

## SCHEDULE 3.4(B) – CLOUD VOICE SERVICES

### 1. APPLICATION

- 1.1 This schedule, which contains a description of the **Cloud Voice Services**, forms part of the Agreement between the Parties for the provision of Services together with those the **General Conditions** and other documents listed at clause 1.4 of the **General Conditions**.
- 1.2 Definitions and interpretations that are specific to this Schedule are set out in **Annex 1** and apply in addition to the definitions and interpretations set out in **Schedule 1 (Definitions)** of the **General Conditions**.

### 2. SERVICE DESCRIPTION

- 2.1 The Supplier will provide the Customer with access to a cloud-based voice subscription service licensed and chargeable on a per End User basis as set out in the applicable **Order** and hereinafter defined as “**Cloud Voice Service**”. The features included as part of the Cloud Voice Service subscription are detailed at **Annex 2** to this **Schedule** (“**Standard Features**”).
- 2.2 The Supplier will, upon request grant the Customer access to a Web Portal whereby the Standard Features can be configured and managed. Before the request is granted, Customer may be required to undertake training on the Web Portal which shall be chargeable in accordance with Supplier’s standard Tariffs.
- 2.3 The Supplier will provide telephone number(s) or port existing telephone numbers in accordance with the terms of this Schedule.
- 2.4 The Supplier shall, where stated in the applicable **Order**, provide the Customer with additional features to add further customisation of the Cloud Voice Service, which are separately chargeable and may include one or more of the following as further described in **Annex 2** to this Schedule:
- 2.4.1 Integrator Desktop Client with optional CRM integration
  - 2.4.2 PC/MAC Desktop Softphone
  - 2.4.3 Smartphone App - Android & iOS
  - 2.4.4 Receptionist Console
  - 2.4.5 Live Data Feeds (for Akixi Call Management Reporting Service)
  - 2.4.6 Call Queue Group
  - 2.4.7 Call Recording Storage
  - 2.4.8 Call Centre Agent
  - 2.4.9 Call Centre Agent Client
  - 2.4.10 Call Centre Supervisor Client
- as set forth in the applicable Order and hereinafter defined as “**Additional Features**”.
- 2.5 Where stated on the applicable Order the Supplier will provide the Customer with the following additional services which are separately chargeable, and which operate in conjunction with the Cloud Voice Service:
- 2.5.1 Cloud Voice Call Recording;
  - 2.5.2 Cloud Voice Collaborate;
  - 2.5.3 Cloud Voice Contact;
  - 2.5.4 Fraud Monitor; and
  - 2.5.5 Integration with Microsoft Teams.
- hereinafter defined as “**Additional Services**” and as further detailed in paragraphs 14 to 18 and **Annexes 3 to 6** of this **Schedule**.
- 2.6 Cloud Voice Services together with the Additional Services shall be collectively referred to in this Schedule as “**Cloud Voice Services**”.

### 3. HARDWARE

- 3.1 This paragraph 3 is supplemental to clause 4 of the **General Conditions** and shall only supersede it in the event of express conflict.
- 3.2 The Supplier makes no representations, whether expressed or implied, about whether the Cloud Voice Services will operate in combination with any Customer Equipment or other equipment and software not provided by the Supplier specifically for use with the Services.
- 3.3 The Supplier’s responsibility for any Hardware supplied by it to the Customer, is purely to support the Cloud Voice Services. Connection of the Cloud Voice Service to an End User LAN and any other Customer Equipment shall be the responsibility of the Customer.
- 3.4 If a Cloud Voice Service subject to a Minimum Term is terminated by the Customer prior to the expiry of the Minimum Term, title to any Hardware or Free of Charge Hardware associated with such Service shall pass to the Customer on payment by the Customer of all Charges payable to the Supplier in respect of the Cloud Voice Service and Early Termination Charges.
- 3.5 In the event of loss or damage to any Hardware (excluding normal wear and tear) prior to title passing to the Customer, the Supplier shall be entitled to invoice the Customer with the cost to the Supplier of replacement Hardware and the Customer shall pay any such invoice in accordance with paragraph 12 of this Schedule and clause 6 of the General Conditions.
- 3.6 Hardware supplied for use with the Cloud Voice Services cannot be used with any other service and the Supplier is under no obligation to adapt any Hardware for general use at any time either before or after title passes to the Customer.

### 4. CALLS

- 4.1 Where stated on the Order the Supplier shall provide the Customer with a pricing package charged at a fixed price with inclusive of minutes (“**Call Bundle**”). Where the Supplier does not provide the Customer with a Call Bundle or where the minutes of the Call Bundle have been used in full, the Supplier will charge the Customer for calls in accordance with its standard Tariff applicable from time to time.
- 4.2 Where the Supplier provides the Customer with telephone number(s) for use with the Services, nothing in this Agreement transfers or otherwise grants the Customer any legal, equitable or other right in any CLI or dialling code provided.
- 4.3 The Supplier will support Voice Calls to all UK, mobile and international destinations. Call barring is also available for the following destinations:
- 4.3.1 UK national - 01,02,03;
  - 4.3.2 UK mobile – 07;
  - 4.3.3 UK Premium Rate – 09
  - 4.3.4 International – 00, 115;
  - 4.3.5 Directory Enquiries – 118;
  - 4.3.6 Allow freephone calls
  - 4.3.7 Allow 084;
  - 4.3.8 Allow 087.
- 4.4 In addition to call barring options listed above, a full Customer level bar is available with the option to either bar calls, but

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- allow a primary or secondary number, or transfer all outgoing calls to a primary or secondary number.
- 4.5 A full area code is not required when dialling local numbers. The local area is defined by the End User DDI, or where not assigned the main site DDI the End User is associated with. If utilising the system outside of the UK with a requirement to call local in country numbers, then the full international dialling code will be required.
- 4.6 Non-geographic numbers (e.g. 0845, 0844, 0870 and 0871) cannot be added or used within the Cloud Voice Services. If use of a non-geographical number is required, the Supplier is able to arrange for translation product so that a non-geographical number points to a geographical number.
- 4.7 The Cloud Voice Service does not support the following call services:
- 4.7.1 analogue phones and devices, although a terminal adapter box can be used to connect these if required;
- 4.7.2 ISDN data calls;
- 4.7.3 numbers not allocated in the Web Portal; and
- 4.7.4 International number presentation (i.e. we cannot guarantee presentation of a UK CLI across International carriers).
- 5. CUSTOMER OBLIGATIONS**
- 5.1 The Customer shall prepare and maintain the Site(s) for the installation of the Equipment and supply of the Cloud Voice Services, including but not limited to the following:
- 5.1.1 ensure that the Enabling Services are in place, except where the Supplier is responsible for installing the Enabling Services as specifically detailed in the Order;
- 5.1.2 ensure that the Customer Network is prepared for the installation of the Cloud Voice Service by ensuring that it is fully configured in accordance with the Supplier's technical specifications;
- 5.1.3 permit the Supplier and any other person authorised by the Supplier to have reasonable access to the Site and Equipment, and provide such reasonable assistance as the Supplier requests;
- 5.1.4 take all reasonable steps to protect the health and safety of the Supplier's personnel whilst on Site(s) and the Customer warrants, represents and undertakes that it has adequate health and safety provisions in place at the Site(s); and
- 5.1.5 provide a secure, continuous power supply at the Site(s) for the operation and maintenance of the Cloud Voice Services and associated Equipment at such points and with such connections as the Supplier specifies.
- 5.2 For the avoidance of doubt, the Supplier shall not be liable for the non-availability of the Cloud Voice Services caused by any inability for the Supplier to install the Cloud Voice Service as a result of the Customer's failure to meet its obligations under this paragraph 5. The Supplier reserves the right to recover any costs and expenses incurred by the Supplier as a result of such failure.
- 5.3 If the Supplier, is not able to configure the Cloud Voice Service due to the Customer Network not being ready to connect to the Cloud Voice Service or attends the Site(s) and discovers that the Enabling Services are not available and additional works are required, then the Customer shall be liable to the Supplier for any costs and expenses which the Supplier incurs as a result of any cancelled or rescheduled visit.
- 5.4 Before the Commencement Date and where applicable, during the Term of this Agreement, the Customer shall:
- 5.4.1 confirm that telephone numbers to be taken over by the Supplier are free from rights of third parties which restrict such takeover;
- 5.4.2 confirm that the information provided by the Customer to the Supplier is correct and complete;
- 5.4.3 notify the Supplier of any changes in respect of the data provided by the Customer. This includes but is not limited to the Customer's name and address as well as email, telephone and fax numbers of the Customer's service contact;
- 5.4.4 not use the Cloud Voice Services to transmit any content in breach of Applicable Law;
- 5.4.5 ensure that the Cloud Voice Services are not used either by the Customer (including the Authorised Users) or any third party for any fraudulent, criminal, defamatory, offensive, obscene or abusive purpose or so as to constitute a violation or infringement of the rights of the Supplier or any third party;
- 5.4.6 comply with all Applicable Laws and all reasonable instructions from the Supplier in relation to the Customer's use of the Cloud Voice Services;
- 5.4.7 keep any passwords provided by the Supplier to access the Cloud Voice Services strictly confidential and shall promptly notify the Supplier if it becomes aware any unauthorised third party becomes aware of such password;
- 5.4.8 inform employees and members of staff that calls to Emergency Services may require first dialling (9) as a prefix in order to access an external line;
- 5.4.9 inform employees and members of staff that calls to Emergency Services are not available during power cuts and network outages;
- 5.4.10 inform the Supplier of any changes that are required to any Site(s) address and/or access details stored in the Web Portal and shall ensure that this information is up to date; and
- 5.4.11 check voice mail messages at regular intervals, and in any event at least every four (4) weeks. The Supplier reserves the right to delete personal messages if the Capacity Limits within the relevant Tariff have been exceeded
- 5.5 The Customer acknowledges and accepts that a failure to comply with paragraph 5.4.10 to will result in incorrect address information being made available to Emergency Services and consequently may mean that Emergency Services are unable to locate the Customer and/or its Authorised User(s).
- 5.6 If, as a result of the Customer's negligence or default, a third party obtains any password supplied to the Customer, the Customer shall be liable for all Charges incurred as a result of any one of the Service using such password
- 5.7 In the case of a serious breach of the obligations under this Schedule 3.4(B) by the Customer or if the Customer fails to prevent a security breach by a third party (having been warned by the Supplier within a reasonable period about such security risk) the Supplier shall be entitled to terminate this Agreement immediately.

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- 5.8 It is the Customer's responsibility to ensure uninterrupted mains power is supplied to the Equipment. Failure to do so may impact on continuity of Calls to Emergency Services in the event of a mains power failure.
- 5.9 The Customer must not:
- 5.9.1 attempt to circumvent any security measures; or
  - 5.9.2 change the configuration on the Cloud Voice Services without the Supplier's permission.
- 5.10 Where the Customer moves site, it is the Customer's responsibility to notify the Supplier of any change in address where the relevant equipment will be housed so that the information can be supplied to Emergency Services.
- 5.11 The Customer will allow installs of new versions of any Third-Party Software and shall ensure the Cloud Voice Services comply with relevant specifications of any third-party design documentation which will be provided to the Customer from time to time.
- 6. SERVICE CONDITIONS**
- AUTHORISED USERS**
- 6.1 In relation to the Authorised Users the Customer confirms that:
- 6.1.1 the maximum number of Authorised Users authorised to access and use the Cloud Voice Services and Documentation shall not exceed the number of User Subscriptions the Customer has purchased from time to time;
  - 6.1.2 it will not allow any User Subscription to be used by more than one individual Authorised User unless it has been reassigned in its entirety to another individual Authorised User, in which case the prior Authorised User shall no longer have any right to access or use the Services and/or Documentation;
  - 6.1.3 each Authorised User shall keep a secure password for their use of the Services and Documentation, that such password shall be changed no less frequently than monthly and that each Authorised User shall keep their password confidential; and
  - 6.1.4 it shall maintain a written, up to date list of current Authorised Users and provide such list to the Supplier within ten (10) Working Days of the Supplier's written request at any time.
- 6.2 The Supplier reserves the right to audit the Supplier's use of the Cloud Voice Services to ensure that the Customer is complying with the terms of this Agreement. If the audit reveals that the Customer has not used the Services in accordance with this Agreement then the Supplier shall be entitled to (i) invoice the Customer for any such access that exceeds the limits provided by the Supplier to the Customer and (ii) if the Customer's misuse is such that it amounts to a material breach of this Agreement, terminate pursuant to Clause 8.1.1 of this General Conditions. In the event that any audit reveals any use in breach of the terms of this Agreement or any instructions provided to the Customer, the Customer will pay for all costs incurred in connection with and as a result of such audit.
- ENABLING SERVICES**
- 6.3 To enable the Supplier to fulfil its obligations under this Agreement the Customer shall have the following services in place and configured for use with the Cloud Voice Services to ensure that the Cloud Voice Services meet the minimum technical requirements:
- 6.3.1 a suitably enabled Access Service;
  - 6.3.2 a business broadband Hub;
  - 6.3.3 a suitable LAN infrastructure; and
  - 6.3.4 IP Hardware
- each an "Enabling Service".
- 6.4 The Supplier does not issue any IP Address to be used with the Service. Access to and use of the address is controlled by the internet authorities and its use is subject to any rules which they may prescribe. The Supplier reserves the right to withdraw or change the address if for any reason the address ceases to be available.
- 6.5 Where Enabling Services are being provided by the Supplier as set forth in the Order, to ensure that the Customer Network is ready for the installation of the Cloud Voice Service, the Customer shall be responsible for all costs and expenses incurred by the Supplier.
- WEB PORTAL**
- 6.6 Where the Supplier makes available the Web Portal or other Software for the Customer to use with the Cloud Voice Services, the Customer will be required to enter into an Authorised User licence agreement in the form set out at any web-link or other location that the Supplier or the Software supplier may notify the Customer, as may be amended or supplemented from time to time ("EULA").
- 6.7 By accepting the terms of the EULA, the Customer agrees to observe and comply with it for all use of the Cloud Voice Services. If the Customer does not comply with the EULA, the Supplier may restrict or suspend the Cloud Voice Services upon reasonable notice.
- 6.8 The Supplier will use reasonable endeavours to maintain (but does not guarantee) access to the Customer's account on the Web Portal 24/7, 365 days a year, except where planned changes or maintenance is required. The Supplier shall not be liable for any losses caused by any restriction in such access.
- 6.9 The Web Portal is a browser based and designed to support all major browsers and operating systems. Each release is tested against the following browsers:
- 6.9.1 Chrome (the current version at the time of version release);
  - 6.9.2 Firefox (the current version at the time of version release); and
  - 6.9.3 IE8, IE9, IE10, IE11 and Edge (the current version at the time of version release).
- 6.10 The solution requires the Flash plugin only on browsers which do not support HTML audio (IE8).
- 6.11 Whilst it is not possible to ensure that breaking changes do not occur as evergreen browsers (Chrome, Firefox and Edge) update, reasonable endeavours are in place to ensure compatibility and swift resolution of any problems.
- 6.12 The Web Portal is not guaranteed to work on all smartphone/tablet devices and operating systems. On completion of provisioning of the Service, the user should perform a pre-test to ensure the Service work with their browser/smartphone/tablet device.
- CLI PRESENTATION**
- 6.13 CLI Presentation is supported by the Cloud Voice Service and allows an administrator to present a choice of either the Site number, "Withheld / Private", Connect Mobile Number, "Other UK", "Other Int" or "User DDI".

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- 6.14 Alternative Number Presentation is also available where any number owned by the Customer and/or End User can be presented provided it meets Ofcom Guidance on CLI Presentation. That means it must be:
- 6.14.1 a number that can be reached / dialled;
  - 6.14.2 a number that has been received, from the public network and passed on unchanged;
  - 6.14.3 it will have been allocated either to the caller or if allocated to a third party only used with the 3<sup>rd</sup> party's explicit permission; and
  - 6.14.4 it is supported by an underlying network number and service.
- 6.15 For calls to Emergency Services, the presentation to the called party will always be defaulted to the Site Number allocated to the Customer and where address information is stored.
- 6.16 The Other (UK) CLI field will accept the following formats: National Significant with leading zero (01NNNNNNNNNN, 02NNNNNNNNNN, 03NNNNNNNNNN, 07NNNNNNNNNN (excluding 070), 08NNNNNNNNNN) for UK numbers. SIP E.164 - with leading plus - (+441NNNNNNNNNN, +442NNNNNNNNNN, +443NNNNNNNNNN, +447NNNNNNNNNN, +448NNNNNNNNNN) for UK numbers. The Other (Int) will accept the following format only SIP E.164 - with leading plus - (+CCNNNNNNNNNN) for non-UK numbers.
- 6.17 The presentation of any other A-Number CLI types, badly formatted CLI A-Numbers or UK revenue sharing numbers are not supported by the Cloud Voice Service. Presentation of Mobile A-Number CLI types (07NNNNNNNNNN and +447NNNNNNNNNN) excludes Personal numbers (070).
- 6.18 The Supplier cannot guarantee consistent presentation of intended CLI's made to mobile and international carriers as successful presentation of the intended CLI is entirely dependent on the mobile or international carriers use of these numbers and specific call flow.
- 6.19 Mobile missed calls and voicemail notifications can often use the default CLI, being the underlying network CLI, which is the Customer selected default number or the first number of any allocated account range, rather than the intended CLI for presentation.
- 6.20 Some combinations of CLI presentation and call recording will result in the call recording not recording calls for the call flow required. Further information can be requested from the Supplier including its Call Recording Interaction Guide.
- 6.21 In the event you experience issues relating to CLI presentation, please raise a Service Fault in accordance with paragraph 8.
- 6.22 Where call divert is set up from an End User account to an external number then the following rules apply:

User Provided CLI / Outgoing Caller ID	Presentation to Called Party *	CDR Record
Site Number	Site Number	Site Number
Private	The displayed "presentation" to the called party will be dependent on what is supported within the destination network. For example "Unavailable" or "Private Number" may be presented to the called party.	Site Number
Individual CLI	Individual CLI	Individual CLI

### 7. NUMBER PORTING

- 7.1 Where access to the Cloud Voice Service is facilitated through number porting from a current supplier (the "**Ported Number**"), the Customer authorises the Supplier to (i) have the numbers from the current supplier listed in the appendices of the Order Form; (ii) have the Ported Number routed by the Supplier instead of the current supplier and; (iii) to forward appropriate details of the Customer's porting application for the Cloud Voice Service to the Supplier.
- 7.2 The Customer will receive advance notification of the change of supplier of the Ported Number from the current supplier to the Supplier. The Supplier's ability to provide the Cloud Voice Service is subject to the current supplier porting the Ported Number to the Supplier. The Supplier shall not be liable if there are any issues with the availability, suitability or any other issue with the Cloud Voice Services caused by a failure to transfer numbers unless such failure is due to the Supplier's error or omission.
- 7.3 The Customer understands and accepts that all services linked to the original number will be automatically terminated upon completion of the number porting including, but not limited to broadband service, Redcare Alarm, Fax, PDQ & Franking machines and monitoring services such as alarms and utility meters. Other services such as, but not limited to, 1571/Call Minder, Call Barring and Call Diversion will also be ceased. Any messages left via the 1571/Call Minder service will be lost. The Customer must arrange at its own cost availability of such services from other suppliers or over other lines and numbers. Failure to do so will result in disruption to the Customer's business and the Supplier shall not take any responsibility for service loss as result of number porting.
- 7.4 The Customer shall be responsible for any potential contract termination or porting charges which may arise from the termination of the Customer's contract with its existing supplier.
- 7.5 The Customer accepts that Number Porting is governed by regulation and is managed by multiple carriers and telecommunications operators and as a result the Supplier is not in control of the duration or outcome of the process. The Supplier shall not be held liable in any way for any Number Porting related issues, faults or errors howsoever caused.
- 7.6 The Customer accepts all charges and fees associated with Number Porting including submissions, rejections, re-submissions and export. Charges are as per the Supplier's current price list.
- 7.7 From time to time and during the process of switching suppliers, the Supplier may port the Customer's telephone number(s) between its upstream suppliers as a general internal practice. The Supplier shall not be required to notify

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the Customer of this internal network change nor seek the Customer's consent.

- 7.8 On contract termination, any telephone numbers still required by the Customer that are listed under this Agreement must be ported from the Supplier within three (3) months of the date of termination. After this date any remaining numbers will be de-activated, removed from Web Portal and will no longer be available for porting.

### 8. SERVICE LEVELS

- 8.1 For a period of two (2) weeks following installation of the Cloud Voice Service, the Supplier will undertake minor remote engineering changes to ensure that the Cloud Voice Services meets requirements (up to a maximum of two (2) hours of engineering time). Any further adds, moves and changes shall be charged in accordance with Clause 3.21 to 3.23 of the **General Conditions**.
- 8.2 The Supplier shall provide and manage the Cloud Voice Service in accordance with **Schedule 4.1 Fault Management Connectivity**, which sets out the Supplier's notification procedure for Service Faults together with its Service Fault Targets.
- 8.3 Service Levels specific to the Cloud Voice Services are set forth in this **Schedule 3.4(B)** and where there is a conflict between **Schedule 4.1 Fault Management Connectivity** and this Schedule 3.4(B), the latter shall prevail.
- 8.4 The Supplier's responsibility does not extend to the transport between the point of connection (being the SBCs) and the End User or to any equipment in operation beyond this point, both of which shall be the responsibility of the Customer. The Supplier shall only be responsible up to the point of connection (being the SBCs) "**Cloud Voice Support Boundary**".
- 8.5 The Supplier has no responsibility for the Cloud Voice Services outside of the Cloud Voice Support Boundary.
- 8.6 The Supplier shall use reasonable endeavours to repair a Service Fault in relation to the voice element of the service in accordance with the Service Care Level below:

Priority	Target Reaction	Target Reply	Service Times
<b>Critical</b>	1 Hour	4 Hours	Mon to Fri 8:30 – 17:30
<b>High</b>	6 Hours	8 Hours	Mon to Fri 8:30 – 17:30
<b>Medium</b>	8 Hours	3 Working Days	Mon to Fri 8:30 – 17:30
<b>Low</b>	5 Working Days	7 Working Days	Mon to Fri 8:30 – 17:30

- 8.7 The Customer may upgrade its Service Care Level at an additional charge as set out in the Supplier's current Tariffs.
- 8.8 Where the Supplier fails to meet the applicable Service Care Level, the Customer may, make a one-off claim for a Service Credit pursuant to **Schedule 4.1 Fault Management Connectivity**.
- 8.9 The Supplier's liability under this paragraph to pay Service Credits to the Customer shall be the maximum liability of the Supplier and the Customer's sole financial remedy for failure to meet Service Care Levels.

- 8.10 The Supplier reserves the right to apply an additional Charge in accordance with the Supplier's standard Tariffs where following investigation of a Service Fault, the Supplier finds that the Service Fault is due to a fault or damage to the Customer's Access Service.

### 9. NETWORK SERVICES AND AVAILABILITY

- 9.1 The Customer acknowledges that the Cloud Voice Service is an internet-based service and, consequently, the Cloud Voice Services will only function if there is a suitable Internet Connection to support the Cloud Voice Service enabling it to do so.
- 9.2 The Customer shall procure, at its own cost, a reliable business-grade Internet Connection either through the Supplier (any such internet connectivity provided by the Supplier shall be subject to the applicable **Schedule 3**) or through an alternative supplier which must be approved by the Supplier prior to ordering the Cloud Voice Service). The Internet Connection must be configured in accordance with the Supplier's Guide.
- 9.3 Where the Internet Connection is supplied by a third party the Supplier does not assume any liability or responsibility for that third-party internet connectivity and/or any associated Service Levels.
- 9.4 The Customer acknowledges and agrees that the call quality provided over the Cloud Voice Services depends on: (i) both the specifications and availability of the Internet Connection to which the Customer is connected, and; (ii) the telecommunications network to which the person on the other end of the call is connected. The Supplier shall not be liable for calls of an unsatisfactory quality connection caused as a result of points (i) or (ii) above.
- 9.5 Where routing of Calls utilises Cloud Voice Services, the Customer acknowledges and agrees that the quality and availability of the Call can be subject to factors outside of the Supplier's reasonable control and the Supplier shall not be responsible for the quality or availability of such Call.
- 9.6 The Customer acknowledges that the Cloud Voice Services will not be available in the event of a power cut affecting any Site(s) that the Customer installs the Cloud Voice Services, and the Customer will not be able to make any calls during any such power cut. The Supplier shall have no liability for loss of Service that occurs as a result of a power cut at the Site(s) in which the Cloud Voice Service is installed. It is the Customer's responsibility to ensure that they have the means to make Calls to Emergency Services.
- 9.7 The Customer acknowledges that any change in the configuration of the voice and data components of the Services can adversely affect the ability to make calls. The Customer shall not therefore make any changes to the configuration of the voice and data components of the Services unless the Customer has been provided with consent to do so by the Supplier.
- 9.8 If the Customer is provided with consent and access to the Service in order to make changes to its configuration the Customer shall be liable for any changes that it makes to the Services and the Supplier shall not be liable for any adverse effects suffered as a result of the Customer's configuration of the Services. Any work carried out by the Supplier to rectify the Services following such configuration by the Customer shall incur a charge from the Supplier based on the time and materials taken to remedy such issue.

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- 9.9 The Supplier will not make any changes to the configuration of the voice and data components of the Services which has an adverse effect on the Customer's ability to make calls without first notifying the Customer of the potential adverse impact and obtaining the Customer's prior consent to such change;
- 9.10 If the Service is to be used to carry Alarm Signals, then the Supplier shall not be liable in the event that the Customer is unable to deliver an Alarm Signal due to:
- 9.10.1 network failure;
  - 9.10.2 suspension of the Customer's account for the reasons set out in this Agreement, or;
  - 9.10.3 any reason outside the Supplier's reasonable control including but not limited to any technical issues within the network (for example the network is being tested, modified or maintained or access to the network is denied) or the Internet Connection.
- 9.11 The Customer must register the Cloud Voice Services at the Site(s) at which the Customer intends to use them. If the Customer intends to use the Cloud Voice Service from multiple Site(s), then the Customer must update the Supplier each time a new location is added. If the Customer does not notify the Supplier of the updated Site(s), the Customer acknowledges that the Services may not be able to make calls including, for the avoidance of doubt, calls to Emergency Services.
- 10. EMERGENCY CALLS**
- 10.1 Cloud Voice Services support 999/112 emergency call services and such calls will be routed to the national emergency call handling agents. However, these Services do not operate in the same way as PSTN fixed line 999/112 public emergency call services and connection to such services may not be possible in the event of a service outage caused by loss of End User connectivity to the internet for whatever reason. In such circumstances the End User should use their PSTN line to make the emergency call. Furthermore, it may on occasions not be possible for Emergency Services personnel to identify the End User's location and telephone number so this information should be stated promptly and clearly by the End User when making such a call.
- 10.2 The Customer agrees to provide to the Supplier for each network termination point full details of the End User's name and address (including post code) to enable the Supplier and its Third-Party Supplier to fulfil their obligations under Ofcom regulations to pass such details on to BT.
- 10.3 The Customer acknowledges that the Services will not be available for calls to Emergency Services during any power cut affecting the Site(s) at which the Services are installed.
- 10.4 All mid-call functions, such as call transfer, for emergency call types are forbidden on the system which ensures that during an emergency a call is not accidentally lost.
- 10.5 When provisioning the Cloud Voice Services, the Supplier will arrange for the site CLI to be logged in the Emergency Services database, with a VoIP service type and address information provided to the Supplier by the Customer. The Emergency Service Operator will aim to confirm the address with the Customer due to the nomadic capabilities of these numbers. Aside from that, all calls will be handled no differently than a analogue call.
- 10.6 The Customer acknowledges that any configuration changes of voice and data components may affect the ability to make Emergency Calls. The Supplier will not be liable for any claims, losses, costs or expenses that occur as a result of the Customer changing the voice and data components of the Services that result in an inability to call Emergency Services.
- 10.7 A configuration change of the voice and data components preconfigured by the Supplier can adversely affect calls to Emergency Services. The Customer acknowledges that an Emergency Call made via Cloud Voice Services in a different location from the one that is registered in Order, is transmitted to the control centre indicating the registered Site and not the location of the Cloud Voice Service and can therefore mean that any Emergency Services response will be sent to an incorrect location.
- 10.8 If the Customer uses or intends to use the Services outside the UK, the Customer acknowledges that the Services cannot be used to access Emergency Services.
- 11. SERVICE RESTRICTIONS**
- 11.1 The Customer shall not use the Cloud Voice Services:
- 11.1.1 to make abusive, offensive, indecent, menacing, nuisance or hoax calls;
  - 11.1.2 for any illegal and/or criminal purpose;
  - 11.1.3 to send, knowingly receive, upload, download, or use any material which is offensive, abusive, indecent, defamatory, obscene or menacing, or in breach of copyright, confidence, privacy or any other rights;
  - 11.1.4 to cause annoyance, inconvenience, needless anxiety or harassment;
  - 11.1.5 to spam or to send or provide unsolicited advertising or promotional material or, knowingly to receive responses to spam, unsolicited advertising or promotional material sent or provided by any third party;
  - 11.1.6 to contravene any legislation, laws, licences or third-party rights;
  - 11.1.7 for any use in contravention of the Supplier's Fair Use Policy;
  - 11.1.8 in any way that is not in accordance with the instructions provided to the Customer by the Supplier;
  - 11.1.9 in any manner that is contrary to the terms of this Agreement;
  - 11.1.10 in any manner that could be construed to amount to Emergency Call Abuse;
  - 11.1.11 to attempt to copy, modify, duplicate, create derivative works from, frame, mirror, republish, download, display, transmit or distribute any portion of the software and/or Documentation (as applicable) in any form or media or by any means except as allowed by any applicable law;
  - 11.1.12 to attempt to de-compile, reverse compile, disassemble, reverse engineer or otherwise reduce to human-perceivable form all or any part of the Service(s) except as allowed by any applicable law;
  - 11.1.13 to access all or any part of the Services and/or Documentation in order to build a product or service which competes with the Services and/or Documentation;
  - 11.1.14 to use the Services and/or Documentation to provide services to third parties; or
  - 11.1.15 to licence, sell, rent, lease, transfer, assign, distribute, display, disclose, or otherwise commercially exploit, or otherwise make the Services and/or Documentation

## SCHEDULE 3.4(B) – CLOUD VOICE SERVICES

- available to any third party except the Authorised Users.
- 11.2 The Customer shall indemnify the Supplier against any claims or legal proceedings which are brought or threatened against the Supplier by a third party because:
- 11.2.1 the Services are used in breach of this paragraph 11; or
- 11.2.2 the Services are faulty or cannot be used by a third party as a result of the Supplier's breach of this paragraph 11.
- 11.3 Unless specified to the contrary in an Order Form, access to premium rate numbers and directory services will be prohibited via the Services.
- 11.4 The Customer acknowledges that the Supplier may block certain telephone numbers, or groups of telephone number or national dialling codes for example premium rate telephone numbers ("**Blocked Numbers**"). The Supplier will notify the Customer in the event that the Supplier blocks such numbers, number groups or national dialling codes. Such restrictions may be removed at the Customer's request; however, the Customer shall be liable for all charges for and connected to calls to any Blocked Numbers.
- 11.5 The Customer is not entitled to select the upstream network operators and carriers used by the Supplier to provide the Services. The Supplier shall have the complete freedom and discretion to select a network operator and carrier and the Supplier reserves the right to change any of the Supplier's upstream suppliers at any time throughout the duration of this Agreement, where supplier shall include but not be limited to upstream network operators and carriers. Such change may occur without notification to the Customer.
- 11.6 If in the reasonable opinion of the Supplier, the Customer's call profile is indicative of Fraudulent Activity, the Supplier shall reserve the right to suspend the Cloud Voice Services immediately, without notice to the Customer in accordance with clause 7.1.4 of the General Conditions.
- 12. CHARGES AND PAYMENT**
- 12.1 This paragraph 12 is supplemental to clause 6 of the **General Conditions** and in the event of express conflict this paragraph 12 shall take precedence.
- 12.2 The Supplier shall invoice the Customer for the Charges for the Cloud Voice Service, Additional Features and Additional Services as set out in paragraph 12.3 in the amounts specified in any Order or as varied under this Agreement.
- 12.3 Unless stated otherwise in an applicable Order, the Supplier shall invoice the Customer monthly for:
- 12.3.1 Installation Charges, on or after the Connection Date for any work carried out;
- 12.3.2 Recurring Charges in advance, except Usage Charges;
- 12.3.3 Usage Charges in arrears calculated at the then current Tariffs;
- 12.3.4 any Charges for Hardware, which shall apply from the date of delivery of such Hardware;
- 12.3.5 any Termination Charges upon termination of the Cloud Voice Service and Additional Services.
- for any period where the Cloud Voice Services, Additional Features and/or Additional Services (excluding Fraud Monitor) are provided for less than a month, the Recurring Charges will be calculated on a daily basis.
- 12.4 The Supplier may also invoice for the following Charges in addition to those set out in the Order:
- 12.4.1 investigating a Service Fault where no Service Fault is found or is caused by something which the Supplier is not responsible for under this Agreement;
- 12.4.2 commissioning the Cloud Voice Service, Additional Features and Additional Services outside of Normal Working Hours;
- 12.4.3 restoring the Cloud Voice Service and Ancillary Services if the Cloud Voice Service and Ancillary Services have been suspended in accordance with clause 7 of the **General Conditions**;
- 12.4.4 cancelling Cloud Voice Service, Additional Features and Additional Services in accordance with clause 8 of the **General Conditions**;
- 12.4.5 any other charges set out in the Order or the Tariffs or as otherwise agreed; and including but not limited to charges for (i) providing paper invoices, (ii) late payment fees (iii) dishonoured payments and (iv) payment processing fees; and
- 12.4.6 charges as stated in the Tariffs for any Services, Additional Features or Additional Services ordered by the Customer on the Web Portal and/or which arise from any changes made to existing Services, Additional Features or Additional Services by the Customer on the Web Portal.
- 12.5 The Customer shall remain liable for all Charges where the Customer or a third party has used the Cloud Voice Service, whether used with the knowledge and consent or otherwise of the Customer or other Fraudulent Activity in connection with the use of the Services provided under this Agreement, including but not limited to fraudulent Calls made by a rogue caller and Calls made by any third party whom has gained unauthorised access to the Cloud Voice Service.
- 12.6 The Supplier reserves the right to apply a price increase to the Charges each calendar year except where the Supplier has agreed otherwise with the Customer in writing. The Supplier will notify the Customer when the price increase applies for each Service by email, on the Customer's invoice, the Chess Customer portal and/or on its website at [www.chessICT.co.uk](http://www.chessICT.co.uk). The increase will be rounded to the nearest whole pence and calculated by multiplying the existing Charges by a percentage comprised of i) the Retail Price Index ("RPI") rate figure published by the Office of National Statistics in January of that year (ignoring negative figures), plus ii) 3.9%. If the RPI figure is negative in the year the Supplier will only increase Charges by 3.9%. This paragraph 12.6 is without prejudice to clause 6.10 of the General Conditions and as such shall not be deemed superseded.
- 13. TERMINATION**
- 13.1 This paragraph 13 is supplemental to clause 2 and 8 of the **General Conditions** and in the event this paragraph 13 conflicts with clause 2 and 8 of the **General Conditions**, this paragraph shall take precedence.
- 13.2 Where a Customer is a Microenterprise or Small Enterprise Customer or a Non-for-Profit Customer, upon expiry of the Minimum Term, the Minimum Term will not automatically renew under clause 2.1 of the General Condition and the Agreement shall continue until such time that the Small Business Customer provides thirty (30) days' notice to terminate the Agreement. Use of the Cloud Voice Services following expiry of the Minimum Term will be subject to the Supplier's standard published Tariffs.

**SCHEDULE 3.4(B) – CLOUD VOICE SERVICES**

- 13.3 Where a Customer is a Microenterprise or Small Enterprise Customer, they shall have the additional right to terminate the Agreement in the following circumstances:
- 13.3.1 by giving the Supplier notice within thirty (30) days’ notice from the Supplier of any proposed amendments the Charges in accordance with clause 6.10 and/or clause 16 of the General Conditions being received and where such changes are likely to cause material detriment to the Customer; or
- 13.3.2 within the Transfer Period.
- For the avoidance of doubt, the Customer shall not have a right to terminate the Agreement pursuant to 13.3.1 where the Supplier varies the Charges pursuant to paragraph 12.6.
- 13.4 Where the Supplier provides notice of proposed amendments to the Charges and/or the Agreement pursuant to clause 6.10 and/or 16.1 of the General Conditions and the Customer does not provide notice to terminate within thirty (30) days in accordance with paragraph 13.3.1, the Customer shall be deemed to have waived its right to terminate pursuant to paragraph 13.3.1. The Customer’s continued use of the Services shall be deemed acceptance of such changes.
- 13.5 If a Customer terminates the Agreement pursuant to paragraph 13.2 or 13.3 above, the Customer shall not be liable for any Termination Charges.
- 13.6 Notwithstanding paragraph 13.3, the Customer shall be liable to pay Termination Charges to the Supplier in accordance with clause 8.7 of the General Conditions, where the Agreement is terminated within the Minimum Term or any Successive Term.

**14. CALL RECORDING**

**PART A**

- 14.1 Part A shall apply to all Customers who purchase the Cloud Voice Call Recording Service. Part B shall apply to those Customers who purchase the Standard Call Recording and Part C, to those Customers who purchase the MiFID Call Recording together with **Annex 3**.
- 14.2 The Supplier will provide the Customer with access to a secure and compliant business call recording solution with multi-level permissions-based access delivered from a private cloud and includes the following features (“**Cloud Voice Call Recording Service**”):
- 14.2.1 Calls are recorded using the SIPREC protocol. Recording is enabled and performed at user level, not at number/CLI level;
- 14.2.2 The actual call does not pass through the call recording service, instead a tap (SIPREC) branches the call (SIPREC meta data and media) to the Third-Party Supplier’s Call Recording platform;
- 14.2.3 Media and meta data are captured by the Session Recording Server. Files are then processed and encrypted by the Audio Converter before being stored;
- 14.2.4 Encrypted files are stored both in the cloud (AWS) and locally (for a shorter period). In both cases files are never stored for longer than the customer-selected retention period;
- 14.2.5 Recordings are automatically deleted at the end of the retention period; and
- Recordings can be accessed via the Call Recording portal by authenticated and permitted users only.
- 14.3 The platform utilises SIPREC which ensures calls that a End User makes or receives via the Cloud Voice Services are

recorded. This includes all inbound, outbound and internal calls made or received on the user’s desk phone, soft client(s) or connect mobile.

- 14.4 Any time a call recording mode is changed or assigned to a user an email is automatically sent to notify the user that their call recording status has changed and hence their calls may be recorded.
- 14.5 All participants in a call need to be informed that their call may be recorded. This can be achieved via an automated announcement or via the recording user informing the third party(s) verbally at the start of the conversation that the call may be recorded.
- 14.6 Call recordings and user access controls are accessible through a secure (SSL certified) Call Recording portal.
- 14.7 The Supplier shall have restricted access to the Call Recording portal: it will have the ability to access the portal via Single Sign-On but they will see a read-only view of the user section and a limited view of the ‘recording’ section with no capability of listening to the recordings.
- 14.8 The Call Recording portal is browser based and designed to support all major browsers and operating systems. Each release is tested against Chrome and Firefox (the current versions at the time of version release).
- 14.9 To achieve the best experience of the Call Recording portal, it is recommended that the latest versions of Firefox or Chrome should be used. The portal is not guaranteed to work with smartphone / tablet devices and operating systems.
- 14.10 Whilst it is not possible to ensure that breaking changes do not occur as evergreen browsers (Chrome, Firefox) update, the Third-Party Supplier shall use reasonable endeavours to ensure compatibility and swift resolution of any problems.
- 14.11 The Cloud Voice Call Recording Service availability targets are as follows:

Service	Measure	Target
Call Recording Portal	Application availability, storage and retrieval of recordings	99.99%
Recording of Live Calls	Availability	99.99%
*Reporting	Availability	99.99%

\* Only applies in respect of Part C, MiFID II Call Recording.

- 14.12 If there is a failure to meet the availability targets set out in clause 14.11. Service Credits shall be awarded to Customer, once the credit has been received by Supplier, subject to the request being received within two (2) weeks of the availability target being missed. Service Credits are calculated by reference to and awarded against the total monthly user fees for the affected element of the Cloud Voice Call Recording Service.

Service Availability	Percentage of total monthly call recording user fees to be awarded as a Service Credit
≥ 99.99%	0%
≥ 99.00% < 99.99%	12.50%
≥ 97.00% < 99.00%	25%
≥ 95.00% < 97.00%	37.50%

**SCHEDULE 3.4(B) – CLOUD VOICE SERVICES**

< 95.00%	50%
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- 14.13 Service Credits shall be the exclusive remedy for any failure to meet the availability targets.
- 14.14 Customer shall, upon request, provide to Supplier all reasonable information concerning downtime suffered by the Customer including a detailed description of the incident, the duration of the downtime, the server request logs that documented the errors (with confidential information removed), and network trace routes.
- 14.15 The availability levels at clause 14.11 do not apply, and Service Credits shall not be available in respect of:
  - 14.15.1 any issues arising out of a force majeure event;
  - 14.15.2 Internet access problems or related problems outside the Platform / Internet gateway;
  - 14.15.3 any downtime during any period when the Platform Services are being made available on a trial basis or as a pre-release or beta version;
  - 14.15.4 any issues resulting from the acts or omissions of the Customer or the Customer's employees, agents, vendors or contractors;
  - 14.15.5 any issues resulting from any software or hardware operated by the Customer or any third party (except for the Third Party software or hardware within the direct control of Supplier);
  - 14.15.6 any issues resulting from a failure of the Customer to modify its use of the Platform Services as directed by Supplier or the Third Party Supplier;
  - 14.15.7 downtime outside of agreed hours of operation (standard hours of 08:00 – 20:00 London time); or
  - 14.15.8 downtime during scheduled maintenance.

**PART B**  
**Standard Call Recording**

- 14.16 There are two Standard Call Recording options: (i) **Business Call Recording**; and (ii) **Compliant Call Recording**. Both the Business Call Recording and Compliant Call Recording provide access to call recording features and capabilities.
- 14.17 **Business Call Recording** offers several retention period options: 3 months; 6 months; 12 months; 36 months and 60 months. **Compliant Call Recording** provides a retention period of 7 years.
- 14.18 The retention period is the length of time call recordings will be stored in the cloud for, starting from the day of the call. During this period, call recordings can be accessed via the Call Recording portal only to users who have access to the recordings.
- 14.19 All Customer subscriptions shall have the same retention period. Changes can be made to the subscription type i.e. from Compliant to Business call recording as well as the retention period but these type of changes can only be made company-wide.
- 14.20 There is a manual delete function which allows deletion of the link between the metadata of the call recording and the call recording file, meaning the file cannot be retrieved. There is a grace period of 7 days where the link can be reinstated. Thereafter, the file will be permanently deleted.
- 14.21 Calls are encrypted with AES-256 by the Audio Converter before being upload to Amazon. If a file is streamed or downloaded, then this is decrypted within the Third Party Supplier's network prior to being provided to the user. It is not decrypted in AWS so it is always encrypted outside the Third Party Supplier's network whether in transit or at rest

Third Party Supplier's AWS account is operated using MFA (Multi Factor Authentication). This is enforced for the limited users that have access and is controlled by different departments within the business.

- 14.22 Data will be stored on AWS S3 in the London region. Amazon will not transfer data outside the EU London region unless instructed to do so by the customer: [https://aws.amazon.com/compliance/data-privacy-faq/#Where\\_is\\_customer\\_content\\_stored.3F](https://aws.amazon.com/compliance/data-privacy-faq/#Where_is_customer_content_stored.3F).
- 14.23 Whilst the requirements for Customer to become MiFID II compliant extend beyond the specific features of Compliant Call Recording, this option supports Customer's wider compliance.
- 14.24 Recordings made under the Compliant Call Recording tier provide full visibility of call properties e.g. timestamp, calling parties and associated meta-data. Specific features include:
  - 14.24.1 Store calls for up to seven years
  - 14.24.2 Record Internal and External calls (ext-to-ext)
  - 14.24.3 Encrypted secure storage
  - 14.24.4 "Audit trail"
  - 14.24.5 Stored in a durable medium
  - 14.24.6 Readily accessible and available to clients - download direct from the browser; and
  - 14.24.7 Call recording is provisioned for a user, so a user with multiple numbers (fixed and connect mobile) will have all of their calls recorded under a single subscription.
- 14.25 The Cloud Voice Recording Service is BS10008 compliant, meaning Customers' recordings are admissible in a UK court of law. In addition to this, the Service Platform is ISO 27001 compliant, ISO 22301 compliant and Cyber Essentials certified.
- 14.26 The duration of the Cloud Voice Call Recording term shall be stated in the Order. Changes to this can be made at any time.
- 14.27 The Charges do not vary based on the volume of stored call data, but on the length of the retention period, i.e. on how long the calls will be stored for.
- 14.28 Removing the Cloud Voice Service License from the End User will stop recording of calls from that date.
- 14.29 There are strict legal rules governing: (a) the circumstances in which it is permissible to record calls; (b) the purposes for which such recording may be made; (c) the length of time recorded material may be retained; (d) the need for pre-notification to those taking part in the call; and (e) the way such notifications must be given. It is the responsibility of the Customer to consider its legal and compliance obligations. The Supplier and Third-Party Supplier do not accept liable for misuse or mis-sale of the Services or Features.

**PART C**  
**MIFID II Call Recording**

- 14.30 Call recordings are encrypted before they are saved to the disk with 128 bit encryption. They are decrypted as they are streamed for playback or downloaded. At no time are they permanently stored unencrypted on disk.
- 14.31 The solution is BS10008 compliant, meaning customers' recordings are admissible in a UK court of law.
- 14.32 In addition to this, the Service Platform is ISO 20000 compliant, ISO 27001 compliant, ISO 22301 compliant, Cyber Essentials certified, listed on the Cloud Security Alliance STAR registry and featured on the VISA Europe Merchant Agent list for the secure storage of PCI DSS sensitive call recordings.

## SCHEDULE 3.4(B) – CLOUD VOICE SERVICES

14.33 Calls cannot be deleted without specific privileges assigned to a user type. Deletions can be made through the Call Recording portal but may have compliance implications. Should a deletion be made in error, recordings can be retrieved in the following scenarios:

14.33.1 Up to 11:59 UTC on day of deletion carrier provider/Customer can retrieve via portal

14.33.2 Up to fourteen (14) days following deletion, a ticket can be raised into the Supplier support desk to request retrieval. Any request to restore a recording deleted in error will be subject to a one off fee as per Supplier's standard Tariffs.

14.34 The Charges for the MIFID Call Recording are invoiced monthly in advance per End User which includes a defined amount of storage with units expressed as minutes.

14.35 If multiple users enabled for call recording were on the same call, the recorded call would be stored multiple times for each user recording the call.

14.36 Usage Charges apply if the total storage exceeds the sum of the inclusive storage, based on the level of over usage (charged for in bands).

14.37 Each MIFID II Call Recording subscription contains inclusive minutes that can be stored free of charge as per the Tariffs. The Customer shares the inclusive minutes across all End Users per MIFID II Call Recording subscription. The amount of inclusive storage is 84,000 minutes per user for MIFID II Compliance Call Recording e.g. (10 users = 840,000 minutes available for the identified retention period) Each recorded call is stored in seconds per call to/ from the user. The billable storage is aggregated per End User and rounded up to the nearest minute.

14.38 The MIFID II Call Recording call retention policy is 60 months but can be extended to 84 months - set at End User level.

14.39 Recordings will be automatically deleted in line with the standard retention policy, e.g. automatically deleted after 60 or 84 months. Please note that it is possible to manually delete call recordings.

### 15. COLLABORATE

15.1 The Supplier will provide the Customer with access to the unified communications as a service solution, licensed on a per user basis, and includes the following features ("**Cloud Voice Collaborate Service**"):

15.1.1 audio and video calling via the desktop and smartphone;

15.1.2 personal audio, web and video conferencing;

15.1.3 room audio, web and video conferencing;

15.1.4 instant messaging and presence;

15.1.5 service management;

15.1.6 desktop/screen sharing;

15.1.7 voicemail; and

15.1.8 address books/contact management.

15.2 The Cloud Voice Collaborate bolt-on adds the following service personal audio and web conferencing for up to 50 users, instant messaging and presence, peer to peer video, room to room video and full telephony inbound and outbound calling as further described in **Annex 4**. Cloud Voice Collaborate is available to users via a desktop and/or mobile client.

15.3 The desktop client provides comprehensive voice support, the ability to create video calls with up to 15 participants, the

ability to create personal instant audio conferences with up to 50 internal or external participants and instant messaging and presence. The desktop client also provides the user with a collaboration space – my rooms – which allows users to share and collaborate via desktop/screen sharing.

15.4 The mobile client provides voice, video and collaboration functionality on mobile devices. The client utilises the data functionality of the mobile device so quality is subject to the robustness of either the 3/4/5G connection or Wifi connection.

### 16. CONTACT

16.1 The Supplier will provide the Customer with access to a cloud based omnichannel contact centre solution, licensed on a per agent and per supervisor basis, and includes the following features ("**Cloud Voice Contact Service**"):

16.1.1 agents automatically enabled for both voice and email interactions on a single subscription;

16.1.2 webchat available as an add-on subscription for agents;

16.1.3 agent interface that works on any supported browser;

16.1.4 supervisor specific interface

16.1.5 unlimited admin accounts included at no additional cost

16.1.6 inbound and outbound voice capabilities;

16.1.7 shared phonebook across the organisation

16.1.8 shared presence information across the organisation;

16.1.9 graphical call flow design interface;

16.1.10 Customer Relationship Management software included

16.1.11 wallboards included at no additional cost

16.1.12 sophisticated queue management tools

16.1.13 agent and queue-based call recording; and

16.1.14 comprehensive historical reporting tools.

16.2 The Cloud Voice Contact Service is designed specifically to work in conjunction with the **Cloud Voice Service** and the **Cloud Voice Collaborate Service**. Where the Customer subscribes for these Services, they shall be chargeable separately and governed by the terms of this Schedule.

16.3 Agents and supervisors are licensed on a named basis and each licence allows for both voice and email interactions. Supervisor licences include all agent voice and email functionality to support "*player-managers*" within the smaller contact centre.

16.4 Webchat subscriptions are available as an add-on to the agent and supervisor subscription. Supervisors only need the additional webchat subscription if they will be acting as an agent, i.e., setting their status as available for webchat interactions.

16.5 Administrator licences can be applied to any End User at no charge, but these do not enable agent or supervisor features. This means administrators can manage back-end functionality, such as queues and interaction flow design, but cannot receive calls or manage agents. Administrators can also be given the agent or supervisor role, but this is chargeable at the standard rate and consumes a subscription.

16.6 Outbound SMS is available and will be chargeable in accordance with Supplier's standard Tariffs.

16.7 Call queues are licenced for up to 15 calls per agent subscription purchased. For example, if an organisation has 10 agents it can queue a maximum of 150 calls across all queues within the organisation.

16.8 Call recording is licensed on a per product and End User basis. Each End User in Cloud Voice Contact needs to also be licensed

## SCHEDULE 3.4(B) – CLOUD VOICE SERVICES

to use Cloud Voice Call Recording Service within Cloud Voice Contact. Where stated on the Order, the Supplier shall provide the Cloud Voice Call Recording Service in accordance with the terms of this Schedule.

- 16.9 The Supplier makes no representations, whether expressed or implied, about whether the Cloud Voice Contact Service will operate in combination with any Customer Equipment or other equipment and software.
- 16.10 Cloud Voice Contact Service includes voice, chat, email, agent and supervisor interface, contact management, reporting and wallboard features which are further described in **Annex 5**.

### 17. INTEGRATION WITH MICROSOFT TEAMS

- 17.1 The Supplier will provide access to Microsoft Teams which enables the customer to use the Microsoft Teams application as a Cloud Voice endpoint to make and receive calls by using the Third-Party Supplier's direct routing capability ("**Cloud Voice Integration with MS Teams**"). The features are further detailed in **Annex 6**.
- 17.2 As the Third-Party Supplier uses direct routing, the Customer can use the Microsoft Teams desktop and mobile applications as well as the browser-based version of Microsoft Teams delivered as an Additional Service to add further and more specialised customisation of the Cloud Voice Service.
- 17.3 To enable the Cloud Voice Service for Microsoft Teams the Customer must have the following for every End User:
- 17.3.1 a Cloud Voice Service license;
- 17.3.2 a Cloud Voice for Microsoft Teams license;
- 17.3.3 a valid telephone number;
- 17.3.4 a Microsoft or Office 365 license including MS Teams; and
- 17.3.5 Microsoft Phone System license or an E5 license or Business Voice license.
- 17.4 Virtual phone system licenses are not supported. In addition the following features of the Cloud Voice Services have not yet been tested or are not currently supported:
- 17.4.1 Call Queue Groups;
- 17.4.2 Call Centre;
- 17.4.3 Feature Access Codes;
- 17.4.4 Cloud Voice Contact;
- 17.4.5 Instant Conference Group;
- 17.4.6 Integrator;
- 17.4.7 Page Group; and
- 17.4.8 Compliant Call Recording - due to Teams-to-Teams calls not breaking out to Cloud Voice, we cannot offer Compliant Call Recording.
- 17.5 The supply, provisioning and support of the Microsoft environment is the responsibility of the Customer. The Third-Party Supplier can take no responsibility for any aspect of the Microsoft environment beyond the Microsoft facing SBC that resides within the Third-Party Supplier's network ("**Cloud Voice Integration with MS Support Boundary**").
- 17.6 The below is not supported by the Third-Party Supplier nor the Supplier unless purchased from the Supplier where stated in the Order or any applicable SOW agreed in accordance and in which case **Schedule 4.2 Professional Services** shall apply:
- 17.6.1 Microsoft 365 configuration & management;
- 17.6.2 Microsoft Teams configuration & management; or
- 17.6.3 Microsoft Phone System configuration & management.
- 17.7 During the provisioning, the Microsoft Tenant requires 2 unassigned Phone System licenses and 2 unassigned Microsoft or Office 365 licenses. Business Voice is recognised as a valid Phone System License. Once the Cloud Voice Service has been

provisioned and the Administrator has been provided with the user details, the licenses may then be assigned.

- 17.8 As part of provisioning, the Microsoft Administrator will also need PowerShell running on their Windows desktop or laptop.
- 17.9 The Third-Party Supplier Voice Application is designed for Microsoft Administrators to be able to link the Microsoft Tenant and the End User.
- 17.10 To prepare the Microsoft Tenant to work with the Cloud Voice Service, Third-Party Supplier Voice Application makes changes to the Tenant.
- 17.11 During provisioning, the Third-Party Voice Application will disable Microsoft Team's Voicemail and Music-on-hold features due to feature clashes. Voicemail and Music-on-hold will be delivered via the Cloud Voice Service.

### 18 FRAUD MONITOR

- 18.1 Where Fraud Monitor is provided, paragraphs 18.1 to 18.10 shall apply. The provision of Fraud Monitor is dependent upon the Supplier providing the Customer with Cloud Voice Services to which it relates. If for any reason the Supplier ceases to provide such services the Fraud Monitor service shall terminate with immediate effect and the Supplier shall have no liability to the Customer in respect of such termination and no longer providing Fraud Monitor. Where Fraud Monitor is terminated in this way, the Customer shall not be entitled to any refund of any monthly Charges paid.
- 18.2 Fraud Monitor shall only apply to the Cloud Voice Services specified as benefiting from the Fraud Monitor as stated in the Order or as otherwise agreed in writing by the Supplier.
- 18.3 Fraud Monitor is provided solely for the Customer's use and the Customer may not resell or attempt to re-sell Fraud Monitor.
- 18.4 Unless otherwise stated in the Order, the monthly Charges for Fraud Monitor are as per the Supplier's applicable Tariffs.
- 18.5 For one (1) Fraud Incident in any Calendar Year, the Customer shall not be liable to pay the first £200 of call Charges where such call Charges arise from a proven Fraud Incident and provided such call Charges did not arise due to an act or omission of the Customer or breach of the terms of this Schedule 3.4(B) or the General Conditions by the Customer.
- 18.6 Except as stated in paragraph 18.5 above, in all other circumstances the Customer shall be liable for all Charges arising from Fraudulent Activity pursuant to this paragraph 18 of this Schedule 3.4(B) and the Charges shall be payable in accordance with this Schedule 3.4(B) and the **General Conditions**.
- 18.7 The Supplier has the right to suspend provision of the Cloud Voice Service in accordance with this paragraph 18 of this Schedule 3.4(B) whether or not the Fraud Monitor is provided in relation to the Cloud Voice Service. Unless expressly stated in this paragraph 18, the rights and obligations of the Supplier and Customer as detailed in this Schedule 3.4(B) and the **General Conditions** remain applicable to Services which have the benefit of Fraud Monitor.
- 18.8 The Customer shall provide the Supplier with an up-to-date point of contact with 24x7 availability who the Supplier shall notify by email of suspected Fraudulent Activity or of any suspension of the Cloud Voice Service. In the event, the Customer has not provided an email address for notification as anticipated by this paragraph, the Supplier will endeavour to notify the Customer using any other contact information which it has on record. The Customer shall immediately reply to any notification of suspected Fraudulent Activity.
- 18.9 The Supplier will only reactivate any suspended Services when the Customer has satisfied the Supplier (at its sole discretion) that the reason for suspension has been resolved and the

## SCHEDULE 3.4(B) – CLOUD VOICE SERVICES

services are unlikely to be a material immediate risk of Fraudulent Activity.

18.10 The provision of Fraud Monitor is not a fraud prevention system and does not prevent unauthorised access to the Service(s) or the Equipment and the Customer shall be responsible for obtaining professional security advice with regards to the Service(s) and/or the Equipment. The Supplier makes no representation that Fraud Monitor will be error-free or will detect, limit or prevent fraudulent usage of the Services. The Supplier disclaims any warranty of any kind, expressed or implied, including, but not limited to, warranties of fitness for a particular purpose, merchantability or satisfactory quality, with regard to the nature, quality and accuracy or validity of Fraud Monitor. In particular (without limitation), the Supplier accepts no liability for any delays in suspending or reactivating any Service which are beyond its reasonable control (including, without limitation, delays by third party suppliers or carriers in activating or removing barring orders).

### 19 PROFESSIONAL SERVICES

19.1 Where the Supplier provides the Customer with Professional Services in relation to the Initial Installation and Configuration, Customisation or otherwise, the provision of such services shall be governed by **Schedule 4.2 Professional Services**.

### 20 ADDITIONAL SUPPORT SERVICES

20.1 Where specified in the Order, the Supplier will provide the Customer with Additional Support Services as detailed in **Schedule 4.1 Fault Management Connectivity** in relation to Service Faults which relate to the customisation or configuration of the Cloud Voice Services undertaken by the Supplier by way of Professional Services provided upon implementation.

20.2 For the Supplier to provide Additional Support Services in accordance with **Schedule 4.1 Fault Management Connectivity**, the Supplier will require access to the PBX and where the Cloud Voice Service is being provided with an on-site PBX, the Additional Support Service can only be provided to the Customer where, as stated in the Order, the Supplier provides Maintenance Support Services in accordance with **Schedule 4.3 Maintenance Support Services**.

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

### ANNEX 1: DEFINITIONS

**Access Service** means any data connection which connects equipment and ultimately handsets and software;

**Additional Features** has the meaning given to it in paragraph 2.4

**Additional Services** has the meaning given to it in paragraph 2.5;

**Alarm Signals** means any emergency alarm system that may be connected to the Cloud Voice Service which includes but are not limited to burglar alarms and medical alarms;

**Authorised Users** means those employees, agents and independent contractors of You that You authorise to use the Cloud Voice Services and the Documentation as further described in the Order Form;

**Blocked Numbers** has the meaning given to it in paragraph 11.4;

**Call** means a signal, message or communication that is silent, spoken or visual;

**Call Bundle** means a bespoke pricing package, where Tariffs are fixed price and are inclusive of minutes as set forth in the Order;

**Capacity Limits** means up to one hundred (100) voicemail messages each of a duration of 180 seconds;

**Cloud Voice Service** is an Internet-based telephony service delivered over an Internet Connection or any other form of connectivity;

**Critical** means loss of service multiple services affected which is a priority classification as set forth in paragraph 8.6 above;

**Customer Network** means the Customer's physical telecommunications and/or data network infrastructure located at the Site that allows the exchange of voice and data communications established by the connection of voice and data devices, such as internet routers, network switches, CAT5e/CAT6/CAT7 ethernet cabling (including patching and termination) and any mains power supply up to the Third-Party Supplier network;

**Documentation** means the document made available to the Customer by the Supplier or by third party licensors via MyPortal or such other web address notified by the Supplier to the Customer from time to time which sets out a description of the Cloud Voice Services and the user instructions for the Cloud Voice Services

**Emergency Call Abuse** means any hoax/prank calls to emergency service numbers; unnecessary and/or in appropriate calls to emergency service numbers (as is a device that connects to your Internet modem and relays data that it reads from your telephone communication system, computer software, and various devices such as microphones and webcams regarded by a reasonable person); abuse of Emergency Services call handlers or any other actions and/or; any behaviour that could reasonably be determined to amount to an abuse of Emergency Services call lines

**Emergency Services** means in respect of any locality:

- (a) the relevant public police, fire, ambulance and coastguard services for that locality; and
- (b) any other organisation, as directed from time to time by Ofcom as providing a vital service relating to the safety of life in emergencies

**End User** means anyone who is permitted by the Customer to use of access the Cloud Voice Services;

**Fraud Incident** means an instance of Fraudulent Activity perpetrated by a third party in respect of a Cloud Voice Service which benefits from Fraud Monitor;

**Fraud Monitor** means the call analytics service known as Fraud Monitor (as modified or substituted from time to time);

**High** means loss of service relating to a single service which is a priority classification as set forth in paragraph 8.6 above;

**Hub** means a router provider by the Supplier or Third Party Supplier that is compatible with the Internet Service, which is Ancillary Equipment for the purposes of this Agreement;

**Installation Charges** means those Charges in relation to installation and/or configuration of the Cloud Voice Service and/or any Equipment as applicable;

**Internet Connection** means a connection to the global data network comprising interconnected networks using the TCP/IP protocol suite;

**Internet Protocol** or **IP** means a communication protocol for devices connected to the internet that specifies the format for the addresses and units of transmitted data;

**IP Address** means a unique number on the Internet or a network card or controller that identifies a device and is visible by all other devices on the Internet;

**Hardware** means equipment or handsets purchased by the Customer from the Supplier and which is necessary for the provision of the Cloud Voice Services;

**Local Area Network** or **LAN** means the infrastructure that enables the ability to transfer IP services within a Site (including data, voice and video conferencing services);

**Low** means single number destinations / QOS which is a priority classification as set forth in paragraph 8.6 above;

**Medium** means disrupted single or multiple services which is a priority classification as set forth in paragraph 8.6 above;

**Network** means a network which authenticates connections to the Services through SBCs which are deemed to be the connection point between the Services and the Access;

**PBX** means private branch exchange;

**Ported Number** has the meaning given to it in paragraph 7.1;

**Recurring Charges** means the Charges for the Cloud Voice Services or applicable part of the Cloud Voice Services, including but not limited to User Subscriptions, licences for Third Party Software, Additional Features, Additional Services or Call Bundle that are invoiced repeatedly in every billing period as set out in the Order;

**SBCs** means Session Board Controllers;

**Service Care Levels** means the repair options as set forth in paragraph 8.6 above;

**Service Fault and Service Fault Targets** have the meaning given to them in **Schedule 4.1 (Fault Management Connectivity)**;

**Session Initiation Protocol** or **SIP** is a technical standard (specified in RFC 3261) which is used to deliver an IP Voice solution linking to existing systems/equipment and optimises a secure data connection to initiate and terminate voice calls via the Internet;

**SIP Gateway** means a device that connects to a Hub and relays data that it reads from a telephone communication system, computer software, and various devices such as microphones and webcams;

**Termination Charges** means any compensatory charges payable by the Customer to the Supplier on termination of this Agreement in whole or part, in accordance with clause 8.7 of the General Conditions and as set out in the Order, or if not specified, then an amount equal to 100% of the Recurring Charges for all remaining months of the Minimum Term, together with any waived one off charges and/or Installation Charges and an average of the Usage Charges invoiced by the Supplier over the previous six months;

**Transfer Period** means a period of ten (10) Working Days which starts after the Working Day on which notification has been given requesting a Line to be transferred to or from the Supplier;

**Usage Charges** means the Charges, if any for the Cloud Voice Services or applicable part of the Cloud Voice Services that are calculated by multiplying the number of units (voice minutes) for the Cloud Voice

### SCHEDULE 3.4(B) CLOUD VOICE SERVICES

Services that the Customer has used or incurred in a billing period with the relevant Tariff, which are made outside of or which exceed usage or a Call Bundle as set forth in the Order;

**User Subscription** means the user subscriptions purchased by the Customer pursuant to paragraph 4.20, which entitles Authorised Users to access and use the Cloud Voice Services and the Documentation as set forth in the Order;

**VoIP** voice over IP;

**Web Portal** means a web based portal whereby the Cloud Voice Services can be accessed, managed and configured either at Customer, Site or individual user level.

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

### ANNEX 2: CLOUD VOICE SERVICE FEATURES

#### 1. STANDARD FEATURES

1.1 Each Cloud Voice Service subscription has the following standard feature set available:

Account codes	Ad Hoc Conferencing
Authentication	Anonymous Call Rejection
Automatic Call Back	Authorisation codes
Call Admission Control	Busy Lamp Fields
Call Forward Busy	Call Forward Always
Call Forward Not Reachable	Call Forward Selectively
Call Log/history (Top 10 missed, received, dialled)	Call Forward No Answer
Call Notify by Email	Call From Anywhere (Remote Office)
Call Pickup	Call me Anywhere (Twining)
Call Recording Inbound	Call Park
Call Transfer	Call Return
Calling Line Id Blocking	Call Recording Outbound
Calling line Id Delivery (Internal)	Call Waiting
Calling Policy	Calling line id Delivery (External)
Diversion inhibitor	Calling Name Retrieval
Device Customisation	Call Hold
Hot Desk	Do not Disturb
Hunt Group – Circular	Group Paging
Hunt Group – Simultaneous	Hunt Group – Regular
Hunt Group – Weighted Distribution	Hunt Group – Uniform
Last Number Redial	Instant Group Call
Music on Hold User	Music on Hold
Number Presentation	Pre-set availability Profiles
Nuisance Call Management (Call Groups)	Speed Dials
Sequential Ring	Scheduling on Auto Attendant
Voice Messaging – User and Hunt Group	Scheduling on Hunt Group

1.2 Please see below explanation of the standard features available as listed above:

#### Account codes

Enables the tracking of calls made to external parties by prompting users for an account code prior to making a call. Account codes are managed by the administrator of the account and can be 2 to 14 digits in length

Account codes can also be implemented on a per call basis in which users have the option to enter an account code by dialling the feature access code prior to a call.

Please note you can't have Accounts codes activated whilst authorisation codes are in use.

#### Ad Hoc Conference

Enables the ability to invite other participants to a call creating a conference call. Maximum of 4 people partaking.

#### Anonymous Call Rejection

This feature enables a user to reject calls from anonymous parties who have chosen not to present their number. By implementing this service the caller will receive a message stating that the applied number is not receiving anonymous calls.

#### Authentication

This service provides authentication via SIP Registrar and SIP Invite to secure a phone's incoming or outgoing calls with the Cloud Voice Service.

#### Authorisation codes

Performs an authorisation of calls made to external parties by prompting a user for an authorisation code prior to making a call. Calls will not be connected unless a valid code is entered.

Authorisation codes are managed by the administrator and can be 2 to 14 digits in length. Please note you can't have Authorisation codes activated whilst account codes are in use.

#### Automatic Call Back

This feature enables a call back to be set when dialling a user within the group, if a busy tone is received.

#### Busy Lamp Fields

Busy Lamp Fields (BLF) allows a user to monitor a defined extension by the colour of the lamp of the line key assigned. It also acts as a speed dial which when pushed will call that extension or user. **Error! Reference source not found.**

#### Call Admission Control

This feature provides the ability to limit the number of external calls that can be made from a site. This can be implemented by the Customer or the Supplier (where requested) ensuring that the bandwidth that has been scoped for external calls from a Customer's site is backed up by a call control to avoid quality issues.

#### Call Barge

The Call Barge feature allows a managing user to connect into an existing call and setup a Three-Way Call. This means that there will be a set of users (Managing Users) that can Barge-In into calls of a set of users (Monitored Users) which are configured to be able to be monitored.

#### Call Forward Always

Allows a user to redirect all incoming calls to an alternative destination. Users have the option to activate and deactivate this service through dialling a feature access code or configuring the service via their web interface.

#### Call Forward Selectively

Connect users, will be able to forward calls selectively depending on the number that was called e.g. if someone calls 'my fixed number' then calls can be forwarded to 01234 567890 and if someone calls 'my mobile number' then don't forward calls.

Note: the Connect App cannot be used to configure these settings.

#### Call Forward Busy

Allows a user to redirect calls to an alternative destination when an incoming call encounters a busy tone. Users have the option to activate and deactivate this service through dialling a feature access code or configuring the service via their web interface.

#### Call Forward No Answer

Allows a user to redirect calls to an alternative destination when an incoming call is not answered within a specified number of rings. Users have the option to activate or deactivate this service through dialling a feature access code or configuring the service via their web interface.

#### Call Forward Not Reachable

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

Call Forward Not reachable is designed to forward a call in the event that the subscribers device is not registered with the platform. In the case of a call group, all devices associated with the call group need to be unregistered for the not reachable forward to be applied. The Call Forward Not Reachable divert only occurs in the event that the device or devices become unregistered from the platform, typically due to an issue with connectivity between the Cloud Voice Service and the site/device being hard down, this should not be considered as a DR feature for any other scenario outside of this.

### **Call From Anywhere (Remote Office)**

Provides the ability for the user to define a location potentially outside of the service i.e. hotel room, where they can receive and make calls, whilst out of the office. This feature works through re-routing incoming calls to the defined destination, as well as implementing a 2 staged call setup when using click to dial through the service.

### **Call Log/History (Top 10 missed, received, dialled)**

Provides the user with a short term view of both incoming and outgoing calls, and the relevant results of each, through easy to use and interpret graphs displayed on the dashboard of the service.

### **Call Me Anywhere (Twining)**

Allows the user to define one or more locations that can be used as extensions to the user's desk phone. These locations when defined and activated would also ring at the same time as a desk phone when an incoming call is delivered.

### **Call Notify by Email**

Provides the ability to define which call types you would like to be notified about via email. This could range from missed calls during business hours through to outgoing calls from devices which should be locked or out of use.

### **Call Park**

Enables a call to be parked and retrieved from another phone within the same Call Park group, through using the relevant feature access codes and user extension.

### **Call Pickup**

Enables an incoming call to be picked up by another user within a Call Pickup group, through using the relevant feature access code and user extension. If there is more than one call ringing within a Call Pickup group, the call that has been ringing the longest will be retrieved.

### **Call Return**

Allows a user to call the last party that called assuming a CLI was presented, regardless of whether or not the call was answered.

### **Call Transfer**

Enables a user to redirect a ringing, active, or held call to another number or directly to voicemail. Prior to forwarding the call a user can choose to answer it and put the caller on hold whilst they contact the 3rd party to be transferred to.

### **Call Waiting**

Provides sight of additional incoming calls to the user's device while the user is engaged on another call.

### **Calling Line ID Blocking**

Allows a user to block or allow their user identity (name and number) to be presented to a called party.

### **Calling Line ID Delivery (External)**

Allows a user to present their user identity (name and number) for external calls.

### **Calling Line id Delivery (Internal)**

Allows a user to present their user identity (name and number) for internal calls within the service.

### **Calling Name Retrieval**

Provides the ability to deliver a user's name, as well as a number for calls made and received.

### **Calling Policy**

Enables an administrator to define the Calling Policies for both site and user to restrict or allow specific call routing, i.e. Call barring

### **Call Hold**

Allows a call to be put on hold for any length of time, whilst the user performs other activities.

### **Device Customisation**

This feature is subject to device compatibility. The models this is available on is available on request. This provides the ability to manage the available button roles against soft and line keys (and any associated side car) within the Cloud Voice interface. This feature is permission driven allowing assignment to an end user, or control by an administrator. Any selected programming within the interface would be maintained on the device through feature and firmware updates

### **Distinctive Ring**

Ability to set different ring tones for external and internal calls

### **Diversion Inhibitor**

Enables a user to prevent calls made being redirected again by the called party, i.e. redirecting calls to voicemail when trying to forward a call

### **Do Not Disturb**

Allows a user to set their phone to unavailable so that incoming calls are given a busy tone. This feature can be enabled through feature access codes, on supported devices, or through the service GUI.

### **Group Paging**

Group Paging is a group feature that allows for unidirectional paging to a group of users by dialling a group paging directory number (DN) or extension.

### **Hot Desking**

Provides the ability for any user to login to any device assigned to the Customer throughout all sites. A user can log in to a device through either activating the phone on supported devices, or through the service GUI, or Web Portal.

When activated that user will have the ability to make and receive calls as themselves, however programmed line keys or BLFs will only show when logged into their assigned device.

### **Hunt Groups**

Allows the delivery of incoming calls to users in predetermined and configured routing. Group administrators can choose from any of the following "Hunt" routing, and attach users and configuration as required:

Circular – sends calls in a fixed order. The call is sent to the first available user on the list, starting with the user following the last user to receive a call

Regular – sends calls to users in the order they are listed. The call is sent to the first user in the list, always starting with the first user.

Simultaneous – sends calls to all users within a group. The first user to pick up the phone will have the call routed to them.

Uniform – sends calls to the user who has been idle the longest. Once a call is completed that user will be moved to the bottom of the list. Calls received but not routed through the Hunt Group will not be applied to this routing.

Weighted – sends calls to users based on a weighted % of calls to answer. For example out of 10 calls 2 users may be weighted as 40% and 60% meaning 4 calls and 6 calls are delivered as defined to the associated users.

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

Administrators can also define call waiting to enable calls from outside of the Hunt Group routing to be delivered and answered.

### **Instant Group Call**

Provides an instant conference bridge connecting all members within the group. When a member of the group calls the specific group number, all users will receive a call inviting them to join the group. Maximum 20 (members) + 1 (Dialler) (internal or external).

### **Last Number Redial**

Enables users to redial the last number they called through supported devices or through a feature access code.

### **Music on Hold**

Allows the administrator to setup and maintain audio files that can be used in various call scenarios (e.g. Call Park, Call Hold). These files can be recorded through supported devices or uploaded through saved files.

The preloaded default audio files may be used freely as part of the Service. Where the customer chooses to upload and use other audio files then it is the customer's responsibility to obtain the necessary licence rights for their use, and the Supplier accepts no responsibility for any breach of third party rights as a result of the use of such files by the customer. By using the upload facility the customer agrees to indemnify the Supplier against any claims for such infringement. Please also note that service cannot support live feed music.

### **Music on Hold (user)**

Allows users to enable or disable music on hold on a per call basis, through either a feature access code or via the service GUI. This service is especially useful when attending conference calls or similar where you may wish to put a line on hold.

The preloaded default audio files may be used freely as part of the Service. Where the customer chooses to upload and use other audio files then it is the customer's responsibility to obtain the necessary licence rights for their use, and the Supplier accepts no responsibility for any breach of third party rights as a result of the use of such files by the customer. By using the upload facility the customer agrees to indemnify the Supplier against any claims for such infringement. Please also note that the service cannot support live feed music.

### **Nuisance Call Management (Call Groups)**

Allows for the rejection of incoming calls from a user defined list and/or anonymous numbers directly into a Hunt, Auto Attendant, Call Queue, and Call Centre type Call Groups.

Incoming calls with a caller ID found to exactly match a number on the Blacklist will be rejected with an appropriate announcement before automatically terminating the call. The end user can enter up to a maximum of 12 numbers onto the Blacklist per Call Group instance.

Incoming calls where the caller ID is anonymous or withheld can also be set to reject to an appropriate announcement before being terminated.

### **Pre-set availability Profiles**

Allows a user to enable a predefined availability profile, in order to implement specific call routing. These are defined as:

Available in the Office

Available out of the office

Busy

Unavailable

### **Scheduling**

Allows the definition of set schedules for business hours, and other company specific events. These schedules can then be implemented over Auto Attendants or Hunt Groups to provide specific routing during set hours or days.

### **Sequential Ring**

Allows a user to define a "find me" list of numbers that incoming calls will route to, sequentially. While the incoming call is routed, callers will hear comfort announcements, and can interrupt the search to leave a message. The user must set the number of rings after which the service will move on to the next number.

### **Site Admin**

Allows the creation of an administrator who will just manage a single site. This means the Company Admin will still have all the admin capabilities for a company and the Site Admins will have the following facilities for their respective sites within the company.

Manage Users

Device Management

View & Download Call Recordings

View Statistics

### **Speed Dials**

Allows a user to define either 1 or 2 digit speed dials that can be made from their device to key external or internal destinations. Local speed dials can also be established, however we recommend using the system to ensure both the phone and service GUI is in sync.

### **Voice Messaging**

Enables voicemail services to be established either against users or hunt groups so that messages can be left and accessed by users. Please note that the service does not display voicemails in its system, but enables a Voicemail to email function or access via Hardware.

## 2. ADDITIONAL FEATURES

2.1 Please see below explanation of the Additional Features available as listed in paragraph 2.4 of the Schedule:

### **Advanced Call Recording**

This feature enables the administrator to search for up to 3 months' worth of recordings. They can download up to 1000 inbound & 1000 outbound recordings in one go and up to 1000 recordings can also be deleted at once.

### **Bulk Download of Call Recordings**

The service enables an administrator to select up to a 14 day consecutive period and the feature will then collate the entire volume of recordings associated to the specified period and download them to the Administrators PC desktop in the form of a ZIP file. Once the batch has downloaded the Administrator will then have the option to delete the call recordings from the storage platform.

### **Call Recording Pause and Resume**

If a user is recording a call, with sensitive data that does not need to be recording, then a user can pause the recording and resume when they are ready. An example of when this could be used is credit card payments being taken over the phone.

### **Integrator**

Integrator is software that all allows a user to control their service from their desktop without having to log in to their portal or navigate through phone menus. In addition, the software integrates with a user's Outlook program making contacts easily accessible and dialable from Outlook and the desktop. Accessing key features and settings becomes very quick and easy, and finding and dialling contacts very fast - helping users to work more efficiently and be more productive. Telephony presence (with Click to Dial) is also provided for up to 20 work colleagues, definable by each user.

Key features provided are:

Click to Dial from Outlook ®

Screen popping from Outlook ® contacts and Directory

Click to Dial from web pages

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

In-call control features – hang up, hold, deflect, consult and transfer  
Desktop feature control – Do Not Disturb and Forward All Calls  
Desktop Address with Click to Dial (searches Directory and Outlook Contacts)  
Desktop Call History  
Desktop Recent Call Search  
Telephony Presence (with Click to Dial)

### **Integrator CRM**

Integrator CRM provides the full functionality and associated benefits of Integrator, as well as providing integration with many of the top CRM systems in the UK market today. The additional CRM functionality provides screen popping and click to dial from the chosen CRM and integrates it with certain desktop features such as desktop contacts searching.

### **Desktop Softphone**

This desktop client allows user to make and receive calls from their PC or MAC (using an appropriate headset), as well as quickly accessing key settings for their service. This is an ideal bolt-on for users who often work remotely; work from different locations where it is not practical to install a handset or who are regularly on the move with access to Wi-Fi (e.g. hotel stays).

In addition to the above the softphone also provides presence and instant messaging between users who also have a softphone (or smartphone app).

The key features provided are as follows:

- Make and receive calls
- Instant messaging and presence (includes Group Chat with up to 4 participants)
- Directory (with Click to Call from the softphone itself or the user's desk phone)
- Call history (with Click to Call from softphone or desk phone)
- Desktop dialler
- Settings management
- Twinning
- Remote office
- Forward calls
- DND
- Withhold my number

### **Smartphone App - Android & iOS**

The Smartphone app allows a user to make and receive calls on a mobile device, as well accessing key setting for their service. It provides all the same functionality as the desktop client above, with the exception of Click to Call and Group Chat. This is an ideal bolt-on for users who often work remotely or who are regularly on the move with access to Wi-Fi.

### **Desktop and Mobile Clients Usage Guidelines**

Please carefully consider the following advice on the use of mobile and desktop clients:

We cannot guarantee any aspect of setting up and conducting a call over any mobile network, whether using a mobile client or desktop client on a tethered laptop. Mobile networks provide no prioritisation of signalling and voice payload packets and some networks will either block or slow down VoIP packets.

If a customer reports a call quality or availability issue on a desktop or mobile client, please ensure you have checked that a mobile network is not being used to connect to the platform, as we are unable to provide support for such incidents.

Using the clients over mobile data will consume data that may either result in charges being raised by the user's mobile operator or be counted against the user's monthly data allowance.

### **Receptionist Console**

To complement the web interface a dedicated receptionist console is available to manage incoming calls over a single or multiple site.

This console provides the ability to:

- Monitor incoming calls to key numbers over all sites
- Monitor fixed (200) or dynamic (800) users over all sites
- Monitor call queues and adjust priority of callers within these queues
- Add notes to contacts to show related information such as leave
- Establish and manage conference calls in the site

The receptionist console is provided when this additional bolt on is provisioned and uses the chosen receptionist user subscription therefore does not incur additional subscription costs over and above the cost of the console bolt on.

### **Live Data Feeds**

The service is designed to enable the attachment of external offerings utilising data to complement a solution. Where this is requested or offered by the Supplier, a secure, read only data feed can be provided to extract call information.

In the majority of cases unless specified support for these services is managed by a contractual relationship between the Supplier and a Third-Party Supplier. The Third-Party Supplier will only provide access information to this feed to the Supplier.

### **Call Queue Group**

This is a basic simultaneous Hunt Group with the ability, should all users be engaged, to queue up to 25 calls at the network level. Each Call Queue Group can be customized with its own Welcome, Comfort, and Hold music/messaging, and has the added capability of a user breakout.

Charging is only applied to a user who can be part of a Call Queue Group; therefore you could have 3 users over multiple groups and only be charged for those 3 users, rather than users per group.

### **Call Recording Storage**

This is provided in a range of charging tiers and designed for use with the 'on demand' and 'X% of calls recorded' features over both user and also groups.

Call recording retention is defaulted to 3 months but has 6, 12, 36, 60 and 84 month options before being deleted.

### **Call Centre**

An extension to the hosted telephony platform, this add-on service enables businesses to easily manage their call centre environments, boost productivity of call centre agents and the overall efficiency of their call centre and help them deliver a first-rate service to their customers.

Additional Licences that can be ordered are:

- Call Centre Agent
- Call Centre Agent Client
- Call Centre Supervisor Client

## **ANNEX 3: CALL RECORDING SERVICE FEATURES**

### **Auto attendant**

If the call goes from an Auto Attendant to a user with Call Recording the call is recorded.

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

If the call goes from an Auto Attendant to a user without Call Recording the call is not recorded.

If a Call Recording user transfers or forwards a call to an Auto Attendant the messaging will be recorded until the Call Recording user is no longer active on the call.

### **Call barge**

If a user with Call Recording “barges in” on a call, their part of the call will be recorded.

A call already being recorded will include the part of the call with the “barge” in.

### **Call forwarding**

If a call is forwarded to a user with Call Recording the call is recorded.

If a call is forwarded to a user without Call Recording the call is not recorded.

### **Call paging**

If a user with Call Recording invokes Call Paging the call will be recorded.

### **Call Park**

If a user with Call Recording retrieves a parked call the call is recorded.

If a user with Call Recording parks a call and it is retrieved by a user that does not have call recording, the call is not recorded.

### **Call Pickup**

If the user that picks up a call has Call Recording the call is recorded.

If the user that picks up a call has not got Call Recording the call is not recorded.

### **Call Queue Group**

If the call goes to a user with Call Recording the call is recorded.

If the call goes to a user without Call Recording the call is not recorded.

If a user with Call Recording transfers a call to a Call Queue Group the time spent in the queue will be recorded until the user is no longer active on the call.

### **Call Transfer - Blind**

If the call is transferred to a user with Call Recording the call is recorded.

If the call is transferred to a user without Call Recording the call is not recorded.

### **Call Transfer – Consultative**

Same as blind transfer, but if the call is being recorded, either for the transferring user or by the destination user, the consultative leg is also recorded.

### **Click to Dial**

If a user with Call Recording makes a call using click to dial it is recorded.

### **CLI presentation**

If an incoming call has CLI presentation de-activated, the call is recorded but the CLI is not presented. The third party is shown as “anonymous 0”.

### **Collaborate**

Only the audio portion of Collaborate video calls will be recorded.

### **Hold / Music on Hold**

If a recorded call is put on hold with Music on hold, the music is included as part of the recording.

If there is no music whilst a recorded call is on hold, the “silent” part of the call is included in playback.

The other user in the call is still recorded while the call is on hold.

### **Hot Desk / Hoteling**

If a user with call recording makes a call from a device they have

associated themselves with, regardless of location, the call will be recorded.

If a user without call recording makes a call from a device they have associated themselves with the call will not be recorded, irrespective of whether other users with Call Recording have used the same device.

### **Hunt Groups**

If the call goes from a Hunt Group to a user with Call Recording the call is recorded.

If the call goes from a Hunt Group to a user without Call Recording the call is not recorded.

### **Instant Conference Groups**

If a call is triggered by a user with Call Recording, a recording of the whole call whilst they are active will be made.

If other users with Call Recording join the conference, recordings will be made per participant for the duration they are active in the conference.

### **Integrator**

If a user with Call Recording makes an outgoing call using Integrator the call is recorded.

If a user with Call Recording answers an incoming call using Integrator the call is recorded.

### **Receptionist**

If a user with Call Recording makes an outgoing call using receptionist the call is recorded.

If a user with Call Recording answers an incoming call using Receptionist the call is recorded.

### **Remote office / Click to Dial**

If a call is made by a user with Call Recording the call will be recorded.

### **Sequential Ringing**

If a user with Call Recording uses sequential ringing to take a call on a device that is not associated with one of their Cloud Voice numbers the call will not be recorded.

If a user with Call Recording uses sequential ringing to take a call on a device associated with another user that has Call Recording, the call will be recorded, but the user that “owns” the number will be shown as the User in the portal.

### **Schedules**

If a schedule changes the way a call is routed at certain times, and routes calls away from users who have Call Recording to users or off-net numbers that do not have Call Recording, calls will not be recorded.

### **Three-way call**

If a Call Recording user is on a call this will be recorded – when a third user joins this leg of the call will also be recorded.

If a Call Recording user joins an existing call, the part of the call they are active on will be recorded.

### **Twinning**

Incoming calls to a user with Call Recording picked up on a twinned end point will be recorded.

Outgoing calls from an end point twinned with a Cloud Voice user with Call Recording will not be recorded.

### **Voicemail**

Calls from a Call Recording user to the voicemail portal to retrieve left messages will be recorded.

Call to a user with Call Recording in which a message is deposited will be recorded, including both the message and the voicemail instructions.

### **Standard Call Recording - Call Recording Modes**

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

The Business Call Recording subscription provides users with five available call recording modes (whereby the recording in all such modes is conditional upon the requirements as set out in the call recording consumption section above):

- Always: all calls are automatically recorded without the user taking any action and is saved to the Cloud Voice Call Recording platform.
- Pause/Resume: all calls are automatically recorded, however the user has the ability to pause and then resume the recording using Feature Access Codes (FACs) or call recording controls where supported. Users can select to play nothing, a beep or an announcement for when Pause/Resume has been activated. Not available on Compliant recording
- On Demand: all calls are recorded from the beginning, but only the recordings of those calls that the user triggers with a FAC (\*44) or with call recording controls are kept by the platform. Not available on Compliant recording
- On Demand with User Initiated Start: the recording of the call is not started until the user starts recording the call using the \*44 FAC or call recording controls where supported. Not available on Complaint recording
- Never: none of user's calls will be recorded

The Compliant Call Recording subscription provides users with one recording mode: Always & None. This ensures that all calls are automatically recorded and remain compliant.

### **Standard Call Recording - User Types**

There are four user types available, each having different permissions:

- Global User – full access to any configurable item, recording and capability of the portal. The Global User is the only user who can delete, disable, or change a user type.
- Team User – access to the recordings and related data for all users (Please note that this type will not allow you to select a subset of users and you will have access to stream all users recordings, but reduced functionality than the Global user.)
- Staff User – limited access to recordings screen only (typically used for listening to own call recordings).
- Support User – portal view only but no access to recordings. This type of access is used for anyone who is not in Customer's organisation but may need access to provide support.

### **MIFID II Call Recording – User Types**

By default, five user types are created, under which users can be assigned different permissions:

- Super User - Full access to any configurable item.
- Admin User - User Administration only and no access to recordings.
- Recording User - Recording access across all users but no user administration.
- Simple Recording User - Limited access to recording screen only (typically used for own call recordings)
- Third Party Support User - Portal view only but no access to recordings in line with Data Protection regulation and potential implications of GDPR.

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

### ANNEX 4: CLOUD VOICE COLLABORATE SERVICE FEATURES

#### Instant Messaging

Instant messaging (IM) enables users to communicate in real time on computers or a compatible mobile device. Both two-party and multiparty IM sessions are supported. If a third participant is added to the conversation, the conversation window changes to support My Room conferencing features.

#### Presence

Presence provides information to users about the status of other Cloud Voice Collaborate users. The presence status is displayed as an icon automatically based on calendar or user activity i.e. making a call but can also be manually set. The presence icon represents the user's current availability and willingness to communicate.

#### Voicemail

Every Cloud Voice Collaborate user is supplied with an enterprise-grade voicemail box. This provides a multi-announcement capability that can be assigned to either users or hunt groups and the voicemail delivered to the user or hunt group via email.

#### Personal and Room Video Calling

Users are able to hold a video call between clients on a one to one basis or a many to many basis. The maximum number of users that can join a single video call is 15. Small meeting rooms are supported using the Poly Studio. Fully integrated into Cloud Voice Collaborate, users can enjoy a room video conference driven from their Cloud Voice Collaborate client with simply plug and play. Up to 15 rooms can participate in a video conference.

#### Geographic Calls

Calls to 01, 02 and 03 numbers from the Cloud Voice Services shall be chargeable as per Supplier's standard Tariffs.

#### Calls to mobiles

Calls to UK Mobile destinations from the Cloud Voice Services shall be chargeable as per Supplier's standard Tariffs

#### Calls to Emergency Services

Calls to emergency services are supported by the service including within the mobile client within the UK. Should the user take the service to another country, the emergency service is not supported and should not be used to dial the UK or relevant overseas emergency services.

#### Number Porting

PSTN, ISDN and DDI numbers can be ported into the unified communication solution.

#### New Number (DDIs)

Where additional numbers are required, these can be provided from the pre-allocated pool and immediately associate them to the customer allowing them to be assigned to the unified communication platform.

#### Voice Calling

Cloud Voice Collaborate offers users the following:

Account codes	Ad Hoc Conferencing
Authentication	Anonymous Call Rejection
Automatic Call Back	Authorisation codes
Call Admission Control	Busy Lamp Fields
Call Forward Busy	Call Forward Always
Call Forward Not Reachable	Call Forward No Answer
Call Log/history (Top 10 missed, received,	Call From Anywhere (Remote Office)
Call Notify by Email	Call me Anywhere (Twinning)

Call Pickup	Call Park
Call Recording Inbound	Call Return
Call Transfer	Call Recording Outbound
Calling Line Id Blocking	Call Waiting
Calling line Id Delivery (Internal)	Calling line id Delivery (External)
Calling Policy	Calling Name Retrieval
Diversion inhibitor	Call Hold
Device Customisation	Do not Disturb
Hot Desk	Group Paging
Hunt Group – Circular	Hunt Group – Regular
Hunt Group – Simultaneous	Hunt Group – Uniform
Hunt Group – Weighted Distribution	Instant Group Call
Last Number Redial	Music on Hold
Music on Hold User	Pre-set availability Profiles
Number Presentation	Nuisance Call Management (Call Groups)
	Scheduling on Auto Attendant
Sequential Ring	Scheduling on Hunt Group
Voice Messaging – User and Hunt Group	Speed Dials

#### Audio and Web Conferencing

Each user has access to a permanent, always available conferencing service called 'My Room'. My Room enables users to hold ad-hoc or planned conferences with up to 50 people using voice and/or IM, and they can share applications, presentations or the complete desktop/ Up to 15 of the users can participate via video. Guest Participants i.e. those who do not have Cloud Voice Collaborate will be sent a link contained in an invitation. The guest can partake in the IP voice or video call without the need to download any software.

The call me feature instigates a call from the conference owner to the guest owner. The owner will be responsible for the cost of the call either from their minute bundle or overage. Only UK standard and mobile calls are supported.

#### Video

Cloud Voice Collaborate enables users to connect from either their PC/Mobile device or a Cloud Voice Collaborate enabled Video Conference Room. Person to person, room to room and multi party sessions (up to 15) are supported. Users must have a compatible video and audio device supported by the client. The quality of the video is subject to the underlying IP network.

#### Video Conference Room

Using the plug and play studio, smaller conference rooms (typically up to 8 persons) are enabled for video conferencing. Fully integrated and managed from the collaborate client, all the features of a collaborate my room session are available with the Studio Room system.

#### Content Sharing

With Cloud Voice Collaborate My Room, users can share on 121 or 1-many basis their entire desktop or single application. Similar to voice and video, users can create adhoc or pre-planned collaboration meetings.

### **ANNEX 5: CLOUD VOICE CONTACT SERVICE FEATURES**

#### **1. VOICE CHANNEL**

Cloud Voice Contact provides a comprehensive set of voice features to enable agents to make and receive calls and manage the current and historical communication with customers.

##### **1.1 Service Numbers**

Service numbers are assigned to the company from the Cloud Voice Contact Portal - the contact centre is setup as a site within the portal and the number must be assigned to this site (Cloud Voice Contact). Customers can have as many service numbers assigned to Cloud Voice Contact as they need. Currently, non-geographic numbers cannot be assigned as Service Numbers within the portal.

Once assigned to the company, Service Numbers can then be assigned to queues within the Cloud Voice Contact portal.

##### **1.1A Routing of Calls between Cloud Voice and Cloud Voice Contact**

The Service numbers allocated to Cloud Voice Contact enable you to manage and queue calls up to the number of Cloud Voice Contact subscriptions purchased.

When routing calls between Cloud Voice and Cloud Voice Contact, the maximum number of simultaneous calls for the Customer between these two platforms is 2 x the number of Cloud Voice Contact agents provisioned plus 5. For example, if the Customer has 10 agents, the maximum simultaneous calls would be 25.

Calls transferred between platforms, the number of simultaneous outbound calls from Cloud Voice Contact and any calls sent to Cloud Voice via a call flow will be counted towards the simultaneous calls number. Also, if Cloud Voice Handsets are being used then every call made or received on the handset will count towards the total calls between the platform.

It is not recommended that Customers host numbers on Cloud Voice and then route the majority of that traffic to Cloud Voice Contact. Doing so risks calls being dropped due to exceeding the simultaneous calls limit.

If the majority of calls are destined for Hunt Groups that sit on Cloud Voice, the Customer should sit those numbers on Cloud Voice.

If the Customer sends calls to Cloud Voice Hunt groups, they could queue and potentially increase the number of simultaneous calls active between the platforms preventing further calls routing between the two platforms.

##### **1.2 Voice Queues**

Inbound telephone calls are queued, and the administrator can manage how these queues work within the contact centre environment. There is no limit to the number of queues allowed, but a service number will have to be assigned to a queue to make it active and agents will need to be available via groups for all active queues.

###### **1.2.1 Basic Features**

Each queue is given a name and can also be given a long description. For a queue to be active it needs to be given a primary group whose agents will take the calls presented to the queue.

Administrators can choose which classifications they allow agents to apply to calls at wrap-up for each queue. These act as tags for the call enabling the management team to understand what broad categories of interaction are flowing through the contact centre. This master list is configurable by the administrator and these classifications can be used in a variety of reports.

Administrators can assign an agent script to a queue. This prompts the agent with questions when they pick up a call and gives space to record the answer. This dialogue is automatically recorded into the internal CRM and can be viewed later.

###### **1.2.2 Groups**

Administrators can choose to automatically push calls to additional groups based on the following predetermined criteria:

If the queue length exceeds a set number of calls

If the queue length exceeds the number of calls per available agent

If the queue's maximum wait time is exceeded

If there are no available agents in the primary group

###### **1.2.3 Outbound/Transfer**

The administrator can choose whether a queue allows outbound calls to be made from it. The queue presentation number can be set here. By default, this number will be the Service Number attached to the queue, but this can be changed to any number. The customer should follow Ofcom guidelines regarding number presentation.

There is also flexibility as to what number is displayed to the caller when calls are transferred from the queue.

###### **1.2.4 Audio**

Customers can upload their own music and voice announcements, which can be used with queues and for menus etc. when creating their own interaction flows.

A text to speech engine is included so that it is easy to add voice announcements without the need to hire professional recording equipment.

The following audio can optionally be associated with the queue.

A-Party Announcement - this is the recording that is played to the caller when they join the queue

B-party Announcement - this is the recording that is played to the agent when they answer the call

Queue Music - this is the music played when the caller joins the queue

B-party music - this is the audio that is played to the agent when they put the call on hold

A-Party agent connect audio - This is the audio played to the caller just before they are put through to an agent.

###### **1.2.5 Queue Recording**

The administrator can set the percentage of calls that will be recorded on the queue from 0% to 100%

You can choose to record both caller and agent, just agent or just caller. You can also give the customer the option to opt out of being recorded.

These recordings are stored and are accessible from within the Call Recording platform.

The queue information as well as the caller CLI and agent ID is stored in the metadata.

Please note. Call recording cannot be set at a queue level on outbound calls.

###### **1.2.6 Agent Recording**

Sometimes an agent or a supervisor wish to record a call when they are mid call. The administrator can set up distinct call recording reasons that can be triggered by the agent e.g., if the agent is dealing with an abusive caller. This records the call from when this is triggered and records the relevant metadata.

The administrator must set up a selection of call recording reasons here before they are selectable by the agent.

These recordings are stored and are accessible from within the 's Call Recording platform.

###### **1.2.7 KPI's**

The administrator can set the following KPI parameters:

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KPI measurement Period - by default this is set to 15 minutes and determines for example whether the longest wait measurement has been breached.

Service Level Target - how long should calls be in the queue in seconds before they are answered.

Service Level Warning Threshold (%) - the percentage of calls that should be answered in the Service Level Target time.

Call Time Target (Seconds) - how long should calls be connected to agents.

Availability Warning Threshold (%) - the percentage of calls that are being answered by agents vs calls hitting the queue.

Number of Agents Warning Threshold - the minimum number of agents that should be available on the queue.

Caller Queue Warning Threshold - the ratio of calls in the queue to the maximum queue length.

The administrator can also set how often alerts are sent and who will receive these alerts. Alerts can be sent either via the portal only or the portal and email to the nominated email addresses.

### 1.2.8 Advanced

The following advanced queue features can be configured:

Maximum Queue Length - here the maximum queue length can be configured. This can either be set as an absolute value or as a multiple of the number of agents available or on interruptible breaks. Please note. This value always needs to be less than or equal to the total number of agent subscriptions multiplied by 15.

Dynamic Queue Length - this is an optional setting that allows the maximum queue length to be set based on the number of agents available on that queue.

Wrap up behaviour - the number of seconds allowed for wrap up and whether this can be extended by the agent.

Advanced Agent/Queue Settings - here the administrator can control whether agents can view the queue status, whether calls are allowed to queue when there are no agents on the queue and whether agents are automatically logged off the queue at certain times of the day

The following additional miscellaneous features can also be set

Maximum total callers on the queue

Maximum wait time (s)

Out dial timeout

Busy Back-off Time

Call Failed back-off time

No pickup Back-off Time

Breakout DTMF Key

Priority of this queue if agent is assigned to multiple queues

Whether to prevent queue jumping by other rules/ users

Connect caller to last agent they talked to (if available)

### 1.2.9 Announcements

Both the queue position and estimated wait time can be announced to the caller and the audio can be supplemented with additional custom messages dependent on queue position and estimated wait time.

### 1.2.10 Call Backs

Depending on the queue position or estimated wait time, call backs can be offered. These hold the caller's position in queue and call back the caller when they reach the head of the queue. Custom audio can be set for both the caller and the agent.

In addition, call slots can be offered to provide a more flexible call back option. These are configured in the Call Slots section and need to be included in a call flow.

### 1.3 Call Flow Manager

Call flows enable the routing of calls from a service number to an agent through a queue, offering calls to the most highly skilled agent, not already busy.

This is a graphical interface that enables a series of nodes to be connected to control how a call is managed. Both inbound and outbound calls can be managed via a call flow and each flow is associated with a Service Number.

When building call flows, the administrator can validate the call flows and only valid call flows can be published. When updating call flows, the updated version can be scheduled to take effect at a time outside of the core operating hours or the change can be made immediately.

Cloud Voice Contact allows for the export and import of call flows as JSON files.

### 1.4 Audio Files

Audio files can be uploaded in MP3 or WAV format. These can be speech files to be used in an announcement or music that can be used when callers are on hold.

Speech can also be created by using the text to speech engine provided by Nuance.

### 1.5 Play Books

Several individual audio files can be played in sequence, which could be used for example to play announcements in between music for queueing callers. The sequence of files can be edited by the administrator and new files can easily be added and old files removed.

### 1.6 Area Codes

A list of telephone area codes can be added, which can then be used when creating call flows, e.g., branch on area code.

### 1.7 Number Lists

A list of telephone numbers can be added, which can be used within call flows, e.g., branch on a number contained within a list.

### 1.8 Global Variables

Global Variables enable user defined values that are usually changed via the Web Portal to be updated via the Call flow if the Web Portal is unavailable. For example, this may be used where to play a standard message or forward calls to another number in the event the call centre is offline.

A call flow will need to be created in routing flow editor that uses a branch on company variable node with a defined tag.

### 1.9 Surveys

Post telephone call surveys can be created, which enable callers to answer questions using their touch tone telephones. Custom audio questions can be uploaded, and various answering schemes are available e.g., press 1 for yes.

Surveys are viewable by creating a new Contact Report.

### 1.10 Campaigns

Outbound campaigns can be set up to enable End Users to automatically call a list of numbers and assign these calls to a queue. Custom audios can be uploaded and various answering schemes are available.

### 1.11 Call Slots

As mentioned in section 3.2.10, call slots enable the option of slots to be made available to customers for specific times of day. These may coincide with less busy times. At the specified time, an outbound call will be made and connected to a free agent.

For each call slot the maximum number of callers in the time period can be set.

## 2. CHAT CHANNEL

This channel enables the business to put one or more chat interfaces into their website to route webchat to skilled agents. It uses the same

## SCHEDULE 3.4(B) CLOUD VOICE SERVICES

logic to route interactions to agents, via skill Groups, i.e., a webchat is routed via an interaction flow to a queue and the most skilled, available agent is offered the chat. Currently agents are offered up to four simultaneous webchats.

### 2.1 Chat Services

The administrator can create multiple chat services via this interface. Each chat service is given a Name, an optional Description, and an Access Name, which is used to identify this service to the remote web client.

The Chat Service needs to be associated with a Chat Flow and once this has been done, the administrator can click the Web Snippet, but with opens a new window showing the code that needs to be placed in the Page Header of the relevant web page.

### 2.2 Chat Flows

Chat flows can be constructed using the same Interaction Flow Editor interface as call flows. For example, It easy to construct flows that asks questions to the customer and then automatically routes the chat to the correct queue based on the answers.

### 2.3 Chat Queues

Each Chat Queue must be given a name and an optional Description.

Additionally, like the other channels the Group that the queue is directed to and the Classifications that are to be used on the queue can be set.

## 3. EMAIL CHANNEL

### 3.1 Email Servers

Cloud Voice Contact can be connected to email servers to send and receive emails using the POP3, SMTP and IMAP protocols. This allows customers to use existing email services such as Gmail or M365 and multiple email addresses can be configured, which can then be assigned to different queues.

Cloud Voice Contact supports both a basic and the OAuth2 authentication type and will attempt to authenticate the credentials when the settings are saved. You should check what settings are required by your email provider.

### 3.2 Email Flow Manager

Email flows can be constructed using the same Call Flow Editor interface as call flows. It easy to construct flows that inspect the email for words and then branch the email to different queues based on different matches.

For a complete list of available nodes, please check the appendix.

### 3.3 Email Queues

Email queues enable the efficient management of email to and from Cloud Voice Contact. Emails will appear on the queue and agents that are within groups that serve that queue will be able to select emails to work in. Participation on email queues can be set at an agent level, so for example an agent might be part of a Group that is attached to an email queue, but they could be set to work on voice exclusively.

Each queue can be associated with a different email server and/or email account and can therefore be associated with a different email flow.

A list of classifications can be assigned to emails and these will be recorded against the call notes and can be reported against using the built in Reports tool. The administrator can select which classifications are enabled for email as with other channels.

A timer can be set for emails on a queue. This measures the time that it takes the agent to reply to the email, once they have initiated the response. This time can be set by the administrator and the opportunity to allow and extension can also be configured.

#### 3.3.1 Templates

The administrator can write text blocks that will be included on all emails on the queue. This supports a range of formatting options as well as allowing the inclusion of hyperlinks, jpgs, and embedded media.

#### 3.3.2 Text Blocks

The administrator can additionally upload a library of text blocks which are made available to agents on the queue, which can reduce the amount of time spent responding to the email.

#### 3.3.3 Attachments

The administrator can upload documents, which can be made available to email queues. The maximum file size of an attachment is 8MB.

Agents are unable to attach documents not included within the document library to ensure only authorised attachments can be used.

The default file extensions that can be attached are .doc and .pdf. This list can be configured within the assets configuration section, under the System menu.

#### 3.3.4 Email Editor options

Under the System menu is the Email Editor Options menu. This controls what editing options an agent sees when they are replying to an email. The following options can be set.

Styles - bold, italic, underline, strike

Code Blocks

Lists - ordered or bullet

Scripts - subscript or superscript

Indents - +1 or -1

Direction - you can set the to right to left

Sizes - Small, medium, large, huge

Headings - Header 1, Header2, Header 3, Header 4, Header 5, Header 6, Normal

Colours - Font colour, background colour

Font

Alignment

Clear Content - this can be used to remove formatting of pasted text.

Attachments - this enables attachments to be used and allows the document extensions configured within the assets configuration.

## 4. AGENT INTERFACE FEATURES

Agents can take calls via a Cloud Voice handset or via a softphone using the Cloud Voice Contact portal.

This is currently supported on the latest versions of Chrome, Edge and Firefox browsers and uses the Web RTC protocol. The method of receiving calls, i.e., via a handset or softphone (webRTC) is set by the agent when they log in to Cloud Voice Contact.

### 4.1 Queue Visualisation

Agents can view all the queues that they have been given access to view, providing the number of agents available to handle and interaction. This also provides a visualisation of the number of waiting interactions on each queue.

### 4.2 Agent Status

Cloud Voice Contact agents can set their status and indicate if they are available to handle new inbound requests. The available statuses are configured by their administrator and their current status is visible to their supervisors.

### 4.3 Call Manipulation Buttons

Allows Cloud Voice Contact agents to put callers on hold, transfer calls to other agents or groups, and to put callers on hold while they request assistance from supervisors.

### 4.4 Cloud Voice Phone Book

Cloud Voice Contact is part of the Cloud Voice family and so agents can search the phone book for both front office (Cloud Voice Contact) and back office (Cloud Voice) users. They can use the call manipulation methods for both types of user as well as being able to transfer calls to other calls.

### 4.5 Call Recording

Allows Cloud Voice Contact agents to start new call recordings (for example recordings that may be flagged as containing the agent reading terms and conditions for contact fulfilment, or for an abusive caller) or to pause existing call recordings.

### 4.6 Call Wrap-Up and Call Classifications

Allows Cloud Voice Contact agents to make call wrap-up notes and to provide a call classification (which may be used for reporting purposes) at the end of a call. Call classifications are set by the administrator and can be different across queues.

### 4.7 Call pickup from Queue

Allows Cloud Voice Contact agents to choose which interaction to pick up from an inbound queue. Agents may be configured so that they are able to choose which interaction to handle or to have the highest priority interaction pushed to them.

## 5. SUPERVISOR INTERFACE FEATURES

The supervisor's main screen shows Live Data for both the queues and the agents that they manage.

Queues display various critical data such as Average Wait Time, Longest Wait Time and the queues can be configured to show a RAG status depending on the loud 's set against the queues. Clicking into the queue will show a further layer of detail.

When viewing agent data, agent availability is shown and indicated by colour; and more information is available by clicking on the agent. This also gives the supervisor the ability to change the availability of the agent across the channels they are licenced for.

When an agent is on a call, the supervisor can listen in, speak to the agent, take control of the call, and record the call.

## 6. CLOUD VOICE CONTACT MANAGEMENT FEATURES

### 6.1 User Management

Users will be created and enabled for Cloud Voice Contact within the Cloud Voice Contact portal and a username is common across all Horizon applications.

Within the Cloud Voice Contact portal a Cloud Voice user can be set as an agent, a supervisor or as an admin. The supervisor user has full agent functionality, so does not need to have agent functionality added within the portal. Any user can be given administrator privileges. If the administrator wishes to act as either an agent or a supervisor, they will need to be assigned this role in addition to the admin role – see section 5.3.

#### 6.1.1 Basic settings

Here the administrator can reset a user's password and set whether a user can receive direct calls.

#### 6.1.2 Agent Level Call Recording

Here the administrator can select whether an agent is set for Call Recording and the percentage of their calls that are recorded. If Call Recording is switched on in the Web Portal, then this will be automatically ticked and the percentage set to 100%.

In scenarios where the Contact Centre does not want to record at a queue level this can be set at an agent level.

#### 6.1.3 Agent Configuration

Under the System Configuration the administrator can set the following agent configuration items:

Timeout before agents become unavailable when they lose connectivity to the web server – this is set at 120 seconds by default.

Number of times an agent can fail to pick up before they become unavailable – this is set as two by default

Number of times an agent can fail to pick up before they become unavailable – this is set as two by default

Number of times a busy agent can decline a call before they become unavailable – this is set to 2 by default

Number of times the call to an agent can fail before they become unavailable – this is set to 2 by default

Agent portal configuration - this sets whether agents can see status of queues, groups and agents.

### 6.2 Group Management

Users are assigned to groups and these groups are assigned to queues, thus managing which agents answer which interactions. Groups can be assigned to more than one queue.

Within the group management interface, you can assign one or more agents and rate those agents for the group skill from one to five stars. This skill rating determines the order in which agents within this group will be offered interactions. If agents have the same skill rating calls will be distributed to the longest idle agent.

You can also determine whether agents are automatically made available when they log in and active across all queues that this group is assigned to.

### 6.3 Role Management

Roles define what the user can do, for example an agent can by default handle voice and email interactions but cannot see the Live Data screen. Currently, roles are fixed, but this restriction will be lifted for General Availability.

Roles are assigned in the Cloud Voice Contact Portal.

See appendix A. for the full list of default role permissions.

### 6.4 Agent Break Management

Multiple break reasons can set for agents and these can be classed as productive or non-productive breaks. An example of a productive break is training, and a non-productive break is lunch.

The break reason can be set as interruptible enabling the supervisor to set the agent to available if, for example, a large volume of calls arrived.

### 6.5 Holiday List Management

One or more lists of holidays can be added. These are used with the Time Ranges functionality so that different service hours can be set for dates listed as holidays.

### 6.6 Time Range Management

Time ranges can be set absolutely or relatively. Absolute time ranges set operating hours for a specific date or date range. This can be used if the contact centre was shut down for a day for training for example.

Relative time ranges allow operating hours to be set for each day of the week and for days specified as holidays, which makes time range management straightforward. Time Ranges can be used when creating interaction flows.

### 6.7 External Telephone Destination Management

Using this option calls can be diverted to other numbers.

### 6.8 Global Variables

Global variables can be recorded and managed here, which can be used for call flow management.

## 7. REPORTING

### 7.1 Creating New Reports

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There is a comprehensive reporting tool built into Cloud Voice Contact that enables multiple different reports to be created and viewed with the Cloud Voice Contact Portal. Alternatively, these reports can be downloaded as a CSV file.

Depending on the report type further detail can be reported on such as queue, agent, callers etc. This data can be prepared for customisable time periods and then further filters can be applied such as the service level target.

### 7.2 Scheduling reports

Once the report has been created it can be automatically generated and sent to an SFTP destination or to an email address at a set interval

### 7.3 Contact Reports

Contact Reports allow the administrator to generate reports from survey data, the templates used by agents and the agent scripts.

## 8. WALLBOARDS

Wallboards can be easily constructed to show information relating to Service Numbers, Queues, and Live Status events such as the availability of Agents. It is easy to drag, drop and resize these data elements to clearly show performance within the contact centre.

The following elements can be included in a wallboard:

Service number information, e.g. number of calls answered on that service number

Queues, e.g. average wait time on that queue

Email Queues, e.g. Number of emails handled today

Live Data e.g. Live view of queues

Wallboards can be shown on any device that can run a supported browser. Up to 10 different wallboards can be displayed without any additional licences.

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### Auto Attendant

Auto attendants allow voice calls to be transferred through to a user or another call group without the intervention of an operator or receptionist. Calls that arrive to a user through an auto attendant and its various options will be delivered to a Cloud Voice for Microsoft Teams user.

### Business Call Recording

Currently only 'All Calls' option is available to Cloud Voice for Microsoft Teams and no other call recording variants are available at this time. Calls will be delivered through the Third-Party Supplier. Teams to teams calls will not be recorded as the call is not delivered by the Third Party Supplier.

### Call Barring

Call Barring set at either the user level or the site that the user is provisioned on will be applicable for all calls made through Microsoft Teams and controlled through the Third-Party Supplier.

### Call Forwarding

A user's call forward treatment will always be applied except in the scenario of a Teams – to Teams call. Call forwarding is set up and controlled through the Third-Party Supplier portal.

### Call Transfer

Calls that need to be transferred to other users or numbers can be, using the call transfer button within Microsoft Teams.

### Call Waiting

Where a user has call waiting enabled, if the user is on a call and another call arrives to the user's Cloud Voice account, then this will also be present via the Microsoft Teams application.

### CLI Presentation

The Cloud Voice Service allows users to present a choice of either the 'site' number, 'withheld/private', 'other UK', 'other international' or the user's own DDI. Calls made from Microsoft Teams to the PSTN will be routed through the Third-Party Supplier and so will present the number that the administrator has selected for that user within the Third-Party portal.

### Hunt Groups

Cloud Voice Services allows the delivery of incoming calls to users in a predetermined and configured routing set up through hunt groups. All hunt group types are available to deliver calls into Microsoft Teams.

For those hunt groups that send the call onto another agent after a pre-defined number of rings it is recommended that the number of rings in Cloud Voice is increased by one from what you would normally select. For example, if a call skips to the next agent after 2 rings, with Cloud Voice for Microsoft Teams we would recommend that this becomes 3 rings due to the extra signalling involved.

### Management Reporting using Akixi

Customers can get access to Akixi reports when using the Cloud Voice for Microsoft Teams service when telephone calls are made or received through the Third-Party Supplier PBX.

Teams-to-Teams calls, will not be captured by Akixi reports due to Microsoft's design.

### Music on Hold

The Music on Hold used in Cloud Voice for Microsoft Teams is taken from the Third-Party Supplier, and not the Microsoft tenant. The telephony for Teams app disables Microsoft's Music on Hold due to undesirable feature clashes. This means that Teams-to-Teams calls will not have any music on hold.

### Voice Calling

Extension Dialling

Where a user dials another extension number within the Third-Party Supplier, the Third-Party Supplier will manage the call as it would any other endpoint with all the relevant settings applied.

### Teams to Teams Calls

These calls will always stay within the Microsoft tenant and will not break out to the Third-Party Supplier, as per Microsoft's design. This means that services such as management reporting with Akixi and business call recording are not currently possible.

As call groups are all provisioned in the Third-Party Supplier, if a full telephone number or extension number is called that is associated with a call group, then the call will break out to the Third-Party Supplier and the relevant call treatment will be applied.

### Direct Dialling - UK Calls

Calls to 01, 02, 03 and UK mobile numbers from the Cloud Voice services shall be chargeable in accordance with Supplier's standard Tariffs.

Calls can be made from the MS Teams dial pad. Any call barring settings that a user has set up in Cloud Voice will be enforced.

### Direct Dialling - Local Dialling

Local dialling, where a user dials a telephone number without an area code, is supported on Cloud Voice for Microsoft Teams.

### Direct Dialling - International Calls

Calls can be made to international destinations using Cloud Voice for Microsoft Teams, providing that the user has the applicable call barring set.

### Calls to Emergency Services

Calls to emergency services are supported by the service including the mobile client within the UK, should the user take the service to another country, emergency service is not supported and should not be used to dial the UK or relevant overseas emergency services.

### Inbound telephone calls

Calls made to a user will be delivered and can be answered or declined using the Microsoft Team's call notification on a user's selected device.

### Voicemail

Due to undesirable feature clashes with the Microsoft Teams voicemail service and Cloud Voice, Microsoft Team's voicemail is disabled by the Cloud Voice application and is not available. The Cloud Voice voicemail service is available for users and call groups.

Teams-to-Teams calls are not directed to a user's Cloud Voice voicemail and will continue to ring until one party cancels the call down, or the call automatically closes down after 60 seconds.

The Third-Party Supplier strongly recommends that you keep the MS Teams voicemail switched off as this will interfere with Cloud Voice PBX call flows.