


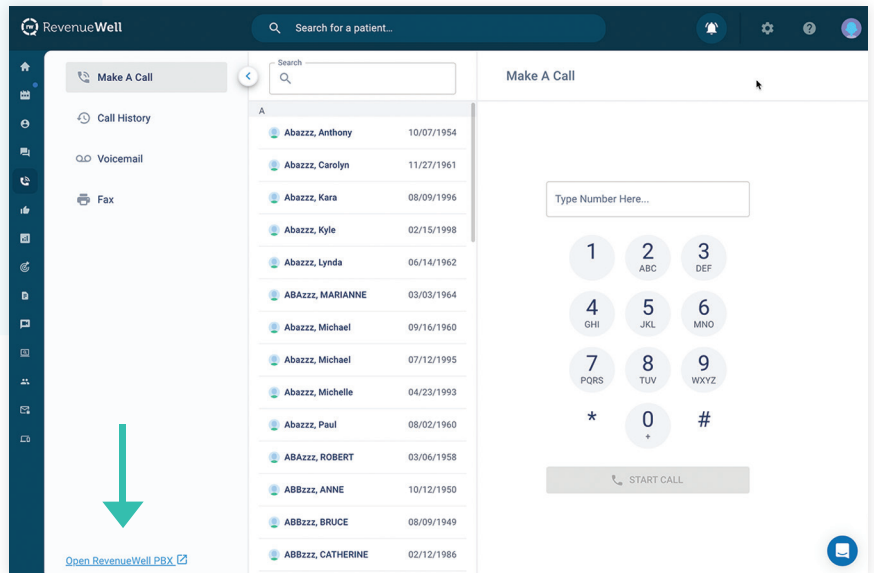
RevenueWell Phone Portal

Commonly Used Features in Phone PBX




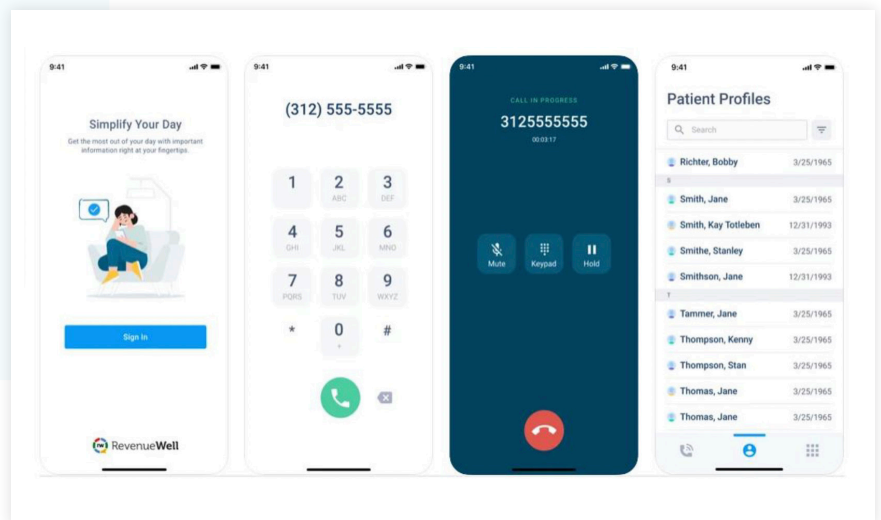
Logging into RevenueWell PBX: (Only Admin Users)

1. Sign into RevenueWell APP 
2. Click Phone Icon
3. Bottom Left - Open RevenueWell PBX Link (Phone Portal)



Downloading RevenueWell On The Go APP:

1. Download RevenueWell on the Go APP in the Apple Store 
2. Sign In with RW Username and Password
 - Phone Icon to Make a Call
 - Person Icon to View Patient Profiles



RevenueWell Phone Portal

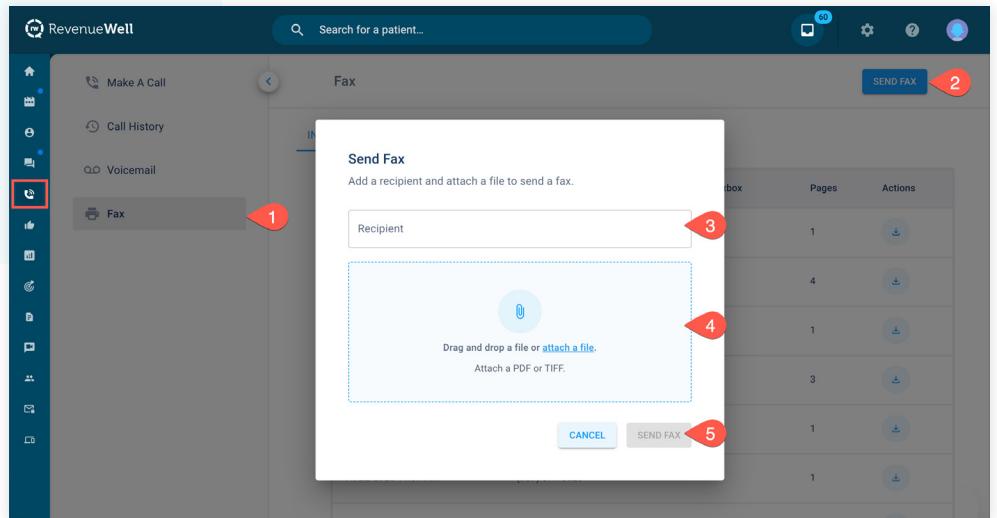
Commonly Used Features in Phone PBX



How to Send a Fax:

(Log into RW Desktop APP & Click Phone Icon)

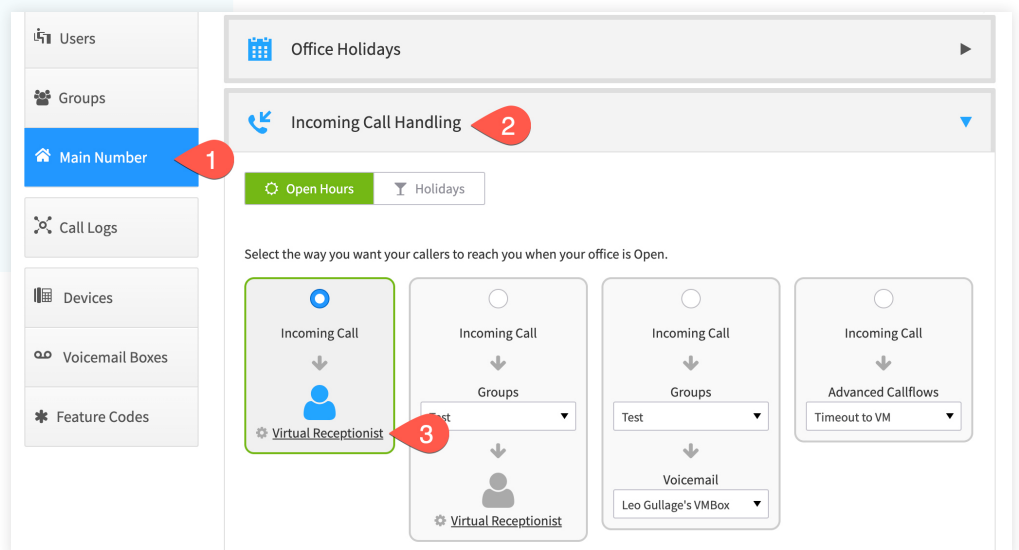
1. Click Fax
2. Click Send Fax
3. Recipient (Enter Fax number to)
4. Attach PDF
5. Click Send FAX



How to Change Virtual Receptionist:

(Log into RevenueWell PBX)

1. Click Main Number
2. Click Incoming Call Handling
3. Click Open Hours
4. Click Virtual Receptionist



RevenueWell Phone Portal

Commonly Used Features in Phone PBX

Updating Virtual Receptionist:

Text to speech

Upload your own files

Virtual Receptionist - Open Hours

Virtual Receptionist will answer incoming calls professionally and automatically transfer them to an appropriate department or person. Main Menu will allow you to set up call routes. Please type or record greetings that matches the Main Menu.

Main Menu

Press 1 for SmartPBX Directory

Press 2 for Main Voicemail Box

[Add route](#)

Greetings

Text to Speech

You need to click the "Update" button in order to save your changes for the greeting message.

Please press 1 for Richard's voicemail. Please press 2 for the Main Voicemail.

Cancel Update

Upload your own file

Choose from existing recordings

Record it over the phone

Cancel Save

Virtual Receptionist - Open Hours

Virtual Receptionist will answer incoming calls professionally and automatically transfer them to an appropriate department or person. Main Menu will allow you to set up call routes. Please type or record greetings that matches the Main Menu.

Main Menu

Press 1 for SmartPBX Directory

Press 2 for Main Voicemail Box

[Add route](#)

Greetings

Text to Speech

Upload your own file

You need to click the "Update" button in order to save your changes for the greeting message.

Choose File

Cancel Update

Choose from existing recordings

Record it over the phone

Cancel Save

Choose from existing recordings

Record it over your phone

Virtual Receptionist - Open Hours

Virtual Receptionist will answer incoming calls professionally and automatically transfer them to an appropriate department or person. Main Menu will allow you to set up call routes. Please type or record greetings that matches the Main Menu.

Main Menu

Press 1 for SmartPBX Directory

Press 2 for Main Voicemail Box

[Add route](#)

Greetings

Text to Speech

Upload your own file

Choose from existing recordings

You need to click the "Update" button in order to save your changes for the greeting message.

MainOpenHoursMenuTTS

Cancel Update

Record it over the phone

Cancel Save

Virtual Receptionist - Open Hours

Virtual Receptionist will answer incoming calls professionally and automatically transfer them to an appropriate department or person. Main Menu will allow you to set up call routes. Please type or record greetings that matches the Main Menu.

Main Menu

Press 1 for SmartPBX Directory

Press 2 for Main Voicemail Box

[Add route](#)

Greetings

Text to Speech

Upload your own file

Choose from existing recordings

Record it over the phone

Record the greeting message yourself over the phone, by following the steps below:

1. Pick up a phone registered in this account.
2. Dial your office main number.
3. Enter this PIN when prompted: 9282
4. Record your greetings / menu.

Cancel Save

RevenueWell Phone Portal



Commonly Used Features in Phone PBX



Updating Voicemail Greeting with MP3 file:

1. Click Voicemail Boxes
2. Click Wrench Icon
3. Click Advanced
4. Click Greeting Media
5. Upload (MP3 File)
6. Click Save Changes

Dashboard | Total Voicemail Boxes 3 | Add Voicemail Box | Search.....

Number	Name	User	Edit
100	Main Voicemail Box	-	
300	[Redacted]	[Redacted]	

Editing a Voicemail Box: Main Voicemail Box

Main Voicemail Box | Basic Settings | **Advanced**

- Options
- Recipients
- Greeting Media**

Media: mailbox 100 unavailable gree | **Upload**

Temporary: - None - | **Upload**




Delete Voicemail Box | Cancel | **Save Changes**



Change your Voicemail Greeting using the RevenueWell Phone:

1. Press Envelope Button or press *97
2. Enter Mailbox Number - (Note this can be found in the PBX)
3. Press 5 to Change Settings
4. Press 1 Change Mailbox Greeting

Dashboard | Total Voicemail Boxes 3 | Add Voicemail Box | Search.....

Number	Name	User	Edit
100	Main Voicemail Box	-	
300	[Redacted]	[Redacted]	
800	[Redacted]	[Redacted]	

Voicemail Boxes

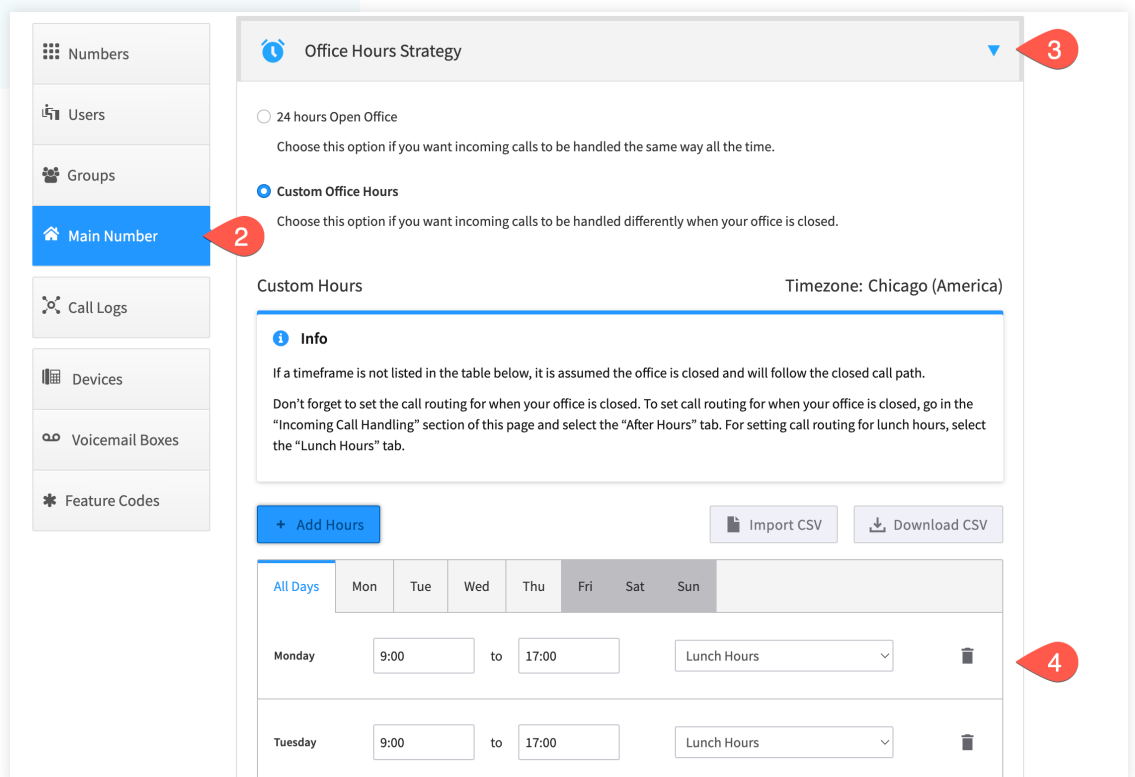
RevenueWell Phone Portal

Commonly Used Features in Phone PBX



Best Practice on Closing your Office & Changing Office Hours:

1. Sign in Open RevenueWell PBX Link
2. Click Main Number
3. Office Hours Strategy
4. Example “Closing early on Monday”
 - Click the 17:00
 - Creates a drop down for choosing a different hour
 - Click the hour you would like to close at
5. Click Save Changes



Office Hours Strategy

24 hours Open Office
Choose this option if you want incoming calls to be handled the same way all the time.

Custom Office Hours
Choose this option if you want incoming calls to be handled differently when your office is closed.



Custom Hours Timezone: Chicago (America)

Info

If a timeframe is not listed in the table below, it is assumed the office is closed and will follow the closed call path.

Don't forget to set the call routing for when your office is closed. To set call routing for when your office is closed, go in the "Incoming Call Handling" section of this page and select the "After Hours" tab. For setting call routing for lunch hours, select the "Lunch Hours" tab.

[+ Add Hours](#) [Import CSV](#) [Download CSV](#)

All Days	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Monday	9:00	to	17:00					Lunch Hours 
Tuesday	9:00	to	17:00					Lunch Hours 

****Make sure you update your hours back the next day, if this isn't a permanent change to your office hours****