURTESY
OTHER
2700 Univ...
SCHEDULED EMAIL REPORTS
Weekly report
Monthly report
DELETE USER
UPDATE

1. **Title**: Required field.
2. **Timezone:** Check to make sure your timezone is correct.
3. **Phone**: Enter at least one phone number (can have up to 5).
4. **SMS:** Check this box if you would like to receive text message notifications.
5. **Email**: You can have up to 2 email addresses in the system.
6. **Pin #**: Enter in a 5-digit PIN number that is unique to you. If you call into the system from an unrecognized phone number, this will be your PIN to access the phone system and listen to maintenance messages. If you call from the phone number listed on your profile, you will not be asked to enter your PIN.
7. **Live Escalation (required):** Select a phone number where you can be easily reached. Live Escalation means that a caller will be put on hold and the Notify system will call this number in order to connect the caller to you live. You can have up to 2 numbers for Live Escalation. If you add a second number and you are on a Live Escalation schedule, it will call the top number first, then immediately call the second number. Live Escalation will only be active if it is built into a property's schedule, and you are added to that schedule.
8. **Notifications (escalation rules):** You must have at least one Notification Rule and up to 5 rules. We recommend each person have at least 2. You can receive messages via text message (SMS) and/or a phone call. After every notification you also set the WAIT time, which is the amount of time the system will wait until it either goes to your next notification rule or the next person on the schedule. You can add, edit or delete notification rules at any time.
9. **Escalation Alerts:** Set up text message notifications to alert you when an escalated call has not been responded to. Escalation alerts are not required, and you can add, edit or delete at any time.
10. **Email Preferences:** Anytime a message is left in the Notify system, an email with the transcription and audio file and attached will be sent. Select the email address you want notifications sent to. If you entered more than one email address in your user profile, you can set up different email preferences for each email address. For each property you are assigned to, you can pick the emails you wish to receive by adding a checkmark to the box. Changes can be made at any time.
11. **Scheduled Email Reports:** By checking the weekly and monthly report boxes, you will be emailed a weekly and monthly snapshot of the property list page, including the missed call stats and average emergency maintenance response times.

NOTIFICATIONS

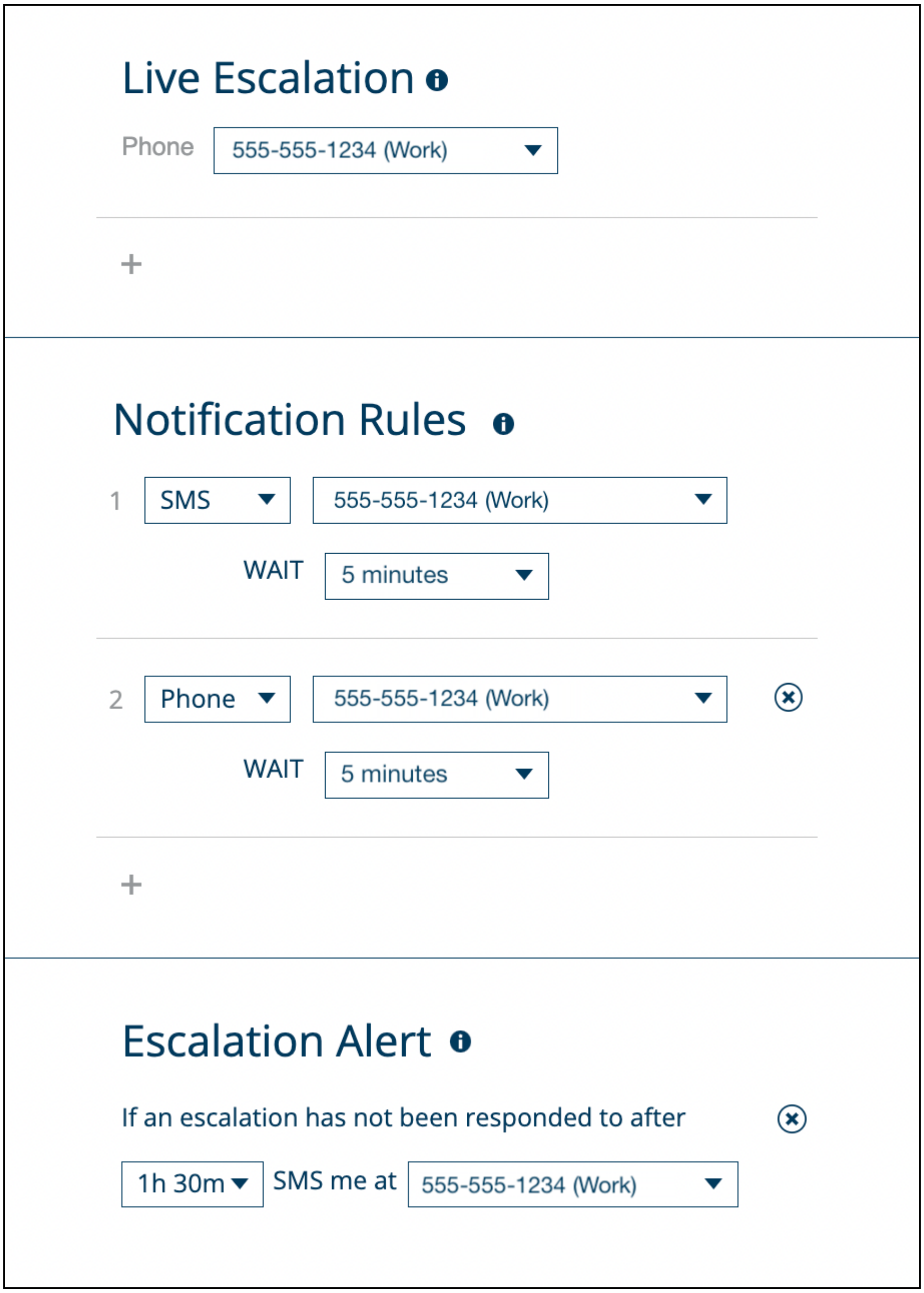
Types of Notifications

Admins can set up and edit a user’s notification preferences any time by clicking the edit symbol in the **Team Management** page. There are 4 different types of notifications a user can receive:

1. **Live Escalation (required field):** Select a phone number where you can be easily reached. Live Escalation means that a caller will be put on hold and the Notify system will call this number in order to connect the caller to you live. You can have up to 2 numbers for Live Escalation. If you add a second number and you are on a Live Escalation schedule, it will call the top number first, then immediately call the second number. *Live Escalation will only be active if it is built into a property’s schedule, and you are added to that schedule.*

2. **Notifications (escalation rules):** You must have at least one Notification Rule and up to 5 rules. We recommend each person have at least 2. You can receive messages via text message (SMS) and/or a phone call. After every notification you also set the WAIT time, which is the amount of time the system will wait until it either goes to your next notification rule or the next person on the schedule. You can add, edit or delete notification rules at any time.

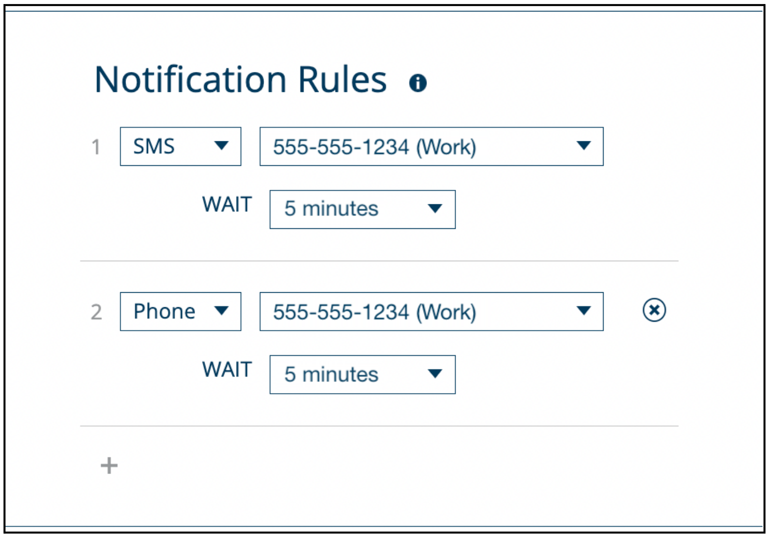
3. **Escalation Alerts:** Set up text message notifications to alert you when an escalated call has not been responded to. Escalation alerts are not required, and you can add, edit or delete at any time. These are recommended for staff that are not on the on-call list, but want to know when an escalation has not been resolved.



Notification Rules Overview

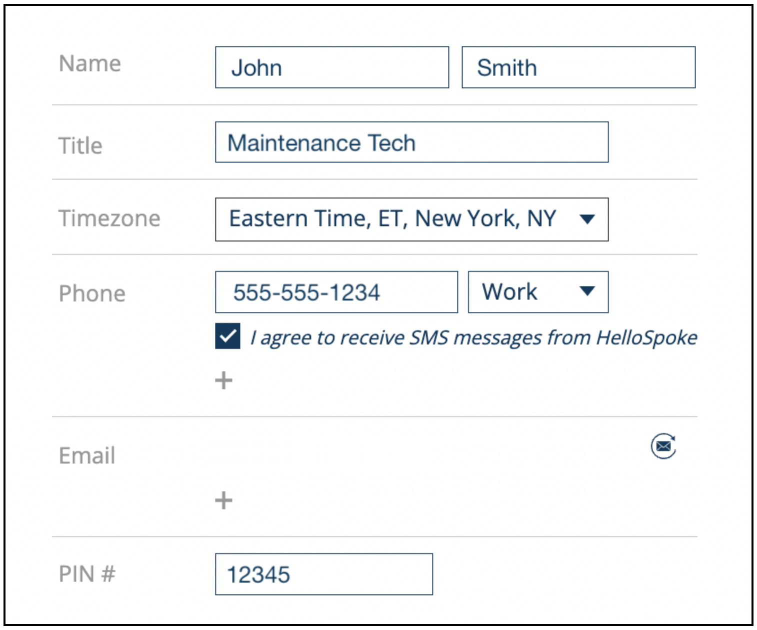
Notification rules are the system rules for how to notify staff in the event of an emergency maintenance issue or courtesy officer issue. Admins can set up and edit a user's Notification

Rules any time by clicking the edit symbol in the **Team Management** page and scrolling down to “Notification Rules.”



Every user must have at least one Notification Rule and up to 5 rules. We recommend each person have at least 2. You can add rules by pressing the plus symbol + under “Notification Rules.” Notifications are made to users that are on the Emergency or Courtesy schedule. After every notification you also set the WAIT time, which is the amount of time the system will wait until it either goes to the user’s next notification rule or to the next person on the schedule.

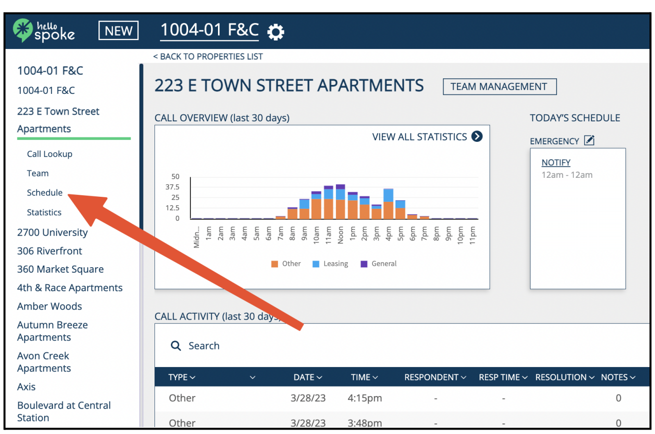
Users can receive messages via text message (SMS) and/or a phone call. To enable text message notifications, check the box to agree to text messages at the top of the user profile.

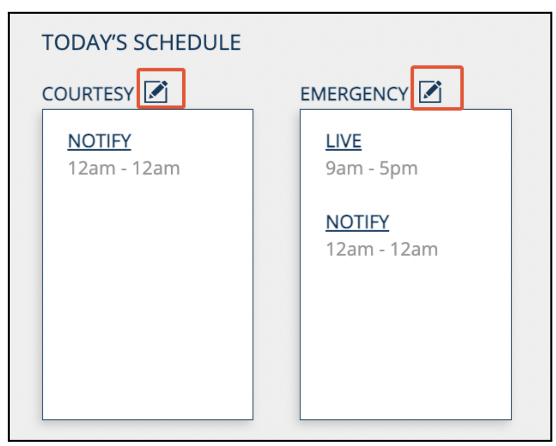


SCHEDULE

Types of Schedules

Admin and Limited users can set up and edit the schedules by clicking “Schedule” on the left side panel or clicking the edit symbol next to the schedule on the property dashboard.





Types of Schedules

There are four different types of schedules:

1. **Emergency Notify** – This is the emergency maintenance schedule. When a caller leaves an emergency maintenance message, the message will be escalated to the people on this schedule based on each user's Notification Rules.
2. **Emergency Live** – This type of schedule will only appear if Live Escalation is added as a feature on your account. When someone calls during this time, the caller will be put on hold (for the designated amount of time) and the system will call the people on this schedule (based on each user's Notification Rules) in an attempt to connect the caller with someone live. If the call is not connected live in the designated amount of time, they will be asked to leave a message and it will be escalated according to the Notify schedule rules. If a Live Escalation call is missed and a message is left, the Live Escalation schedule will be turned off until the messages are resolved.
3. **Courtesy** - This is the courtesy officer schedule. This schedule will only appear if Courtesy is included on your account. When a caller leaves a courtesy message, the message will be escalated to the officers on this schedule based on each user's Notification Rules.
4. **Inactive** – All notifications will be turned off during this time, and will resume once a Notify schedule starts.

Three Ways to Set Up a Schedule

When first creating a schedule, our team can assist with setting it up in one of three ways, depending on your team's preferences:

1. **Forever & ever** – the same people are on call every day, all day
2. **Rotating** – every other week rotation
3. **Custom** – anything outside of forever & ever and rotating

Only custom schedules have the ability to make system changes to their schedules.

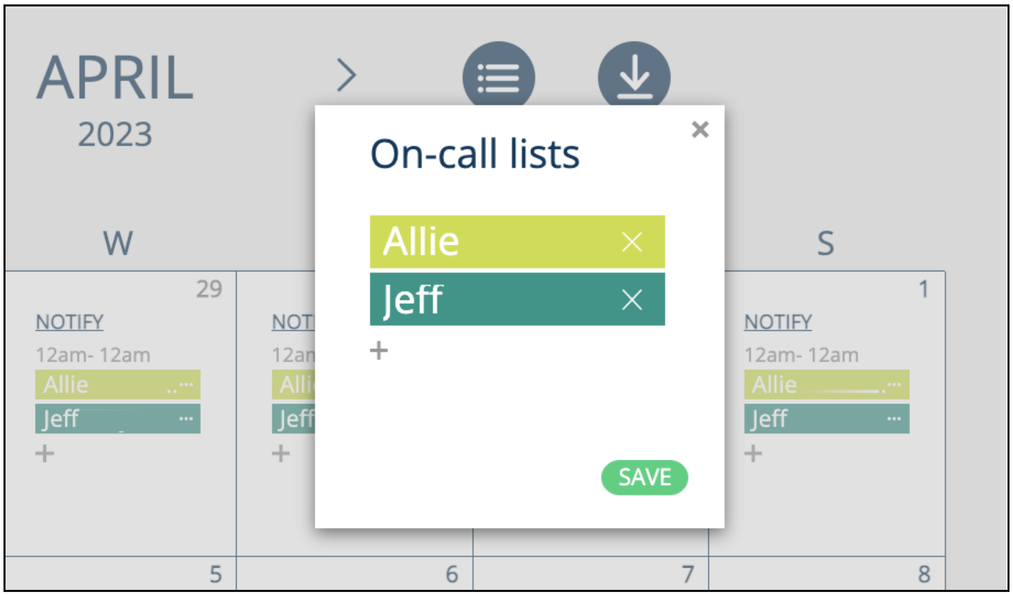
*If your schedule needs to change from one to another, reach out to [HelloSpoke Support](https://).

Adding/Removing People on Schedule

You can add/remove people from a schedule by clicking on the plus symbol on a day or on an escalation list. The method of adding/removing people will be different depending on which way your schedule is set up.

Forever & Ever and Rotating Schedules

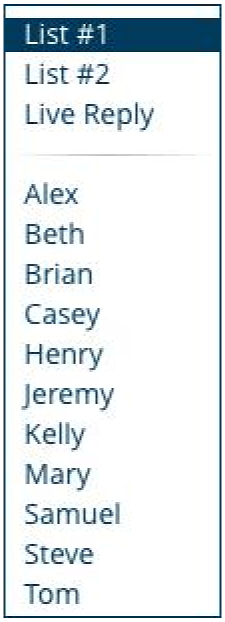
Click the list button in the upper right hand corner to edit your list(s). Here you can add (+), delete (X), and drag and drop users. Changes here will change the people on-call from the day of the change going forward.



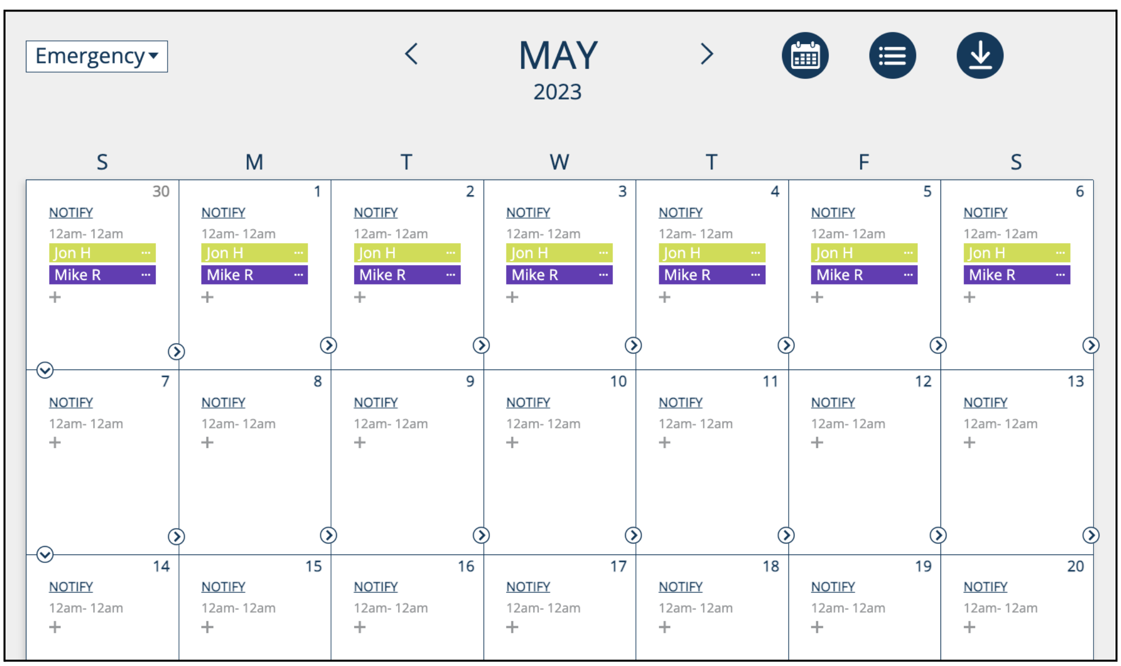
Custom Schedule

1. On the calendar there are + signs under each schedule time. Click the + sign, and you can either select an escalation list (if you have created them) or an individual person. You can

add as many people under each time slot as needed.



2. The escalation calls will happen in the order people appear on the schedule, so the top person will get the first call. You can drag and drop the order of people on the calendar if you need to rearrange.
3. Here’s an example of the first week filled out:



4. You can use the **copy right** and **copy down** arrows to help fill out your schedule faster. If your schedule is the same week to week, you can fill out one week and then **copy down** the schedule to fill it out. If your schedule is the same (or similar) day to day,

then you can use the **copy right** arrow to copy the people from one day to the next. If the schedule times are not exactly the same for the entire day, it will only copy people where the times match.

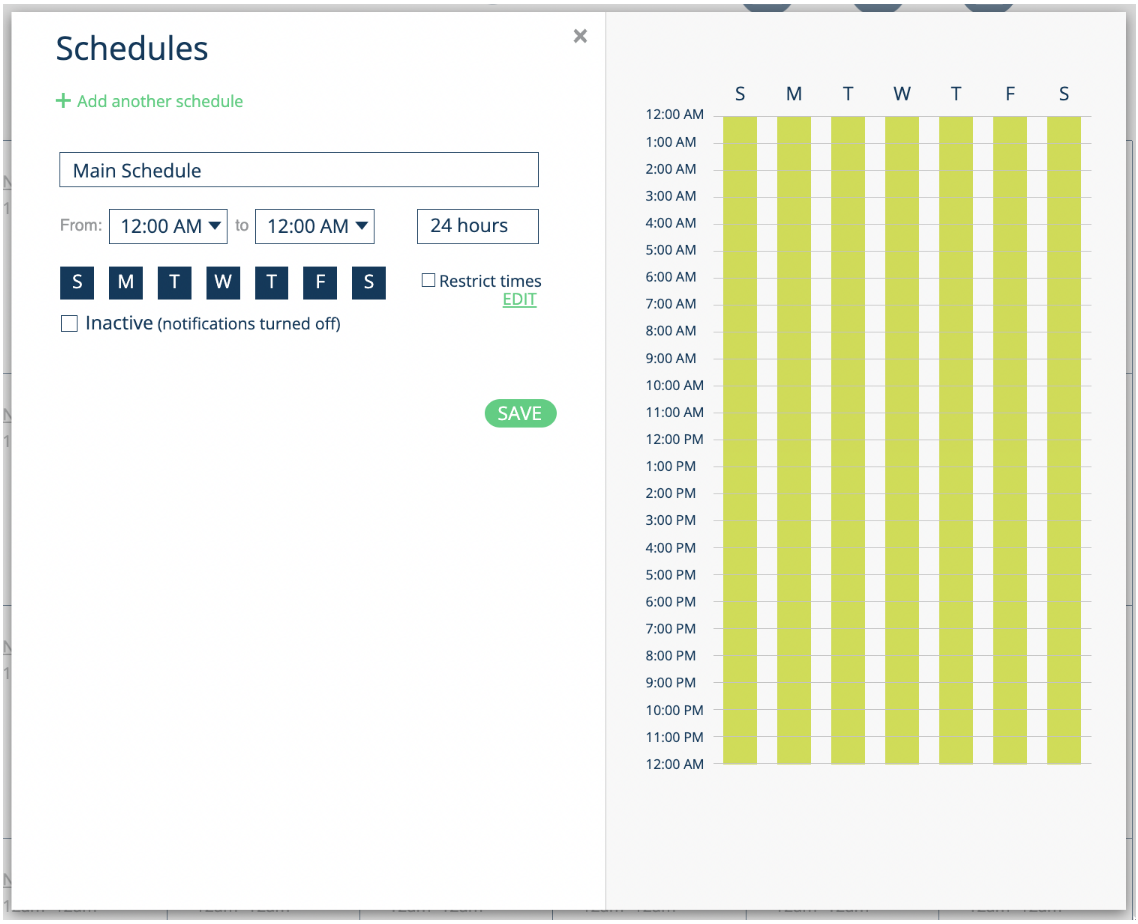
5. If you have a **Live Escalation** schedule, you will need to consider how many people to add to the schedule based on your on hold time. Each person on the Live Escalation schedule will be called for 30 seconds. Example: if you set a max hold time of 2 minutes and only put one person on the Live Escalation schedule, that person could potentially be called 4 times if they never answer the call. So you'd maybe want to either add more people to the Live Escalation schedule, or consider reducing the on hold time if there is only one person to answer the call.
6. If you do not add people to your schedule, you will get an error and the people last on call will remain on call until people are added/found. Your calendar will present an error letting you know that no people are found.

Using the Schedule Builder (custom only)

Properties using a custom schedule can design their schedule using the Schedule Builder. Any edits in the Schedule Builder will change the schedule from today forward. To get started, follow the steps below.

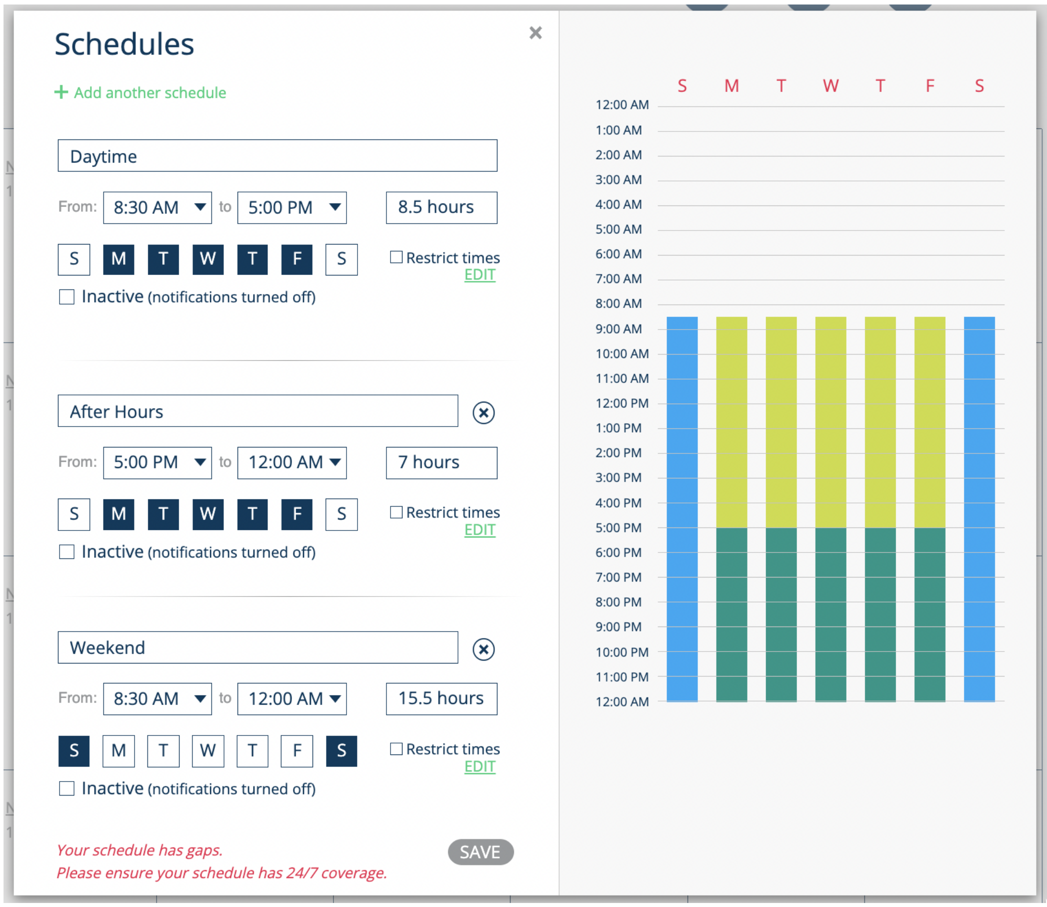
1. Pick the property and calendar type you want to build a schedule for.
2. Click the **Schedule Builder** icon . The schedules window will open, and you can create as many schedules as needed. Your schedules must cover 24 hours a day, 7 days

a week.

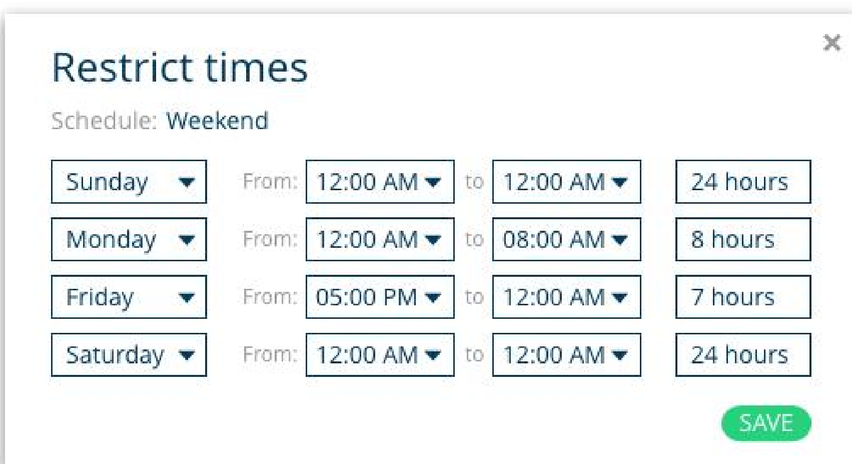


3. Name your schedule.
4. Choose the times that this schedule covers. Schedules are in increments of 30 minutes, so you can choose anywhere from 30 minutes to 24 hours. Once your times are selected, be sure that the duration box reflects the right amount of time.
5. Select the days of the week this schedule applies to. Your schedule will build visually on the right side of the window to ensure you are covering 24 hours a day, 7 days a week.
6. If this is a schedule where you want **Live Escalation** (calls are sent directly to a person's mobile phone vs. caller leaving a message), then check the **Live Escalation** box and set the on hold time (the total amount of time a caller will be on hold).
7. If this is a schedule where you don't want notifications sent, then check the **Inactive** box and all messages that are left during this time will be sent via email and will begin to escalate once your schedule is active again.
8. To add another schedule, click **+ Add another schedule** at the top of the window and repeat steps 3-7 until your 24/7 schedule is completely filled.
9. The system will not let you save your schedules if there are any gaps or overlaps, so use the visual schedule builder to ensure that 24/7 is covered. Note: Live Escalation

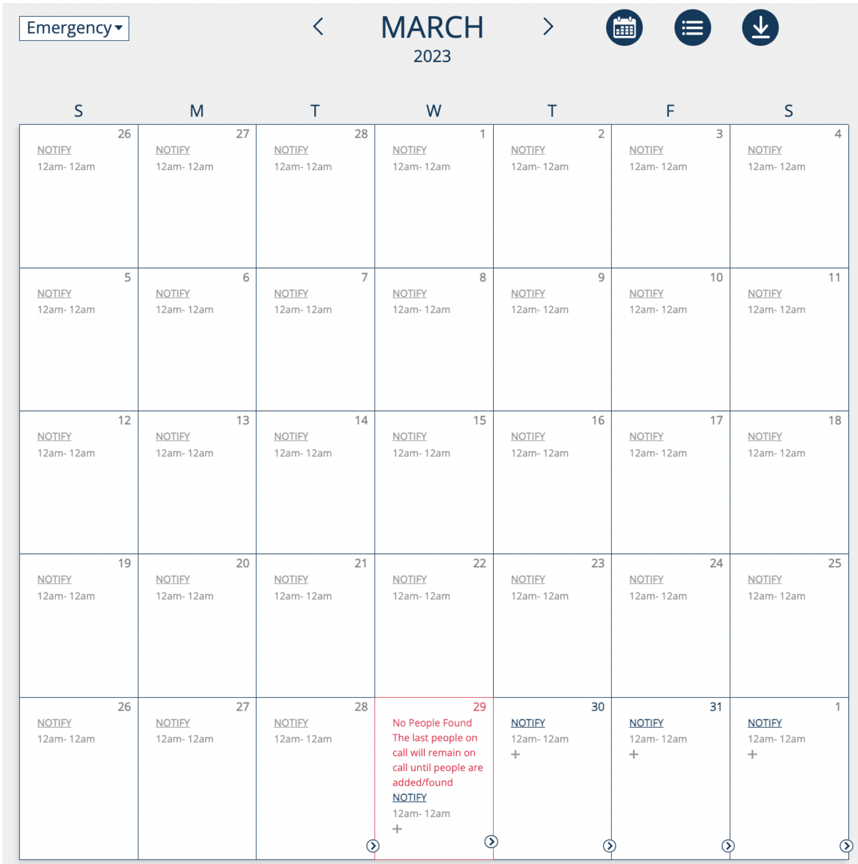
schedules will not show up on the visual schedule builder.



10. If you have a schedule that is over multiple days, but the times are different each day ([like this example](#)), you can adjust times by checking **Restrict times** and then clicking **EDIT**. You must first select the days of the week for this schedule.



11. Once you have your schedules built and click save, your calendar will now be updated with the times you set for each day.



12. If you do have a day/time where there isn't a schedule, the last people on call will remain on call until a new schedule is found. Your calendar will present an error letting you know that no schedule is found.

Editing Individual Days

You can add/remove people, change the order of people, and edit the schedule for individual days.

Editing People For Individual Days

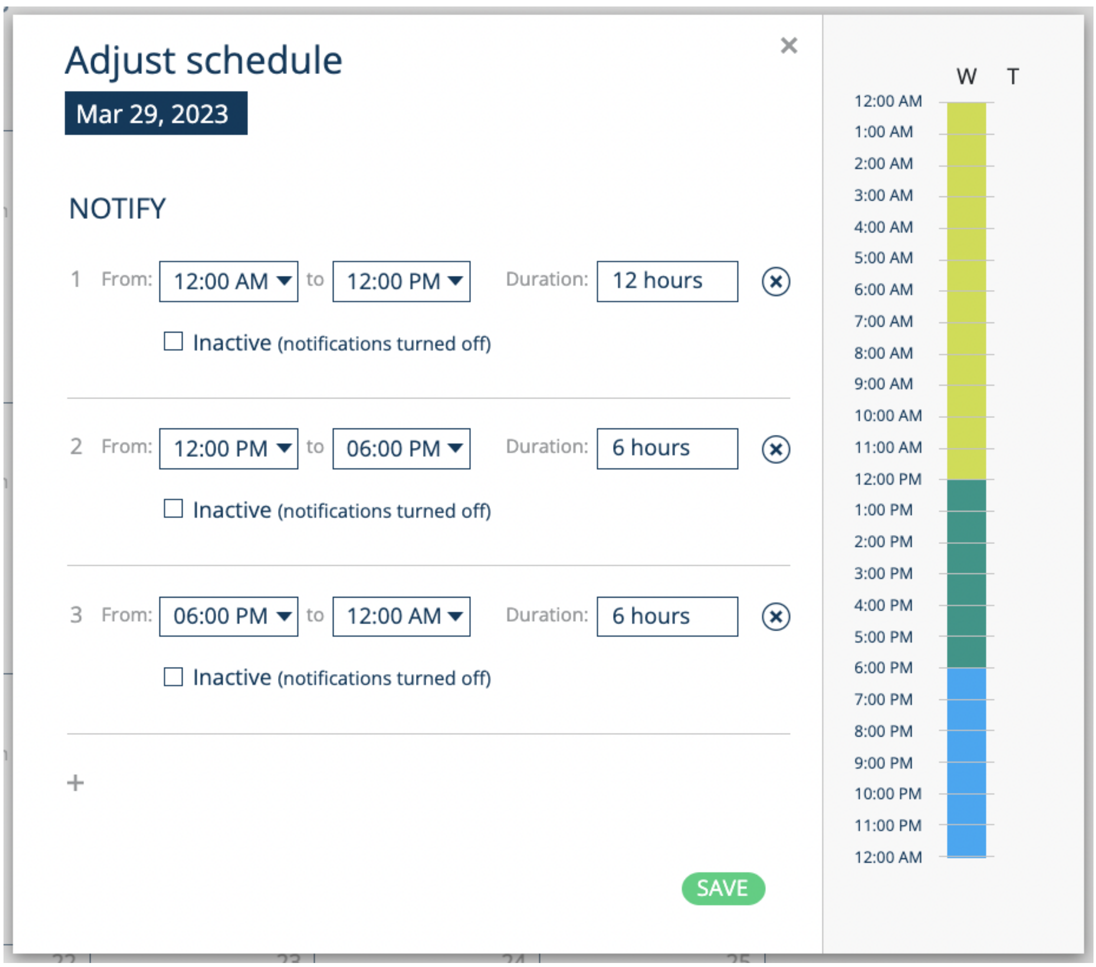
To adjust the people on your schedule, you can:

- Drag and drop the order
- Click the ••• and remove someone from the schedule (this will only delete this instance, not every instance going forward)

- Click the ••• and you can [edit a user's preferences]() (this is helpful if you need to change a phone number or notification preference)
- Click the + to add someone new to the schedule.

Editing Schedule For Individual Days

To edit the schedule on one day (like a holiday), right click (Ctrl + click) on that particular day on the calendar. A window with that day's schedule will appear. You can edit the existing schedules, delete or add + **a new schedule**. Keep in mind that your schedule still must cover the entire 24 hours.

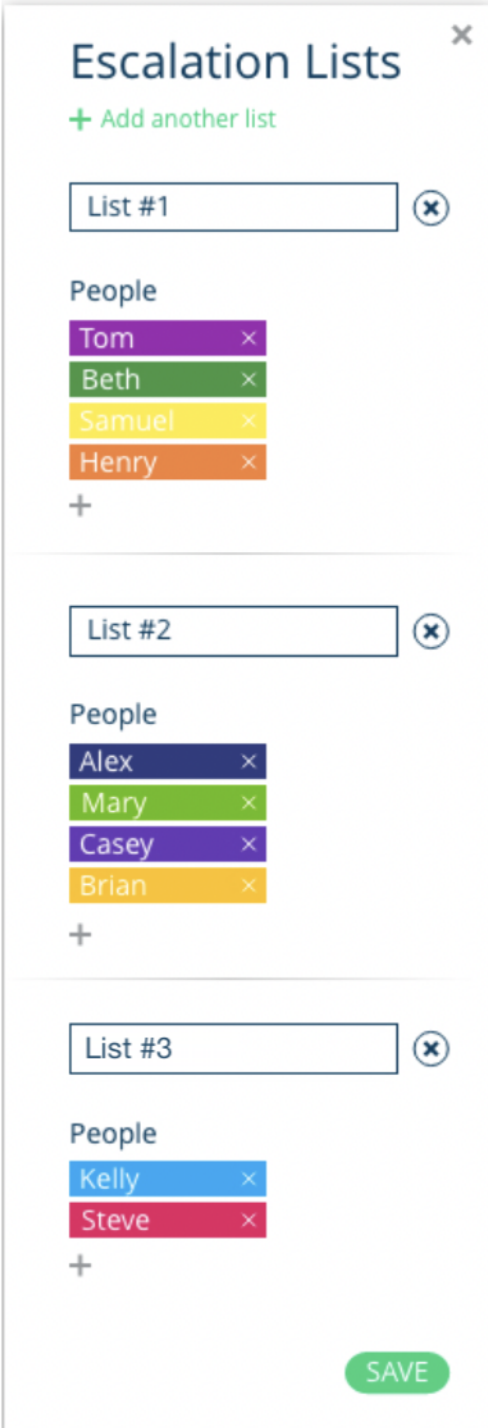


Escalation Lists (custom only)

If you have a custom schedule, you can use escalation lists to organize your lists of emergency maintenance staff. Escalation lists are handy if you always have the same group of people on call together. Example: Tom, Beth, Samuel and Henry are always on call at the same time. Escalation lists are not required but are a time saver when adding people to your schedule.

1. To build an escalation list, on the custom schedule, click the **Escalation List** icon in the upper right corner.
2. Name your escalation list.
3. Click the **+** sign under People and add your people to this list. Add them in the order they are on call.

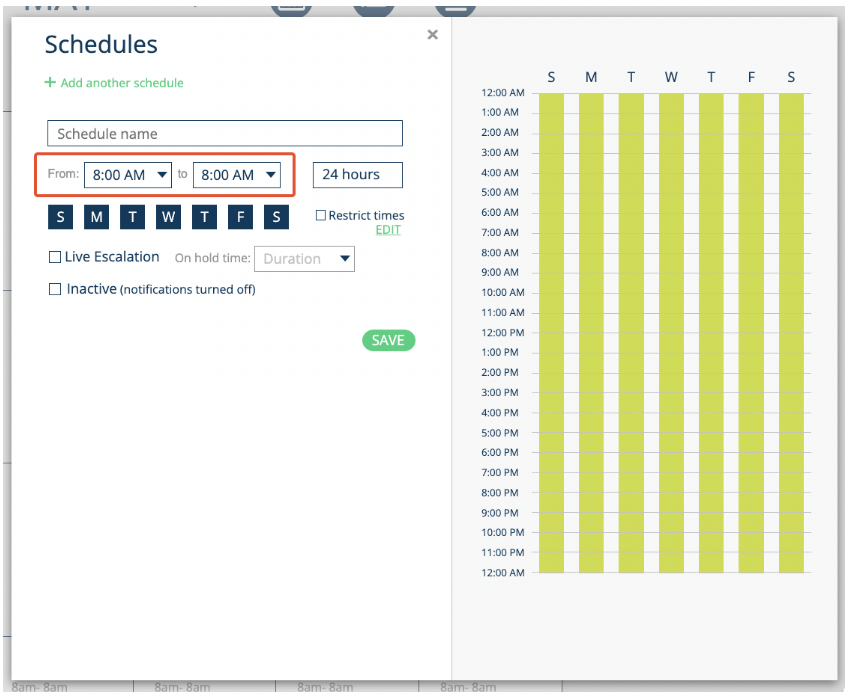
Click **+ Add another list** at the top of the window to create more than one list.


Escalation Lists
+ Add another list
List #1
People
Tom
Beth
Samuel
Henry
List #2
People
Alex
Mary
Casey
Brian
List #3
People
Kelly
Steve
SAVE

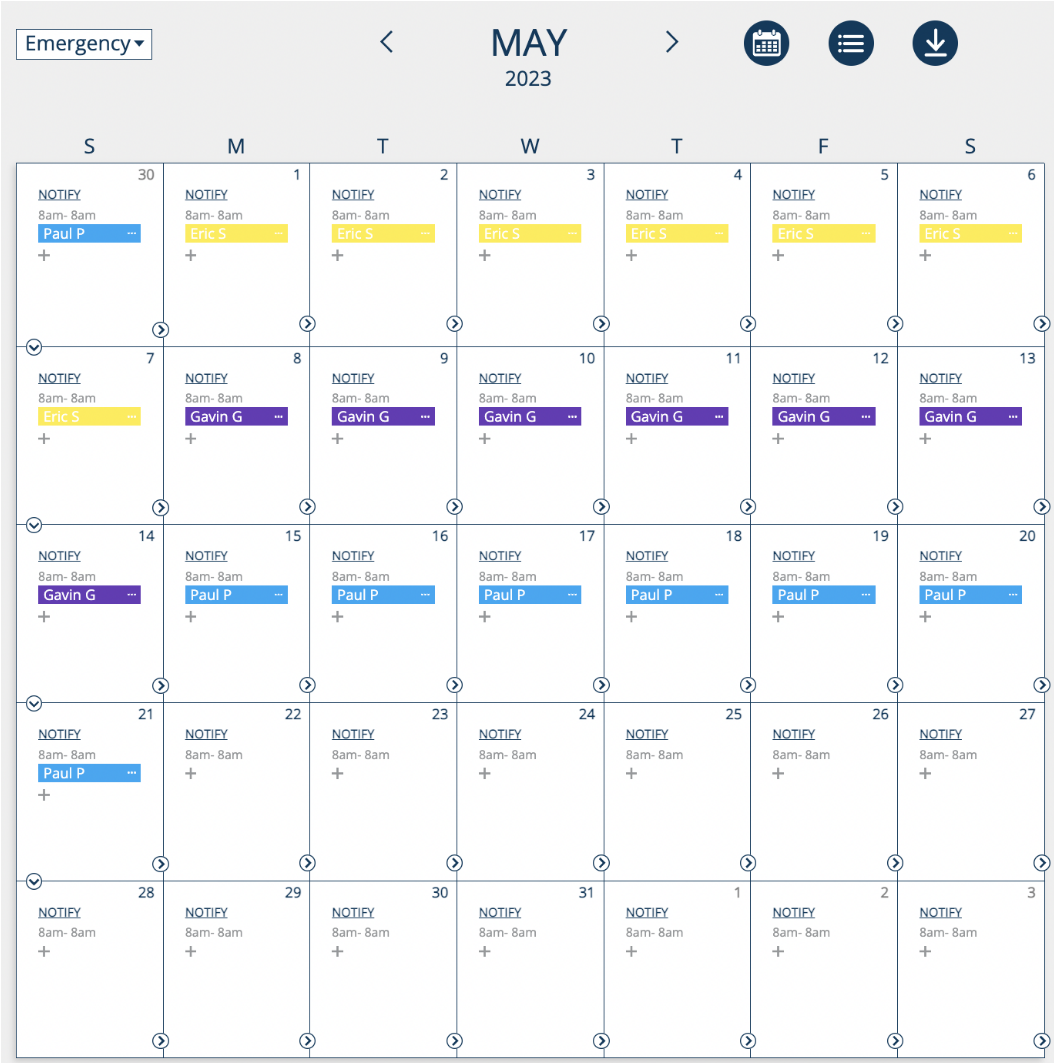
Custom Schedule Examples

Rotation

You have three maintenance techs, and they rotate their shift every week at the same time. You'd set up one schedule for this, but just adjust the times to match the time that they rotate. For example, this crew rotates on Mondays at 8am, so the times are adjusted to 8:00 AM to 8:00 AM.

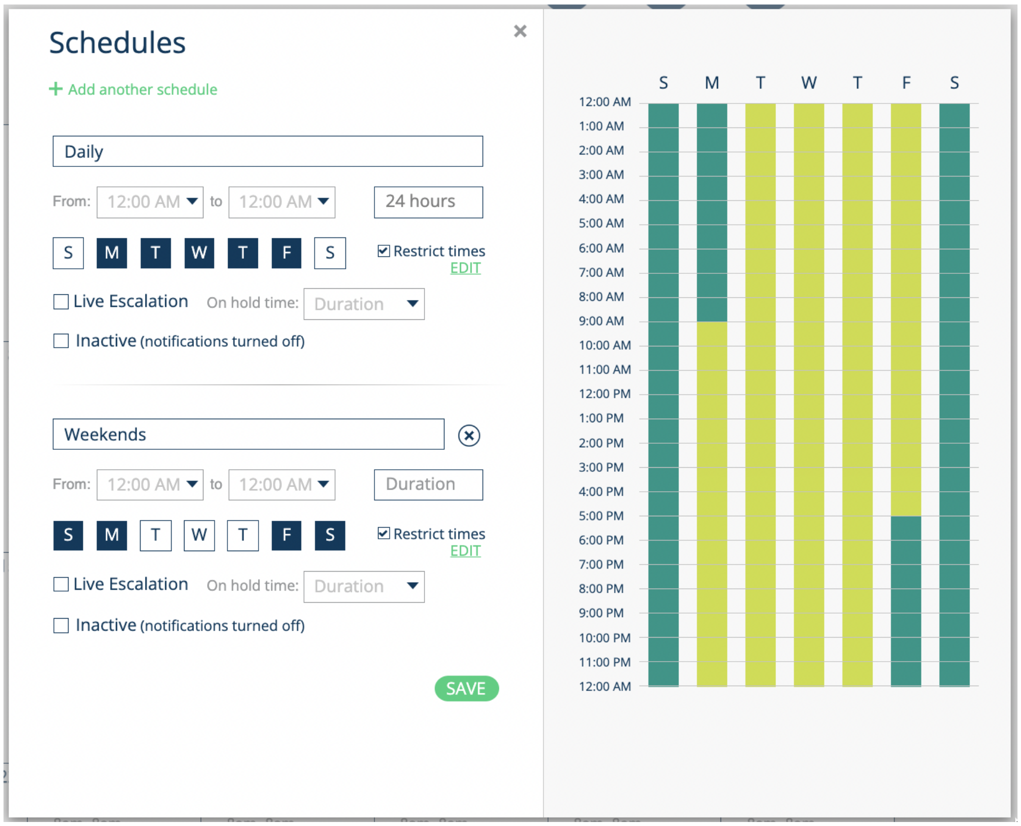


This is what the rotation calendar would look like on the schedule with the 8am switch on Mondays:

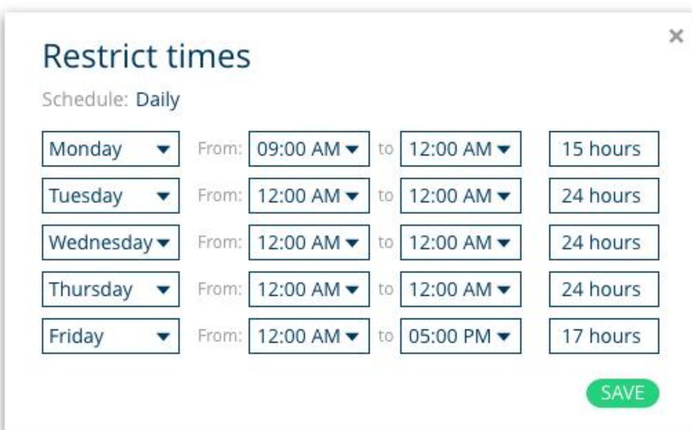


Restrict Times

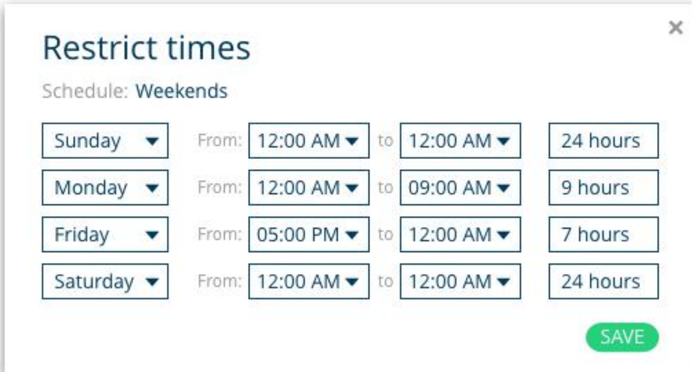
You have two maintenance crews – one works M-F and the other works weekends.
You'd set up two schedules for this. And because there are different times each day you would use the **Restrict times** option on both schedules.



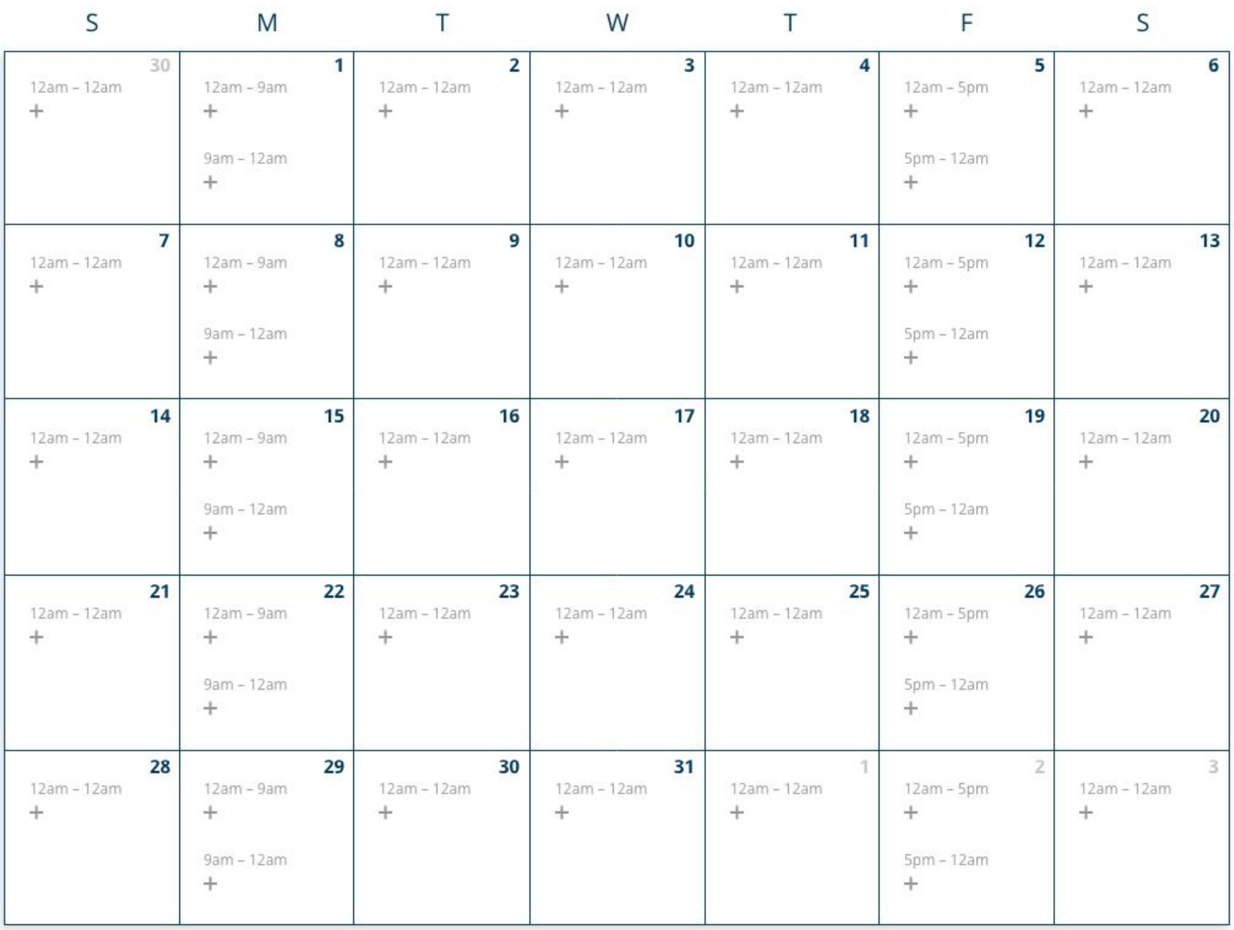
Daily schedule – This maintenance crew is on call starting Monday morning at 9am until Friday at 5pm. Because the times are not the same every day, you would select your days, check **Restrict times**, and click **edit** to set the times for each day.



Weekends schedule – This maintenance crew is on call starting Friday at 5pm until Monday at 9am. Because the times are not the same every day, you would select your days, check **Restrict times**, and click **edit** to set the times for each day.



Your calendar will look like this:



S	M	T	W	T	F	S
30 12am – 12am	1 12am – 9am 9am – 12am	2 12am – 12am	3 12am – 12am	4 12am – 12am	5 12am – 5pm 5pm – 12am	6 12am – 12am
7 12am – 12am	8 12am – 9am 9am – 12am	9 12am – 12am	10 12am – 12am	11 12am – 12am	12 12am – 5pm 5pm – 12am	13 12am – 12am
14 12am – 12am	15 12am – 9am 9am – 12am	16 12am – 12am	17 12am – 12am	18 12am – 12am	19 12am – 5pm 5pm – 12am	20 12am – 12am
21 12am – 12am	22 12am – 9am 9am – 12am	23 12am – 12am	24 12am – 12am	25 12am – 12am	26 12am – 5pm 5pm – 12am	27 12am – 12am
28 12am – 12am	29 12am – 9am 9am – 12am	30 12am – 12am	31 12am – 12am	1 12am – 12am	2 12am – 5pm 5pm – 12am	3 12am – 12am

CALLING INTO THE NOTIFY SYSTEM

Checking New Messages

Based on your notification preferences, you will receive a text message or phone call notifying you that there is a new urgent message (emergency maintenance or courtesy) that needs attention. Text notifications will always come from 502-276-7859, and phone calls will come from a property specific number. We recommend saving each number as a contact in your phone for easy recognition.

Below is a chart of how to navigate from there.

New messages – 1

Replay message – 1
Return call – 2
Acknowledge, on my way – 3
Acknowledge, not an emergency – 4
Delete message – 7
Date and time – 0

New Message Options

1 - Replay message - Replay the new message.

2 - Return call - Call the person who left the message back directly. The system will mask your phone number, so they will not receive your personal phone number. This conversation is also recorded.

3 - Acknowledge, on my way - The system will call the caller back and play a pre-recorded message informing them that you are on the way to the property.

4 - Acknowledge, not an emergency - The system will call the caller back and play a pre-recorded message informing them that their issue is not an emergency, and someone will assist them during regular business hours.

7 - Delete message - Delete the message.

0 - Date and time - Hear the date and time that the message was left.

NOTE: you must either return call (2), acknowledge (3 or 4), or delete (7) the new message for the escalation process to end.

Checking Saved Messages

To check saved messages, call your emergency number (the notification number that called you or the number in the text message notification you received).

Below is a chart of how to navigate from there.

Saved messages – 2

Replay message – 1
Return call – 2
Save message – 3
Listen to next message – 4
Listen to previous message – 5
Delete message – 7
Return to main menu – *

Saved Message Options

1 - Replay message - Replay the new message.

2 - Return call - Call the person who left the message back directly. The system will mask your phone number, so they will not receive your personal phone number.

3 - Save message - Save the message.

4 - Listen to next message - If you have multiple saved messages, choose this to listen to the next one.

5 - Listen to previous message - If you have multiple saved messages, choose this to listen to the previous one.

7 - Delete message - Delete the message.

* - Return to the main menu.

Resolving an Escalation

To resolve an escalation, and stop receiving phone or text notifications for an urgent message, you must answer the emergency number (the notification number that called you or the number in the text message notification you received), and then choose one of these options:

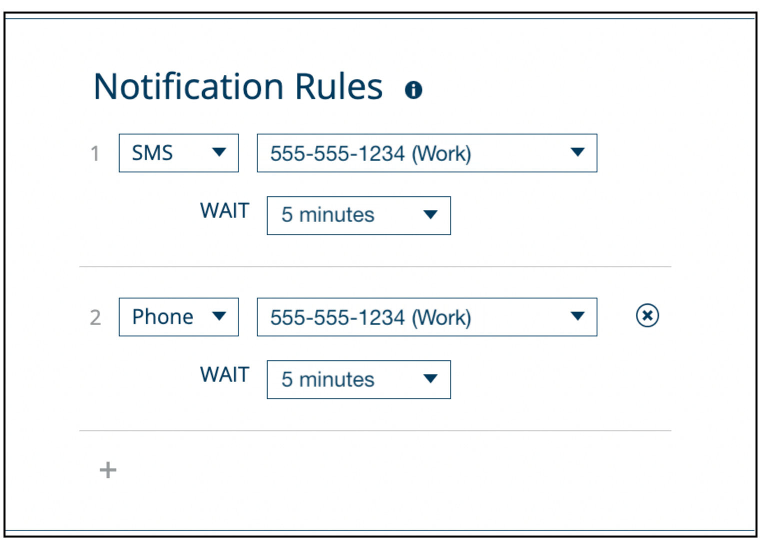
New messages – 1

- Return call (2)
- Acknowledge (3 or 4)
- Delete (7)

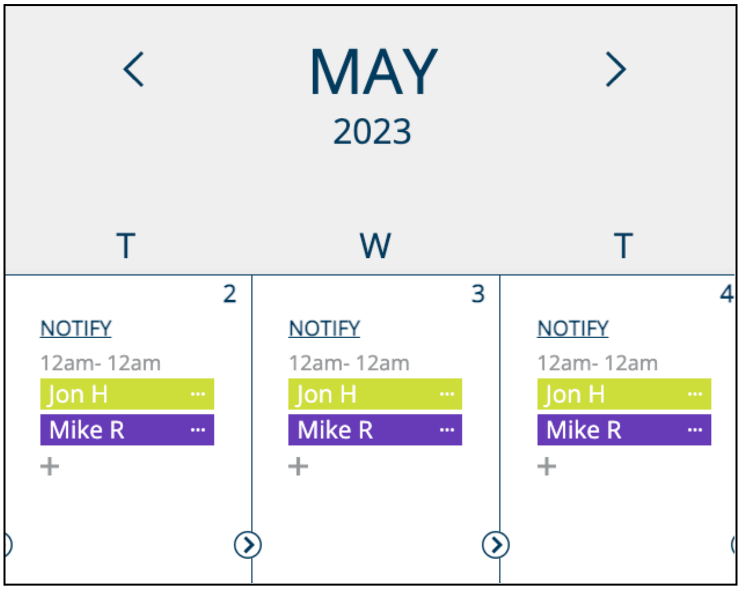
What happens if you don't choose an option

If you don't choose one of the above options, the system will continue notifying you based on your notification preferences. When it gets to the last notification on your notification preferences, it will move onto the next person on the emergency or courtesy schedule.

For example, if your notifications are set up like the rules below, if you do not answer the text message and choose a valid option to end the escalation, the system will wait one minute, and then try calling you. If you do not answer the phone and choose a valid option, the system will then move onto the next person on the emergency schedule:

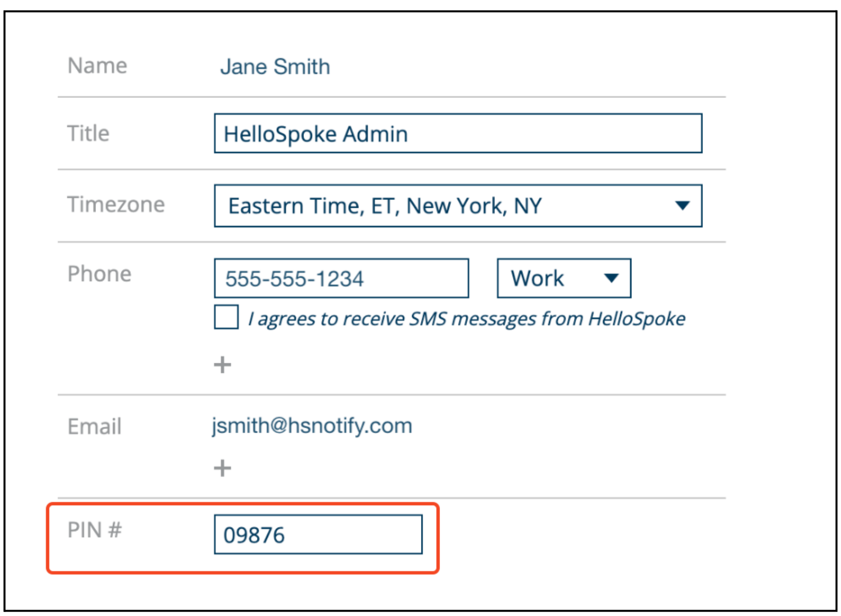


In this example, if Jon doesn't answer any of their notifications, it will move onto Mike. If Mike doesn't answer any of their notifications, it will go back to Jon, and will continue like that for 24 hours until the escalation is resolved by someone:



When to Use PIN Number

Every user in the Notify system requires a five digit PIN number. The PIN needs to be unique, and cannot be already used on another user account. You can set a user's PIN number when editing the user profile in the **Team Management** page.



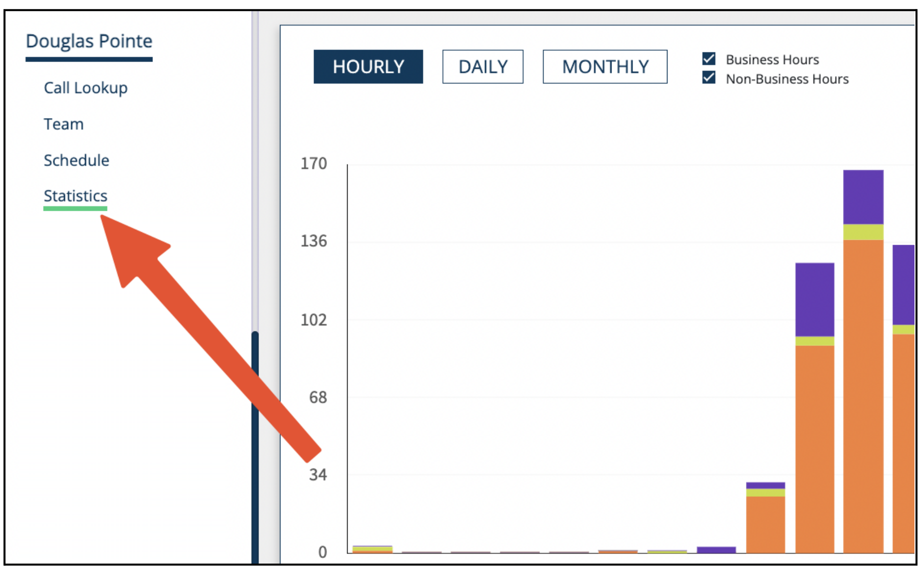
When to Enter PIN

Users only need to enter their PIN number if they call into our system from an unrecognized phone number. If they call into the system from the phone number that is on their user profile, they will not need to enter their PIN number.

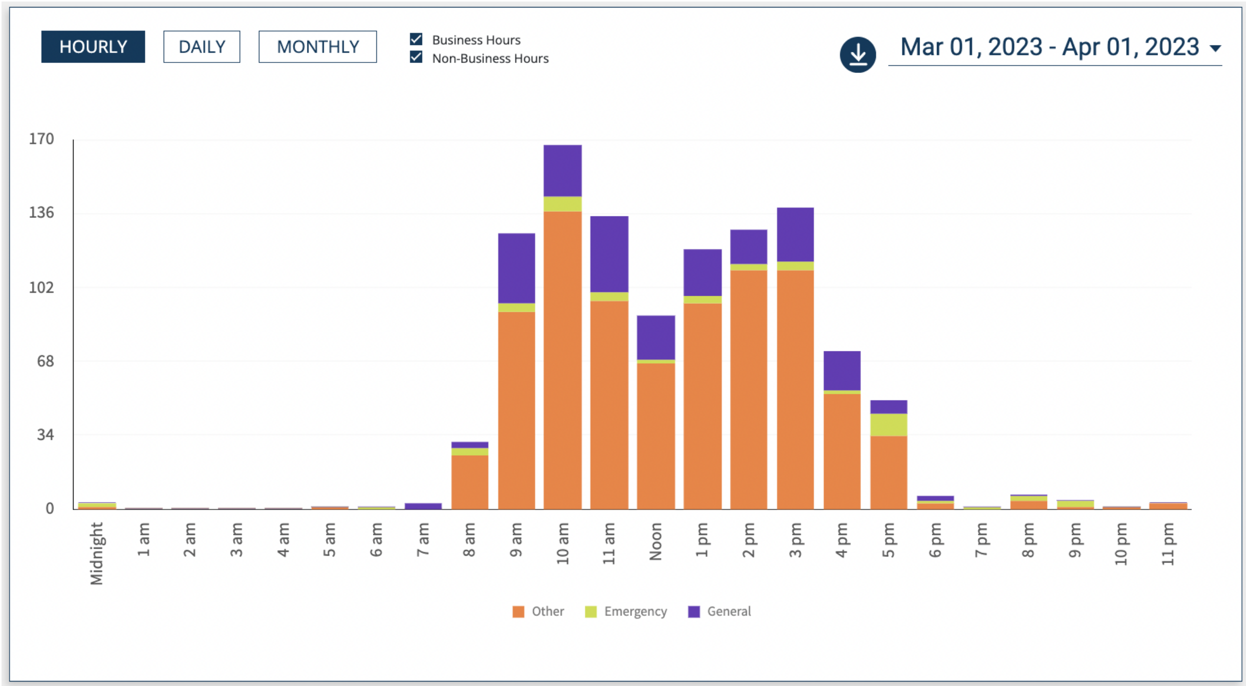
REPORTS

Statistics

You can access Statistics by clicking **Statistics** in the left side panel.



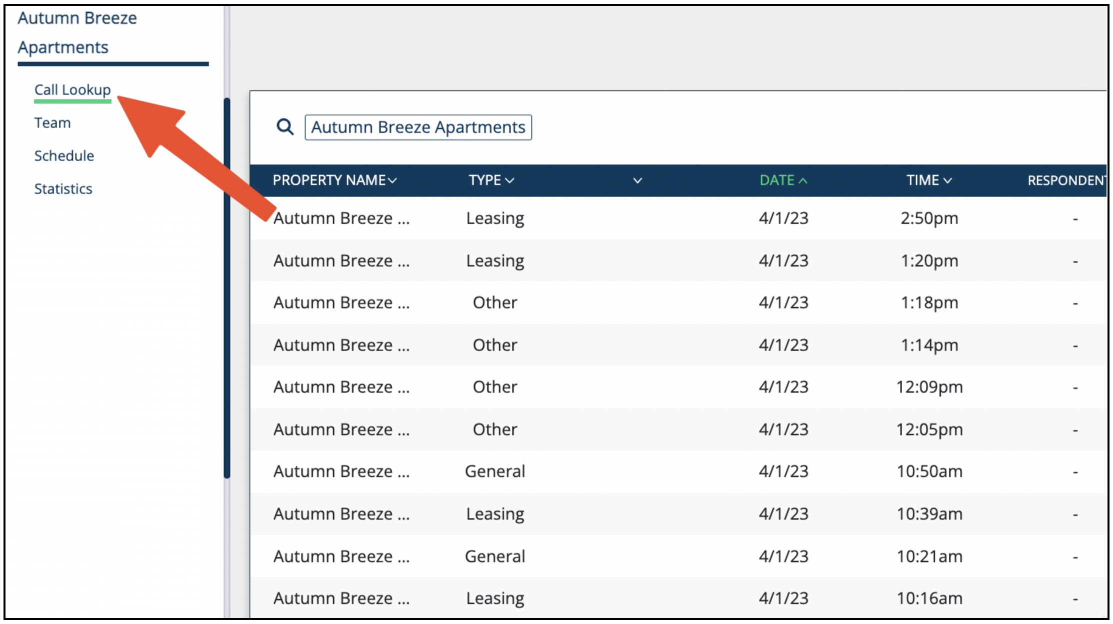
This is a graphical overview of calls received by type.



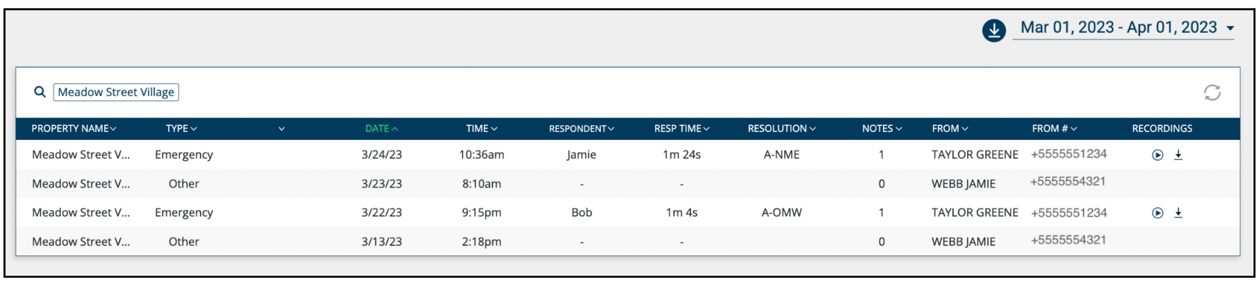
1. In the upper right corner of the graph, you can select your date range. The default is the last thirty days, but you can pick a custom date range.
2. In the upper left you have some viewing options: hourly, daily, and monthly. This will change the graph view based on your selection. The data defaults to include both business hours and non-business hours, which you can change by selecting or deselecting the check boxes.
3. Along the bottom, your call types are color coded. Any combination of these can be filtered out by clicking on them. Example: you can view only Emergency calls by clicking on General and Other to turn them off.
4. You can hover over anything on the graph to see actual numbers.
5. To download the graph, click the download icon  in the upper right and select PDF, JPG or PNG format.

Call Lookup

You can access Call Lookup by clicking **Call Lookup** in the left side panel.



This is a list of all of the phone calls received for all properties you are assigned to.



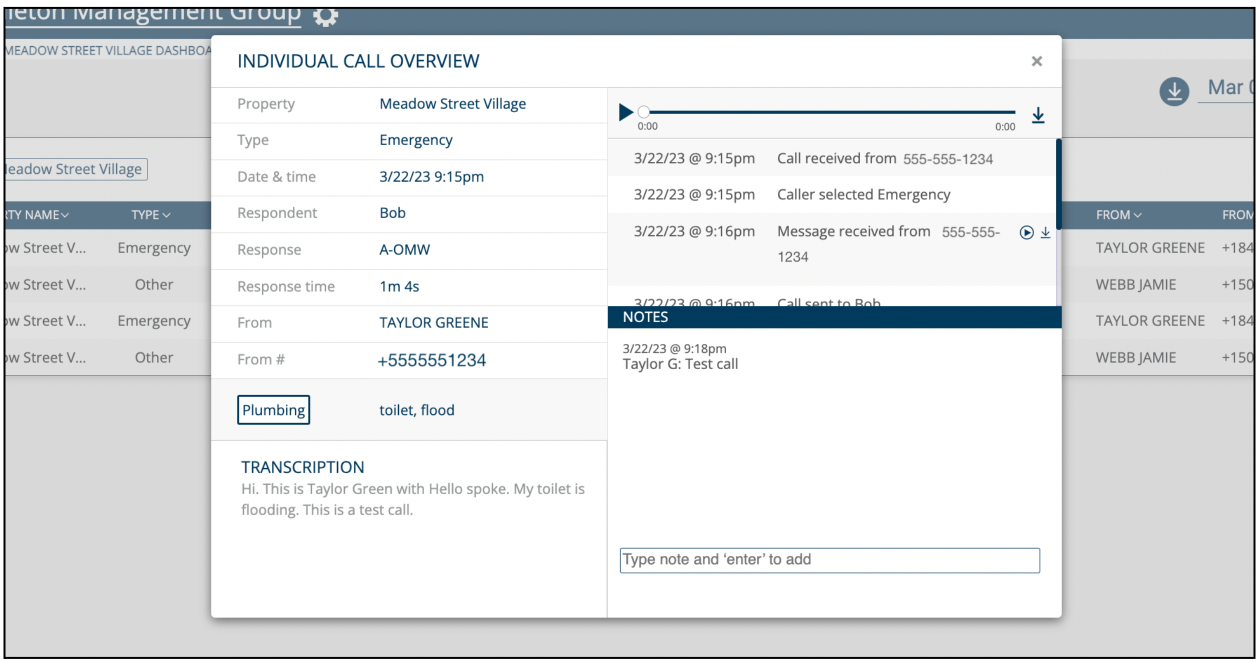
1. In the upper right corner, you can select your date range. The default is the last 30 days, but you can pick a custom date range.
2. There are a couple of ways to sort and filter the data:
    a. **Sort:** The data automatically sorts by date and time, but you can sort any column (ascending or descending) by clicking the down arrow next to the header. The header will turn green when sorted.
    b. **Filter:** At the top of the list there is a search bar where you can enter in keywords to search by. Example: you want to see all Emergency calls that Tom responded to. You'd type in *Emergency* and hit enter, and then *Tom* and hit enter. The data will

then filter to show you all calls that include Emergency and Tom in the data.

Emergency × Tom ×

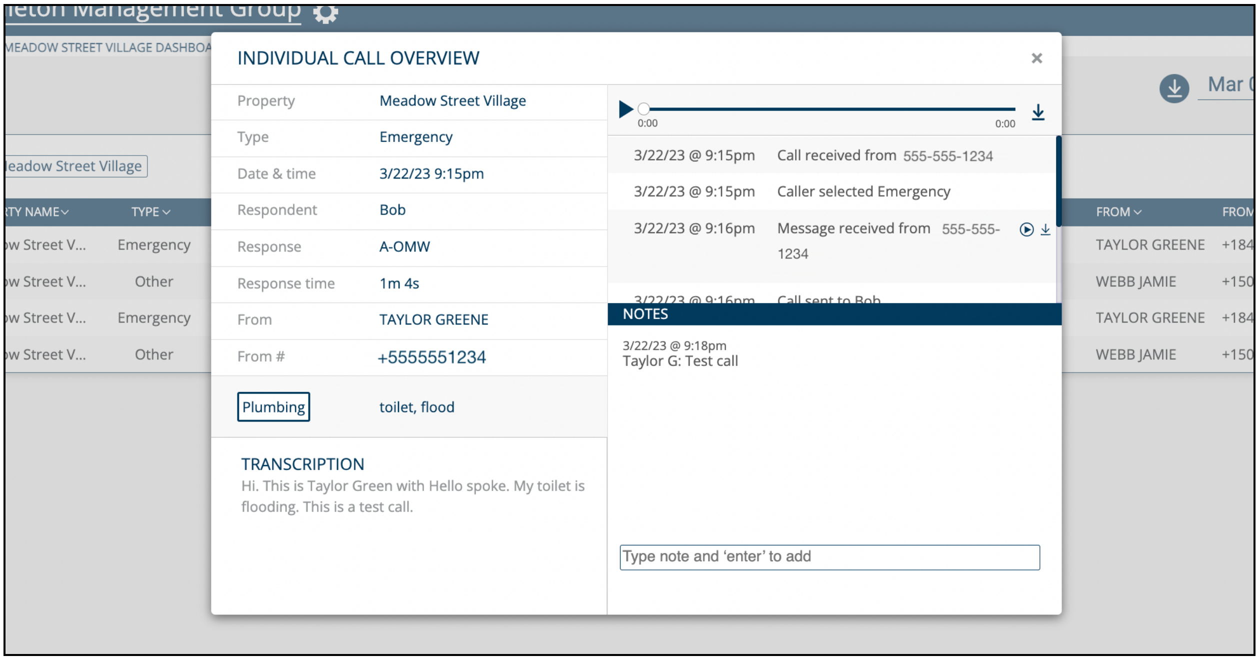
TYPE	TIME	CALL DURATION	RESPONDENT	RESPONSE TIME	LIVE	NOTES
Emergency	9:37am	1m 31s	Tom	8m 43s	-	4
Emergency	9:39am	1m 31s	Tom	3m 08s	-	-
Emergency	4:05pm	1m 31s	Tom	1m 55s	LIVE	4

3. Once you have the data sorted and filtered the way you want, you can download it to a spreadsheet. To download the data, click the download icon in the upper right.
4. Clicking on one of the calls displays the Individual Call Overview:



Individual Call Overview

You can view the Individual Call Overview by clicking on a specific call line in the **Call Lookup** page or in the Call Activity box on the **Property Dashboard**.

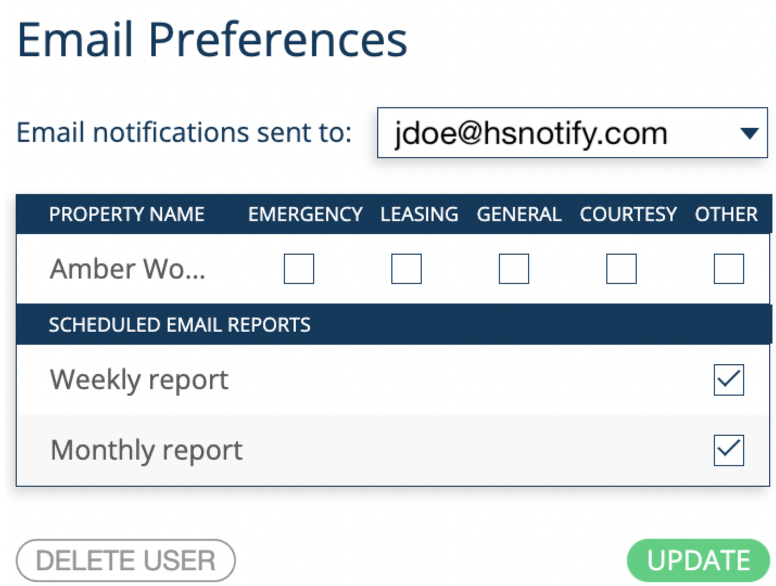


The Individual Call Overview contains:

1. In the top left, you can see information about the caller and call.
2. In the bottom left, you can read a transcription of the message if they left a message.
3. If the caller said any keywords recognized by our system, it will display them in the gray box above the transcription, and it will categorize the call accordingly.
4. In the top right is a timeline of events where you can see exactly what happened from the time the call came in to when the call ended or escalation was resolved.
5. In the bottom right, you can add notes about the call. Each note displays who wrote the note, and a date and time stamp.

Scheduling Reports

You can choose to have reports sent to your email inbox on a weekly and monthly basis when setting up your Email Preferences.



The PDF reports contain the total number of missed calls broken down by type, as well as the Average Emergency Maintenance Response Times for your properties.

CALL FORWARDING

Setting Up Call Forwarding

**** We recommend setting up automatic call forwarding ****

Automatic Call Forwarding

1. Contact your Phone Service Provider
2. Ask to add Call Forwarding Ring No Answer (CFNA) and Call Forward Busy (CFB) features. *If they tell you to push *72, reiterate that you need Call Forwarding Ring No Answer (with 4-5 rings to your office phone), not just call forwarding.*
3. Provide the *Forwarding Number* listed in your Notify Training Follow Up email (always be sure to include a 1 in front of the number)

For One Phone Line:
CFNA (4 rings) & CFB

For Multiple Phone Lines in a Hunt or Rollover Group:
CFNA on all phone lines in your office hunt group, after 4 rings
CFB on the last line only

Additional Notes:

- If you have voicemail via your phone company, this will need to be canceled/turned off
- If you have an internal voicemail or answering machine in-house, you will need to disable
- Write down the representative's name that took the order and their extension #, along with the order due date for tracking purposes

Manual Call Forwarding

Manual call forwarding can be set when you want incoming calls to go directly to your IVR (phone menu) instead of ringing. This can be handy when you need to step away or want to manually forward at the end of a day.

Each major phone provider may have a different process, but here's a list of the most common manual call forwarding techniques:

*72 – Call Forwarding Always (*73 to deactivate)

*90 – Call Forwarding Busy (*91 to deactivate)

*92 – Call Forwarding No Answer (*93 to deactivate)

Please refer to your phone provider for more detailed instructions on manual call forwarding