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# Mobile Manager Training Guide

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— A Convenient Desk Reference —

**Important Resources:**

Online training site: [www.makejustonecall.net](http://www.makejustonecall.net)

Customer Service: 1-877-880-0055



51 Pine Hill Drive • Walpole, MA 02081  
1-888-326-6531  
email: [sales@makejustonecall.com](mailto:sales@makejustonecall.com)

## Welcome To The Mobile Manager Training Guide

Mobile Manager by OneCall, powered by AccessLine, offers so many features and options that it can seem overwhelming at first, but in fact it's really easy to use. Fortunately, there's no need to rush. This Training Guide is for you to refer to anytime you need help. If you prefer to learn online, you can use the Tutorial at [www.makejustonecall.net](http://www.makejustonecall.net).

For your ease of use, the Training Guide is laid out similarly to the online Tutorial. Both are divided into four easy steps which will make it easy to transfer from one to the other if you desire.

We recommend that you complete Steps 1 and 2, then try what you've learned. Later, you can move on to Step 3, then Step 4. However, if you decide to complete the training in one sitting, you should easily be able to complete it in less than one hour. Remember, you can always come back and reference any area of interest at your leisure.

Once you've learned how to use Mobile Manager, you will also be able to:

- Attract more clients using one-number technology
- Save on cell phone expenses
- Manage your listings
- Secure feedback on showings
- Set up transaction files of your varied communications
- Download call histories

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## **Step One - Getting Started**

### **► Logging In**

You can access your Mobile Manager's features from almost anywhere. Using your new 10-digit Mobile Manager phone number and the PIN you selected, you can access your new service through any touch-tone phone or through the Internet.

When you access your account via the Internet, remember that Mobile Manager by OneCall is powered by AccessLine; therefore, your online account is essentially powered by AccessLine too. Your online account is located at [www.accessline.com/onecall](http://www.accessline.com/onecall).

#### **By Phone:**

1. Dial your Mobile Manager number.
2. Enter your temporary PIN when instructed to do so.
3. You will be prompted to put in a new PIN and to record your Name (used for forwarding voicemail). It is important to complete these actions prior to taking calls.
4. Once your PIN is accepted, you are automatically placed into your account and will have access to its many features.

#### **By Web:**

1. Go to [accessline.com/onecall](http://accessline.com/onecall).
2. In the Number field in the upper right, enter your 10-digit Mobile Manager number (dashes aren't necessary).
3. In the PIN field, enter your numeric PIN.
4. Click "Log In."

Once your PIN is accepted, you are automatically placed into your account and will have access to its many features. However, you will still need to record your name and introductory greeting.

### **Creating and Changing Your PIN**

When you first log into your service, you will be prompted to change your PIN from the temporary PIN you were provided, as explained above. You also can change your PIN any time you wish, by following the instructions below.

Your PIN must be between 6 and 10 digits and cannot start with 0. Also, the system will not allow a PIN that uses repeating numbers such as 222222 or an easily recognized pattern such as 123456.

**Tip:** If you have a favorite PIN that is fewer than 6 digits – for example a more traditional 4-digit number such as 8123 – you could simply add 00 to make it 6 digits: 812300.

#### **By Phone:**

1. Dial your Mobile Manager number.
2. Enter your PIN over the greeting.
3. Touch 8 for User Options.
4. Touch 7 to change your PIN and follow the instructions.

#### **By Web:**

1. Click the Personal Info tab.

2. Select Change PIN.
3. Enter your current (temporary) PIN.
4. Enter your new PIN.
5. Re-enter you new PIN.
6. Click Ok.

### **Overview of Prompts**

As you go through this training you will quickly see that Mobile Manager is much more than voicemail. What's more, Mobile Manager gives you the ability to access most of your many options right from inside your account. You will learn more about these during this training, but for now, here is an overview of the prompts you will hear each time you dial into your account:

Touch 1 to listen to voice-messages  
Touch 2 to direct your call (Find-Me-Follow-Me)  
Touch 3 to access your fax messages  
Touch 6 to send a voice message (Messaging between associates)  
Touch 8 for user options (Change things like greetings)  
Touch 9 to make a call (Call anyone in the USA by touching 9)  
Touch 0 to get recorded help  
Touch 00 to get customer service."

### **► Places to Find Help**

With Mobile Manager, help is always available. Here are some options :

**Online Tutorial** — Visit the Tutorial at any time.

**Web-based Help** — Reach online help in your account by clicking on the "Live Help" button.

**Phone Help** — While using your Mobile Manager over the phone, touch (0) and an automated attendant will help guide you to where you need to go.

**Customer Service** — To contact Customer Service, call 1-877-880-0055 or, over the phone, touch (00) while logged into your Mobile Manager. You can also send an email by clicking the Customer Service button from within your Internet account or use the LIVE web chat option by clicking the "Live Help" button.

### **► Set-up Checklist**

When you have completed all the set-up tasks, your Mobile Manager is ready to go! Review this checklist and make sure you have completed all the necessary tasks:

- Recorded your Name over the phone.
- Updated your email signature and marketing materials with your new Mobile Manager number.
- Advised your contacts of your new Mobile Manager number.
- Reviewed the rest of this Training Guide to learn more about Mobile Manager features.
- Completed any additional set-up instructions from your company.

Now that your account is all set up, you can move on to Step Two to learn how to use your Mobile Manager.

## **Step Two - The Basics**

In mastering the Basics, you will learn about:

- Directing Calls
  - Basic Extensions
- Open Extensions
- Managing Voicemail
  - How to Play a Message
  - How to Give a Copy to an Associate
  - Forwarding Voicemail to Email Addresses
  - Navigating Through the Played and Unplayed Queues
  - Group Messaging
    - How to Send a Broadcast Message
    - How to Reply to a Broadcast Message
    - How to Create Your Own Group
- Placing Outbound Calls
  - Speed Dial
  - How to Reach an Associate Without Knowing His/Her Name
- Managing Faxes
- Setting Up Notification

### **► Directing Calls (Find-Me-Follow-Me)**

Your Mobile Manager receives calls and then routes them to your current location. You can send calls to any phone or location, allowing important calls to reach you. We refer to this feature as **Find-Me-Follow-Me**.

You are already set up to use Find-Me-Follow-Me. This means you already have several extensions that identify the locations where calls can be directed, such as your office or cellular phone. An extension can ring at one phone or multiple phones one after another. Each extension is represented by a two-digit number (10, 20, 21, 30, 31, etc.) and a name that you designate.

We just need to confirm that your stored numbers are correct. Follow these simple instructions to check.

1. Go to the web [www.accessline.com/onecall](http://www.accessline.com/onecall).
2. Enter your AccessLine number and PIN.
3. Click on stored numbers (left side of the screen).
4. Enter all appropriate numbers.
5. Press OK when finished.

### **Basic Extensions**

- \*10 — Callers have the option to touch 0 to reach you at your HOME
- 20 — Callers will be forwarded directly to your OFFICE
- \*21 — Callers have the option to touch 0 to reach you at your OFFICE
- 30 — Callers will be forwarded directly to your CELL PHONE

- \*31 — Callers have the option to touch 0 to reach you at your CELL PHONE
- 40 — Callers will be forwarded directly to a number you program on the fly
- \*50 — Callers have the option to touch 0 to reach you at a number you program on the fly
- \*70 — Callers will be directed directly to your VOICEMAIL
- \*79 — Callers will be directed directly to your VOICEMAIL (alternative greeting)
- \* Recommended by OneCall.

**Tip:** The first time you change to an extension you have never used, place a call to your Mobile Manager to confirm the call will be handled the way you intended.

Note that Directing Calls with Mobile Manager works differently from other call-forwarding services that only forward from one phone to another. With Mobile Manager, all calls are received by the Mobile Manager system first, and then are sent off to the various locations you choose. This gives you greater flexibility in how each call is handled.

### **To Change Extensions**

#### **By Phone:**

To Direct Calls Using the Phone:

1. Go to the Main Directory (Dial your Mobile Manager number, then enter your PIN)
2. From the Main Directory, touch 2 to direct calls.
3. Touch in the 2-digit extension of where you want your calls to go.
4. Touch (\*) or hang up to keep the extension active until you manually select another extension. You can also set a timer by touching in the hours and minutes. For example, for 1 hour and 30 minutes, touch 130. If you set the timer, touch the two-digit extension that indicates where you would like calls forwarded after the timer runs out.

### **Changing Key Locations**

Direct your calls only when you leave one of your key locations.

Just as you put on your jacket when you leave a place, change your key locations on Mobile Manager when you leave a place as well. Typically when you leave (your home, for example), you are going to another key location (your office, for example).

Go to the Main Directory (Dial your Mobile Manager number, then enter your PIN)

1. Enter extension “31” (for maximum benefit, we recommend this extension be used only when you are mobile or between “land lines”)
2. The prompt will ask, “For how long?” Enter the time it takes to get where you are going from your present location (Office to home, appointment to office, for example)

At the prompt, enter the extension for your new location (office 21, or appointment 70, for example)

Repeat each time you leave a place.

**By Web:**

To Direct Calls Using the Web:

1. Once logged into your account, click the “Change” button at the top of the page next to the words “Current Active Extension.”
2. Select any extension you wish to activate.

Note: We recommend that you forward to a land line whenever possible, and cell as a last resort. (Cell is too unreliable and too expensive.)

**► Open Extensions**

Open Extensions (extensions 40 and 50) are designed so you can enter a temporary "forward to" number on-the-fly, such as the phone number of a flex office, hotel or meeting room, or whoever covers for you while on vacation. OneCall recommends extension 50 when one agent covers for another while on vacation.

Touch in extension 40 to direct callers to a number you program on-the-fly.

Touch in extension 50 to direct callers to touch 0 to reach you on a number you program on-the-fly.

**IMPORTANT:** The "forward to" number you program into these types of extensions will automatically be erased as soon as you activate another extension.

**Making Your Open Extension Active**

Each time you select an Open Extension as your Active Extension, you will be prompted to enter a temporary "forward to" number.

1. From the Main Directory, touch (2) to direct your calls.
2. Enter the Open Extension number. (Either 40 or 50).
3. Enter the temporary "forward to" number. For example, the desk phone number.
4. Touch (\*) (or hang up) to keep the extension you selected active until you activate another extension.

Note: You can also set a timer by touching in the hours and minutes that you want this extension to remain active. For example, for 1 hour and 30 minutes, touch 130. If you set the timer, you will be prompted to touch the 2-digit extension that indicates where you would like calls forwarded after the timer runs out.

**► Managing Voicemail**

Your Mobile Manager comes equipped with built-in voicemail. You may access your voicemail messages from any touch-tone phone or the Web. You may:

- Listen to, save, or delete voicemail via the phone or web.
- Instantly call back anyone who has left you a message without dialing a phone number.
- Forward voicemail via email.
- Forward voicemail to other co-workers or groups of co-workers who also have Mobile Manager voicemail.
- Download voicemail to your computer for later listening.

**How to Play a Message:**

**By Phone:**

To listen to voicemail over the phone:

1. Dial your Mobile Manager number.
2. Enter your PIN.
3. Touch 1 to listen to messages.
4. Follow the instructions to listen to, save, delete and forward messages. For example, you can press 3 to move a message to the played queue (stored for 60 days), or 2,5 to delete it.

Note: You may touch 9\* to call the person back who has left you a message. You may touch ## to rebound back to your Mobile Manager when finished with the call.

**By Web:**

To listen to voicemail via the Web:

1. Once logged into your account, click on the voicemail services button on top of the page.
2. Click the Play VM button associated with the voicemail you wish to listen to.

**How To Give a Copy of a Message to an Associate:**

1. From inside your Mobile Manager number, press 1 to play your message.
2. At the conclusion of the message, press 6,1 to forward a copy.
3. Enter the group number (only 4 digits) or Mobile Manager number (all 10 digits) of the person you wish to receive this message.
4. Upon hearing the name of the person and confirming it to be the right person, press 1 to accept your entry.
5. You can then add another group number or Mobile Manager number to send a message to, or press \* to begin recording.
6. At the conclusion of your introduction, press \* to send it.

**Forwarding Voicemail to Email Addresses**

From inside your account, by computer:

1. Listen to the voicemail you wish to forward to ensure it is the correct one.
2. Enter email address (you can send a voicemail to up to 10 email addresses each separated by a semi colon).
3. Click 'Continue.'
4. Complete the cover sheet.
5. Select delivery method. Choose between Link or .WAV attachment. (Consider sending voicemail messages by email as a link. Some large files may be rejected due to lack of capacity in the recipient's email account. When sent as a link, you must save the voice message in your account until the recipient has listened to it. Discarding the voice message from your account breaks the link.)
6. Complete the cover sheet.
7. Click .

**Messaging Between Mobile Manager Users**

1. From inside your Mobile Manager number, press 6.
2. Enter the Mobile Manager number (all 10 digits) followed by #.
3. Upon hearing the name and confirming it to be the right person, press 1 to accept your entry.
4. Add another number to send a message to, or press \* to begin recording.

5. When finished recording, press \* to send.

If you wish to message an associate by name instead of number:

1. From inside your Mobile Manager number, press 6.
2. Touch 6# to dial by name.
3. Enter the full last name of the person you wish to message with, followed by #. Follow instructions.
4. Upon hearing the name and confirming it to be the right person, press 1 to accept your entry.
5. Add another name to send a message to, or press \* to begin recording.
6. When finished recording, press \* to send.

### **Navigating Through the Played and Unplayed Queues**

- Press 1 to play your messages
- \* = Moves forward in a message
- # = Moves backward in a message
- Press 3 to move messages from one queue to another (i.e., You can save messages by pressing 3. The 3 key moves messages from the unplayed queue to the played queue and back again.)
- Press 5 to navigate down through your list of messages in either queue.
- Press 7 to navigate up in either queue.
- Press 1 to be in the unplayed message queue, then 55 to get to the played queue.
- From anywhere in either queue, press 77 to go to the beginning of messages (unplayed queue).

### **Group Messaging**

Group Messaging allows you to forward voicemail messages from one Mobile Manager user to another. If there are many people within your company who have Mobile Manager voicemail, you can create lists to send broadcast and forwarded messages. With Group Messaging, you can:

- Forward voicemail messages to groups of people
- Create and send broadcast messages to groups of people
- Quickly and easily create and manage group list via the Web

### **How to Send A Broadcast Message By Phone:**

1. From inside your Mobile Manager number, press 6.
2. Enter the group number (4 digits) followed by #.
3. Upon hearing the group number and confirming it to be the right group, press 1 to accept your entry.
4. Add another group number to send a message to, or press \* to begin recording.
5. When finished recording, press \* to send.

### **How to Reply to a Broadcast Message:**

1. From inside Your Mobile Manager number, press 1 to play your message.
2. At the conclusion of the message, press 62 to reply.
3. Record your response.
4. At the conclusion of your response, press \* to send it.

**How to Create Your Own Group:**

1. Click the Call Manager tab.
2. Select Group Manager button.
3. Click Create Group.
4. Enter a unique Group Number (used when sending message via the phone).
5. Enter a unique Group Name (used when sending message via the Web).
6. Enter a Description for this group (optional).
7. Enter the Mobile Manager phone number, or first or last name, of the first person to be added to the list.
8. Determine if this person is an Administrator (able to modify this list) and/or a Sender (able to send messages to this group) and/or a Recipient (only able to receive messages).
9. Click Add.
10. Repeat steps 7, 8 and 9 until all members of the group have been added.

**► Placing Outbound Calls**

When logged into your account over the phone, you can use the Out-dial feature to place a call at anytime by touching 9 from any menu. Then, dial your 10-digit number.

Note: Local calls are subject to the local message unit charge where applicable. Long distance is only \$.05 per minute, 30-second min, billed in six-second increments.

**Out-dial Highlights:**

- Place local, long distance or international calls.
- Use Rebound to return back to your Mobile Manager when finished with the call.
- 10 easy-to-use Speed Dials that you set up via the Web.

**Rebound**

After placing a call through Mobile Manager, you can quickly return to your Mobile Manager by touching ##. Using rebound saves you the effort of having to hang up, redial, and log back into your Mobile Manager.

**Speed Dial**

You can use the Speed Dial feature when placing calls through your Mobile Manager. The Speed Dial saves you time on dialing or remembering the numbers you frequently call. Before using your Speed Dial, you must first set it up via your online account.

**By Phone:**

To place a call once logged into your Mobile Manager using the Phone:

1. From any menu, touch 9.
2. When you hear the dial tone, touch in the desired 10-digit number.

**To use your Speed Dial over the phone:**

From any menu, touch 9 to get an outside line. Touch in the 2-digit code (90 through 99) for the desired number, followed by #. (For example, 9-91#, 9-92#, 9-93#, etc.)

**By Web:**

To set up your Speed Dial via the Web:

1. Log into your online account and click the speed dial tab on the left of the page.
2. Enter the name and number of the Speed Dial in the fields.

### **How To Reach an Associate Without Knowing His/Her Number:**

1. From inside your Mobile Manager number, press 9.
2. Press 6 to dial by name.
3. Wait for the prompt, then dial the person's last name followed by first name (at least 7 letters).
4. You may be given a choice of names; if so, select the appropriate name.
5. If your associate is using the Find-Me-Follow-Me option, you will be able to use this service to reach your party.

### **► Managing Faxes**

Your Mobile Manager can act also as your fax machine for incoming faxes. Callers send faxes to your Mobile Manager number which recognizes the call as a fax, and subsequently stores it for you. You may then access the fax from any touch-tone phone or via the Web.

#### **Faxing Highlights:**

- Forward received faxes to any fax machine via the phone or web.
- View faxes online, via your Web account, in two formats (TIFF, JPEG).
- Forward received faxes to any email account as an attachment or link (.PDF format).

#### **By Phone:**

To forward a fax to a fax machine using the phone:

1. Dial your Mobile Manager number.
2. Enter your PIN over the greeting.
3. Touch 3 to access faxes.
4. Follow the instructions to forward all faxes, individual faxes, or access a fax status report to a specific fax machine or list of fax machines.

Note: You may store a fax forwarding number by touching 8 for User Options, then 4 for forwarding numbers. Then touch 3 to add your fax number. This number then becomes your 'default fax number.'

#### **By Web:**

To View a Fax via the Internet:

1. Once logged in to your account, click on faxing services on the top of the page.
2. Click the icon representing the format in which you wish to view your fax (JPEG or TIFF).

### **Saving Faxes To Your Computer If You Have QuickTime**

Because TIFF files give the best resolution of the three graphic files here (TIFF JPEG and .PDF), OneCall recommends that you download the AlternaTIFF Plugin and save faxes as TIFF files.

NOTE: If you have QuickTime on your computer, perform this operation before downloading the AlternaTIFF plugin.

1. From the Start menu, select "Control Panel."
2. [Windows XP] If it says "Pick a category," click "Switch to Classic View" at the upper-left.
3. Double-click the "QuickTime" icon.
4. Click the "Browser" tab, or from the drop-down list, select "Browser Plug-in." Click the "MIME Settings" button.
5. Double-click the "Images ..." item to expand it.
6. If the "TIFF ..." or "image/tiff" item is checked, uncheck it.
7. Press the "OK" button, then close the "QuickTime Settings" window.

### **Downloading AlternatIFF Plugin**

1. Go to [AccessLine.com/onecall](http://AccessLine.com/onecall).
2. Enter your number and PIN.
3. Click on tools and updates.
4. Click on AlternatIFF Download.
5. In the upper right hand box click on:  
Install into IE for Internet Explorer  
Install into other browser
6. Click on [Auto-install AlternatIFF ActiveX control](#).
7. Wait for download.
8. Register as a user.

### **How to Save Faxes To Your Computer**

From inside your Account by computer:

Always open your faxes as TIFF files.

Right click on the fax you wish to save.

Select the file into which you wish to place the file (transaction file by address perhaps).

Change the name of the file from numbers to something meaningful.

Click Save.

You can also click on the save icon in the AlternatIFF toolbar (upper left).

Select the file into which you wish to place the file (transaction file by address perhaps).

Change the name of the file from numbers to something meaningful.

Click Save.

### **Forwarding Faxes Via The Web**

From inside your Account by computer:

- View the fax you wish to forward to ensure it is the correct one.
- Close it and click  to forward.
- Select how you wish to forward this fax, as an attachment or link (If you send it as a link, you must keep the fax in your account until the receiver has viewed the fax. If you delete the fax, the link is broken.)

#### **To Fax Number:**

Enter the fax number (you can add up to 10 numbers separated by semi-colons)

Click Continue.

Complete cover sheet.

Click 

#### **To Email:**

- Enter email address (you can send a fax up to 10 email addresses each separated by a semi colon)
- Click Continue.
- Complete the cover sheet.
- Select delivery method. Choose between Link JPEG, .PDF or TIFF attachment. (Consider sending faxes by email as a link. Some large files may be rejected due to lack of capacity in the recipient's email account). When sent as a link, you must save the fax in your account until the recipient has viewed it. Discarding the fax from your account breaks the link.)
- Complete the cover sheet.
- Click 

## ► **Fax Upload**

### **1. Sending a Fax from Your Computer**

The Fax Upload Program allows you to send any type of document as a fax (providing the document is printable) from your Windows-based PC.

#### **To Upload/Send a Fax From Your Computer:**

Step 1: Verify your computer's Internet connection.

Step 2: Open the document you wish to send.

Step 3: Select "File," then "Print."

Step 4: From the Print Dialog box, select "Upload New Fax."

Step 5: Click the "OK" button.

Step 6: Check the appropriate boxes to send the document to one or more fax machines and/or to your Fax Mailbox. Documents sent to fax machine(s) will be received in fax format.

Documents sent to your Fax Mailbox can be managed via the Web. This allows you to forward them to any fax machine, forward via email, or view them as .PDF, TIFF, or .JPG.

Step 7: To send a document to one or more fax machines, enter the 10-digit fax number(s) in the field provided. To send to multiple fax machines, separate each fax number with a semi-colon, or press "CTRL" and "Enter" and enter each fax number on a separate line.

Step 8: Click the "Send" button to send document(s) to one or more fax machines and/or to your Fax Mailbox.

Note: Sending a fax may take up to 3 seconds per page, depending on the size and type of document being faxed and the speed of your Internet connection

### **2. Adding a Cover Sheet**

Before sending your document, you may want to add a cover sheet.

#### **Setting up Your Cover Sheet For the First Time:**

Step 1: Click on the "Cover Sheet Tab" at the top of the window.

Step 2: Fill in your name, company name, phone number and any footer information you wish to add (such as confidentiality wording).

Step 3: All information added will be automatically saved, and will auto-populate into any cover sheet you begin.

To continue, and to add a cover sheet to a specific document, click the "Options" Tab and follow the next set of instructions.

#### **Adding a Cover Sheet before Sending a Document:**

Step 1: Click the “Add Cover” Sheet button.

Step 2: Fill in the recipient’s name, company name, and the document subject. Add additional comments in the “Comments” box.

Step 3: Click the “OK” button to return to the main options page. You may remove/edit the cover sheet at any time before sending the fax.

NOTE: If you are sending the document to more than one fax number, the fax numbers will NOT show up in the Fax Number field.

### 3. Signature and Annotation

You may add your signature or any text annotation to a document you want to send as a fax. To do this, first you must load your signature.

#### Loading your signature:

Step 1. Write your signature on a blank piece of paper

Step 2. Scan your signature into your computer

Step 3. Use Microsoft Paint to open the file that contains your signature

Step 4. Use the selector tool to highlight your signature (draw a rectangle around it)

Step 5. Right click on your signature and select Copy

Step 6. Click Edit

Step 7. Select “Copy To”

Step 8. In the “Save In” drop down box, navigate to Program Files/Fax Upload

Step 9. Save your signature and name it SIGNATURE.BMP

#### Adding a Signature or Annotation

To add your signature or any type of text annotation to a document you wish to send as a fax, click the Add Signature/Annotation button.

To place your signature on the document, click the Signature button then move the signature icon to where you want your signature to appear.

To **Resize** the signature - Place your mouse pointer on the border, click and drag outward.

To **Move** the signature - Right click on the signature, select Move, then move the signature to the desired location.

To **Delete** the signature - Right click on the signature then select Delete.

To add an annotation to your document, click the Annotation button then move the annotation icon to where you want the annotation to appear. Begin typing in the field provided.

To **Change Font** in the annotation - Highlight the text within the annotation box you wish to change, then right click. Choose Font and make your changes.

To **Move** the Annotation - Right click on the annotation, select Move then move the signature to the desired location.

To **Delete** the Annotation - Right click on the annotation then select Delete.

To **Preview** how your document will look with the signature and/or annotations, click the preview button.

Once you have added your signature and annotations, click the “Accept Changes” button.

### 4. Previewing a Fax

Before sending your document, you may preview how it will appear when printed from a fax machine.

#### To Preview a Fax:

Click the “Preview” button. Your document will open in a separate window, allowing you to preview how it will look when printed from a fax machine.

Note: Attached cover sheets can also be previewed.

## 5. Changing Your Fax Account Phone Number

Your Fax Account Phone Number allows you to receive incoming faxes (it may also contain additional communications features). To change this number, simply update your Fax Upload Program with the new number (there is no need to reinstall the Fax Upload Program).

### To Change your Fax Account Phone Number:

Step 1: Click the “Start” button.

Step 2: Select “Programs.”

Step 3: Select “Fax Upload.”

Step 4: Select “Fax Upload.”

Step 5: From the “Option” Tab, click the “Change” button below your current Fax Account Phone Number and enter you new Fax Account Phone Number in the box provided.

Step 6: Click the “OK” button to save the change.

## 6. Fax Upload Log

The Fax Upload Log allows you to view a list of all the documents you have uploaded, as well as all documents you have sent to fax machines and/or to your Fax Mailbox. The Fax Upload Log contains:

Date and Time Sent

Document Name

Total #of Pages

List of Fax Number(s) Sent To

Sent to Fax Mailbox (Yes or No)

Status (Upload Successful/Upload Unsuccessful/Error Message)

### To View the Fax Upload Log:

Step 1: Click the “Start” button.

Step 2: Select “Programs.”

Step 3: Select “Fax Upload.”

Step 4: Select “Fax Upload.”

Step 5: Click the “Log” tab at the top of the window.

Step 6: Click the “View Log” button.

### To Clear the Fax Upload Log:

Click “Clear Log Now” button on “Log” tab.

### To Automatically Clear Fax Upload Log:

Choose a time frame for automatic clearing of your Fax Upload Log on the “Log” tab. Your choices are: Never; Before Each Upload; Every Day; Every Week; Every Month.

## 7. Uninstalling the Fax Upload Program

The Fax Upload Program comes with a built-in uninstall utility.

### To Uninstall the Fax Upload Program:

Step 1: Click the “Start” button.

Step 2: Select “Programs.”

Step 3: Select “Fax Upload.”

Step 4: Select “Uninstall.”

## ► **Setting Up Notification**

To save you time and increase your efficiency, your Mobile Manager has the ability to notify you of new voicemail and faxes. Notification is available via email, or digital cell phone.

### **Notification Highlights:**

- Displays the type of message (voicemail, urgent voicemail or fax).
- Displays the Caller ID of the person or fax machine who called you.
- Displays the DID you received the message on.
- Displays the number of voicemail or fax messages in your mailbox.
- Indicates how full your Inbox is.

### **By Web:**

If you have a phone that allows you to play wav files or open pdf files when you are notified of a voicemail or a fax arriving in your account, simply click on the attached file. This will allow you to hear the voicemail, or view the fax.

1. Log into your online account ([www.accessline.com/onecall](http://www.accessline.com/onecall)) and click Preferences tab.
2. Select Notification.
3. Enter the email address(es) you want notifications sent to.

### **Select how your wish to be notified**

- Attach the voicemail message as a .WAV file in the email notification
- Keep a copy of my voicemail messages in my voicemail box
- Do not keep a copy of my voicemail messages in voicemail box
- Include a link to the voicemail in the email notification Email notification WITHOUT attachment or link
- Email notification with numeric codes only
- Fax Attach the fax as a .PDF in the email notification
- Keep a copy of my fax messages in my fax box
- Do not keep a copy of my fax messages in my fax box
- Include a link to the message in the email notification
- Email notification without attachment or link
- Email notification with numeric codes only

### **Select what you wish to be notified about**

#### **Notification Receipt Types**

- New Voicemail
- New Urgent Voicemail
- New Fax Sent
- Fax Delivered
- Sent Fax Failure

Click Save!

To set up text messaging notification to your cell phone:

By Web:

To set up notification via the Internet:

1. Log into your online account ([www.accessline.com/onecall](http://www.accessline.com/onecall)) and click the Preferences tab.
2. Select Notification.
3. Enter the email address(es or text message address you want notifications sent to. (If you wish to receive notification to a cell phone by text message and are unsure of the address, use the provided list of cell phone carrier's text message addresses.)
4. Determine the format of the notification
5. Click save
6. Use the test button to send a test notification.

## **Step Three – Expanding Your Options**

This section of the training covers the following:

- Advanced Extensions and Screening
- Announcements (Greetings)
- Call Manager
- Setting Up Weekly Schedule
- Always-On Conference Calling
- Reserved Conference Calling
- On-the-Fly Conferencing
- Remote Call Transfer
- Call Connection

### **► Advanced Extensions**

Along with the Basic Extensions outlined in the previous section of this Training Guide, Mobile Manager provides the use of up to 95 total extensions. OneCall recommends grouping your extension selections as follows:

When Extension 10 is invoked, callers touch 0 to reach you at “HOME”  
11-19 should be used for “HOME” related extensions whether that be forwarding to a summer home, or using another screening process to come to your “HOME”

When Extension 21 is invoked, callers touch 0 to reach you at “OFFICE”  
22-29 should be used for “OFFICE” related extensions whether that be forwarding to a different office, or using another screening process to come to your “OFFICE”

When Extension 31 is invoked, callers touch 0 to reach you on your “CELL”  
32-39 should be used for “CELL” related extensions whether that be forwarding to a different cell, or using another screening process to come to your “CELL”

When Extension 70 is invoked, callers must leave a voice message.  
Extension 79 can be used with an alternate greeting, perhaps vacation, or when you are at a closing etc.

### **Screening your calls**

Calls can be screened in three ways:

1. Urgency Screen
2. Voice Screen
3. VIP Screen

### **Urgent Screening**

Receive urgent calls only. When prompted, your callers touch 0 to indicate the call is urgent. Mobile Manager attempts to forward urgent calls to you. All other calls go to voicemail. This is the standard OneCall Mobile Manager screen, on extensions 10, 21 and 31.

**Voice Screening**

Receive in advance the name of the caller and purpose of the call so you can choose from these options:

1. Touch 1 to accept the call
2. Touch 2 to send the caller to voicemail
3. Touch 3 to send the caller away
4. Touch 4 to listen to the caller's name again
5. Touch 6 to transfer the caller to another phone number
6. Touch 7 to tell the caller to never call back

**Private Code Screening**

Receive calls from persons with your private code. Callers enter your private code during your greeting. Mobile Manager attempts to forward private calls to you. All other calls go to voicemail. This screen must be established by Customer Service.

NOTE: Go to CALL MANAGER to create new extensions using these screens. See Instructions in STEP 3, CALL MANAGER.

**► Announcements (Greetings)**

You may choose to record Extension Announcements. Customized greetings that are specific to a location or event are ideal when you want callers to hear different messages at different times. Announcements can be recorded over the phone or uploaded to your Web account.

An Example for Extension 70 would be: "Hi. This is (your name). I'm out of the office through Friday. I will be checking voicemail each evening. Please leave me a message or contact (name) if you have an urgent issue."

**TIP:** Whenever you use a new extension, call your Mobile Manager to confirm that your greetings and call flow work as you intended.

**By Phone:****To record an Announcement:**

1. From the Main Directory, touch 8 to access User Options.
2. Touch 1 to record an announcement.
3. Touch in the 2-digit extension number of the extension for which you wish to record an Announcement.
4. Listen to the existing Announcement or touch \* to skip listening to it.
5. At the tone, record the new announcement.
6. Touch \* to end recording.

**Recommended Greetings*****Extension 10 Screened forward to your Home***

You have reached the Mobile Manager number of (your name) at (your company). If it is important that you reach me directly, press 0 now. To leave a message, please stay on the line.

***Extension 20 Direct Call forward to your office***

You have reached the Mobile Manager number of (your name) at (your company). Please hold as Mobile Manager finds me at my office. If I am available we will be connected in a moment. To leave a message, please touch the # key now.

***Extension 21 Screened Call Forward to your office***

You have reached the Mobile Manager number of (your name) at (your company). If it is important that you speak to me directly press 0 now and you will be forwarded to my office. If I am available, we will be connected in a moment. To leave a message, please stay on the line.

***Extension 30 Direct Call Forward to your cell phone***

You have reached the Mobile Manager number of (your name) at (your company). Please hold as Mobile Manager finds me on my cell phone. If I am available we will be connected in a moment. To leave a message, please touch the # key now.

***Extension 31 Screened Call Forward to your cell phone***

You have reached the Mobile Manager number of (your name) at (your company). If it is important that you speak to me directly press 0 now and you will be forwarded to my cell phone. If I am available, we will be connected in a moment. To leave a message, please stay on the line.

***Extension 70 Voicemail***

You have reached the Mobile Manager number of (your name) at (your company). I am sorry I am unable to take your call at this time. Please leave a detailed message along with your name and number and the best time to return your call.

***Extension 71 Voicemail (Have a new extension created by customer service 1-877-880-0055)***

You have reached the Mobile Manager number of (your name) at (your company). I am with a client at this time, but will be happy to call you the moment our meeting has ended. Please leave a detailed message along with your name and number, and I will return your call promptly.

**► Call Manager**

Call Manager allows you to modify or create new extensions via the Web.

**Call Manager Highlights:**

- Quickly modify any information within any of your extensions.
- Create additional extensions for a wider variety in managing your calls.
- Preview a greeting before activating an extension.
- Create a Weekly Schedule that automatically directs calls according to the time of day and day of the week.
- View all of your pre-configured extensions and any new extensions you setup.

**Tip:** Your Call Manager is a great place to visually see how your calls are being directed and to modify extensions as needed.

**By Web:****Modifying Extensions:**

1. From the Call Manager, click Modify Extension.
2. Click the “Modify” button associated with the extension you wish to modify.
3. Make the desired changes.

4. Click the “Save” button.

**Reviewing an Existing Extension:**

1. From the Call Manager, click Modify Extension.
2. Click the “Review” button associated with the extension you wish to review.
3. A new window will open which explains the details of the specific extension.

**Creating a New Extension:**

1. From Call Manager, click Create Extension.
2. From either the Recommended or Full list, select the type of extension you wish to create.
3. Select an extension number.
4. Enter a name for the extension.
5. Enter the specific information required for that extension.
6. Click Save.

**► Setting Up A Weekly Schedule**

The Weekly Schedule is used to activate specific extensions at predetermined times and days of the week. For example, Mobile Manager could route calls to your voicemail when your business is closed. To use the Weekly Schedule, select the day of week and time you want to activate each extension. The Weekly Schedule may be changed or turned on or off at anytime.

**By Web:**

To set up your Weekly Schedule:

1. Click on the Call Manager tab.
2. Select Weekly Schedule.
3. Select the day or days you want to create a schedule for.
4. Select the start time (time the extension will become active).
5. Select the extension you wish to activate.
6. Click “add.”
7. Repeat as necessary.

Note: When creating a Weekly Schedule, you must have more than one extension included in the list. (If you want to have one extension active all the time, there is no need to configure the Weekly Schedule.) Also, the Weekly Schedule allows you to configure start times. This means one extension is active until the next extension is scheduled to become active.

**► Always-On Conference Calling**

An Always-On Conference does not have a defined start time, so you may initiate a conference call whenever needed. Up to 9 callers may participate. Your Mobile Manager serves as the "call in" number.

**Always-On Conferencing Highlights:**

- No reservation needed.
- One-time setup via the web.
- Have up to 3 sets of always-on Host/Guest codes.
- Use for reoccurring meetings.

**Note:** To allow you the greatest amount of flexibility, you can use a combination of Always-On and Reserved conferencing.

Always-On conference calls can ONLY be created and modified via the web interface.

### **By Phone:**

#### **Joining an Always-On Conference:**

An Always-On Conference may be accessed at any time: Dial the Mobile Manager number on which the conference is scheduled. Touch \*\* when prompted. (See NOTE below) Enter your Host or Guest code to join the call.

**Note:** The prompt that instructs callers to "touch \*\*\*" to join a conference IS NOT permanently activated if you create an Always-On Conference. The first participant joining your call must know they need to touch \*\* to access the conference. After the first participant joins the conference, the "touch \*\*\*" prompt is played for all subsequent callers.

### **By Web:**

#### **Creating an Always-On Conference:**

To create an Always-On Conference via your web account:

1. Log on to your web account.
2. Select the Conferencing Services button at the top of the page.
3. Click "Set Up Always-On Conference Now" button.
4. Enter all required information.
5. Click Reserve.

#### **Modifying an Always-On Conference:**

An Always-On Conference may be modified at any time via your web account:

1. Log on to your web account.
2. Select the Conferencing Services button at the top of the page.
3. Locate the Always-On conference you wish to alter and click the "modify" button.
4. Make any necessary changes.
5. Click Save.

## **► Reserved Conference Calling**

Reserved Conference Calling gives you the ability to host a conference call over the phone for yourself and up to 15 guests. Your Mobile Manager number serves as the "call in" number.

### **Reserved Conference Calling Highlights:**

- Quickly set up a reserved conference call via the phone or the Web.
- Host the conference call through your Mobile Manager.
- Make modifications to the conference call before the scheduled time or during the call.

### **Reserving a Conference Call**

You can reserve a conference call for up to 16 people.

**By Web:****To Reserve a conference call via the Web:**

1. Click the Conference Calling button at the top of the page.
2. Click **Reserve a New Conference Now!**
3. Enter the date of the conference.
4. Enter the start time of the conference.
5. Enter the length of the conference.
6. Enter the number of guests desired, both listen only and speaker/listener, for the conference.
7. Enter the Guest Code (4-10 digits) that allows guests to join the conference.
8. Enter the Host Code (4-10 digits) that allows you to join the conference and access host options during the conference.
9. Click Reserve Conference to confirm and accept the reservation.

**Tip:** After reserving a conference call, remember to send your guests invitations that include the time of the conference call, the Guest Code and instructions to enter \*\* during your greeting followed by the Guest Code.

**Tip:** During a conference, touch \*1 to mute your line, touch \*1 again to unmute.

**► On-The-Fly Conferencing**

On-the-Fly Conferencing allows you to host an unscheduled conference call with up to 7 people at any time. There is no need to hang up, make a reservation, or send email invitations. You simply call the guests and add them to the conference. In order to host an On-the-Fly Conference, you need to place or receive a call through your Mobile Manager.

On-the-Fly Conferencing is useful for quickly resolving issues effectively, contacting the appropriate people, and quickly coming to group decisions.

**By Phone:****To host an On-the-Fly Conference:**

1. Answer a call or place a call through your Mobile Manager.
2. With the first guest on the call, touch #5.
3. Touch in the phone number of the next guest (Include the area code).
4. Wait for the guest to answer. If the phone number of the guest you are trying to conference is busy or unanswered, touch #6 to reconnect to the other guest(s) already in the conference.
5. Touch #5 to conference yourself and your 2 guests.
6. Repeat the steps above until all guests have been added to the conference.

**► Remote Call Transfer**

Whenever you receive or place a call on your Mobile Manager, you can transfer that call to any other phone or person.

**Remote Call Transfer Highlights:**

- Quickly transfer callers from one phone to another.

- Transfer callers to another person.
- Use from any phone, anywhere.

**An Example of When to use Remote Call Transfer:**

An important caller reaches you through your Mobile Manager on your cellular phone. Your cellular phone's battery is running low. By touching a few buttons, your caller can be transferred conveniently to your office phone.

Rather than transferring the call, you can also stay on the line and host an On-the-Fly (unscheduled) conference.

**By Phone:****To Transfer a Call:**

1. Receive a call on your Mobile Manager or place a call through your Mobile Manager.
2. Touch #5 to start the transfer.
3. At the dial tone, touch in the number you want to transfer the caller to. (Include the area code.)
4. When the transfer party picks up the phone, touch #5 again.
5. All three of you will be connected. Hang up and the two parties are connected.

**Tip!** If the transfer party does not pick up the phone, touch #6 to return back to the original caller.

**► Call Connection**

Your Mobile Manager can place callers on hold and notify you of the holding caller via pager, email, or digital cell phone. After being notified of the holding call, go to any touch-tone phone and dial your Mobile Manager to connect to the caller. If you are unable to connect to the caller, they are transferred to voicemail.

**Connection Highlights:**

- Callers can stay on hold for up to 4 minutes before transferring to voicemail.
- If unable to wait, callers may select to leave you a voicemail at anytime.
- Music plays while the caller is on hold.
- Caller ID shows you the phone number of the caller on hold.

Your Mobile Manager is NOT pre-configured with Connection Extension. However, you can add this by calling Customer Service.

Connection is a great way to be available to accept important calls while in a meeting or when you are away from your desk.

## **Step Four – Mastering Your Service**

This section of the training covers the following:

- Cutting Your Cell Phone Bill
- Billing Info/Call History
- Setting Up A Transaction File
  - How to Save Voice Messages to Hard Drive
- Securing Feedback from Showings
- Receiving Voicemail Messages in Just One Place
- Gaining Control

### **► Cutting Your Cell Phone Bill**

Use Extension 31 when forwarding calls to Cell Phone (Touch 0 option)

Instead of calling your voicemail from your cell phone every half hour, call only when you get to a landline. All urgent calls will come to you, so the messages left do not need to be responded to in an instant.

#### **Use Text Messaging Notification:**

Each time a voice message or fax is left for you in your Mobile Manager you will be notified by text message. The text message will include the caller's number. You can judge whether to pick up the message or immediately or wait to get to a landline.

#### **Eliminate Cell Phone Voicemail.**

Each time a call goes into your cell phone voicemail the clock is ticking. Each time you pick up a cell phone voicemail from your cell phone the clock is ticking. Instead, have all urgent calls come to your Mobile Manager and if you cannot or choose not to take the call live have the calls return to your Mobile Manager voicemail. (See Receiving Voicemail in Just One Place in Step Two)

### **► Billing Info/Call History**

You may view your Billing Info (invoices) and Call History through the Web site. You may view billing information and call history for specific months and years. Billing Information shows your monthly charges and taxes and Call History details every call made to and from your Mobile Manager.

#### **By Web:**

To view Billing Info or Call History:

1. Click the Personal Info tab.
2. Select either the Billing Info (invoices) or Call History button.
3. Select the timeframe of the invoice or call history you wish to view.

**You can change your credit card/debit card number on line:**

1. From inside your Mobile Manager, go to Billing Information.
2. Click on Payment Info.
3. Enter new card number, address, expiration date, and CVV code.
4. Click Save.

**► Setting Up A Transaction File**

OneCall recommends that you set up a transaction file for *each* of your properties. In that file, you can save *all* correspondence – emails, voicemail messages, and faxes. Transaction files prove particularly helpful during closings, because you can simply carry your laptop and/or a flash drive to the closing and have immediate access to *every* communication you exchanged regarding the property.

If you are on a PC using Windows-based software, for example, you could set up a file by clicking on Start (generally lower left corner of your computer screen), then My Computer. Next you must designate on which disk you will save the file; most people choose Local Disk or Drive C. Next, click on File, New Folder, and then give your folder a name. OneCall recommends you use the property's address as your folder name.

**How To Save Voice Messages to Your Hard Drive (and/or Transaction File)**

1. Choose the file you wish to save.
2. Press the download icon.
3. Right click on the diskette (picture) icon for .WAV
4. Click on "Save target as. . ."
5. Change the name of the file from numbers to something meaningful.
6. Click Save.

**► Securing Feedback from Showings**

Mobile Manager can help you score 100% when it comes to collecting feedback on your properties' showings. The next time you know one of your properties is being shown, and you would like to provide the owner with buyer feedback, simply message the showing agent from within your Mobile Manager:

1. From inside your Mobile Manager touch 6 to create a message
2. Enter the 10-digit Mobile Manager number and follow the prompts
3. Request feedback on the showing, noting that you would like to forward it to your seller.
4. Ask the buyer's agent to respond to your voicemail by touching 62.
5. Once you get feedback from the showing agent, you can forward the message to the owner by email. (See Managing Voicemail in Step Two.)

**► Receiving Voicemail Messages in Just One Place**

Want to insure that you receive all your voicemail messages in just one place? All you have to do is manage the number of rings before a call is transferred to voicemail.

## **Cell Phone**

Call your cell phone directly and listen for the number of rings **your caller would hear** before the call is transferred to cell phone voicemail. For example, let's say that number is six rings.

Next, forward your Mobile Manager to ring your cell phone when a caller touches 0. (This is extension 31). Program the number of rings **your caller will hear** to at least 1 fewer than it takes to go to your cell phone voicemail. In this case your Mobile Manager will ring your cell phone five times; then if you do not answer, the caller will be transferred to Mobile Manager voicemail. Mobile Manager does not allow your cell phone to ring enough times to get to cell phone voicemail.

### **Programming the Number of Rings:**

#### **By Web:**

##### **Modifying Extensions:**

1. From the Call Manager, click Modify Extension.
2. Click the "Modify" button associated with the extension you wish to modify (31 for this example).
3. Set the desired number of rings on the pull-down menu.
4. Click the "Save" button.

Repeat for all extensions used.

NOTE: The appropriate number of rings is generally 4-5; however, if you tend to carry your cell phone in a purse, briefcase or other such bag, then OneCall recommends allowing 5-6 rings. The latter is strictly to allow more time for cell phones to be retrieved from bags.

While some cell phones allow you to manage the number of rings before transferring to cell phone voicemail, you can always manage the number by calling the customer service department of your cell phone provider.

## **► Gaining Control**

Mobile Manager lets you take back control of your work and your life! First, you will learn how; then, below under "Here's What Happens," you will learn the benefits you will reap:

1. Use your Mobile Manager as your *only* contact number. (You then decide where -or if - to take a call live).
2. Use the touch 0 screens (Ext 10/home, 21/office, 31/cell) to maximize efficiency.  
[http://makejustonecall.net/step2\\_calls.html#directing](http://makejustonecall.net/step2_calls.html#directing)
3. Change your extension only when you leave a place.  
[http://makejustonecall.net/step2\\_calls.html#key\\_loc](http://makejustonecall.net/step2_calls.html#key_loc)
4. Create a second extension for voicemail to forward to when you are on an appointment extension 71; Call customer service 877-880-0055 to have this done.) Put a greeting on this extension specifically for this purpose. [http://makejustonecall.net/step3\\_announce.html](http://makejustonecall.net/step3_announce.html)

5. Use Mobile Manager as your fax number.  
[http://makejustonecall.net/step2\\_fax.html](http://makejustonecall.net/step2_fax.html)
6. Use Fax Upload for faxing out to any fax machine directly from your computer.  
[http://makejustonecall.net/fax\\_upload.html](http://makejustonecall.net/fax_upload.html)
7. Set up a transaction file on your computer by street address.  
[http://makejustonecall.net/step4\\_file.html](http://makejustonecall.net/step4_file.html)
8. Save voicemail messages and faxes to that transaction file.  
[http://makejustonecall.net/step2\\_fax.html](http://makejustonecall.net/step2_fax.html)
9. Fax any document related to that transaction to your Mobile Manager and add to the transaction file.
10. Download the transaction file to a Flash drive.
11. Attach a business card to the flash drive and give it to your client on closing.

### Here's What Happens:

**All important calls come to you live** — (How? Using the Find-Me-Follow-Me option, you simply forwarded your number to where you are, using any phone.)

**Other calls (including group messages) go to Mobile Manager voicemail; not cell or home voicemail.** — (How? This is achieved through programming.)

**You have just one place to look for voicemail** — (How? You stopped relying on three voicemail boxes — cell, business, home. You use just your Mobile Manager number for everything so that you only have one voicemail to check.)

**You can focus on one client, and still be responsive to others** — (How? You use extensions 21 and 31, for example, so that callers have the option of leaving you a message rather than disturbing you each time.)

**Faxing hassles are a thing of the past** — (How? All faxes come to the same number. You view, print and/or forward faxes to any email or any fax machine. What's more, any document that comes to you that you wish to keep, you now fax it to your Mobile Manager number.)

**Fax Upload** allows you to fax any document resident on your computer to any fax machine...anywhere! Add a cover sheet, annotate the document and add a previously scanned signature as well.

**Your files are amazing!** Instead of just papers, they also now include voicemail, faxes and email (emails can be saved in text format).

Give a completed transaction folder on a flash drive to your client with your business card attached that includes voicemails, emails, faxes, pictures, etc. Your client will keep it in a safe place and bring it out when it's their turn to sell the property.

Be creative with the use of your Mobile Manager. Some of the most ingenious uses of Mobile Manager have come from agents themselves. We'd love to hear how you uniquely use your Mobile Manager!