

A man wearing a white hard hat, safety glasses, and a high-visibility yellow and grey work jacket is looking down at a tablet computer. He is in an industrial setting, possibly a factory or construction site, with large machinery and another worker in the background.

TELUS Business

TELUS Business Connect™ self installation onboarding

How to successfully set up your service

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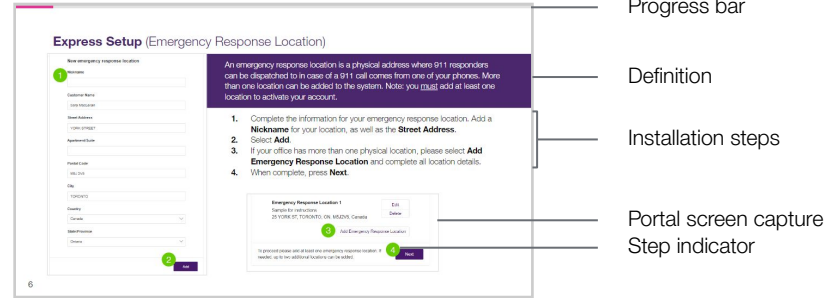
Support

How to use this guide

This document is intended to guide you through the setup and initial installation and configuration of your new TELUS Business Connect service. It is recommended that you:

- Set aside 1 hour to configure your account
- Set aside an additional 15 minutes per user or extension (30 minutes if you are using physical phone devices)
- Gather the materials needed before you begin (see [Preparing for installation & configuration](#))
- Follow the instructions in order; subsequent steps are dependent on the completion of earlier steps (e.g. user setup must be completed before number transfer)

Installation instructions:



The screenshot shows the 'Express Setup (Emergency Response Location)' interface. It features a progress bar at the top, a definition of an emergency response location, a list of four installation steps, and a portal screen capture showing a step indicator. Annotations with lines point to these elements:

- Progress bar
- Definition
- Installation steps
- Portal screen capture
- Step indicator

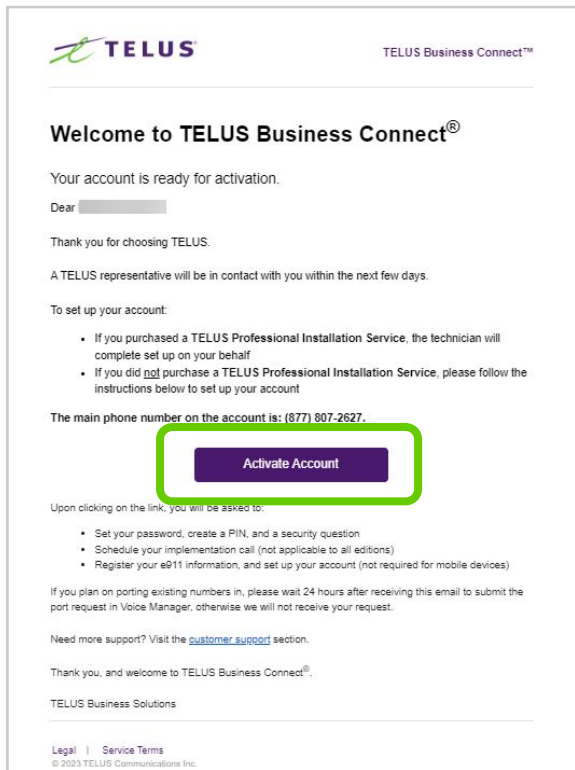
Preparing for installation & configuration

The checklist below prepares your organization for a smooth installation. It ensures that user information is prepared, hardware and software requirements are met, and network infrastructure is ready.

- ❑ Ensure you have high speed internet with sufficient bandwidth
- ❑ Ensure you have Cat5E (ethernet) cabling or
- ❑ Ensure router compatibility
- ❑ Ensure you have set aside enough time to complete the installation (est. 1h + 30min/user)
- ❑ Have on-hand your physical phones (if ordered)
- ❑ Have on-hand a list of employees with their assigned extensions
- ❑ *If you are transferring numbers from an existing business account: A complete, digital version of your most recent phone bill, including:*
 - Your service address
 - Your main billing telephone number
 - A list of all phone numbers you wish to transfer (identified as local and/or mobile)

Accessing your account

Welcome email



Please look for the email shown on the left in your inbox. It is the key to beginning your Business Connect journey. Once you are ready to begin, click the purple **Activate Account** button.

Note: your account must be activated within 7 days of receiving this email. If not, you must request another activation email by calling support at 1-844-626-6638 (select Update Your Account or Technical Support when prompted).

Subject: Please set up your TELUS Business Connect™ account
From: TELUS Business Connect™ <telusvoip@ringcentral.com>

Express setup

After Activate Account, you will be walked through the express setup process. Please follow the guided steps to set up some common features of your phone system.

Note if you exit the express setup before completion, you will not be able to return to it. Fear not—this guide will assist you with the configuration of your phone system, [beginning with User Setup](#).

Express setup (emergency response location)

New emergency response location

1

Nickname

Customer Name

Street Address

Apartment/Suite

Postal Code

City

Country

State/Province

2

An emergency response location is a physical address where 911 responders can be dispatched to in case of a 911 call comes from one of your phones. More than one location can be added to the system. Note: you must add at least one location to activate your account.

1. Complete the information for your emergency response location. Add a **Nickname** for your location, as well as the **Street Address**.
2. Select **Add**.
3. If your office has more than one physical location, please select **Add Emergency Response Location** and complete all location details.
4. When complete, press **Next**.

Emergency Response Location 1

Sample for instructions
25 YORK ST, TORONTO, ON, M5J2V5, Canada

3

To proceed please add at least one emergency response location. If needed, up to two additional locations can be added.

4

If you're encountering errors entering the address and can not complete, please call our tech support at 1-844-626-6638 (select Technical Support when prompted).

Important note: If you do not update the emergency response location accurately, any 911 calls made from the device may be sent to the wrong emergency response center and will not transmit your current location information to emergency responders, delaying emergency assistance to you.

Express setup (activate your account)

Activate Your Account

Create Password
Used to login to your Voice Manager clients

1 Password

Reenter New Password

2 Continue

1 Company Info
Complete basic details about your company and users, and select your company call greeting and operator.

2 My Info
Complete basic details, select your call forwarding and voicemail preferences.
Your users will see the same view for themselves when they set up their own extensions.

3 Review
Review your preferences and see how your system will work when your setup is complete.

3 Next

1. Create a **Password** used to log in to your online account. Follow the **Password Criteria** when creating your password.
2. Once done, click **Continue**.
3. On the next screen, select **Next** to continue with Express Setup.

Note: You may skip any of the following steps at any time. All features can be customized directly in the Voice Manager admin platform.

Express setup (setting up users)

The screenshots illustrate the following steps:

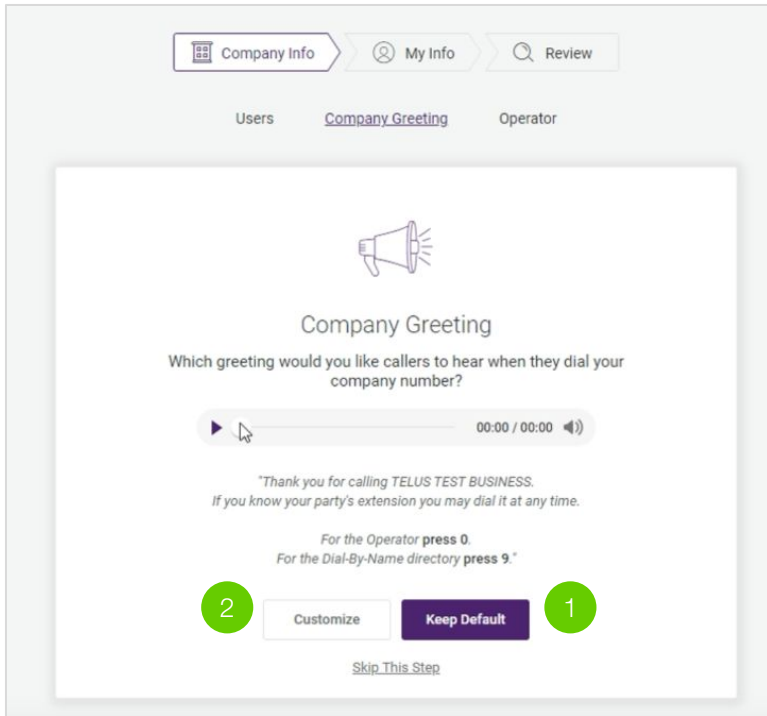
- Step 1:** The 'Users' page shows instructions for setting up users and a 'Set Up Now' button.
- Step 2:** The 'User Details' page shows the 'Step: Get template' section with a 'Download file' button and an 'Email' field, and a 'Send' button.
- Step 3:** An Excel spreadsheet showing a table with columns: Mailbox ID, Include in Company Directory, First Name, Last Name, and Email. The data rows are numbered 2 through 6.
- Step 4:** The 'User Details' page shows the 'Step: Upload file' section with a 'Browse' button, a 'Next' button, and a 'Skip This Step' link.

If you are assigning extensions to more than 10 users, it is recommended that you complete the template to automatically import user details. The system will pre-populate user setup fields from the template, now allowing you to:

- assign an extension to each user,
- allow users to set up their own extension settings,
- select a user to be the operator, and
- allow callers to reach your users by the dial-by-name directory.

1. Click **Set Up Now**.
2. Download the template.
3. Open the template and enter the necessary information for each of your Users in the coloured cells.
4. Save and upload your completed template.
5. Click **Next**.
6. Review the uploaded user details and select **Next**.

Express setup (set up your company greeting)



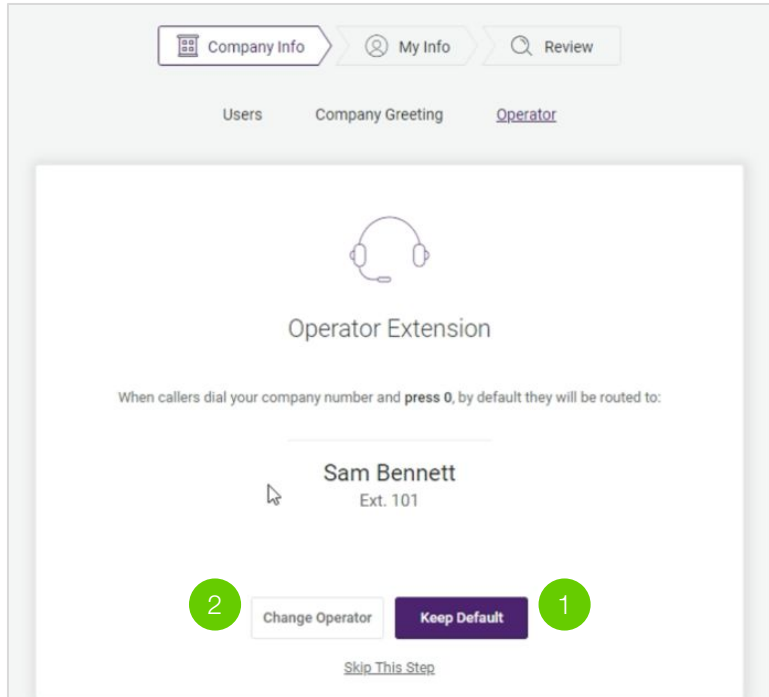
Callers will hear a default company greeting when they dial your company number.

1. Click **Keep Default** to keep the default greeting.
2. To record a customized one, click **Customize**. You can either **Record Over the Phone** or **Import** an audio file.
3. Click **Next**.

You will have an opportunity to customize your greeting later in the Voice Manager platform based on your business hours and again for special days, such as holidays.

Note: The default greeting is an automated voice recording: "Thank you for calling [your business name]. If you know your party's extension, you may dial it at any time. For the Operator, press 0. For the Dial-By-Name directory, press 9."

Express setup (set up your operator extension)



When callers dial your company number and press 0, they will be routed to your assigned operator by default. To change the operator, other users must be assigned a number.

1. Click **Keep Default** to keep the default operator.
2. To change your operator, Click **Change Operator**.
3. Select a user, then click **Save**.
4. Click **Got It**.

If the phone is not answered, the assigned user will receive all company voicemail messages. You have now changed your operator voice mail, proceed to set up your personal information

Note: The default operator is assigned to the first user that is assigned a phone number. This is typically extension 101 that is set up during Express Setup.

Express setup (set up your info)

Company Info My Info Review

My Info Call Forwarding Voicemail Greeting

1 My Info

First Name: Sam

Last Name: Bennett

Email: test@test.local

Use email to log in

Contact Number: +1 (416) 2066341

Extension Number: 101

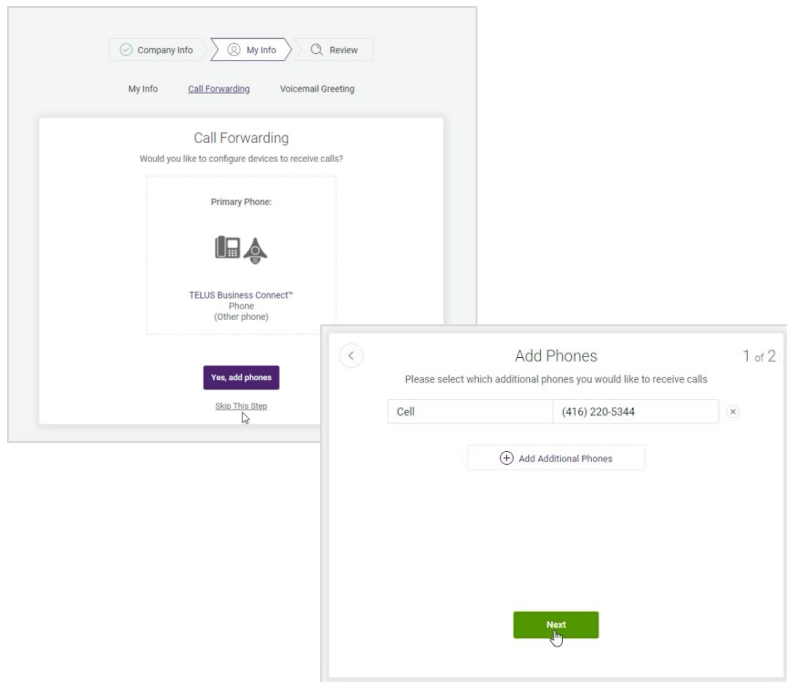
Company Number: (877) 757-1194

Direct Number: (581) 205-8494

2 Regional Settings

1. To edit your personal contact information, click the Pencil icon next to **My Info**.
2. Fill in the necessary details under **Regional Settings**. Click **Continue**.

Express setup (call forwarding to devices)



If you have already set up any physical devices you will use with your Business Connect system (i.e., desk phone, conference phone), you can configure calling and assign phone numbers to them now. To set up new TELUS devices, see [Device Setup](#) first.

1. Click **Yes, add phones** to set up call forwarding now. You can also do this later within the Voice Manager platform.
2. You can click on **Just ring my primary phone** to route all incoming calls to your phone or click **Yes, add phones** to set up another phone to receive calls.
3. On the **Add Phone Numbers** window, click the dropdown arrow to select the phone. You can also click the **Add Additional Phones** button to add other phones. Click the **x** button to delete. Click **Next** when done.
4. On the **Call Handling** window, select either **Simultaneously** or **Sequentially** to set the order on how you would like your services to answer incoming calls. Click **Next** when done.
5. You can click on **Just ring my primary phone** to proceed with setting up voicemail greeting.

Note: Cell phones can be configured by downloading the app.

Express setup (set up your voicemail greeting)

The screenshot shows a web interface for setting up a voicemail greeting. At the top, there are navigation tabs: 'Company Info', 'My Info', and 'Review'. Below these, there are sub-tabs: 'My Info', 'Call Forwarding', and 'Voicemail Greeting'. The main content area is titled 'Voicemail' and has two radio buttons: 'Default' and 'Custom'. A green circle with the number '1' is next to the 'Custom' option. Below the radio buttons, there are two buttons: 'RECORD OVER THE PHONE' and 'IMPORT'. A green circle with the number '2' is next to the 'IMPORT' button. The 'RECORD OVER THE PHONE' button is selected. Below these buttons, there is a text prompt: 'TELUS Business Connect™ will call you to record your custom greeting over the phone.' Below the prompt, there is a 'Call me at:' label, a text input field containing 'Phone Number', and a 'Call' button. Below the input field, there is a play button, a progress bar, and a timer showing '00:00 / 00:00'. At the bottom, there is a 'Save' button and a 'Skip This Step' link. A green circle with the number '3' is next to the 'Save' button.

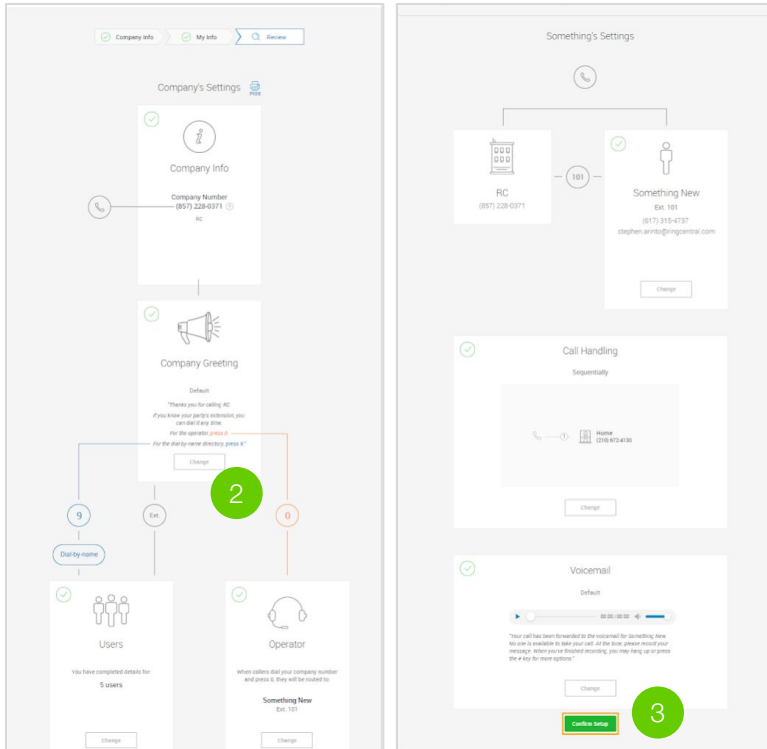
Callers will hear a default voicemail greeting when they dial your company number and are prompted to leave a voicemail.

1. Click **Keep Default** to keep the default voicemail.
2. To record a customized greeting, click **Customize**. You can either **Record Over the Phone** or **Import** an audio file.
3. Click **Next**.

Note: This is the voicemail greeting for the company's main line. Individual users are welcome to customize their own voicemail greetings for their own extensions later.

Note: The default greeting is an automated voice recording: "Your call has been forwarded to the voicemail for [your business name]. No one is available to take your call. At the tone, please record your message. When you've finished recording, you may hang up or press the # key for more options."

Express setup (review)



1. Review the details you entered in the previous steps.
2. If you need to correct an error, click **Change** at any time to modify your information.
3. If you don't have changes or when done reviewing, scroll down and click **Confirm Setup**.

Express Setup is finished. You now have the option to download the app for mobile and desktop.

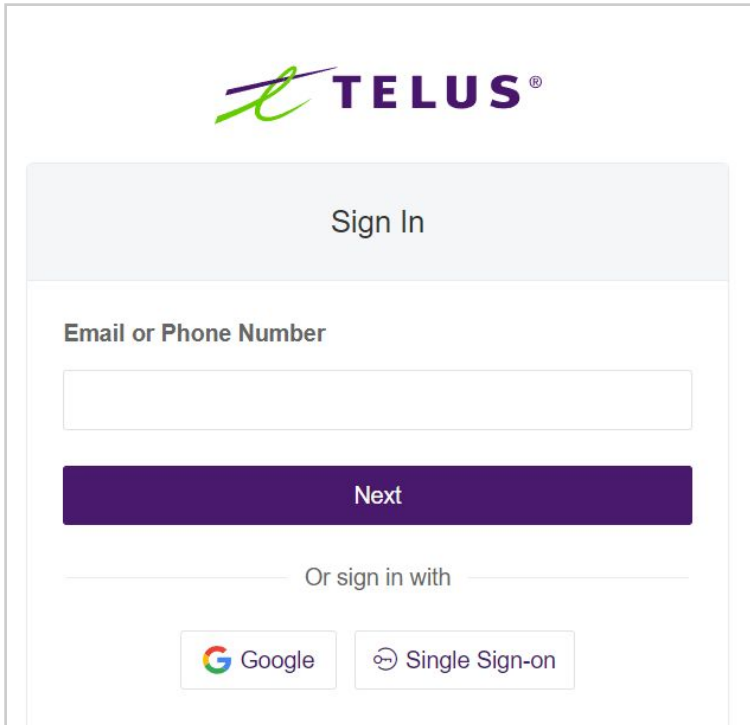
Express setup (downloading the app)

The screenshot shows the 'Express Setup' page for TELUS Business Connect. At the top, it says 'Use TELUS Business Connect™ Anywhere' and 'Collaborate with coworkers and manage your phone system from any device'. The main heading is 'Unified communications app. Your single place for message, video, and phone.' Below this, there are two buttons: 'Download for Mac' and 'Download for PC', with a green circle containing the number '1' next to them. A section titled 'Looking for TELUS Business Connect™ iPhone desktop app?' provides instructions for users with Head Up Display (HUD) and offers 'Download for Mac' and 'Download for PC' buttons. Three feature sections are listed: 'Message Team messaging, file sharing, and tasks', 'Video HD video meetings with advanced screen sharing, and more', and 'Phone Enterprise-grade calling'. At the bottom, there are images of a smartphone and a tablet displaying the app interface, with the text 'Unified business communications in the palm of your hand' and buttons for 'Download on the App Store' and 'GET IT ON Google Play'. A green circle containing the number '3' is positioned over the 'Finish' button at the bottom of the main content area. The page footer includes 'Legal | Service Forms', '© 2023 TELUS Communications Inc.', and 'RingCentral' logo.

Wherever you go, TELUS Business Connect follows. Download our applications for your computer and smartphone to receive business calls on your desktop or mobile phone.

1. Click **Download for Mac** or **Download for PC**. The file will download from your browser.
2. Follow the prompts in the TELUS Business Connect Setup Wizard.
3. To continue setting up your account, press **Finish**.

Accessing the Voice Manager admin portal



The screenshot shows the TELUS logo at the top. Below it is a light blue header with the text "Sign In". Underneath is a form with the label "Email or Phone Number" and a text input field. A dark purple button labeled "Next" is positioned below the input field. At the bottom, there is a section titled "Or sign in with" with two buttons: "Google" (with the Google logo) and "Single Sign-on" (with a circular arrow icon).

If you leave the installation at any point, you may log into your online account by visiting the [TELUS Business Connect login page](#). The default method of account access is by TELUS Business Connect email or phone number.

Using your phone number to log in:

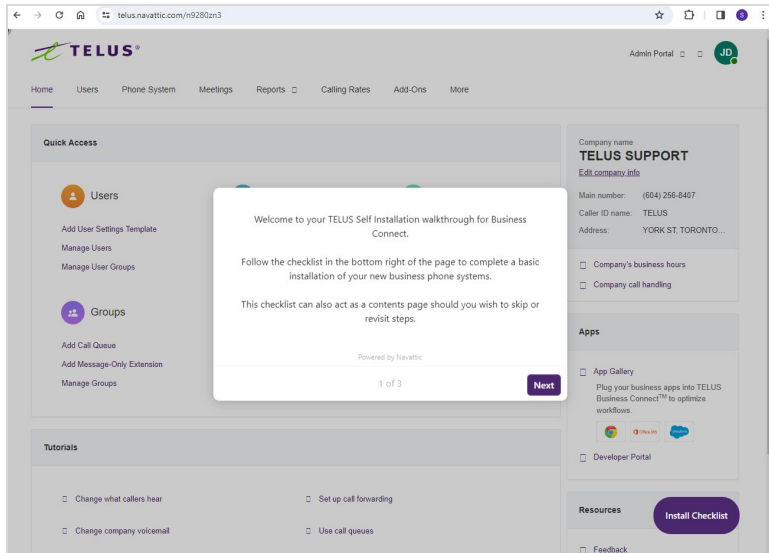
1. Enter your TELUS Business Connect phone number.
2. Click **Next**.
3. Select your country from the dropdown menu.
4. Enter your extension number (optional) and password.
5. Click **Sign In**.

Using your email address to log in:

If you have already enabled the “Use email to log in” feature in your account, you can also log in using a unique email address.

1. Enter your email address.
2. Click **Next**.
3. Enter your password.
4. Click **Sign In**.

Online interactive installation walkthrough



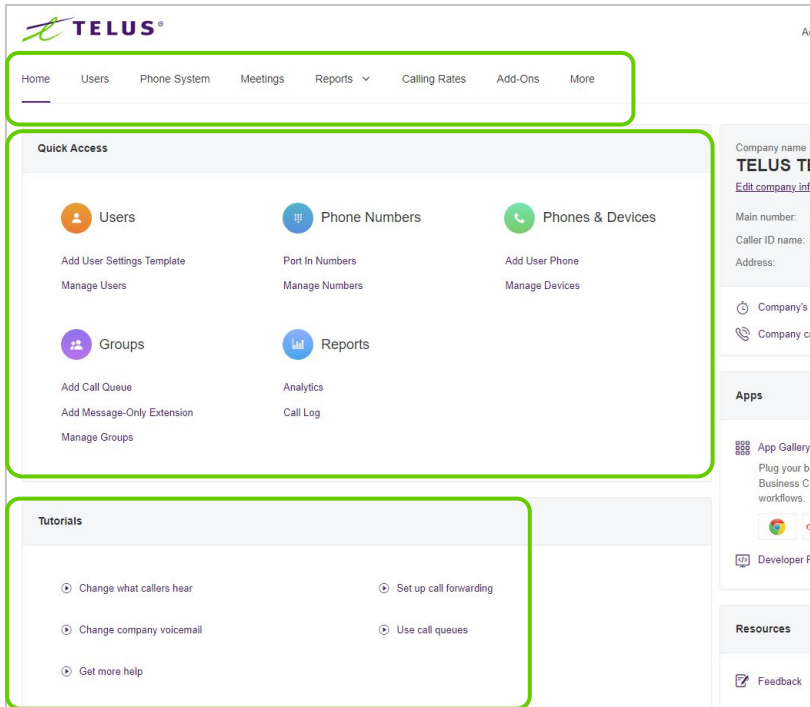
If you prefer to follow an interactive, step-by-step walkthrough of installation instructions, you are welcome to switch to our [online guide here](#).

The interactive walkthrough will show you how to navigate the portal in real time as you setup your account in the Voice Manager platform.

Note: It is recommended that you have the walkthrough in a separate window side by side to the Voice Manager platform or on a second screen for easiest use.

Navigating the Voice Manager admin portal

Navigating the Voice Manager admin portal



Your Voice Manager Admin Portal can be set up using your browser. The navigation bar across the top is where we will configure your new Business Connect account.

The quick links below can also be used to make common changes to your account.

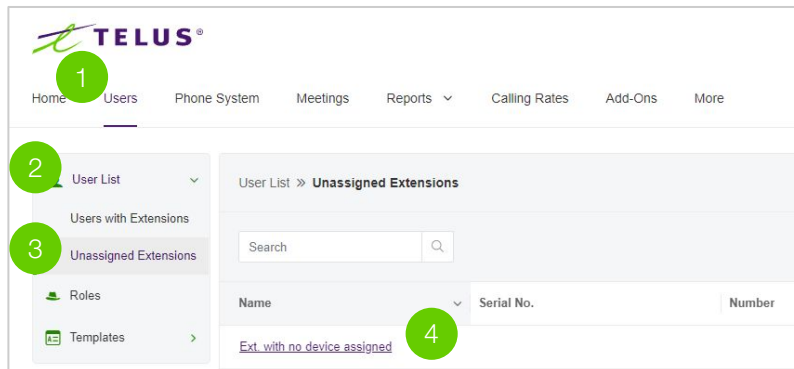
The bottom of your home screen also includes links to short tutorials to assist you with navigating common setup processes.

Helpful terms

Admin portal	the online account that allows users with admin access to install and configure the company Business Connect services
Auto-receptionist	an automated answering system configured to direct callers to specific extensions or call queues based on the options selected/dialed
Call handling	controls what callers hear when they dial your company number(s) during or after business hours
Call queue	a specific group of users (such as Sales, Support, or Billing) that share incoming calls via an extension or direct number of its own
Emergency Response Location	a physical address where 911 responders can be dispatched to in case of a 911 call comes from one of your phones
IVR (interactive voice response)	an automated telephone system that combines pre-recorded messages or text-to-speech technology with the ability for callers to provide information without a live agent to direct calls accordingly by dialing different extensions
Porting	transferring your existing landline or cell phone number from one telephone service provider to another
Seat	a unique user account registered with your Business Connect account that includes a direct line, extension number and voicemail box
Temporary number	a number assigned to a seat in your Business Connect account that will be replaced by a number when transferred over
Toll-free number	provided to all Business Connect customers for their own callers to reach them at no charge. Note: each time the toll-free number is dialed, an incremental charge is added to your next bill
Voice Manager	name of the Business Connect admin portal or user applications

User setup


Setting up a new user (extension)



1. Navigate to the **Users** tab.
2. Expand **User List**.
3. Select **Unassigned Extensions**.
4. Choose an extension to setup.

Continued on next page ➤

What are Unassigned Extensions? When you signed your Business Connect contract, you indicated how many people or devices at your company required their own phone line. Any phone numbers not yet assigned to a user or device in the Express Setup will be listed here.

 No Device Assigned

Phone Number: Extension without number
 Serial Number: Unknown
 Expansion Modules: 0

5

Setup Option

Send invite ⌵

Activate by assigning credentials ⌵

Activate later ⌵

6

New User Info

<p>First Name * <input type="text"/></p> <p>Email Address * <input type="text"/></p> <p><input type="checkbox"/> Users require unique email IDs</p> <p><input type="text" value="Verify Email Uniqueness"/></p> <p>Contact Phone <input type="text"/></p> <p><input type="checkbox"/> Publish in Company Directory ⌵</p> <p>Job Title <input type="text"/></p> <p>Assigned Role ⌵</p> <p>Standard <input type="text"/></p> <p><input type="button" value="Edit Role"/></p> <p>Settings</p> <p>Select User Language <input style="width: 100%;" type="text" value="English"/></p> <p>Select Regional Format <input type="text" value="Canada (English)"/></p> <p><input checked="" type="checkbox"/> Include User in Company Directory ⌵</p>	<p>Last Name * <input type="text"/></p> <p>Extension Number <input type="text" value="102"/></p> <p>Mobile Phone <input type="text"/></p> <p>Department <input type="text"/></p> <p>Assigned Country ⌵</p> <p>Canada <input type="text"/></p>
--	--

7

5. Choose one of three setup options:
 - a. **Send invite** to a user - allows the user to create Password, PIN & Recovery Question
 - b. **Activate by assigning credentials** to a user - allows the admin to create the Password, PIN & `Recovery Question on behalf of the user
 - c. **Activate** user at a **later** time - allows the admin to invite or create at a later time
6. Fill in the information for the new user. Required fields are indicated with an asterisk (*).
7. Click **Save**.

Repeat the steps above for any remaining extension you wish to set up.

If you require any additional seats or phone numbers, please contact your sales representative.

Phone system setup

Outbound caller ID name

1. Admin Portal

2. Company Info

3. Caller ID Name

4. Text input field

5. Save and Publish

1. Click the **Phone System** tab from the Admin Portal.
2. Expand **Company Info**.
3. Click **Caller ID Name**.
4. Enter your company name exactly the way you want it to appear on Caller ID displays, for local calls made from your main company phone number. You can enter up to 15 characters.
5. Click **Save and Publish**.

Note: Outbound Caller ID cannot be set for an individual number or digital line. It is only available for local numbers and not toll-free numbers.

If your edition of Business Connect includes “multi-site,” you have the ability to configure Outbound Caller ID by location.

What is this? Set your Company Caller ID to your company’s name so that your customers will know who is calling them. This name, along with the phone number, is displayed to the called party whenever an outbound call is made using the local number as the caller ID.

Company business hours

1. Click the **Phone System** tab from the Admin Portal.
2. Expand **Auto-Receptionist**.
3. Click **General Settings**.
4. Select **Schedule**.
5. Set your Company Hours to:
 - a. **24 hours** to have incoming calls handled the same way all the time.
 - b. **Specific Schedule** lets you specify hours for each day of the week. You can also set separate call-handling rules and greetings for Business Hours and After Hours. To copy hours from one day to all weekdays, or to the entire week, select **Copy to Weekdays** or **Copy to All Days**.
6. Collapse the **Schedule** section.

Continued on next page ➤

What is this? Customize your company's business hours. You can specify the opening and closing time for each day of the week or select 24 hours. This establishes the settings for the Business Hours and After Hours tabs in other settings areas (such as call queue settings and user settings).

TELUS® Admin Portal

Home Users Phone System Meetings Reports Calling Rates Add-Ons More

Company Info > Auto-Receptionist > **General Settings**

Phone Numbers > Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management.

Auto-Receptionist >

General Settings

Dial-by-Name Directory

IVR Menus

IVR Editor

Prompts Library

Groups >

Phones & Devices >

Emergency Calling >

Schedule
Custom

Call Handling
Business hour calls are routed to: Company greeting

Call Recording
On-demand: On

Block robocalls on toll-free numbers
Off

Regional Settings

This is where administrators can set the account's time zone and time format.

Time zone
(GMT-05:00) Toronto

Time Format
 12 h (AM/PM) 24 h

Home Country Code
Canada (1)

User Language
English

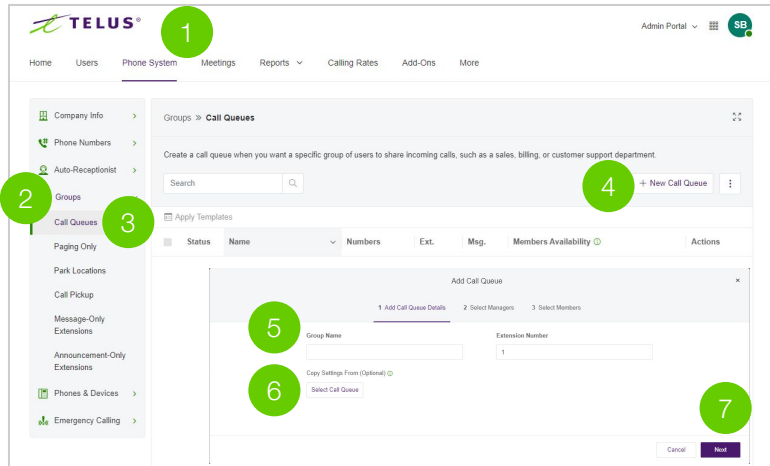
Greetings Language
English

Regional Format
Canada (English)

Cancel Save

7. Expand the **Regional Settings** section.
8. Select the time zone drop-down menu and choose your time zone from the list.
9. Click **Save**.

Call queues



Adding a call queue group:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Expand **Groups**.
3. Click **Call Queues**.
4. Click the **New Call Queue** button. The **Add Call Queue** window will appear.
5. Enter a **Group Name** and **Extension Number**.
6. Optional: If you'd like to copy the settings from an existing call queue, click **Select Call Queue**.
 - a. Select the button next to the call queue name.
 - b. Click **Done**.
7. Click **Next**.

Continued on next page ➤

What is this? Create a call queue when you want a specific group of users (such as Sales, Support, or Billing) to share incoming calls. Each call queue can have an extension or direct (local or toll-free) number of its own. You can define specific business hours for each call queue and set up email or text message notifications of any missed calls or voicemails.

[Add Call Queue Details](#) | **2 Select Managers** | [3 Select Members](#)

Select Managers From User List | Use Manager's Email

Voicemail PIN

Reenter Voicemail PIN

Select Managers
 Select desired managers and assign each a permission. At least one manager must be assigned "Full Access". [Learn more](#)

Search

Show All | Show Selected (0)

<input type="checkbox"/>	Name	Ext.	Permission
<input type="checkbox"/>		101	

Total: 1

Back Next

Add Call Queue

[Add Call Queue Details](#) | **2 Select Managers** | [3 Select Members](#)

Search Department: All

Show All | Show Selected (0)

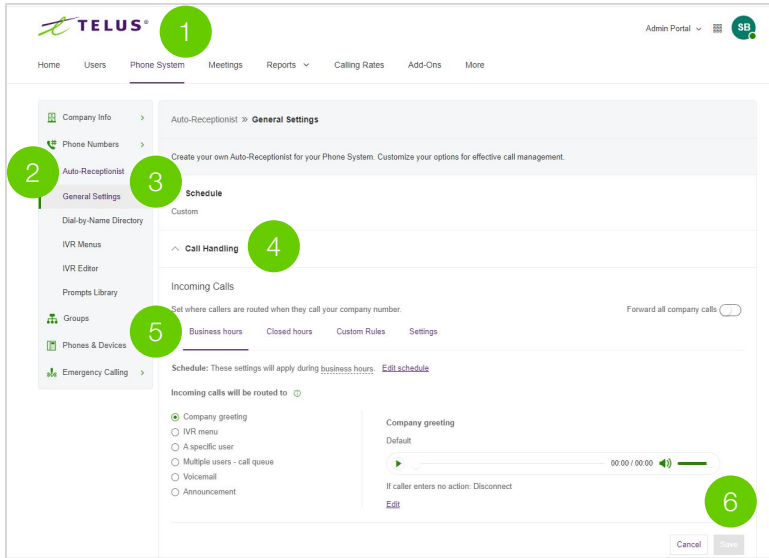
<input type="checkbox"/>	Name	Ext.	Department
<input type="checkbox"/>		101	

Total: 1

Back Done

8. Configure the following options:
 - a. If you'd like to have several managers for the call queue, select the button for **Select Managers From User List**.
 - Enter a PIN, then re-enter it on the fields provided.
 - Select managers and specify their permissions.
 - Click **Next**.
 - b. If you'd like to have one manager for the call queue, select **Use Manager's Email**.
 - Enter the email on the **Manager's Email** field.
 - Click **Next**.
9. Select the users you'd like to add to the group from the **Call Queue Members** list.
10. Click **Done**.

Company call handling



1. From the Admin Portal, navigate to **Phone System**.
2. Expand **Auto-Receptionist**.
3. Select **General Settings**.
4. Click **Call Handling**. Company Call Handling appears
5. Under **Business hours** and **Closed hours**, select:
 - a. **Company Greeting**: Sends the call to company greeting. Callers may hear options where they want to be connected to.
 - b. Record a customer company greeting
6. Click **Save** to keep these settings.

What is this? Company Call Handling controls what callers hear when they dial your company number(s) during or after business hours. You can configure separate settings for business hours and after hours.

Phone numbers (assigning number to auto-receptionist)

1. Select the **Phone System** tab.

2. Expand the **Phone Numbers** drop-down list.

3. Select **All Numbers**.

4. Click on the number you wish to designate as your main line or press the three dots under actions.

1. Select the **Phone System** tab.
2. Expand the **Phone Numbers** drop-down list.
3. Select **All Numbers**.
4. Click on the number you wish to designate as your main line or press the three dots under actions.

(It is recommended to choose the # assigned to ext 101.)

5. Select **Auto-receptionist**.

6. Select **Assign**.

5. Select **Auto-receptionist**.
6. Select **Assign**.

When a phone number is assigned to the Auto-Receptionist, all users can use it as their caller ID. Phone numbers assigned to individual users are locked to that specific user.

What is this? In order to begin receiving calls, we need to select a number and move it to the auto-receptionist; here it will serve as your main line for the company. If you have existing numbers, don't worry we will submit a request to move those in a later step. If you do not have a main company number currently this will become your main line.

Number transfer

Number Transfer

If you have a new TELUS Business Connect deployment and will use the numbers assigned to you by TELUS for Business Connect, you can skip this step.

This step is only necessary if you plan to use your existing phone numbers from your existing phone system.

Tips for simple transfers:

Single-line or wireless transfers for <5 numbers

1. Set up your TELUS Business Connect solution at least **24 hours prior to** transferring numbers. Transfer requests completed any earlier will need to be resubmitted.
2. Don't cancel your old phone service.
3. Be exact in your transfer request.
4. Don't forget to upload your most recent phone bill (less than 30 days old) in Voice Manager.
5. Monitor your email inbox for updates regarding your transfer request.

Tips for complex transfers:

Multi-line (>5 numbers) or wired transfers (Centrex, PRI or IP Trunking)

1. More care required from client.
2. Call the previous provider, request "equipment record", confirm/list all numbers (DIDs).
3. Provide notes in Voice Manager for every number (DID), even those not being ported: Port, Retain, Cancel, Promote to Pilot.
4. Keep an eye out for emails from the porting team.
5. Monitor your email inbox for updates regarding your transfer request.

Let's get started

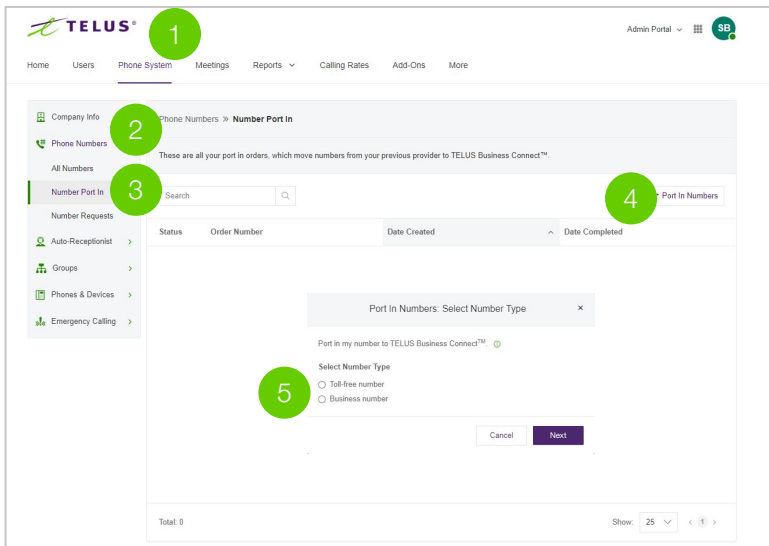
Make sure you have the following pieces of information readily available in order to complete the transfer request:

- ❑ **A local or mobile phone number** – You need to let us know if it's a local or mobile number, and all the phone numbers you want to transfer. You will also need to provide the account and BTN numbers. Your phone bill should provide this information.
- ❑ **Your service address** – This is the physical service address where your phone rings. This may or may not be the same as your billing address. You may need to contact your current service provider for the exact service address they have on file.
- ❑ **A recent phone bill** – You will need to upload your most recent phone bill in the Voice Manager portal. Please make sure the phone bill is dated within the last 30 days and it is the entire copy of the bill.
- ❑ **Your main billing telephone number (BTN)** – This is the primary phone number used for billing and should appear on your phone bill.
- ❑ (Optional) **A toll-free number** – If you are porting in an existing toll-free number for your business, you will need to upload a Letter of Authorization (LOA). Please note that the customers should hand sign the toll-free LOA.
- ❑ (Optional) **Complex services** – If the phone number(s) you wish to transfer are attached to a Complex Service (PRI, Centrex, DID, overlines), you need to specify what you want to do with all of the numbers on the circuit (transfer, retain or cancel). As it is important to identify all the numbers, you may need to contact your current service provider to gain Equipment Records which outlines all active numbers on the circuit.

Transfer process overview

- You must submit a transfer request through the online TELUS Business Connect Voice Manager. Please make sure that all information matches exactly what's on record with your current service provider.
- TELUS will send and manage your transfer request to your current service provider. The process usually takes 10-15 business days, but can be completed sooner if accurate information is provided in the transfer request. Meanwhile, you can make and receive calls through your IP desk phones, desktop or mobile apps using a temporary TELUS Business Connect phone number.
- Immediately use the solution by forwarding your existing phone number to your temporary TELUS Business Connect number.
 - Note: You should have this set up with your current service provider prior to submitting the transfer request. Long distance charges may apply with your existing provider.
- On the day of your expected transfer completion (pre-selected on a regular business day), you will experience a short outage (i.e. 15-30 mins) with your numbers until TELUS notifies you by email that the transfer is complete. This process will take place during business hours. At that point, your transferred number(s) are ready to use with the TELUS Business Connect solution.
- Stay aware that your current provider may cancel any features or services (ex. DSL, call forwarding, etc.) currently attached to the number you want to transfer once it's completed. If you wish to retain these services, you may need to reach out to your current provider prior to submitting your transfer request. If you continue to be billed for services after your transfer request, please reach out to your service provider to cancel, as applicable.
- Should you require any assistance during the number transfer process, please contact our porting support team at **1-844-626-6638** or businessconnectporting@telus.com.

Transferring your local business number via Voice Manager (porting)



Submit a transfer request through TELUS Business Connect Voice Manager. Please ensure that all information matches exactly what's on record with your current phone provider.

Note: Only administrators can perform this action via the online admin portal.

1. Select the **Phone System** tab from the Admin Portal.
2. Expand the **Phone Numbers** drop-down list.
3. Select **Number Port-In**.
4. Press the **Port In Numbers** button at right.
5. Select **Business Number** and click **Next**.

Continued on next page ➤

6 Port In Numbers: Pre-Check

Are the business numbers being ported in currently active?
 Yes No

Do you have the latest bill ready to be uploaded for the number you are porting in?
 Yes No

Do you currently have DSL/Broadband on any of the numbers you are porting in?
 Yes No

Are you porting in more than one business number?
 Yes No

With your current service provider, have you ordered new services associated with this number?
 Yes No

Are you porting in all of your numbers from your current Service Provider?
 Yes No

Have you received your TELUS Business Connect™ phones?
 Yes No

Back Next

6. Within the **Pre-Check** screen, please answer the seven (7) preliminary questions by selecting the applicable **Yes** or **No** radio button.

Note: If you select No on questions 1 and 7*, you cannot proceed with your order. You can only proceed when you can answer Yes to both of these questions.

*For orders without physical hardware, please select **Yes** when prompted in “Have you received your TELUS Business Connect™ phones?”

Continued on next page ➤

Port In Numbers: Enter Numbers x

Billing/Account Telephone Number ⓘ

(403) 999-6325 7 Verify 8 ✓

Do you want to port in your Billing/Account Telephone Number 9

Yes No

How would you like to enter your numbers to port in

Enter Numbers Manually

Upload from Template

Enter additional business numbers to port in ⓘ 10

Separate numbers by commas or semicolons.

Porting in existing numbers is defined and regulated by the Canadian Radio-television and Telecommunications Commission (CRTC).

Actual time of port in depends on the release of the telephone number from your current telephone service provider. This is the first step required to check if the telephone number is portable to TELUS Business Connect™.

Back Next

7. Within the **Enter Numbers** screen, input your Billing Telephone Number from your current carrier.
8. Click **Verify** to determine if the number is eligible to transfer
9. If you want to transfer your Billing Telephone Number, select **Yes**.
10. If applicable, you can enter additional phone numbers in the box, each separated by commas or semicolons. You may enter up to 100 numbers. Select **Next** to continue.

Continued on next page ➤

Port In Numbers: Port In Date

Preferred Port In Date: 04/05/2024

- Earliest available date: 04/05/2024
- Port in dates on weekends and holidays will be rejected.
- Please contact businessconnections@telus.com if you require a sooner due date.
- Your port in date will be confirmed once your request is processed. Port in dates can be impacted by request complexities.

Back Next

Port In Numbers: Mapping the Temporary Number

Replace temporary number with port in number
Pair temporary TELUS Business Connect™ numbers with the business numbers you are porting in.

Your business number	Temporary TELUS Business Connect™ number	User Ext	User Name	Actions
(403) 999-6325				Change Unselect

Total: 1 Show: 25

Choose Temporary Number

Number porting in: (403) 999-6325

Search: []

Select	Number	Assigned to	Ext.
<input type="radio"/>	(236) 427-5859	Auto-Receptionist	
<input type="radio"/>	(236) 479-8812	Auto-Receptionist	

Total: 2 Show: 10

Cancel Select

Port In Numbers: Mapping the Temporary Number

Replace temporary number with port in number
Pair temporary TELUS Business Connect™ numbers with the business numbers you are porting in.

Your business number	Temporary TELUS Business Connect™ number	User Ext	User Name	Actions
(403) 999-6325	(236) 427-5860		Auto-Receptionist	Change Unselect

Total: 1 Show: 25

Back Next

11. In the **Date & Mapping** screen, select a transfer date that falls on a regular business days.
 - The system will reject requested transfer dates on a weekend or holiday.
 - You may wish to select a later transfer date if your order is very complex to allow time to process your request.
12. To pair temporary and transferred numbers, select the temporary number(s) you wish to replace from the list.
13. Map it with the corresponding transferred number.
14. Once all numbers are mapped, press **Next**.

Continued on next page ➤

Port In Numbers: Account Confirmation ×

For security purposes, your current telephone provider requires you to:

1. Enter all information **exactly** as your current phone company has it on file. It may require you to contact your current provider.
2. Provide the physical location where the phone number is used. If the billing address is different than the physical location, **don't enter the associated billing address**.
3. Understand any internet features associated with your phone number being ported in, such as Internet Fax or VoIP services, will be cancelled with the port in.
4. Business SMS is not automatically activated when your number(s) port. Please click [here](#) to learn how to enable SMS for your ported number(s).

✓ **Type of Account** 15 ∨

Name on Account 16 ∧

First Name * M.I.

Enter the name of the person authorized to make changes to the account

Last Name *

Company Name * Ⓞ

Enter the company name exactly as it appears on your phone bill

In the **Account Confirmation** screen, provide all details exactly how they are on your bill with your current provider.

15. Select the **Type of Account** with your current service provider.
16. Select the drop-down arrow next to **Name on Account**. Enter the name of the company and the authorized person listed on the bill. Note: the authorized person for Business Connect must be the same on record with your current service provider.

Continued on next page ➤

The image shows a web form for entering service address information. The form is divided into several sections:

- Type of Account:** A green checkmark and a drop-down arrow.
- Name on Account:** A drop-down arrow.
- Service Address:** A section with a green circle containing the number 17 and an upward arrow. It includes:
 - Street Number *:** A text input field with the placeholder "e.g. 52".
 - Pre-Directional:** A drop-down menu with "Select" as the current value.
 - Street Name *:** A text input field with the placeholder "e.g. Bell".
- Others:** A section with a green circle containing the number 18 and an upward arrow. It includes:
 - Current Service Provider *:** A text input field.
 - Account Number:** A text input field with the placeholder "1 - 20 Characters".
 - I'm porting in a mobile number
 - Account PIN:** A text input field with the placeholder "e.g. 1212".

At the bottom of the form are two buttons: "Back" and "Next".

17. Select the drop-down arrow next to **Service Address**. Input the service address of your current phone service. Note: the service address must be the physical address where your number is located.

Note: Locations indicate different service addresses if your business has more than one on-site location.

18. Select the drop-down arrow next to **Others**. Input your current service provider and any additional information you can provide (Account PIN, Account Number).

Once all required information is completed (marked by an asterisk*), you will be able to select **Next**,

Continued on next page ➤

Port In Numbers: Account Confirmation

Please check the information provided. It must be identical to the details on the last bill from your current telephone provider.

The name of your business as seen on the last bill from your current telephone provider:
<telus>

Authorized name on the account:
<John Doe>

Service address as seen on the last bill from your current telephone company:
<25 york sts Toronto Ontario m5c3b3 >

The billing phone number associated to your account with your current telephone company:
<(403) 999-6325>

IMPORTANT: You must notify your current telephone provider if there are any phone numbers you do not want to ported to TELUS Business Connect™. Those numbers will need to be switched to another Billing/Account Telephone Number (BTN). Otherwise the port in request will be rejected.

Current Service Provider:
<telus>

Account Number:
<--->

Account PIN:
<--->

The number port in was requested for the following numbers:
(403) 999-6325 replacing (236) 427-5860

Please click the Back button to correct information that does not match details on the last bill from your current telephone provider.

Back Next

19

19. Review the **Confirmation** screen carefully. When you are satisfied, select **Next**. If you need to make changes, select **Back**.

Note: Please ensure all information is accurate; otherwise, your request may be delayed or rejected.

Continued on next page ➤

Port In Numbers: Upload Latest Bill ×

Please upload a copy of the latest bill of the business number being ported in.

Latest Bill

20

If you are not ready to upload the document now, you can do it later here:

1. Login to your TELUS Business Connect™ account online
2. Select Admin Portal > Phone System > Phone Numbers > Number Port In > The number that is pending document submission
3. Use the screen to upload the required documentation

- 20.** Upload a copy of the entire latest bill of the business number you want to transfer by clicking the **Browse** button. The supported file format is PDF. When the upload is complete, select **Next**.

Note: If you are not ready to upload the document, you can do it at a later time. In this case, please select the “No, later” button and then select Next.

You may edit your transfer request and upload the bill at a later time by reviewing the request in the Order Details screen in your Voice Manager account. TELUS will email you and send a notification via the Voice Manager portal should any additional information be required during the number transfer period.

Continued on next page ➤

21 Port In Numbers: Additional Comments x

Contact Phone Number *

This number will be used to inform you of any problems with your port in order.

Send Emails to

Enter email address for others you want to send notification to

Use "," or ";" to separate multiple email addresses.
Enter any contact emails that should receive port notifications regarding this order in addition to the authorized user on the account.

Send emails to notification email address:

Additional Comments

Enter your comments

If you are not porting in all of your phone numbers in the same Billing Account Number, please list the remaining phone numbers here and the action to be taken for each phone number (Remain, disconnect, etc.). Please provide any additional information and instructions to support a successful porting experience.

Back Next

21. In the Additional Comments screen, provide a **Contact Phone Number** for the authorized user overseeing the porting process.

In the **Send Emails To** section, you can provide an alternate email address which will receive all emails pertaining to the transfer request. If you want the system administrator to also receive the emails, select the checkbox.

In the **Additional Comments** section, include the list of phone numbers you are not transferring and the action to be taken with each phone number (cancel or retain).

Then, click **Next**.

Continued on next page ➤

Port In Numbers: LOA
22

Letter of Authorization Print

The letter shown below will be utilized by TELUS and its authorized agents to transfer your telephone number from your current service provider. Please provide your (electronic) signature below where indicated.

The Standard Letter of Agency Document
 A Letter of Agency (LOA) must be completed by the end user and supplied to TELUS upon request. The LOA must contain the name and current service address of the end user and the numbers that will be ported to TELUS from the end user's current carrier. The LOA used must comply with CRTC regulations and must be dated and signed by the end user or a person who has the authority to act as a legal agent.

Dear Customer,

Thank you for choosing TELUS. TELUS will be your new network carrier. As you are aware, you may continue to use your existing telephone number. In order to transition your current telephone number to our network, we must work with your previous service provider to ensure that your service is uninterrupted, and where applicable, to ensure that your number is transferred.

Your prior service provider requires this letter as proof that you have explicitly authorized and requested that your service and current telephone number be transferred to another service provider. By filling in all the information requested below and signing and dating this letter, you provide us with the authorization to initiate the process of transferring your service and telephone number to TELUS. You will then be able to use your old number with the TELUS network.

Please ensure the following information is completed accurately to prevent possible delays.

End User Name (Business or Residential) telus
 Person authorized to make this request if a Business John Doe
 Service Street Address 25 york sts Toronto Ontario m5c3b3
 Suite or Apartment No. _____
 Municipality (City, Town, etc.) Toronto Province Ontario Postal Code m5c3b3
 Current Service Provider telus
 Account Number: _____
 Account PIN: _____
Please Print as follows:

By signing below, I designate TELUS to transfer my service from my current provider to TELUS. By signing below, I also authorize TELUS to transfer my current telephone number used to provide service so that TELUS may provide its network service to me. By signing below, I also authorize TELUS to obtain billing information, customer service records, and other information required to provide me with service on the network.

Beginning R (403) 999-63

PLEASE RE ORDER S C

Printed End User Name: John Doe Date: March 27, 2024 9:53 AM
 Signature: *John Doe* Print

Electronic Disclosure and Consent

RingCentral Canada Inc. ("RingCentral"), acting on behalf of TELUS Communications Inc. ("TELUS"), permits you to fill out and sign certain forms using this web site. This Electronic Disclosure and Consent describes RingCentral's process so that you can decide whether you wish to continue with your request through the web site. Please read this page carefully and print a copy of this page for your records.

Electronic Signature and Electronic Delivery of Disclosures and Notices

By clicking in the box marked "I agree" at the bottom of this page, you consent to use electronic communications, electronic records, and electronic signatures rather than paper documents for the services mentioned on this web site. Third Parties Involved:

I Agree: I consent to use electronic records and signatures in connection with my request to port in my telephone number to TELUS Business Connect™. 23

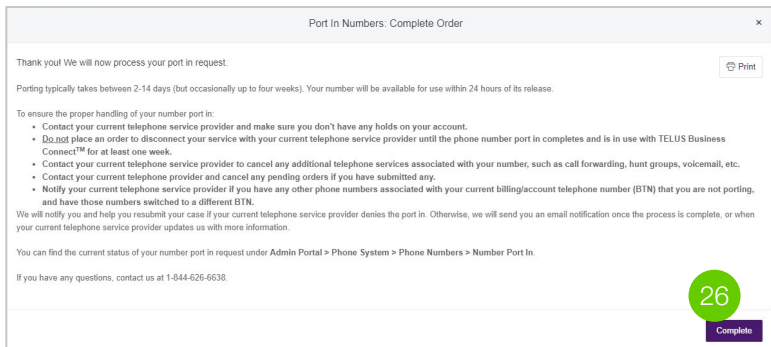
No thanks. I do not consent to use electronic records and signatures in connection with my telephone number port in request. I understand that TELUS Business Connect™ will not be processing my request until the Letter of Authorization is received. 25

Back Next

24

22. Carefully review the **Letter of Authorization, Electronic Disclosure** and **Consent** sections.
23. Check the **"I Agree"** box to provide electronic authorization to proceed with your number transfer.
24. If you do not consent to the electronic LOA, please select **"No Thanks"**. The system will prompt you to download the LOA for signature and will require you to upload the signed document via Voice Manager. If the LOA is not signed and attached within 30 minutes, you will need to enter the order again.
25. Then, click **Next**.

Continued on next page ➤



26. Select “Complete.”

You have now successfully entered your transfer order.

What's next?

TELUS will keep you updated on the progress of your number transfer request. You may receive a notification on your current phone number(s) that a porting request has been made and the process is underway.

Additional information required to complete your request, if needed, will be requested via email or via the Voice Manager portal. Remember that your selected number transfer date may include a brief outage as the transfer is completed.

See [Transfer Process Overview](#) for more information.

Billing

My TELUS account and app

Personal Business Health Agriculture & Consumer Goods Social Impact Log in Support EN

TELUS Mobility Security Home Services Health Deals & Bundles TELUS Privilege My TELUS

1. Service information 2. Verification code 3. Complete your profile

< Back to Login

Sign up for My TELUS

It only takes a few minutes, and we'll guide you step-by-step.

First, enter your service information

To sign up, you'll need to enter the Mobility phone number or account number for the TELUS service you purchased. Select an option for more information.

TELUS Mobility phone number

TELUS account number

Account number ex. 123456789

[How to find and enter your account number](#)

Postal code ex. M4W 1A8

Email

Next

My TELUS is a web-based portal and app to manage your bill and services, view your usage, edit your profile, see your exclusive offers, and more. Billing automatically goes through your My TELUS account by default. If you require bills to be sent to a different email address or via mail, you may configure these settings in your account.

1. Start your registration [here](#).
2. Enter your account information.
3. Complete the verification process.
4. Create your profile and credentials.
5. You should receive a confirmation email upon successful setup.

What's next?

User setup and training

Congratulations! You have completed the initial setup of your TELUS Business Connect account. Next, it's time to get your team set up and using their own Business Connect accounts.

Additionally, as your organization's primary Business Connect administrator, you can assign other users as co-administrators within your Voice Manager online admin portal. For more limited, supervisory access of the account, you may grant specific users administration permission via the Business Connect app.

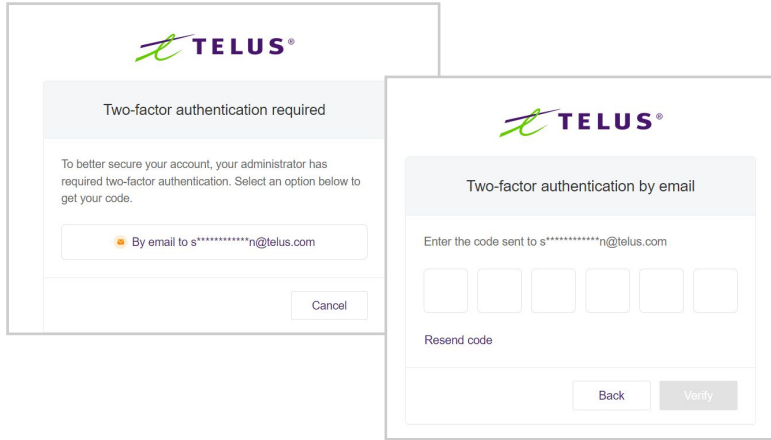
Customizing Business Connect

After completing the initial installation setup and using your Business Connect services for a short time, you may realize that you'd like to further customize your account further.

To review additional functionalities available, visit telus.com/en/business/support/topic/business-connect/features-and-services. Different Business Connect editions offer varying features; please refer to your account details to learn more about what is available to you and your organization.

Appendix

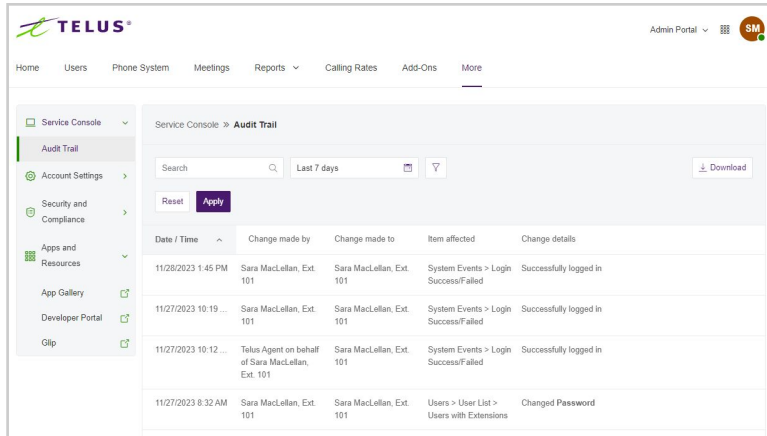
Logging in during express setup



If you are logged out during your Express Setup, you may need to enter a two-factor authentication.

1. Request a code via email and enter it upon receipt.
2. You will be redirected to the Voice Manager platform. You may receive a “We Noticed You Skipped a Step” pop-up. You may select any of the three options:
 - **No Thanks:** You will have the option to adjust any Express Setup steps within the Voice Manager platform itself.
 - **Remind Me Later:** A prompt to complete your setup will be offered at your next login.
 - **Complete Setup:** Selecting this option will take you back to the Express Setup step where you left off.

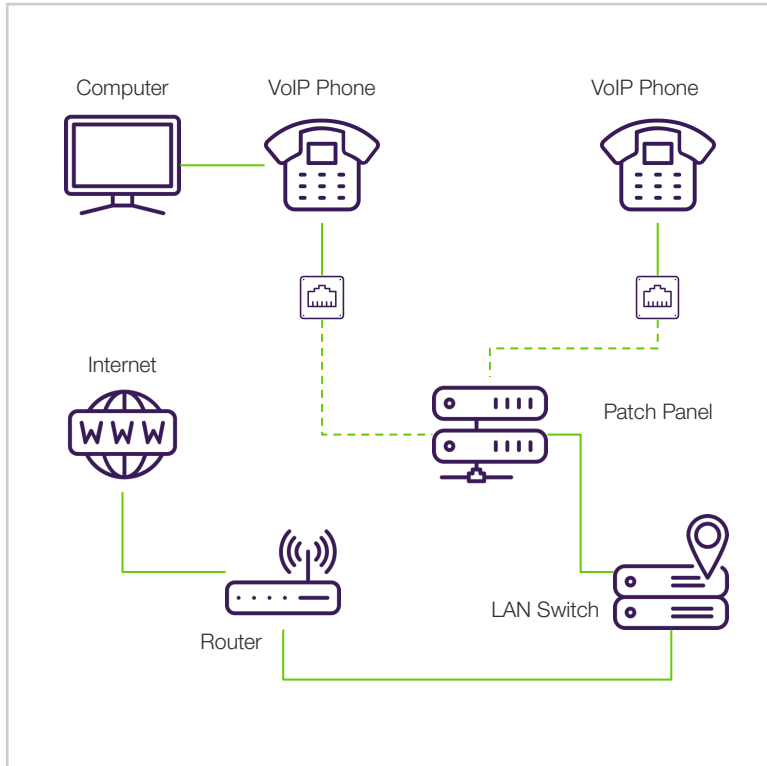
Downloading the app



Wherever you go, TELUS Business Connect follows. Download our applications for your computer and smartphone to receive business calls on your mobile phone.

1. Select the **More** tab.
2. Select **Apps and Resources and App Gallery**.
3. In the new window, select **Business Connect Apps**.
4. Click **Download for Mac** or **Download for PC**.
The file will download from your browser.
5. Follow the prompts in the TELUS Business Connect Setup Wizard.

Device setup



- 1. Unpack and assemble the phone:** Start by unpacking your TELUS Business Connect phone and assemble the components according to the manufacturer's instructions. This typically involves attaching the base, handset, and any additional accessories.
- 2. Connect the phone to the network:** Take an Ethernet cable and connect one end to the LAN port on your TELUS Business Connect phone. Connect the other end to an available Ethernet port on your router or network switch. Ensure that the connection is secure.
- 3. Power on the phone:** Plug the power adapter into the phone and connect it to a power outlet. Turn on the phone and wait for it to boot up. It may take a few moments for the phone to initialize.
- 4. Provision the phone:** If purchased from TELUS, the phone will automatically download and install the required software and configurations from the TELUS Business Connect servers. This process may take a few minutes. Ensure that the phone remains connected to the network during this time. If not purchased from TELUS, further instructions are provided by the online Voice Manager portal.
- 5. Verify the registration:** Once the phone has successfully provisioned, it will display a registration status indicating that it is connected to the TELUS Business Connect service. You should see your extension number or user name on the phone's display.
- 6. Test the phone:** Make a test call to ensure that the phone is functioning correctly. Dial a colleague's extension or an external phone number to verify that you can make and receive calls.

Network readiness

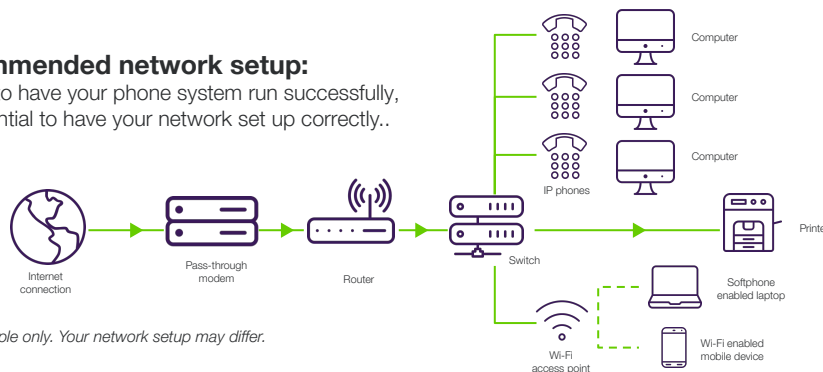
You discussed network requirements with your TELUS representative before choosing the TELUS Business Connect solution. Now, make sure everything is set up and ready for great calls by reading through this information and completing the network readiness checklist.

Introduction to networking for VoIP

The TELUS Business Connect solution provides reliable, high-quality voice service. Your local network plays a big part in your call quality. Since the TELUS Business Connect solution is a cloud phone system, there is relatively little that you need in your offices.

Recommended network setup:

In order to have your phone system run successfully, it is essential to have your network set up correctly..



Note: Example only. Your network setup may differ.

Network readiness checklist

- ❑ Test your Internet connection bandwidth: Make sure your Internet connection has enough capacity to deliver a high-quality call. Use the tools on the next page to test your Internet speed.
- ❑ Site cabling: You may need to update your cabling or install additional access jacks.
- ❑ Ensure you have the right kind of modem: Verify that your modem is in IP passthrough or bridge mode.
- ❑ Buy a router: Ensure your router and firewall have the right features and settings.
- ❑ Plug in your phones: For best performance, plug phones directly into your network with cat5 (or greater) ethernet cables.

Internet connectivity: test your internet connection bandwidth

Use the following tests to make sure your Internet has enough capacity to deliver high call quality:

- [Bandwidth tool](#)
- [Internet speed test tool](#)

How much bandwidth do you need? It depends on how many calls and devices you want to connect. Connection speeds are identified as XX/YY, where XX represents your download speed and YY, your upload speed.

How much upload capacity do I need?	5 Mbps	10 Mbps	25 Mbps
Number of concurrent calls	1 to 25	1 to 50	1 to 125
Number of connected devices	Up to 50	Up to 100	Up to 250

The right kind of modem

Check with your service provider to make sure your modem is compatible. **Gateway modems** (aka routers, modem router combination units) are not recommended. Please ensure you have an **IP passthrough modem** (aka bridge modem). Some modems have different modes that let them behave as both types above; those are acceptable in bridge mode.

Recommended router

It is strongly recommended that your router supports the features detailed below and is compatible. Most routers will already be configured and ready to work out of the box. However, if you need assistance with setup, please see the Network Reference Guide as well as the user guide of the router.

Features to have:

- **Stateful Firewall:** Most routers have a firewall built in to protect your network. The “stateful” types are capable of allowing VoIP traffic without special configuration. For routers with stateless firewalls, please ensure the router supports “port triggering” for single ports and port ranges. Also, please follow the instructions under the “Port and Firewall setup” section of the appendix.
- **QoS Traffic Prioritization:** Allows you to better manage traffic on your network.

Features to avoid or disable:

- **SIP ALG:** This is a feature that involves inspecting and modifying VoIP traffic; it reduces call quality by delaying traffic.
- **Green Ethernet (a.k.a. Energy efficient Ethernet):** This is a feature that shuts down ethernet ports when no traffic is detected. Not recommended for VoIP.

Using switches

- **VoIP Prioritization:** Any switches that carry VoIP traffic should be set to prioritize voice.
 - Refer to your switch documentation for configuration instructions.
 - Depending on the size of your network, you may not require a network switch.
- **Power over Ethernet (POE):** If you plan to run power to the phones over the network cable, make sure that your switch has sufficient power capacity for the number of phones you plan to run on that switch. To do this, check the output power rating on your switch (usually written right on the switch) and add up the power consumption on each of the phones you want to run from the switch. If the power consumption on the phones is greater than the power output on the switch, you'll need to either add another POE switch or use power supplies for the phones.

Cabling

For best results, phones should be connected by cat 5e ethernet cable or better to your VoIP configured router or switch. If your local network is more than 5 years old, or you did not set it up, you should get a cabling or electrical contractor to test it to verify that you have cat 5e or better with good connection quality from end to end.

Wi-Fi

If you have people in your office who will make and take calls using the desktop or mobile application over Wi-Fi, you need to configure your wireless access points to prioritize voice and media traffic. Refer to your access point documentation.

Network Reference Guide

Support

If your installation question has not been answered in this guide, you can find additional support information either online using our self-service portal for Business Connect or by contacting a support agent directly.

Online at TELUS.com

Self-serve options: Learn how to pay your bill, check your data, manage your services and find answers to common questions all online.

Online support requests: Ask a support agent any question using a trackable ticketing system and get a reply within 2 business days (via My TELUS).

By phone at 1-844-626-6638

Account & Billing inquiries

Mon - Fri: 8am - 5pm (local time)

Technical Support

24/7