



Managing Caller Groups

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About Caller Groups

By creating a caller group, you can apply one rule to multiple callers without having to recreate the rule several times. Caller groups contain multiple entries from your personal contacts list and the Cisco Unity Connection directory.

Using groups can help you organize callers in a number of ways. For example, you could create a caller group of your top-priority clients and co-workers. To ensure that these callers can reach you when you are in meetings, you would create a rule set with one rule that transfers calls from anyone in the group to your mobile phone during your meeting times and another rule that transfers other calls to voice mail.

Creating Caller Groups

The following types of callers can be members of caller groups:

Personal contacts	Callers who are entered in your personal contacts list.
System contacts	Callers who are in the Connection directory but who are not enabled to use Connection features and do not have a voice mailbox.
Connection users	Callers who are in the Connection directory, have a voice mailbox, and are enabled to use Connection features.

When a caller group contains a caller in the Cisco Unity Connection directory and the caller is later removed from the system by your Connection administrator, the caller will also be removed from your caller group.

To Create a Caller Group

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- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.
 - Step 2** On the Caller Groups page, click the **New Caller Group** icon below the menu bar.
 - Step 3** On the Caller Group page, enter a name for the caller group, and click **Save**.
 - Step 4** Click **Add Members**.
 - Step 5** On the Find Contacts page, click the applicable tab, depending on whether you want to search the list of users in the Connection directory or your personal contacts list.

You may be able to search for both users and system contacts in the Connection directory. System contacts are indicated by an asterisk (*) next to the name in the search results list.
 - Step 6** Fill in the remaining fields, as applicable to your search and click **Find**.

On this page, you can use the wildcard character * to search by partial name.
 - Step 7** Check the check box next to the name to add the contact or user to the caller group.
 - Step 8** Click **Add Users** or **Add Contacts**, as applicable. Connection adds the contact to the caller group and returns to the Caller Group page.
 - Step 9** Repeat [Step 4](#) through [Step 8](#) to add any additional users or contacts.
 - Step 10** On the Caller Group page, click **Save**.
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Adding Callers to Caller Groups

You can add members to a caller group at any time.

To Add a Caller to a Caller Group

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- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.
 - Step 2** On the Caller Groups page, click the caller group name.
 - Step 3** On the Caller Group page, click **Add Members**.
 - Step 4** On the Find Contacts page, click the applicable tab, depending on whether you want to search the list of users in the Connection directory or your personal contacts list.

You may be able to search for both users and system contacts in the Connection directory. System contacts are indicated by an asterisk (*) next to the name in the search results list.
 - Step 5** Fill in the remaining fields, as applicable to your search and click **Find**.

On this page, you can use the wildcard character * to search by partial name.
 - Step 6** Check the check box next to the name to add the contact or user to the caller group.
 - Step 7** Click **Add Users** or **Add Contacts**, as applicable. Connection adds the contact or user to the caller group and returns to the Caller Group page.
 - Step 8** On the Caller Group page, click **Save**.
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Deleting Callers from Caller Groups

You can remove members of a caller group at any time.

To Delete a Caller from a Caller Group

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- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.
 - Step 2** On the Caller Groups page, click the caller group name.
 - Step 3** On the Caller Group page, check the check box next to the name of the caller you want to delete. You can check multiple check boxes to delete more than one caller at a time.
 - Step 4** Click **Delete Selected**.
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Changing the Names of Caller Groups

To Change the Name of a Caller Group

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- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.
 - Step 2** On the Caller Groups page, click the caller group name.
 - Step 3** On the Caller Group page, change the name of the group in the Name field.
 - Step 4** Click **Save**.
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Deleting Caller Groups

You cannot delete a caller group if it is used by a rule. Delete the caller group from the rule first, then delete the caller group.

To Delete a Caller Group

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- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.
 - Step 2** On the Caller Groups page, check the check box next to the group that you want to delete. You can check multiple check boxes to delete more than one group at a time.
 - Step 3** Click the **Delete Selected Rows** icon below the menu bar.
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