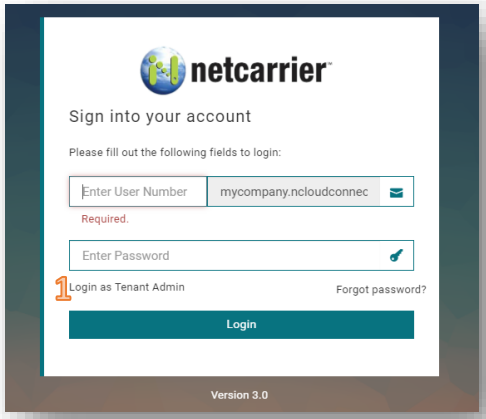
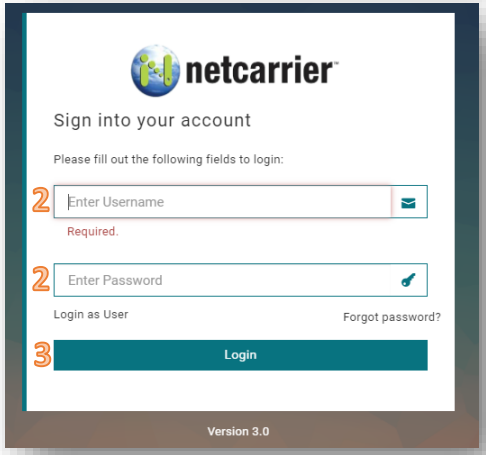
Admin Portal Quick Start Guide

Table of Contents

Admin Sign-In

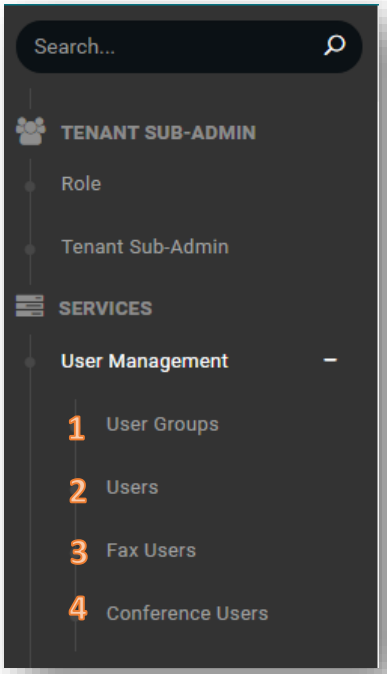




The initial landing page is for user login.
To log into your admin user:

1. Click **Login as Tenant Admin**
2. Enter the Username and Password provided by your Project Manager
3. Click **Login**

User Management

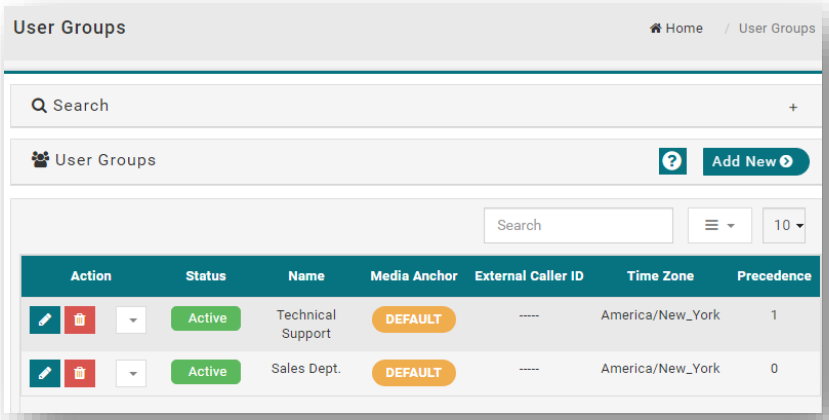


By clicking on **User Management**, four menu items become available.

1. **User Groups:** Used to make changes to multiple users based on admin defined grouping
2. **Users**: List of users or extensions within your phone system and their configuration
3. **Fax Users**: Users built for the Desktop Faxing feature
4. **Conference Users**: Users built for the Business Conference feature

In this guide we will focus on User Groups and Users.

User Groups



Within the User Group page you have a few tools at your disposal to manage your users based on parameters like location, department, etc.

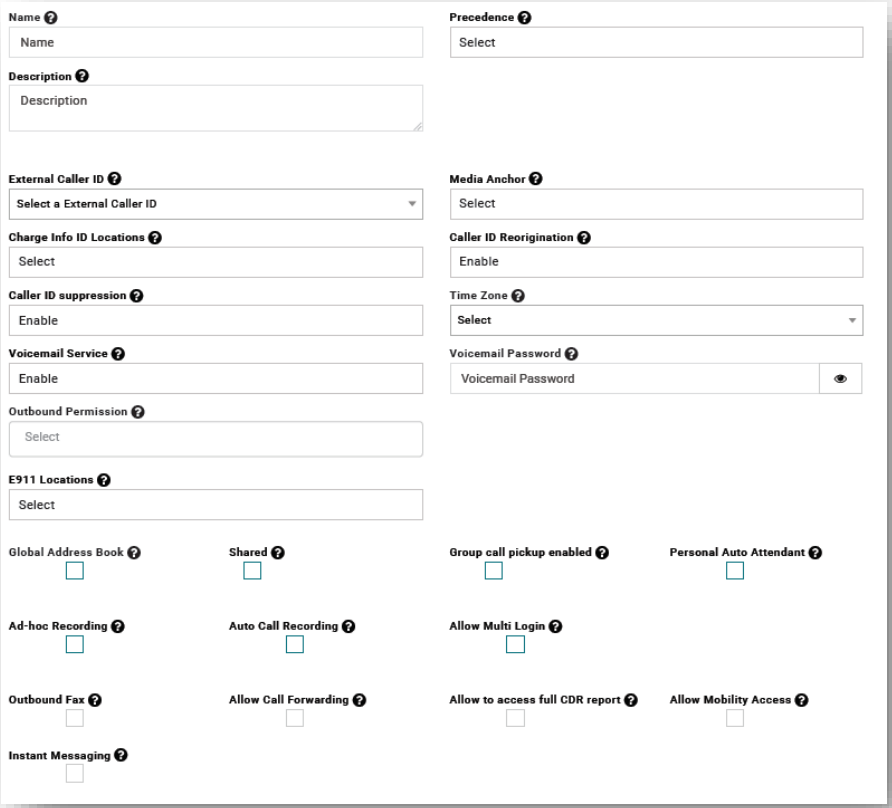
Use the button to edit the Name, Precedence, Description, and Status of the group.

Use the button to deletes a User Group.

External Caller ID is the phone number recipients will see when you call them.

To add a new group use the Add New button.

Creating User Groups



Here you can control uniform settings and features for all users added to a group.*

External Caller ID: The Phone numbers recipients see when you call them.

Caller ID Reorigination: If enabled, calls forwarded from users within this group will display the original callers' Caller ID.

Caller ID Suppression: If enabled, calls to external recipients within this user group will mask your Caller ID.

Group Call Pickup Enabled: If enabled, users within this group can pickup each other's calls.

Ad-Hoc Recording: If enabled, users within this group can turn call recording on using the designated star code. (Default *22)

Allow Mobility Access: If enabled, allows users within this group may utilize the nCloud Connect Mobile App.

Instant Messaging: If enabled, allows users to utilize Jitsi XMPP messaging application.

*The **Name** and **Precedence** fields are required to create a user group.

Users

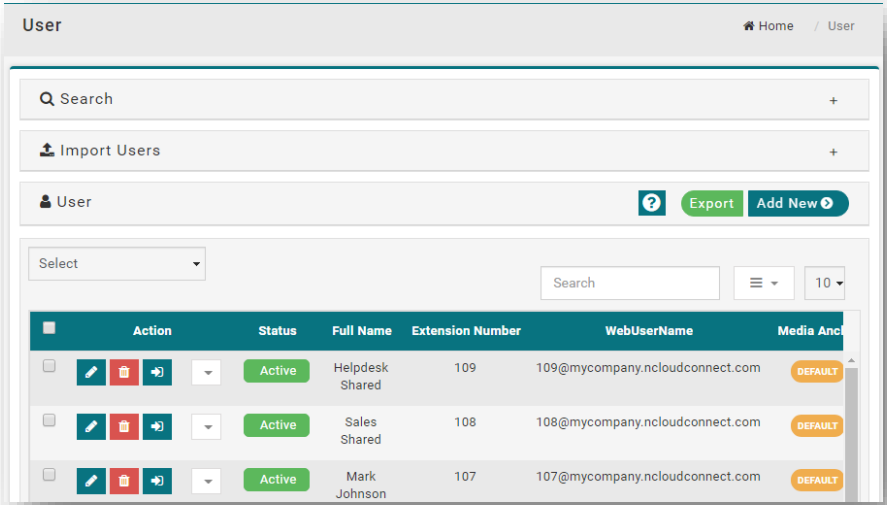


Fig. 1

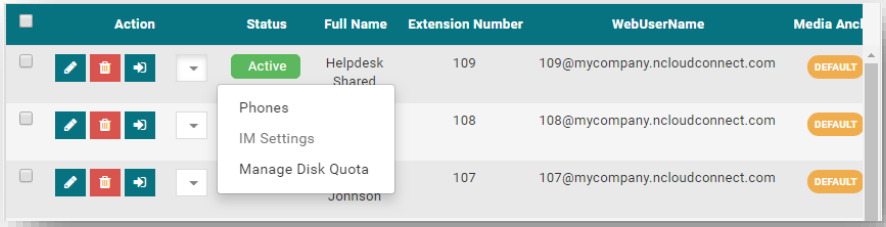


Fig. 2

The user page allows you to manage your users at an individual level. Here you can search for, create, edit, import, and export users.

Use the Add New button to create a new user.†

Use the button to edit an existing user's name, extension, user group, features, etc.

Use the button to delete an existing user.

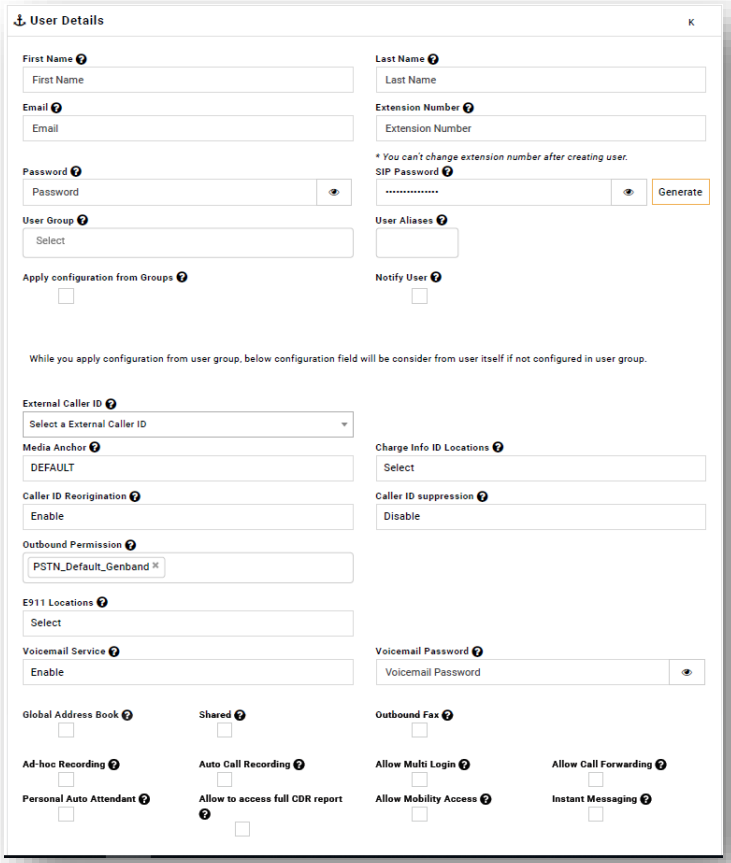
Use the button to login to the User's portal to manage their personal settings.

WebUserName is their username for portal login.*

Use the button to edit **phones** from the user, change **IM settings**, and manage their **Disk Quota**.

†If **Add New** is missing you have reached your max users. To add more contact technical support.
*This username is required to login to the mobile app if user is unable to scan the QR code from the portal.

Creating Users



First Name: The first name to be displayed for a user.

Last Name: The last name to be displayed for a user.

Email: Assigned email for the user.

Extension Number: Extension number chosen for a new extension. The extension number can not be changed after the user has been created.

Password: The password the user will use to log into their user portal.

SIP Password: Required for SIP registration for various SIP devices. (This is auto generated)

User Group: Determines which user group this user falls under.

User Aliases: Assigns an alias for the user.

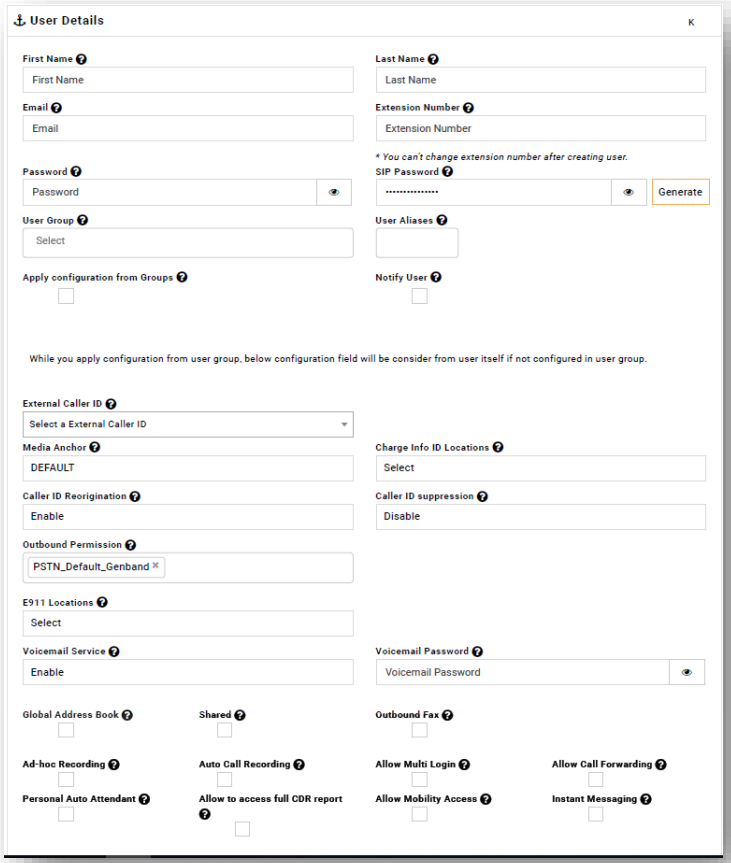
Apply Configuration From Groups: Applies the configuration of a selected User Group. Must be checked for User Group settings to be applied.

Notify User: If checked, a notify email will be sent to this user.

Status: Enables if the user is active or inactive.

*First Name, Last Name, Extension, Password, and Voicemail Password fields are required to create a user.

Creating Users cont.



External Caller ID: The Phone numbers recipients see when you call them.

Caller ID Reorigination: If enabled, calls forwarded from users within this group will display the original callers' Caller ID.

Caller ID Suppression: If checked, calls to external recipients will mask your Caller ID.

Voicemail Service: If checked, this user will have their own voicemail box

Voicemail Password: Personal voicemail access password. Only numbers are accepted.

Global Address Book: If checked, the user will appear in the global address book.

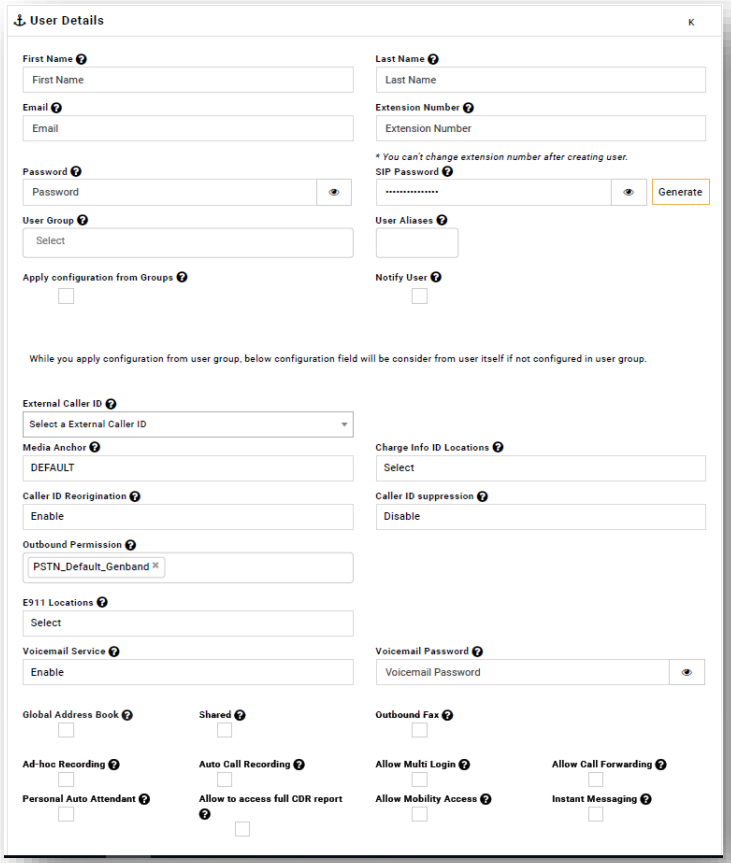
Shared: If checked, the user can be built on multiple phones and calls can be shared between the phones.

Outbound Fax: If checked, the user is able to send faxes.

Ad-Hoc Recording: If checked, the user is able to manually record their calls.

*First Name, Last Name, Extension, Password, and Voicemail Password fields are required to create a user.

Creating Users cont.



Auto Call Recording: If checked, the user's calls will be automatically recorded.

Allow Multi Login: If checked, the user is able to login in on multiple devices.

Allow Call Forwarding: If checked, the user is able to forward their calls.

Personal Auto Attendant: If checked, the user is able to set up an auto attendant before their voicemail.

Allow to access full CDR report: If checked, the user has admin level CDR permissions.

Allow Mobility Access: If checked, the user is able to use the mobile application.

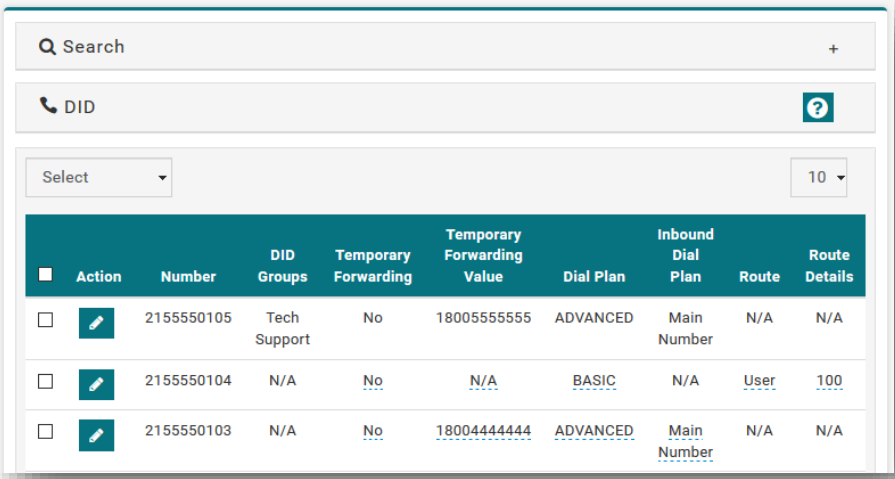
Instant Messaging: If checked, the user is able to use instant messaging.

Enable Dynamic Whitelisting: If checked, the user's IP address will be dynamically whitelisted.

Self Authorization: If checked, the user will need to enter their PIN for their own voicemail.

*First Name, Last Name, Extension, Password, and Voicemail Password fields are required to create a user.

Manage DID



Action	Number	DID Groups	Temporary Forwarding	Temporary Forwarding Value	Dial Plan	Inbound Dial Plan	Route	Route Details
	2155550105	Tech Support	No	18005555555	ADVANCED	Main Number	N/A	N/A
	2155550104	N/A	No	N/A	BASIC	N/A	User	100
	2155550103	N/A	No	18004444444	ADVANCED	Main Number	N/A	N/A

The DID Management page allows you to dictate call routing for individual DIDs.

DID Groups: You may add DIDs to specific groups to allow global changes to routing and forwarding for specific departments, locations, promotions, etc.

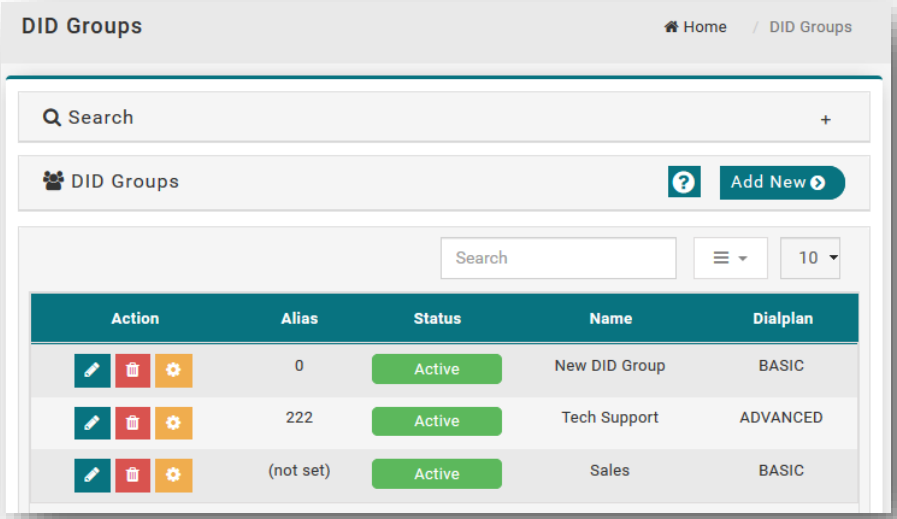
Temporary Forwarding (Value): If set to yes, this feature will circumvent any existing routing to the specified destination under **Temporary Forwarding Value**.†

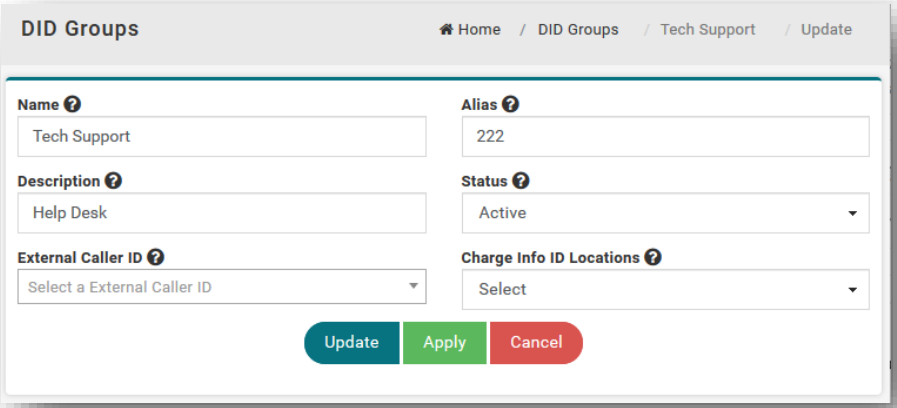
Dial Plan: A dial plan determines how the DID route behaves during specific times of the day. If set to advanced you must specify which **Inbound Dial Plan** is to be used.

Route (Details): If the **Dial Plan** is set to basic, here you will specify where the call will be sent to (e.g. Extension, Ring Group, Auto Attendant) and finally which specific extension the DID points to.

The Temporary Forwarding by default can be enabled or disabled by dialing *37+DID of the extension.
† The Temporary Forwarding Value must be set prior to using the star code.

DID Groups





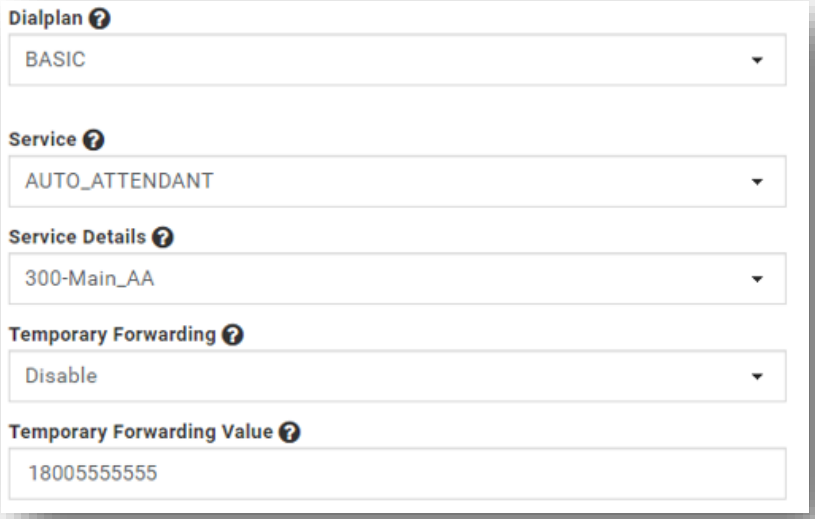
After choosing DID Groups from the side bar the list of all your DID Groups will appear.

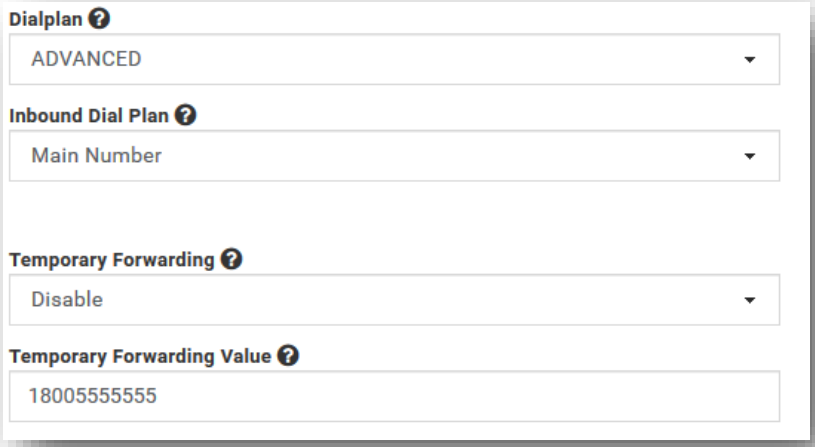
Use the button to edit the name of the group, the alias, add a description, and set it active or inactive.

Use the button to delete any groups.

Use the button to make changes to the DID Groups call routing.

DID Groups





After using the configuration button you will be able to adjust the DID Groups call routing.

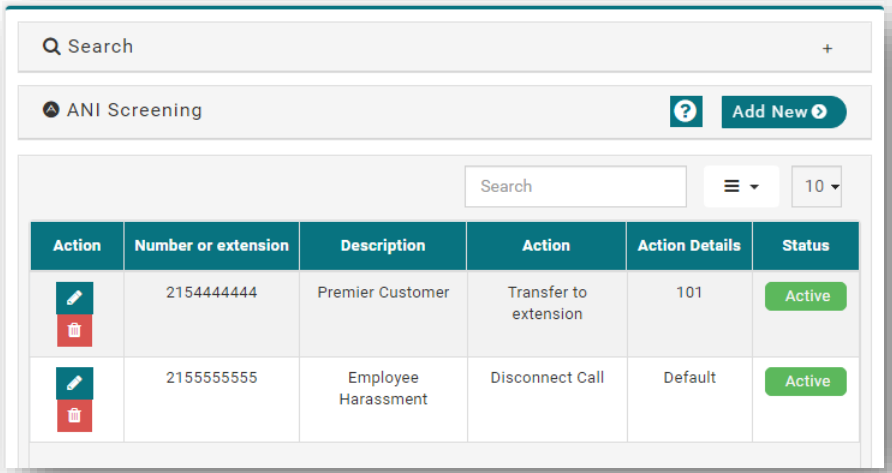
Dial Plan: A dial plan determines how the DID route behaves. If set to advanced you must specify which **Inbound Dial Plan** is to be used.

Service (Details): If the **Dial Plan** is set to basic, here you will specify where the call will be sent to (e.g. Extension, Ring Group, Auto Attendant) and finally which specific extension the DID points to.

Temporary Forwarding (Value): If set to enabled, this feature will circumvent any existing routing to the specified destination under **Temporary Forwarding Value**.†

The Temporary Forwarding by default can be enabled by dialing *38+Alias of the DID Group and use *39+Alias to disable the Temporary Forwarding.
† The Temporary Forwarding Value must be set prior to using the star code.

ANI Screening



ANI Screening allows you to determine the destination of specific callers based on their inbound caller ID. This can be used to direct VIP clientele to any extension, voicemail, or simply disconnect callers.

Number or Extension: Defines the caller's number in the ANI ruleset.

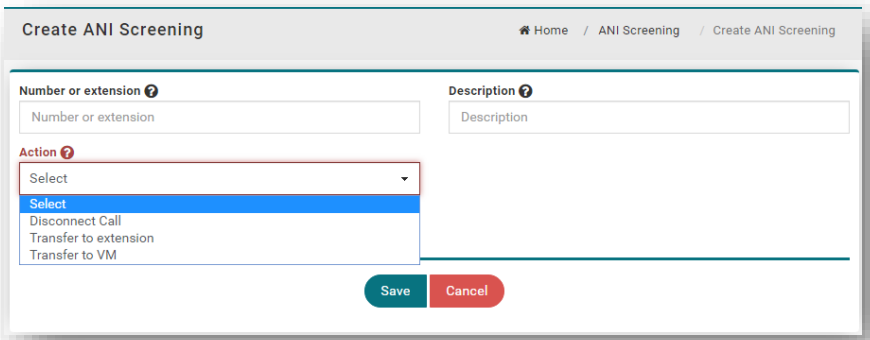
Description: Set by you to notate the ruleset.

Action: Determines which action the phone system will take when presented the specified caller.

Action Details: If the specified **Action** requires any further parameters to function, they are specified here such as extension or message to play when disconnect call is selected.

To add a new ruleset use the Add New button.

Create ANI Ruleset



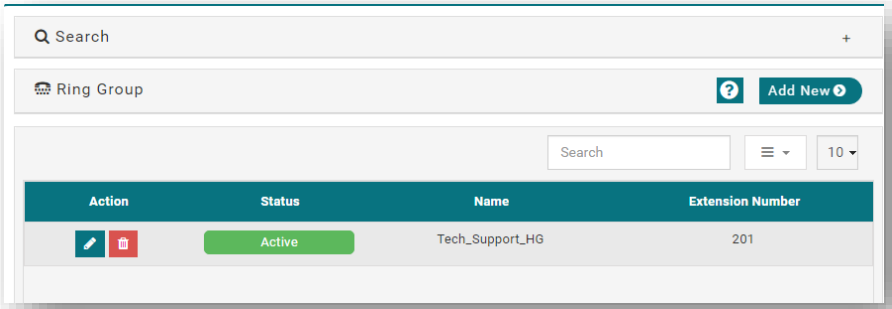
When creating the ruleset you'll need to consider the following:

Number or Extension: This can be an internal extension or any type of external caller ID whether it is a 10 digit phone number or a 15 digit international number.

Description: Include a description to easily track and search for the ruleset.

Action: Choose how you would like the specified caller to be handled. Calls can be disconnected, automatically transferred to an extension, or sent directly to a voice mailbox.

Ring/Hunt Groups



While this page has the title of Ring Group you are able to build Ring and Hunt Groups with their own call flow and rules respectively. Some of the tools on this page are as follows:

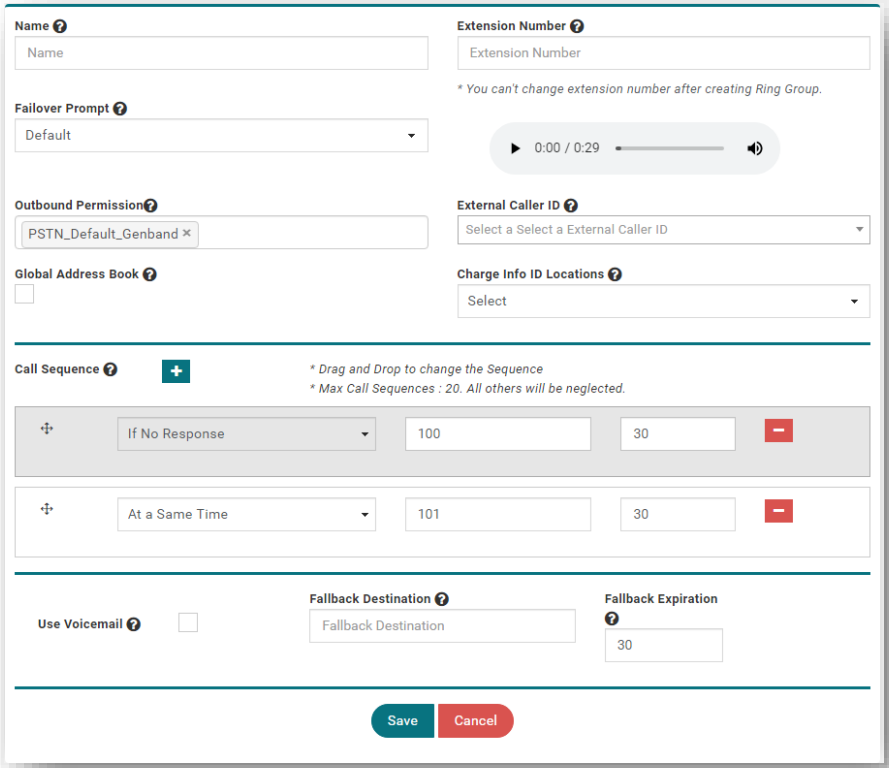
Use the button to edit the name, Failover Prompt*, and users within the Ring/Hunt Group.

Use the button to delete a Ring/Hunt Group.

Use the Add New button to create a new Ring/Hunt Group

*The Failover Prompt can be anything found within your audio library from music on hold, voice recordings, or a combination using the audio phrase feature covered in a later section.

Add New Ring/Hunt Groups



Below are some of the parameters you may include when building a new Ring/Hunt Group:

Name: The name of the Group.

Extension Number: The internal extension for the group. (Required)

Call Sequence: Here you can determine which recipients will be reached and how.

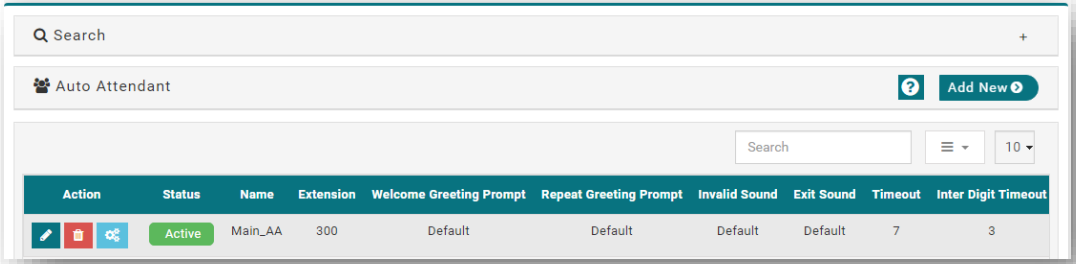
- **If No Response/At the Same Time:** Determines If calls will ring at the same time or in a particular order.
- **Extensions:** Set the extension you wish to ring in the group in the order, if any, you would like them to ring.
- **Ring Timer:** Determine how long you would like the extension to ring. (Maximum 60s)*

Use Voicemail: Determines if the group will use the final user's voicemail when a call is not answered within the defined time.

Fallback Destination: Defines an extension the call is routed to after the ring timer has expired. (This is unavailable if **Use Voicemail** is enabled)

*Combined time if no anchor is used (e.g. Auto Attendant, Call Queue, etc.)

Auto Attendants



This page allows you to create and manage your Auto Attendants.

Use the button to edit the name, prompts, timeouts, and other associated rulesets within an auto attendant.

Use the button to delete an auto attendant.

Use the button to configure options, prompts and sub auto attendants.

Use the Add New button to create a new auto attendant.

Welcome Greeting Prompt: The audio file in use when a caller reaches the auto attendant.

Repeat Greeting Prompt: Audio file in use when repeating the welcome IVR.

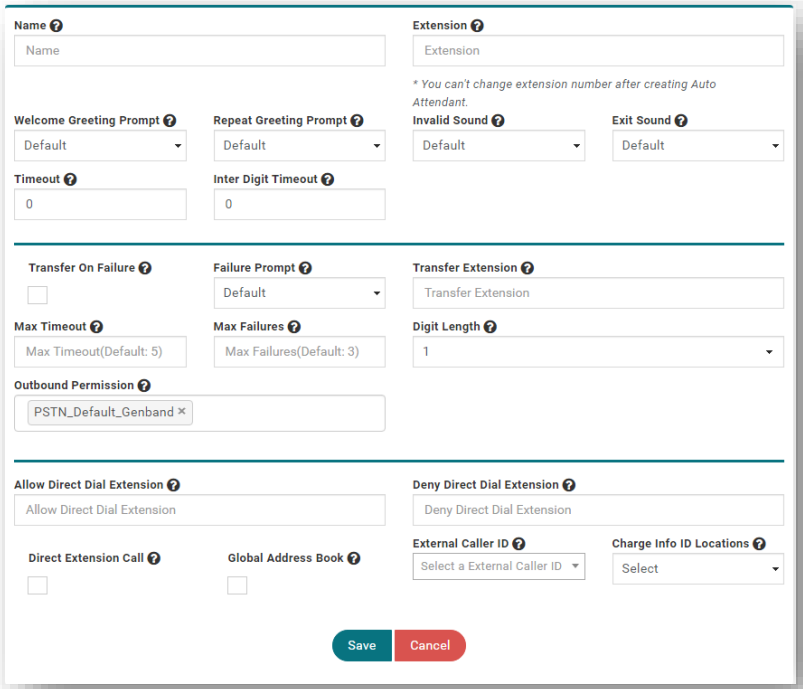
Invalid Sound: Audio file played when an invalid option is selected

Exit Sound: Audio file played when exiting the auto attendant.

Timeout: Time allotted for caller to select an option

Inter Digit Timeout: Time allotted between digit entry. (Used when dialing extensions is allowed from the auto attendant)

Creating Auto Attendants



Creating an auto attendant is done in two parts. First by creating the attendant itself by using Add New and then building the attendant tree via the button.

Name: The name of the auto attendant. (Required)

Extension: The desired internal extension.

Welcome Greeting Prompt: Audio file when first reaching the auto attendant.

Repeat Greeting Prompt: Audio file played when repeating the Welcome IVR.

Invalid Sound: Audio file played when an invalid digit is selected.

Exit Sound: Audio file played when leaving the auto attendant.

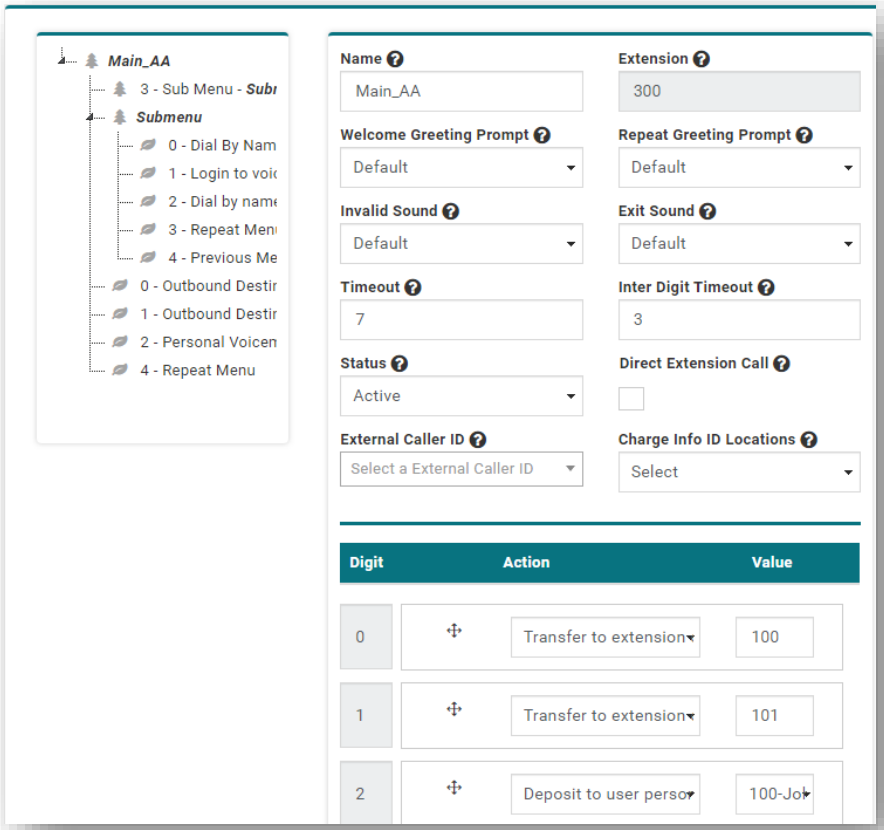
Timeout: Time allotted for caller to select an option.

Inter Digit Timeout: Time allotted in between digits entered.

Transfer on Failure: If enabled, after a predetermined amount of failures the caller will be transferred to the specified extension.

Allow/Deny Direct Dial Extension: Can allow or deny callers to reach specific extensions through the auto attendant.

Creating Auto Attendants cont.



While you are able to alter previously covered fields in the configuration window, here we will only cover the unique aspects of this page.

Auto Attendant Tree: A visual representation of the options available to a caller.

Digit: The digit a caller will select to execute the specified action.

Action: Play file, Transfer, Repeat Menu, Voicemail Deposit, Previous Menu, Sub Menu, Dial by Name, No Action, Disconnect , Voicemail Login.

Value: Specifies further required parameters which could include extensions, other attendants, DIDs, etc.

Submenu: Submenus are used to provide a specific subset of options within the main menu. An example would be, "Press option 4 for directions" after pressing 4, each subsequent option would specify a different site.

Call Parks

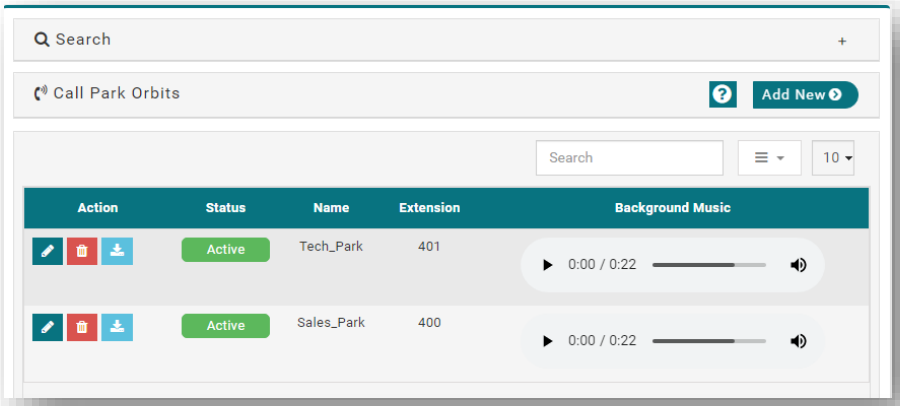


Fig. 1

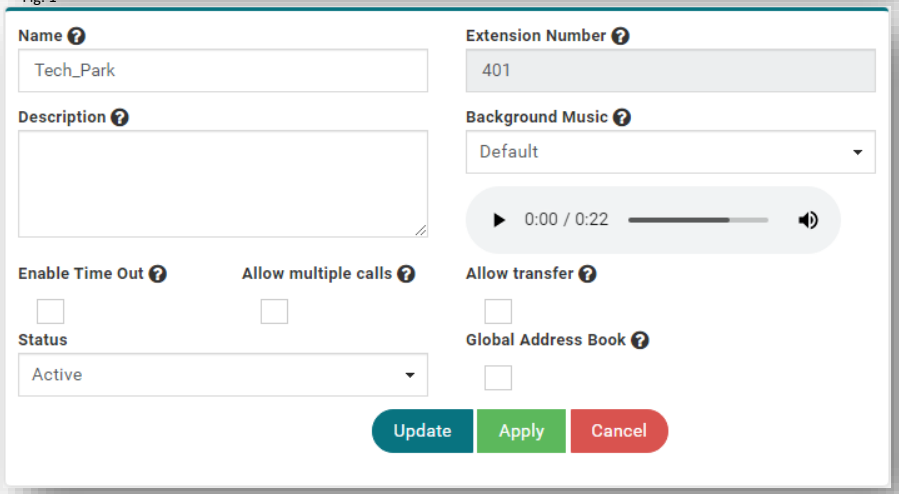


Fig. 2

On this page you can create new parks and edit existing ones.

Use the button to edit an existing park's name, description, background music, etc.

Use the button to delete an existing park.

Use the button to download the current background music applied to the selected park.

Use the Add New button to create a new park.

Editing an existing call park allows you to change behavior along with details for tracking and organizational purposes

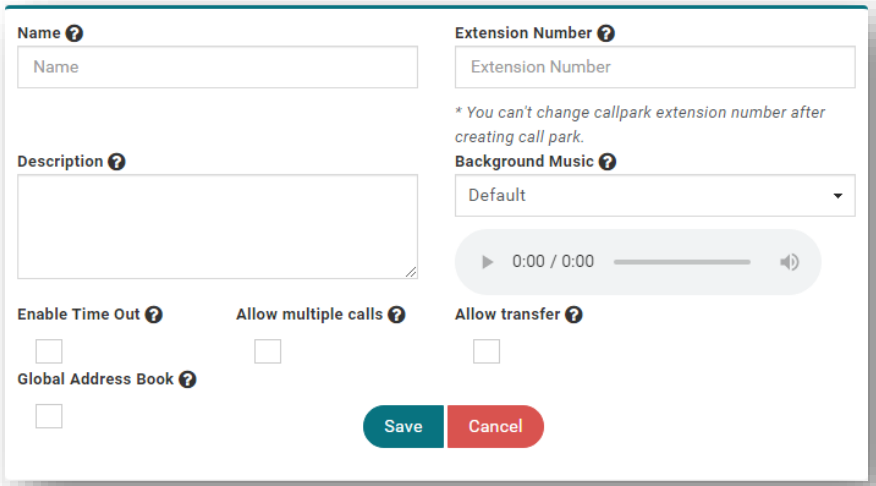
Background Music: Audio file played while caller waits in the call park.

Enable Timeout: If enabled, call will automatically transfer back to user that transferred into the call park after the allotted time has expired.

Allow Multiple Calls: If enabled, multiple callers can be parked within one call park. Callers will be retrieved in the order in which they were parked. (We recommend keeping this option disabled to simplify your call park management)

Allow Transfer: If enabled, gives the caller the ability to transfer back to the user that parked them by pressing a defined key. (Default 0)

Creating Call Parks



Below are descriptions of each field available when creating a call park.

Extension: The direct extension used to reach this call park.

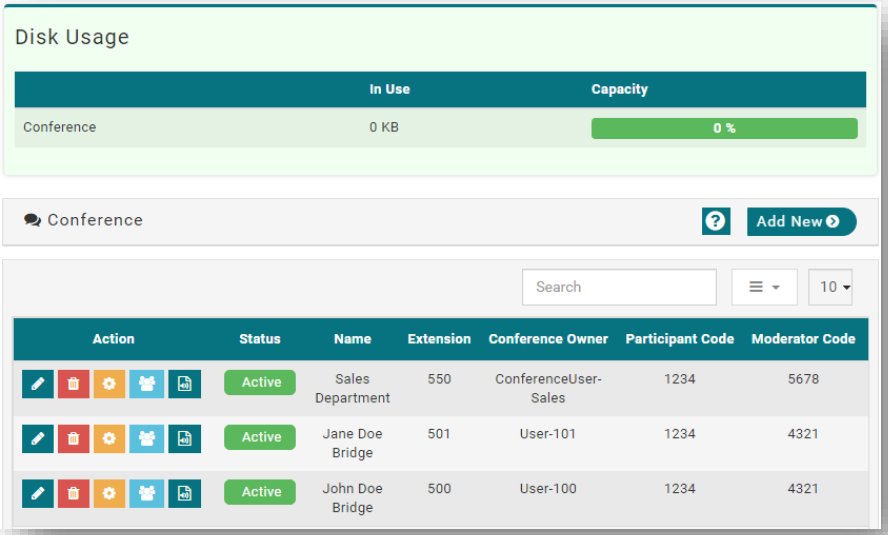
Background Music: Audio file played while caller waits in the call park.

Enable Timeout: If enabled, call will automatically transfer back to user that transferred into the call park after the allotted time has expired.

Allow Multiple Calls: If enabled, multiple callers can be parked within one call park. Callers will be retrieved in the order in which they were parked.

Allow Transfer: If enabled, gives the caller the ability to transfer back to the user that parked them by pressing a defined key. (Default 0)

Conference Bridge



The first thing you may notice is **Disk Usage.** This keeps track of conference recordings and the space used on the server by said recordings.

Use the button to edit the name, participant code, moderator code, etc.

Use the button to delete the conference bridge.

Use the button to configure the star codes for each individual bridge.

Use the button to monitor and manage the conference in progress.

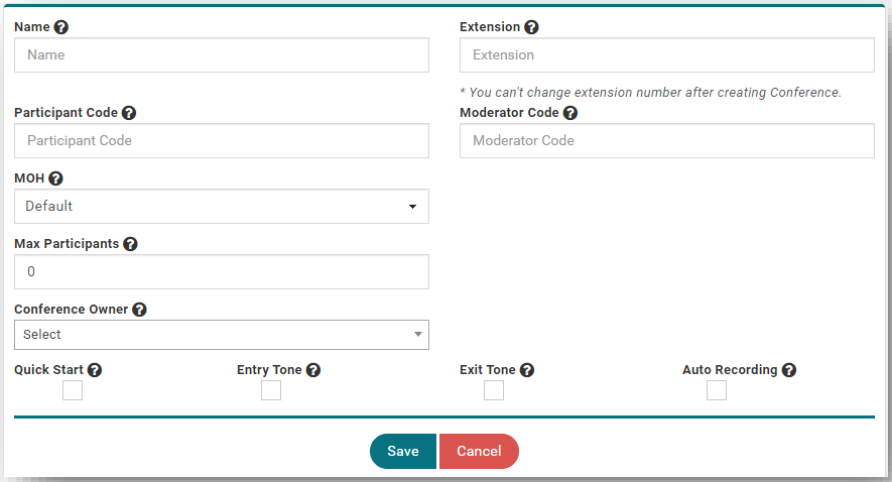
Use the button to view and manage your previously recorded conferences.

Use the Add New button to create a new conference bridge.

Conference Owner: Determines the administrator of the conference bridge.

Participant/Moderator Code: PIN's that must be used to call into the conference bridge and gives permissions respective to their login.

Creating Conference Bridges



Name: The name of the conference bridge.

Extension: The internal extension of the conference bridge.

Participant Code: The code used to access the conference bridge as an attendee.

Moderator Code: The code used to begin the conference bridge unless Quick Start is enabled.

MOH: Hold music that participants will hear prior to a moderator logging in (**Quick Start** must be disabled).

Max Participants: Total participants that may join the conference.

Conference Owner: The administrator of the conference bridge.

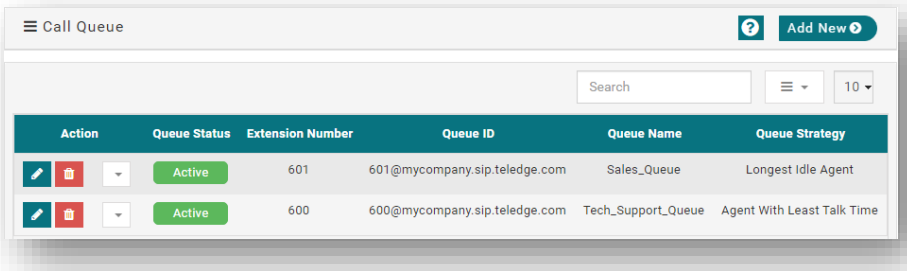
Quick Start: If enabled, allows participants to begin without the presence of a moderator.

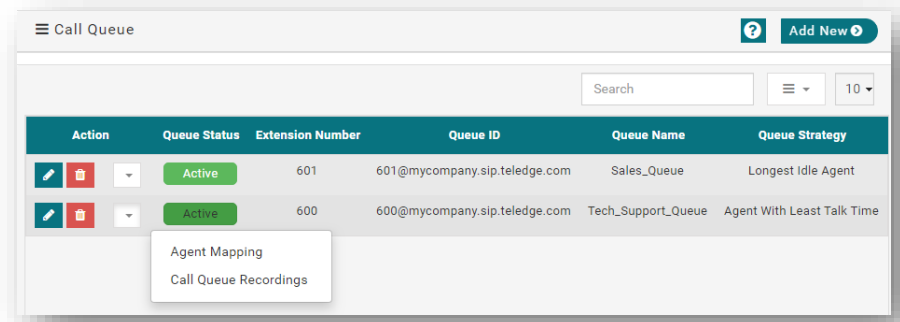
Entry Tone: A tone that plays when participants enter the bridge.

Exit Tone: A tone that plays when a participant exits the bridge.

Auto Recording: If enabled, all conferences will be recorded and stored within the auto recording page for this bridge.

Contact Center Lite - Queues





Use the button to edit your queue's name, rules, music on hold, etc.

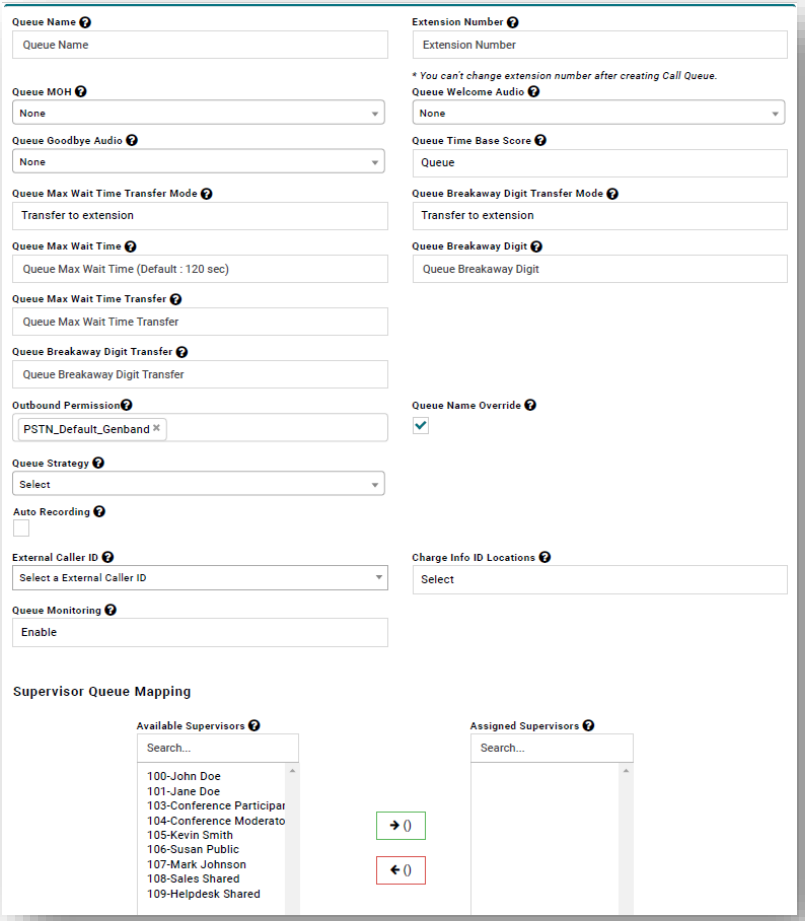
Use the button to delete a queue.

Use the button to access **Agent Mapping** and **Call Queue Recordings**.

Use the Add New button to create a new queue.

Queue Strategy: Give you a quick look at how the queue handles your caller distribution to your agents. (e.g. Agent with most talk time, agent with least talk time, longest idle agent, etc.)

Contact Center Lite - Creating Queues



Extension Number: Internal extension assigned to the queue.

Queue MOH: The audio file assigned to play while the caller is on hold.

Queue Welcome Audio: The audio file assigned to play when a caller enters the queue.

Queue Goodbye Audio: The audio file assigned to play when a caller exits the queue.

Queue Time Base Score: Determines whether base time score[1] is based on when the call first connected (system) or when the caller entered the queue (queue).

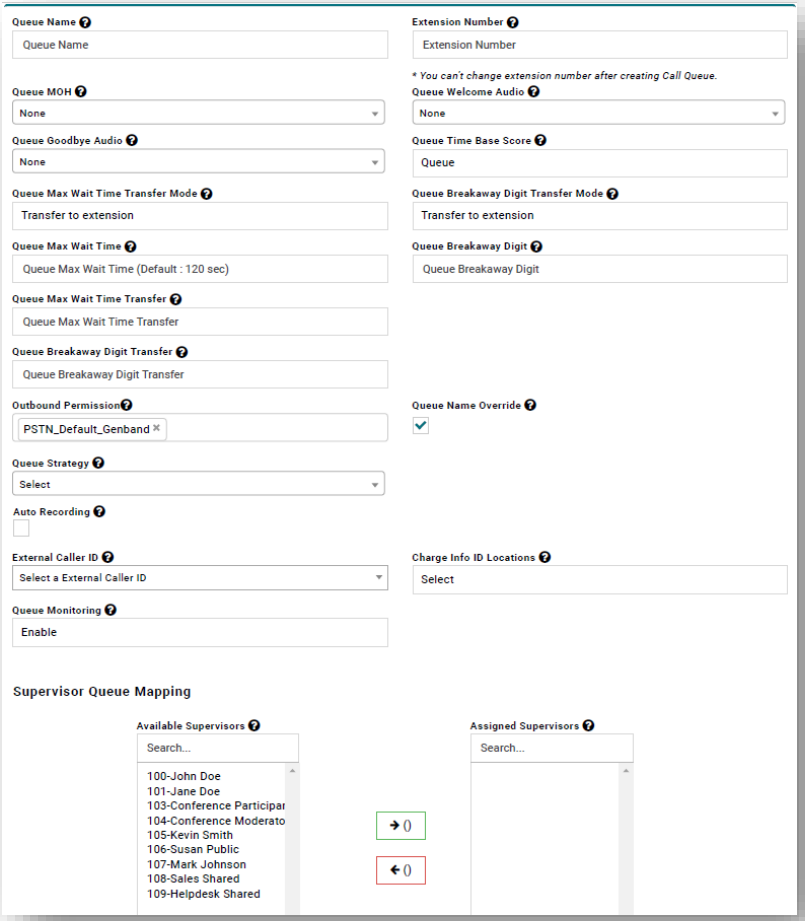
Queue Max Wait Time Transfer Mode: If a max wait time is set the caller can be transferred to another extension.

Queue Breakaway Digit Transfer Mode: If a breakaway digit is set this goes to an extension.

Queue Max Wait Time: Determines max wait time for callers within the queue.

[1] Base time score helps the system determine the priority of a caller based on the length of their call.

Contact Center Lite - Creating Queues cont.



Queue Breakaway Digit: Determines the digit a caller can press to be sent to the specified extension or to activate callback.

Queue Max Wait Time Transfer: Extension the caller is sent to after reaching max wait time.

Queue Breakaway Digit Transfer: Extension caller is sent to after pressing breakaway digit.

Queue Name Override: If enabled, allows agents to see queue name and extension as caller ID rather than the caller's original caller ID.

Queue Strategy: Can be set to Agent with Most Talk Time, Agent with Least Talk Time, Longest Idle Agent, Random, Ring-All, Round-Robin[1], or Agent with most calls.

Auto Recording: Automatically records all calls made within the queue. (May require additional storage)

Queue Monitoring: If enabled, allows supervisors to monitor, barge in, or whisper agent calls.

Supervisor Queue Mapping: This tool allows you to determine which user will be set as supervisors within the queue.

[1] Round-Robin rings in order or of agents listed see page 27 – Agent Mapping.

Contact Center Lite - Agents

Use the button to edit wrap up time, reject delay time, and no answer delay time.

Use the button to delete an agent.

Use the Add New to create a new agent.

Wrap Up Time: A timer between phone calls to allow the agent to finish any work associated with the first call before another call is offered.

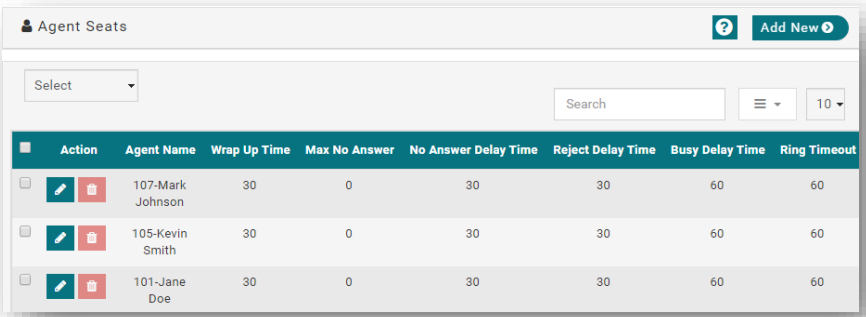
Max No Answer: Number of calls an agent can miss before being set to "Break"

No Answer Delay Time: If an agent misses a call the system will wait this amount of time before offering another call.

Reject Delay Time: If the agent rejects a call the system will wait this amount of time before offering another call.

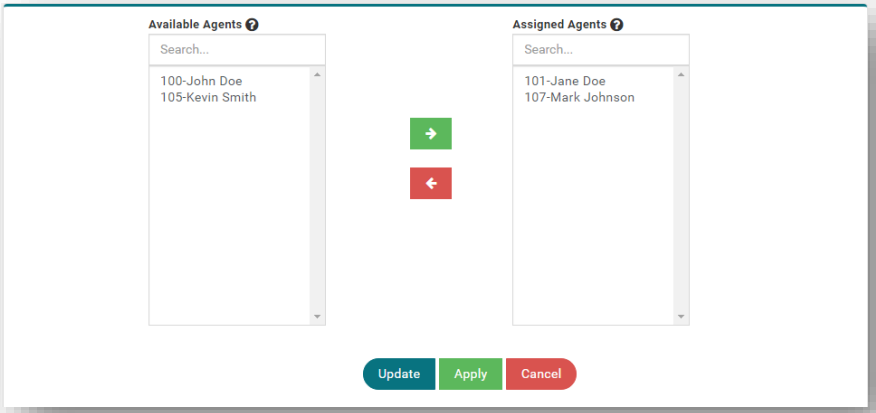
Busy Delay Time: If agent rings busy the system will wait this amount of time before offering another call.

Ring Timeout: How long an agent can ring before call is offered to another agent.



Action	Agent Name	Wrap Up Time	Max No Answer	No Answer Delay Time	Reject Delay Time	Busy Delay Time	Ring Timeout
	107-Mark Johnson	30	0	30	30	60	60
	105-Kevin Smith	30	0	30	30	60	60
	101-Jane Doe	30	0	30	30	60	60

Contact Center Lite - Agent Mapping

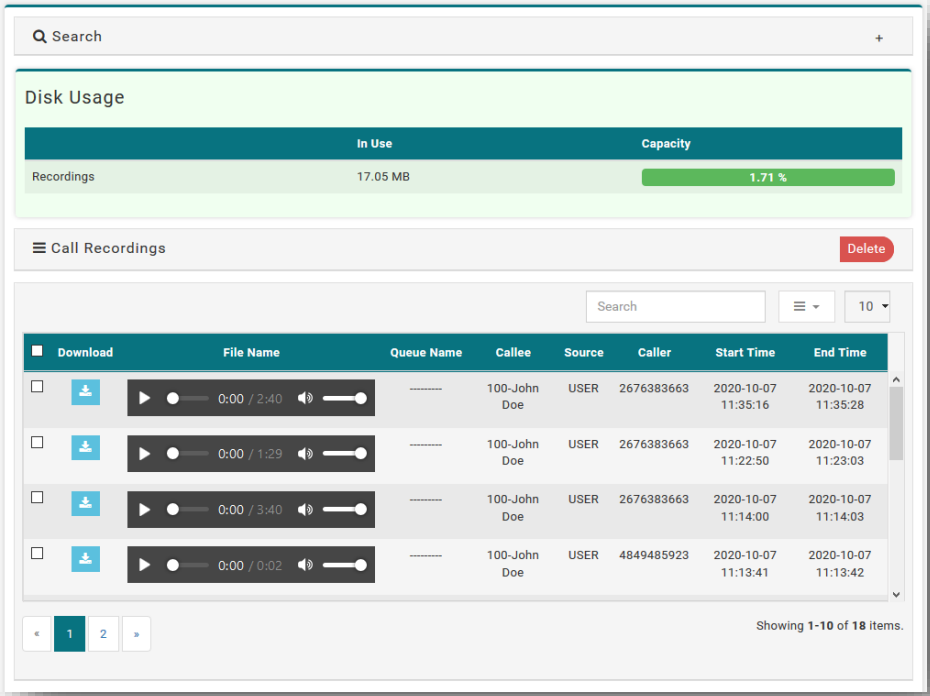


Agent mapping allows you to define which of your agents may participate in your queues. Agents can be assigned to as little or as many queues as you'd like.

To assign an agent to the queue highlight an available agent you'd like to add and use the button.

To remove an agent highlight an assigned agent and use the button.

Call Recording



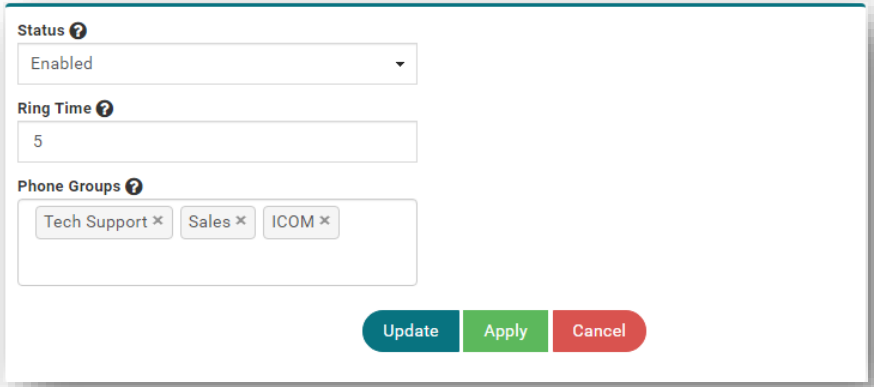
The Call Recording section is where call recordings can be listened to, downloaded, and deleted.

Call recordings can be downloaded using the button. Use the player 0:00 / 1:29 next to the download button to listen to any recorded calls.

Recordings will show the name of the call queue the call was recorded in, the user who received the call(callee), phone number of the person who placed the call(caller), the start time of the call and the end time of the call.

The disk usage for call recordings is shown above the list of calls. Use the checkbox to select any recording and the delete button Delete to remove any recordings.

Intercom



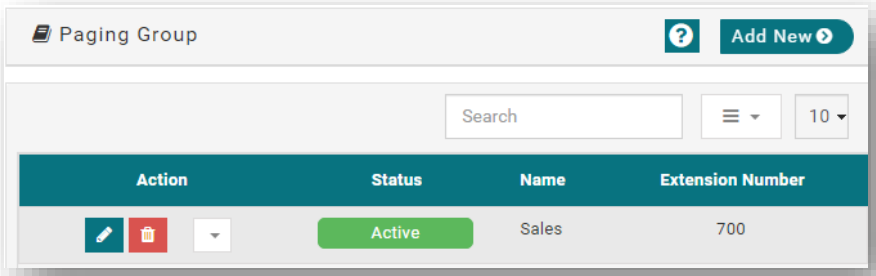
Intercom is based on permission by phone group. In other words, only phones within specified phone groups may receive intercom calls.

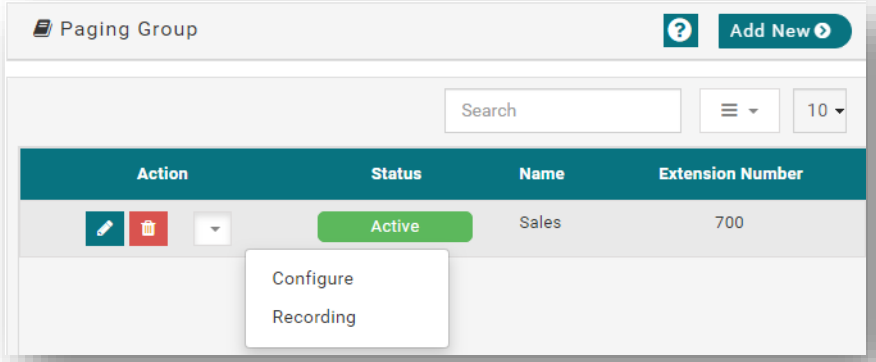
Status: Enable or disable intercom.

Ring Time: How long the phone will ring prior to automatically answering. Pressing zero allows you to accept an incoming intercom immediately. (Setting this to zero allows the speaker to initiate without ringing)

Phone Groups: Specified phone groups to give the intercom permission to.

Paging Groups





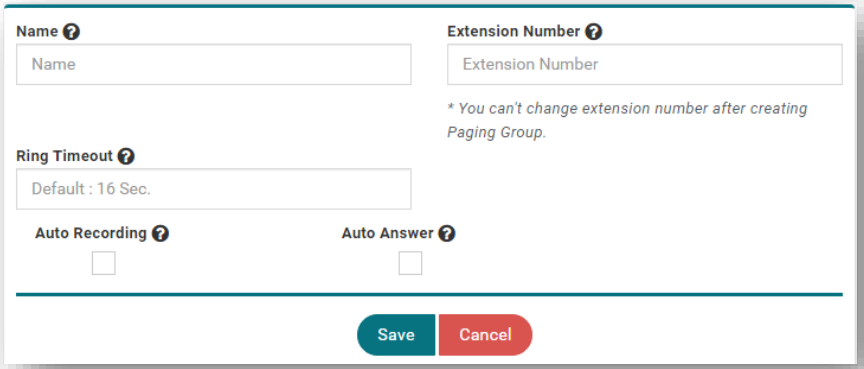
Use the button to edit name, ring timeout, status, etc.

Use the button to delete the paging group.

Use the button to access the **Configure** and **Recording** menus.

Use the Add New button to create a new paging group.

Creating Paging Groups



First start by building the group itself, filling in the following fields:

Name: Name of the paging group.

Extension Number: Internal extension assigned to the group.

Ring Timeout: Time in seconds before page is automatically ended.

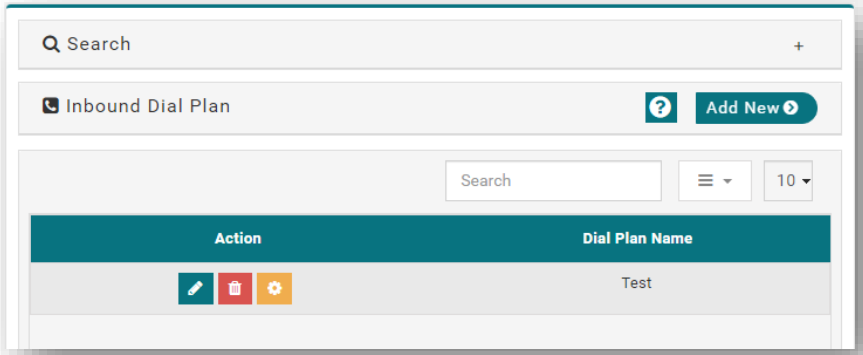
Auto Recording: If enabled, records all pages made to this group.

Auto Answer: If enabled, paged phones automatically answer.

After the group is created, open configuration and add the users you'd like to have in the group.

Use the → button to add users.
Use the ← button to remove users.

Inbound Dial Plans



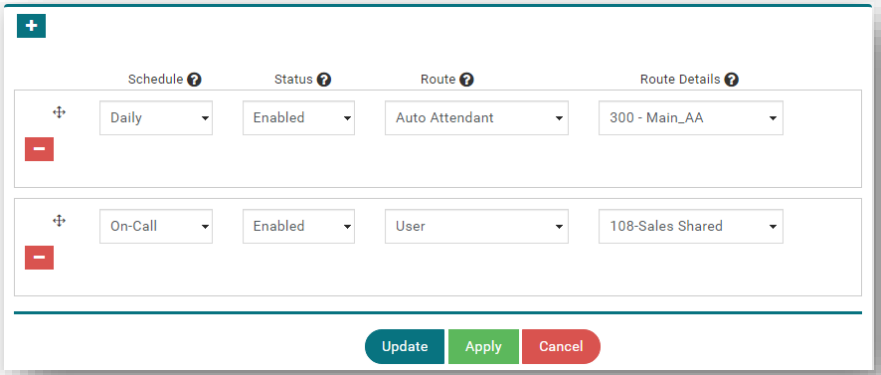
Use the button to edit a dial plan's name.

Use the button to delete a dial plan.

Use the button to configure your dial plan's routes and scheduling.

Use the Add New button to create a new dial plan.

Creating Inbound Dial Plans



Simply name the new dial plan to start. After that head to the configuration window for the new dial plan.

Use the button to add new routes. Routes are prioritized by the order they are presented. Top route having highest priority.

Use the button to remove a route.

Click and drag the icon to move a route.

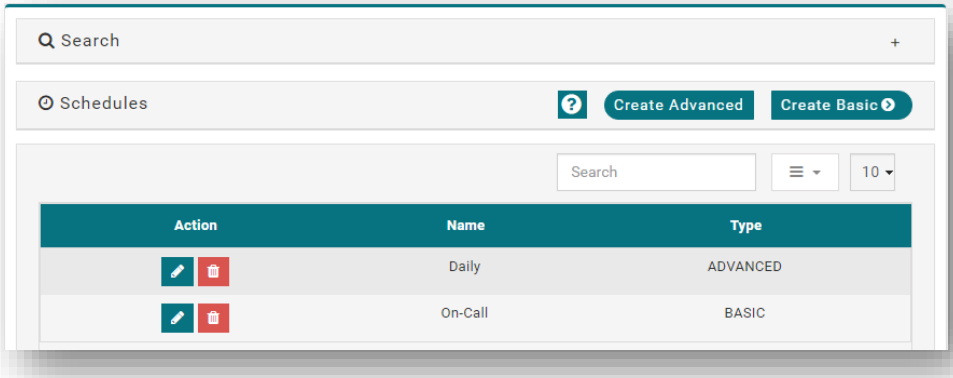
Schedule: The schedule that a route will follow. Schedules are built in the schedule window. (Default: Always)

Status: Determines if the route is enabled or disabled.

Route: Determines if the route will send the call to a user, auto attendant, queue, etc.

Route Details: The specific destination of the route.

Schedules



Schedules are used to determine when routes and forwards are active.

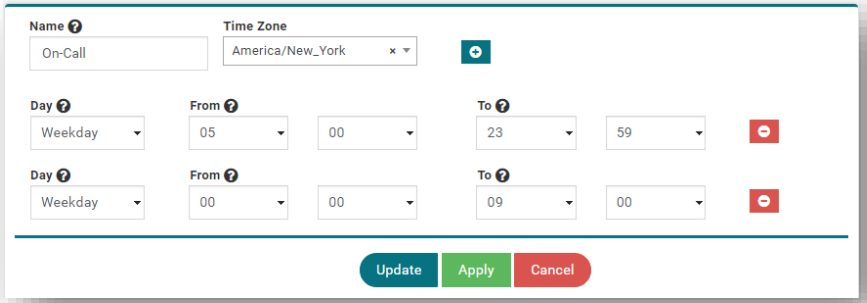
Use the button to edit the parameters of an existing schedule.

Use the button to delete a schedule.

Use the Create Advanced button to create an advanced schedule.

Use the Create Basic button to create a basic schedule.

Creating Basic Schedules



Use the button to add a line.

Use the button to remove a line.

Name: The name of the schedule.

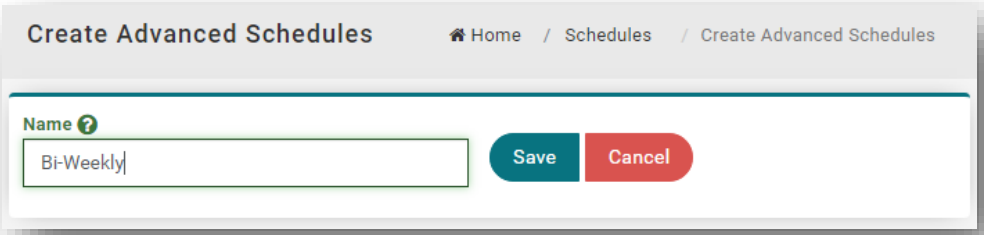
Time Zone: The time zone of the schedule. Particularly useful for multi-site time management. (Multiple time zones)

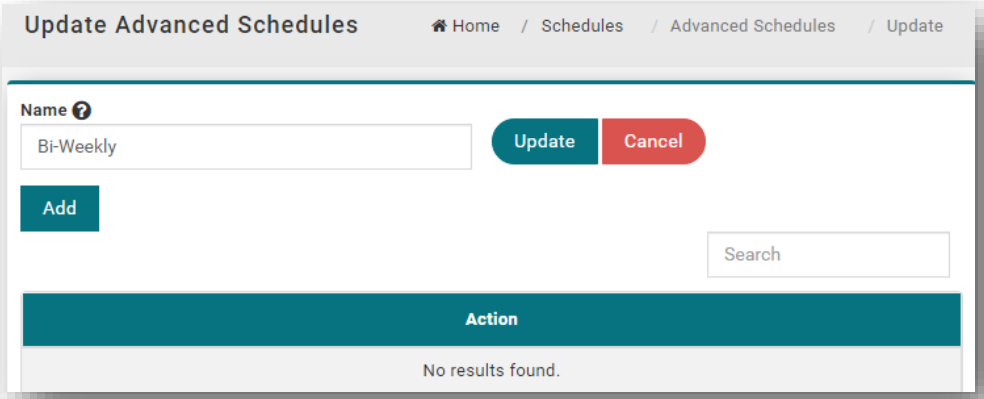
Day: Specifies the day of the week the schedule line covers. Can be a particular weekday or can cover an entire weekday/weekend.

From: The start time of the line.

To: The end time of the line.

Creating Advanced Schedules





After using Create Advanced a name will need to be entered into the field and saved by using the Save button.

Once a schedule has been created rules will need to be added to dictate the parameters of the schedule.

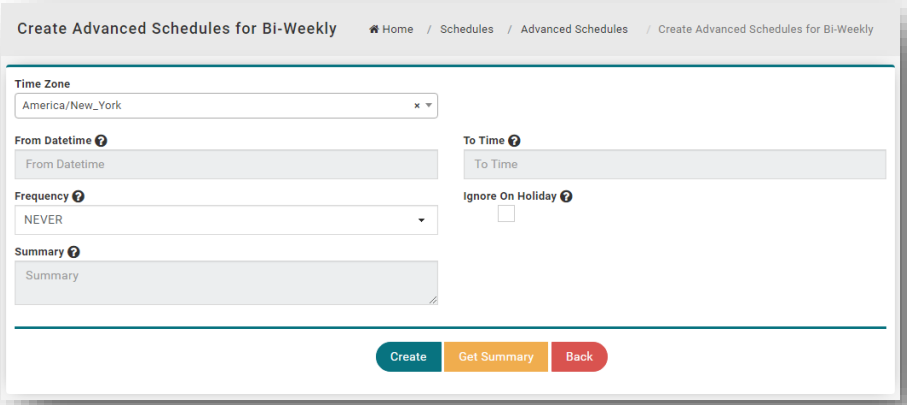
As rules are created they will appear in a list below the Action line.

Use the Add button to create rules.

Multiple rules can be added to an advanced schedule.

Rules will be listed with the most recently created rule at the top of the list.

Creating Rules



Time Zone: Determines the time zone the schedule will be used in.

From Datetime: Determines the date and time when the schedule will begin.

To Time: Determines the time the schedule will end.

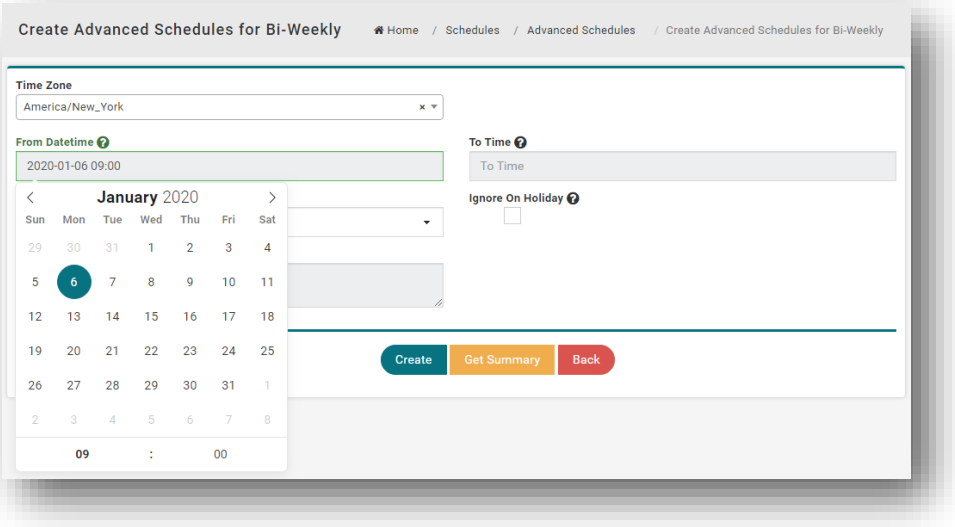
Frequency: Determines how often this rule will repeat.

I.e., Never, Daily, Weekly, Monthly, and Yearly

Ignore on Holiday: Tells this schedule to ignore on predetermined holidays.

Summary: Use the Get Summary button to get a summary of the rule being added. Summaries will be auto-generated when the Create button is used.

Choosing A Start Time



Choose the start time by clicking the empty field labeled **From Datetime**.

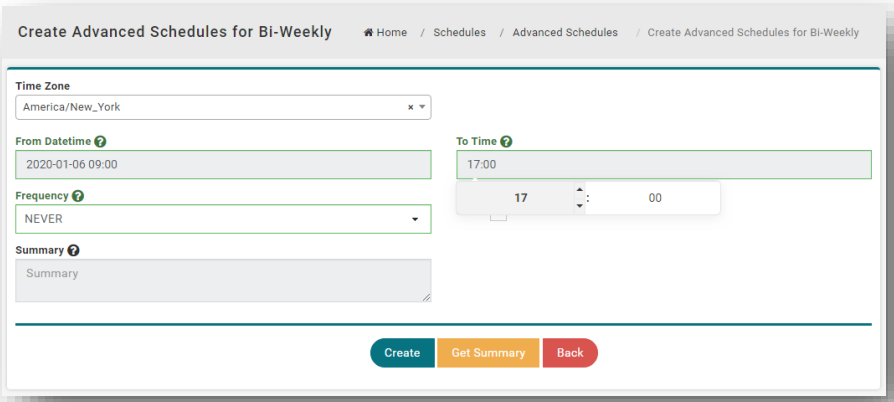
A calendar will appear just below the field as pictured to the left.

Choose the date by clicking it and a blue circle will appear around the chosen date.

Once the date is chosen a digital clock will appear beneath the calendar and the start time can be set.

The clock will be in 24 hour format.
I.e., For 1 AM use 01:00 but for 1 PM use 13:00.

Choosing An End Time

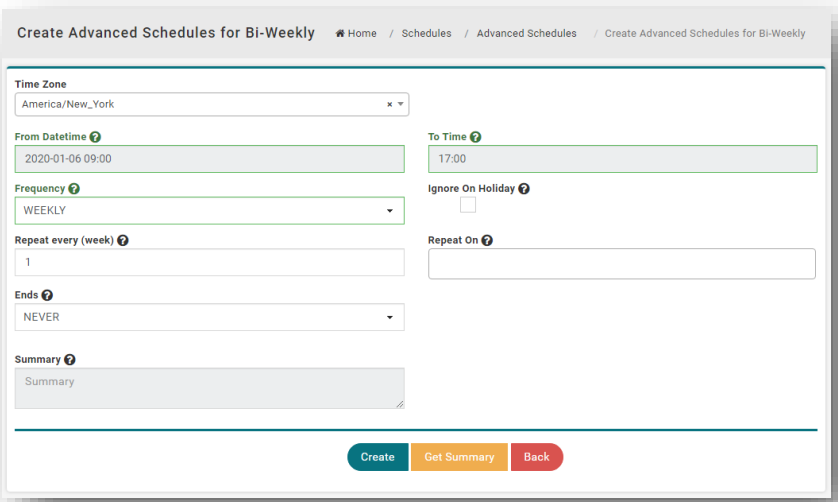


Choose the end time by clicking the field labeled **To Time**.

Only the end time will chosen during this step. The end date for this rule can be chosen in a later step.

The start and end times are adjusted by clicking the up or down arrows next to the hour or minutes portion on the clock. The time can also be entered via the keyboard.

Choosing The Frequency



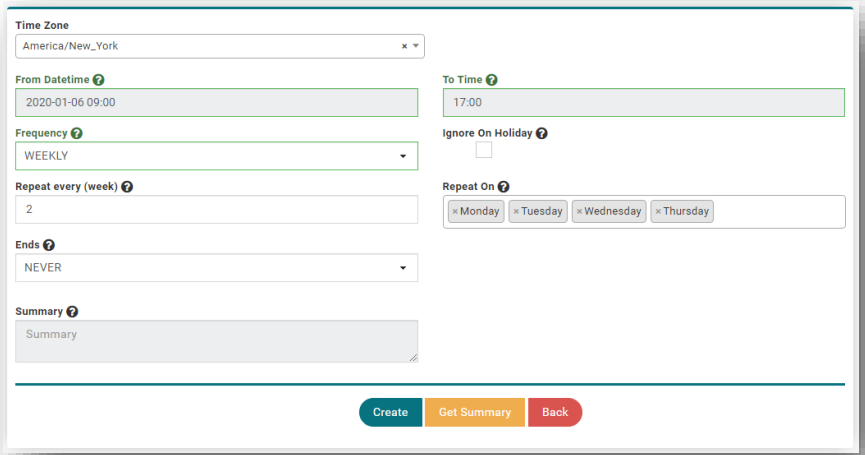
The drop down field under **Frequency** chooses how often this schedule is repeated.

Never, Daily, Weekly, Monthly, and Yearly are the choices.

Depending on the frequency chosen, more options will appear.

Pictured is a weekly schedule with the added options of **Repeat Every(Week)**, **Repeat On**, and **Ends**.

Choosing The Frequency cont.



Repeat Every(Week): Sets how often this rule will repeat. The example shown is set for every other week.

Repeat On: Sets the days in which the rule will repeat. This field is a drop down and will list all of the days of the week when clicked.

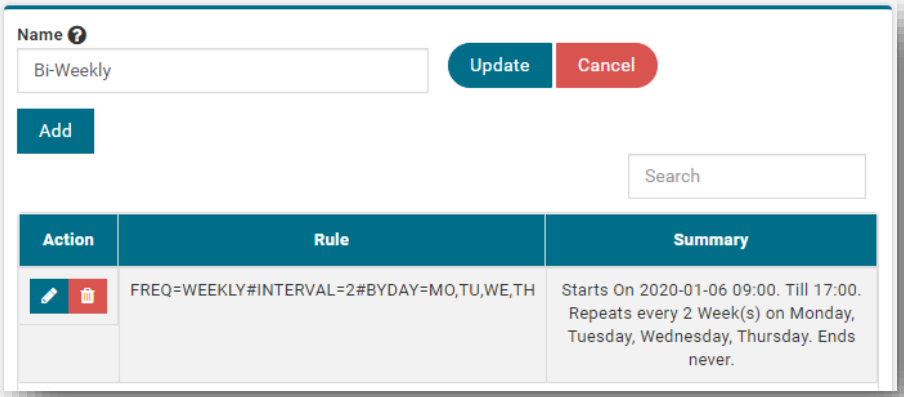
Ends: Sets when the rule will expire. Choices are Never, On and After.

Never: No end date
On: Sets a date for the rule to expire
After: Sets the number of times for the rule to repeat

Use the Create button to save the rule.

The above schedule is set to start on January 6th, 2020.
It will be active from 9am to 5pm, Monday through Thursday.
It will run every other week and is set to never end.

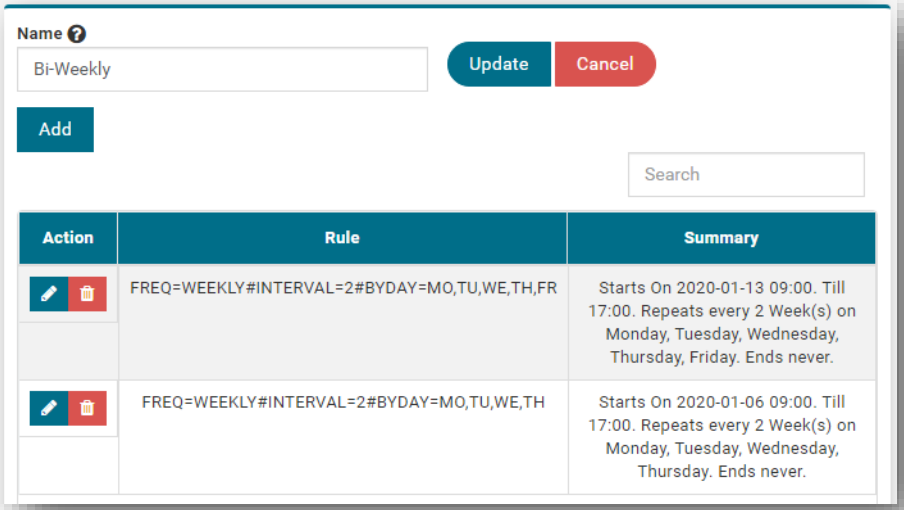
Rules List



Once a rule has been created for the schedule it will appear in the list under the Update Advanced Schedules Section.

Multiple rules can be added as needed to cover gaps in a schedule.

The schedule to the left repeats every other week. A second rule is needed to cover the off weeks.



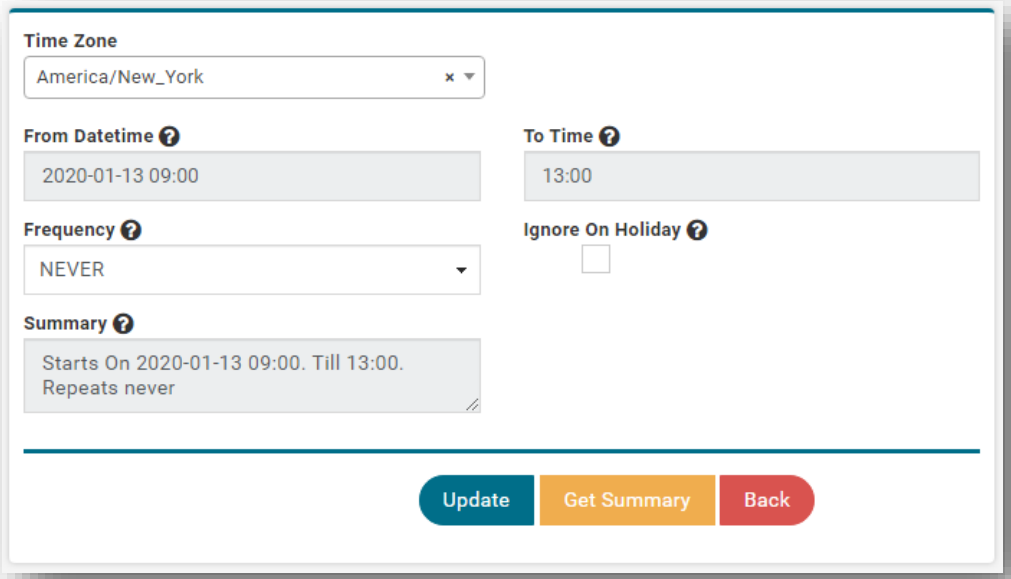
The second rule has been added.

Multiple Rules will be listed in order of creation with the newest at the top.

The listed rules alternate between being open or closed on Fridays.

Note that the start date for the second rule is a week apart from the original rule.

Never Repeat Schedule

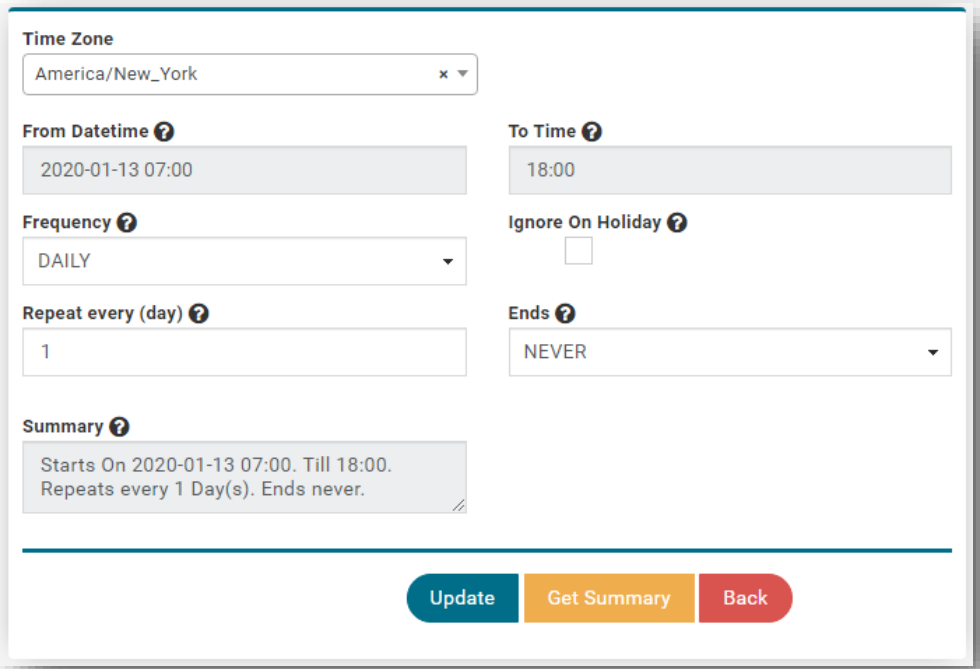


Never repeat schedules can be used for single day events that don't need to be repeated.

When **Never** is chosen as the frequency no additional options will be added.

The shown schedule will start at 9AM on 1/1/2020 and will end at 1PM and will never be repeated.

Daily Repeat Schedule



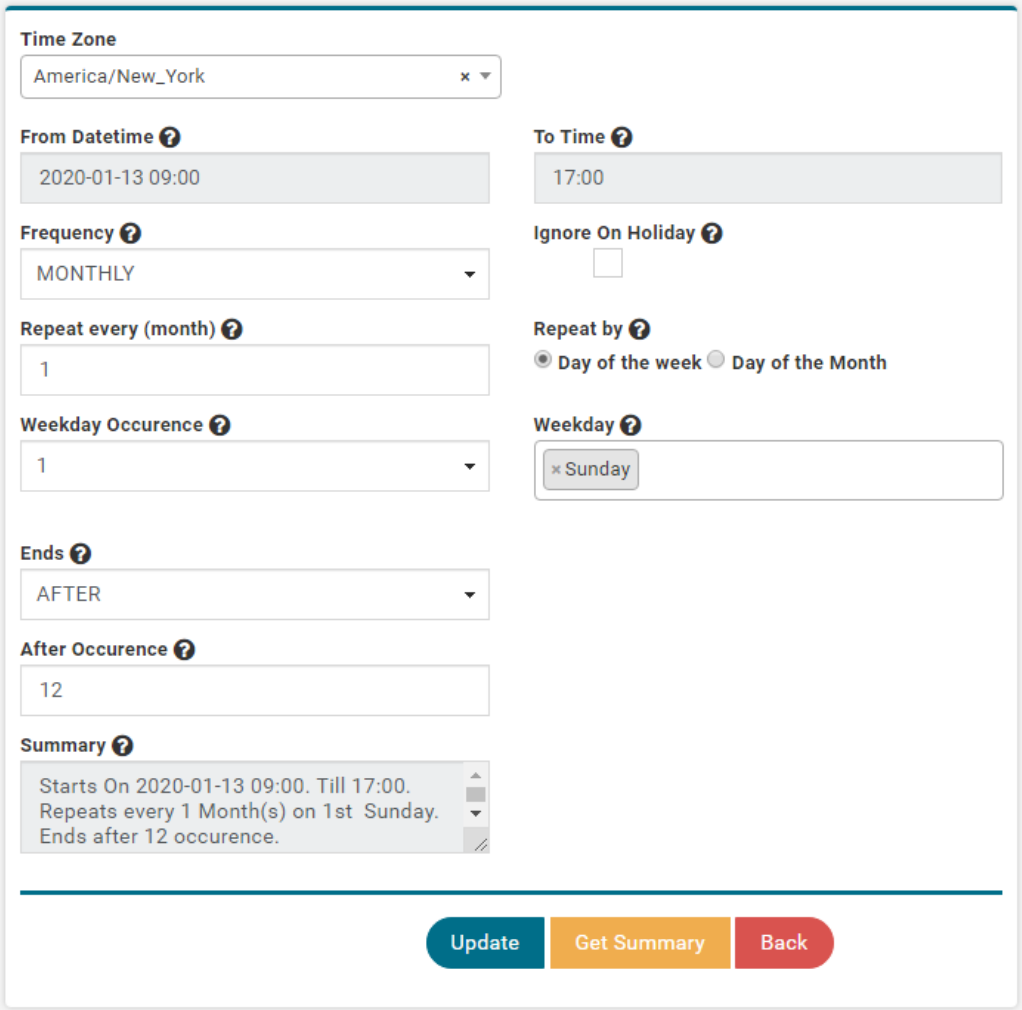
Daily repeat schedules can be used to repeat on a per day basis.

When daily is selected the additional field of **Repeat every (day)** will appear.

This type of schedule can be repeated every other day or every three days by changing the frequency to either two or three days respectively.

In this example, the schedule will repeat everyday and is active from 7AM until 6PM and is set to never end.

Monthly Repeat Schedule



Monthly schedules are able to repeat on a monthly basis.

When **Monthly** is selected as the **frequency** the additional option of **Repeat by** will appear.

Repeat by will have the options of **Day of the week** or **Day of the Month**.

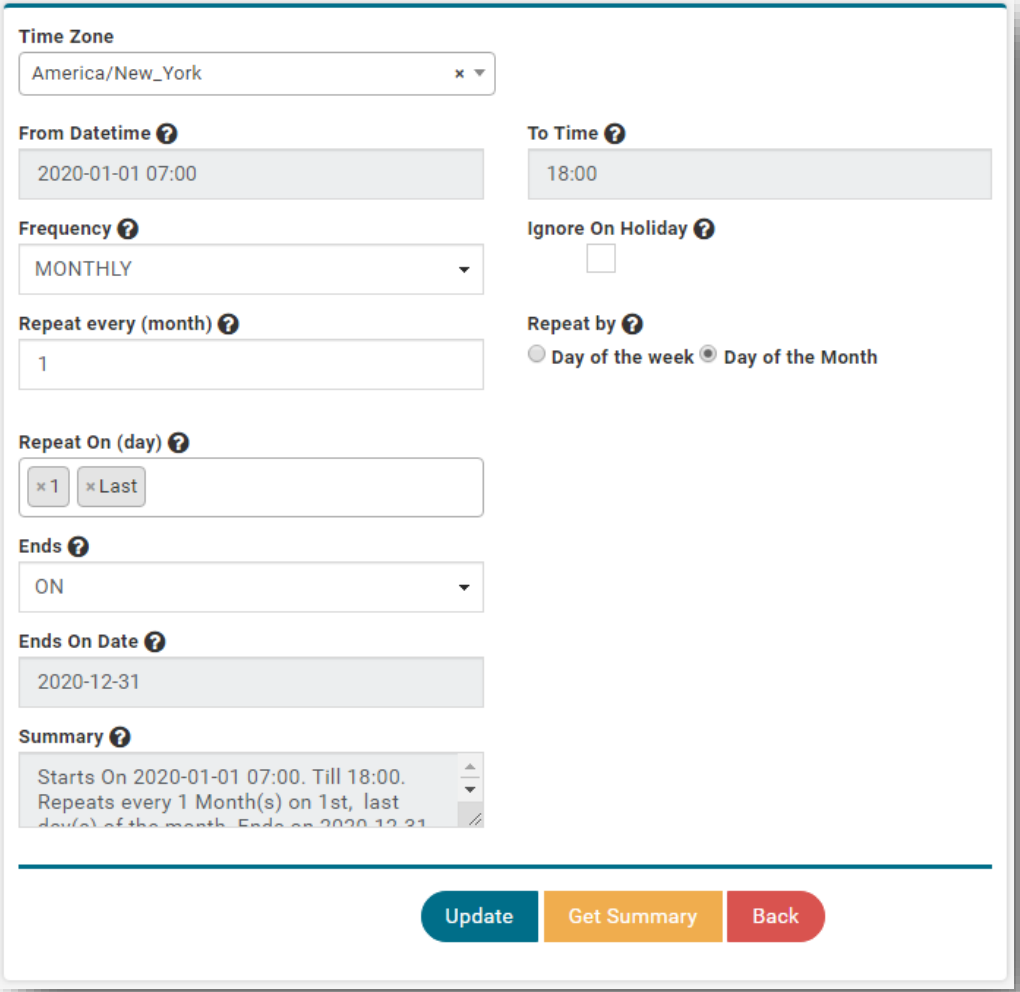
If **Day of the week** is selected the **Weekday** and **Weekday Occurrence** fields are added.

In the **Weekday** field the days of the week of the schedule are chosen.

Weekday Occurrence sets when in the month the schedule will repeat.

The schedule shown will be active from 9AM until 5PM on the first Sunday of every month and will repeat for 12 months.

Monthly Repeat Schedule cont.

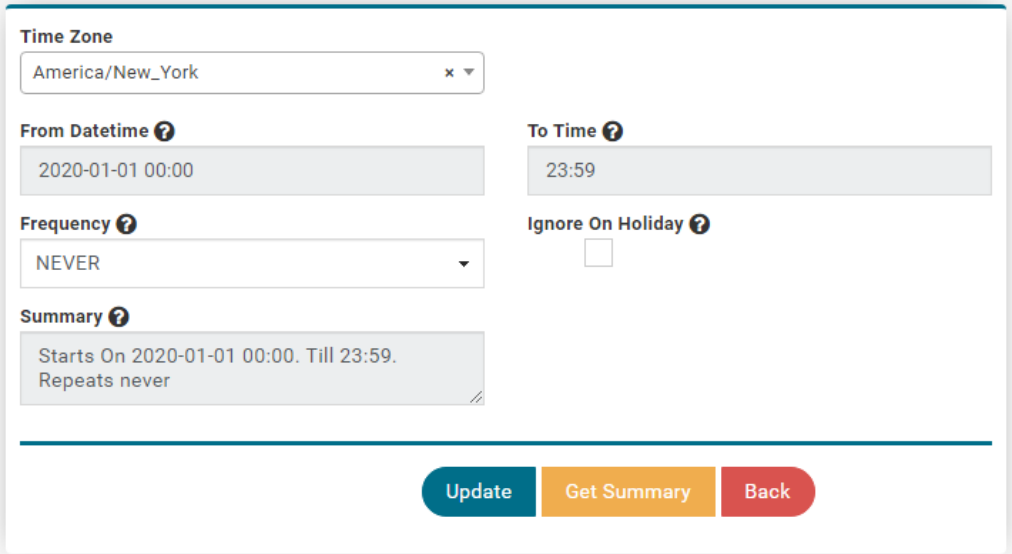


In this example **Day of the Month** was chosen in the **Repeat by** section.

Repeat on (day) allows specific numbered days of a month to be chosen.

The pictured schedule will play from 7AM until 6PM, will be active on the first and last day of the month, and will end on 12/31/20.

Yearly Repeat Schedule



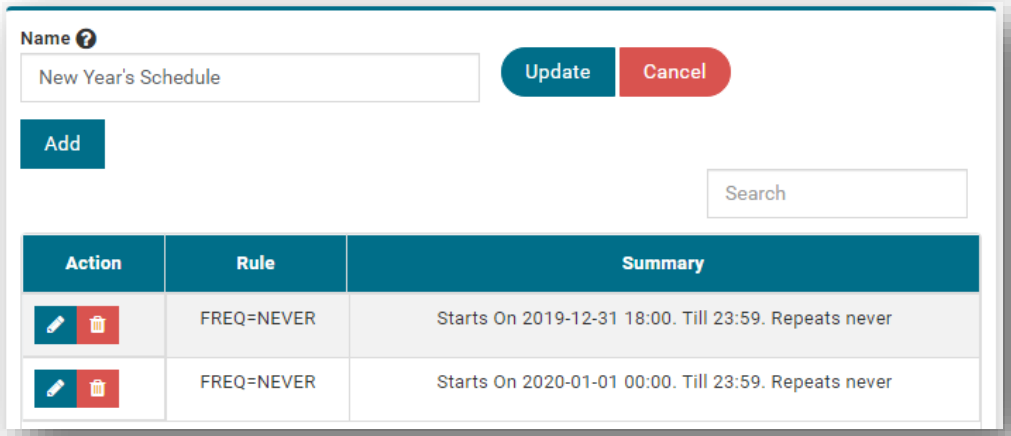
Yearly schedules allow for a single day to be repeated on a yearly basis.

When **Yearly** is selected as the **frequency** the additional options of **Repeat every (year)** and **Ends** are added.

Repeat every (year) will chose how often the schedule is repeated. If 1 is chosen the schedule will be repeated every year. If 2 is chosen the schedule will be repeated every other year and so forth.

This schedule will start at midnight on 1/1/20 and will end at 11:59PM. It will be repeated yearly and will never end.

Yearly Repeat Schedule cont.



Multiple rules are able to be added for all schedules.

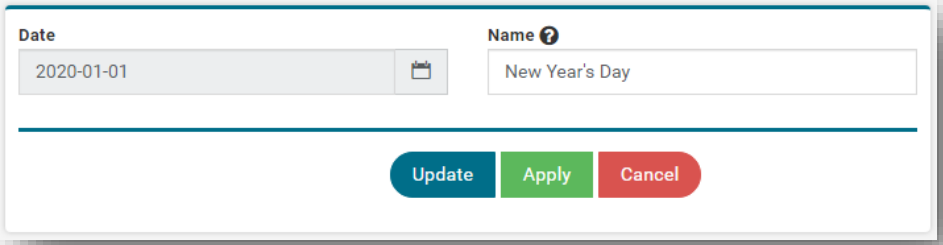
Shown is the yearly schedule with an added rule for the 31st of December to compliment the previous yearly schedule.

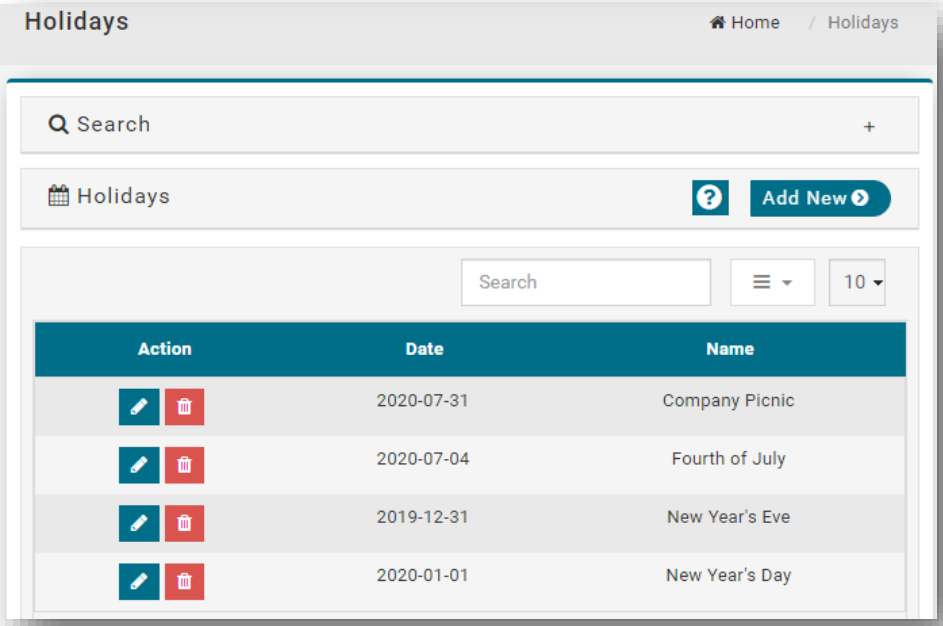
The second rule is listed at the top of the rules list.

This schedule is set to start a 6PM on December 31st and will run until 11:59PM.

The original rule will then be active after midnight.

Holidays





Specific days can be set to be ignored in the Holidays sub-section.

Use the Add New button to add additional holidays.

When adding a new holiday there will only be two sections, **Date** and **Name**.

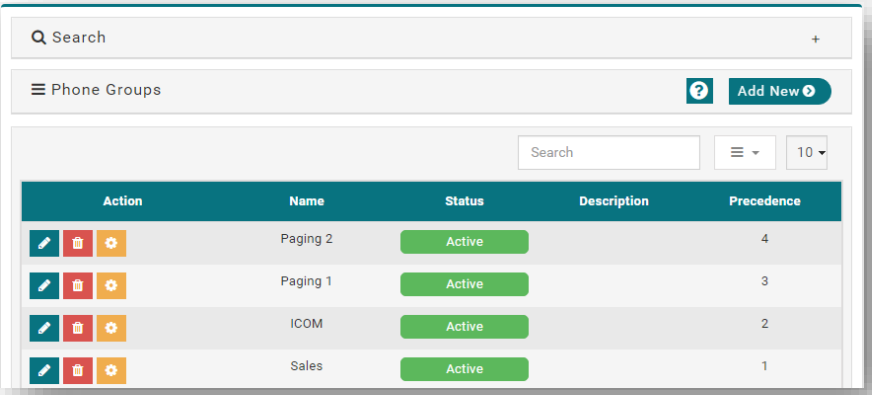
Choose the date by clicking **Date** field and the calendar will once again appear. Only the date is chosen in this section and no times are chosen.

The **Name** field is the named by the admin and can be freely chosen.

Added holidays will populate in the list and will show the date selected and the name given.

They will appear in order of most recently added to the list at the top.

Phone Groups



Phone groups allow you to easily assign features, functions, firmware, etc. to your phones based on department, locality, company etc.

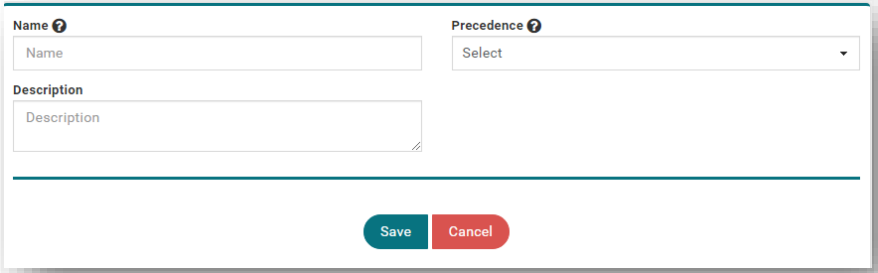
Use the button to edit the name, description, precedence, and status of the phone group.

Use the button to delete the phone group.

Use the button to change any settings, features, or firmware by phone model.

Use the Add New button to add a new phone group.

Creating Phone Groups



To create a phone group simply fill in the below fields.

Name: The name of the phone group.

Precedence: The priority this phone group takes over other existing groups. Phone groups cannot share priority and require a set priority between 0 and 99, 0 being the highest.*

Description: Description of the phone group.

After you have completed the creation of the phone group you may configure it to your specifications. Use the button.

*Phones may only be assigned to one phone group.

Phones

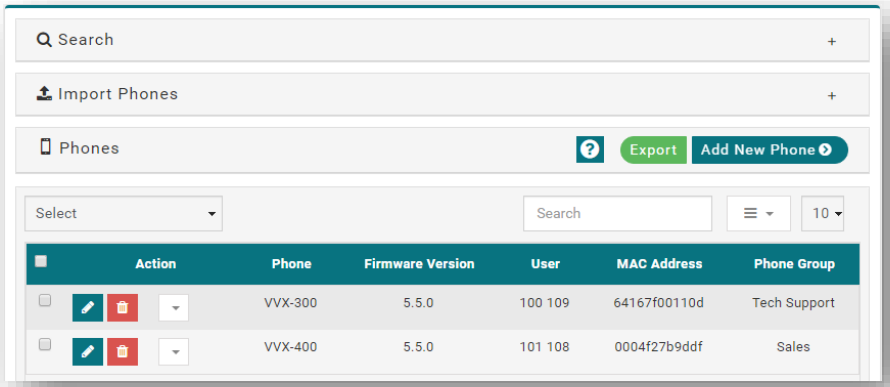


Fig. 1

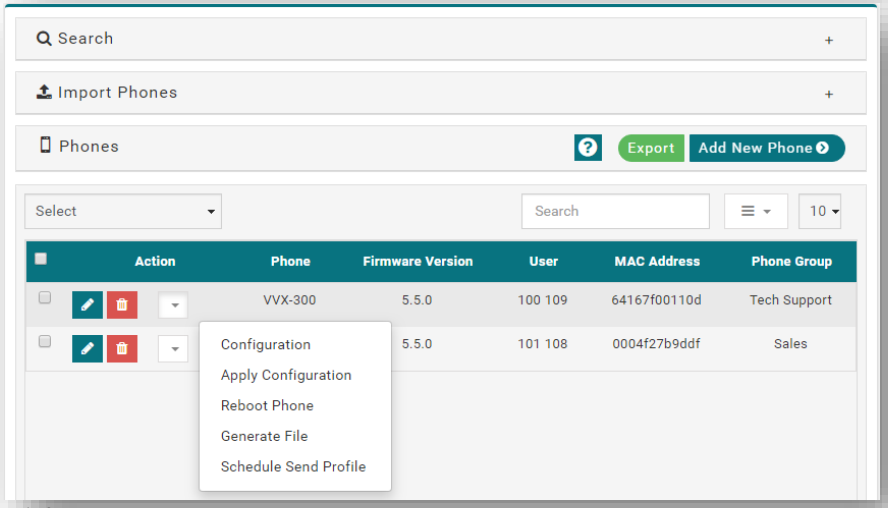


Fig. 2

Here you may configure individual phones for use by your users (Extensions)

Use the button to edit the phone model, phone group, and firmware version.

Use the button to delete the phone.

Use the button to access the configuration menu. **Apply Configuration**, **Reboot Phone**, **Generate File**, and **Schedule Send Profile** are all actions you can perform to the phone.

Use the Add New Phone button to add a phone.

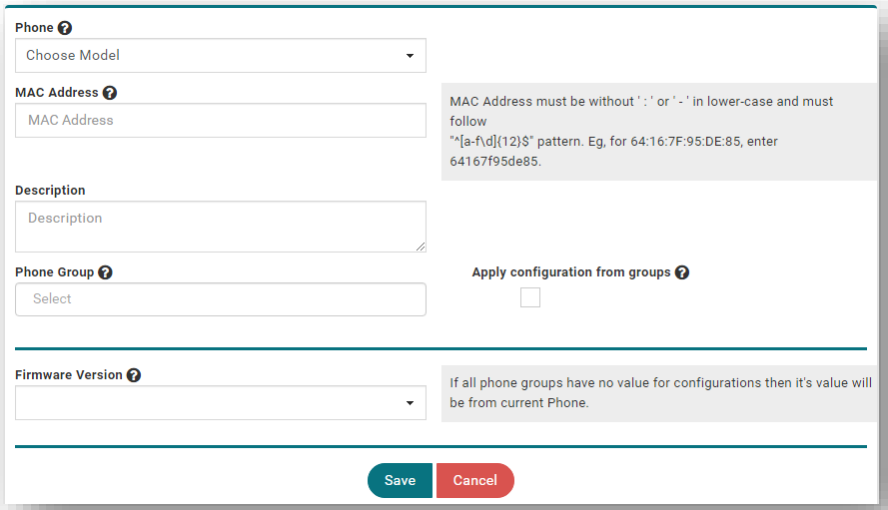
Apply Configuration: Applies the latest generated configuration file to the phone.

Reboot Phone: Reboots the phone when it is in an idle state.

Generate File: Takes the most current configuration and prepares it to be sent to the phone.

Schedule Send Profile: Allows you to build the profile now and apply it to the phone at the most convenient time possible.

Adding Phones



To build a new phone to the system fill in the below fields.

Phone: Choose the applicable phone model you will be provisioning.

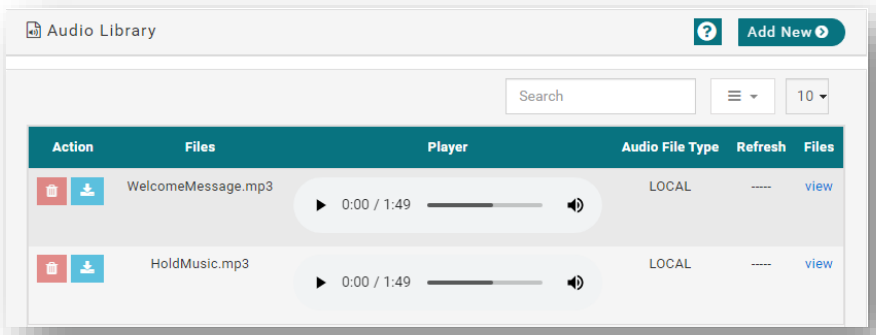
MAC Address: Enter the 12 character MAC address.

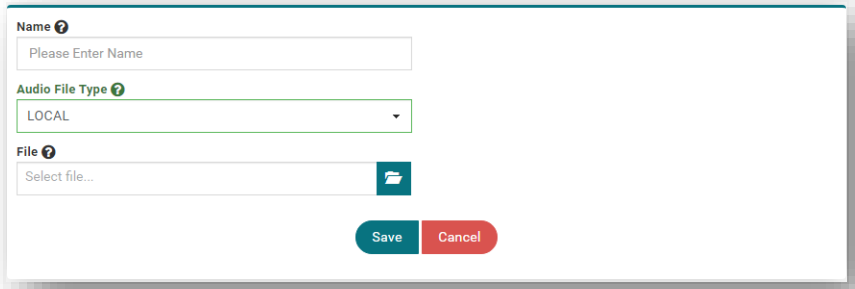
Phone Group: Choose the phone group you would like to build this phone to, if applicable.

Apply Configuration From Groups: Will apply existing configuration settings from selected phone group.

Firmware Version: Choose an applicable firmware version. This is based on the phone model. If you are unsure which to choose, contact our 24/7 helpdesk. (It is recommended to leave this as is for existing phones)

Audio Library





This page displays the collection of sounds available on your server. This can range from hold music to a simple out of office message. Any files here will be presented as an option anywhere administrative audio files are selected. This includes Auto Attendant messages, music on hold and queue messages.

Use the button to delete the audio file.

Use the button to download the audio file to your PC.

To upload a new audio file use the Add New button.

The **Player** allows you to play the audio file straight from the portal without the need to download it.

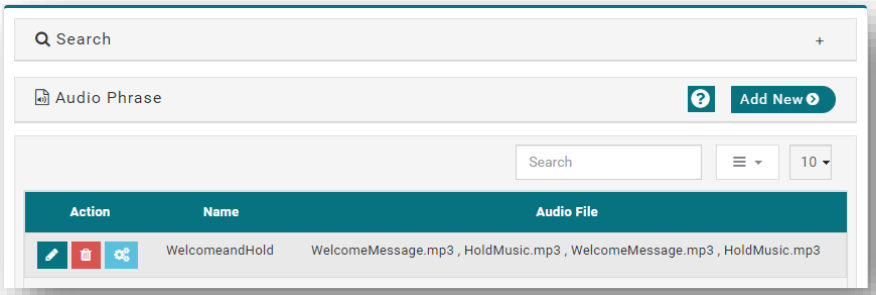
When uploading a new file fill in the below fields.

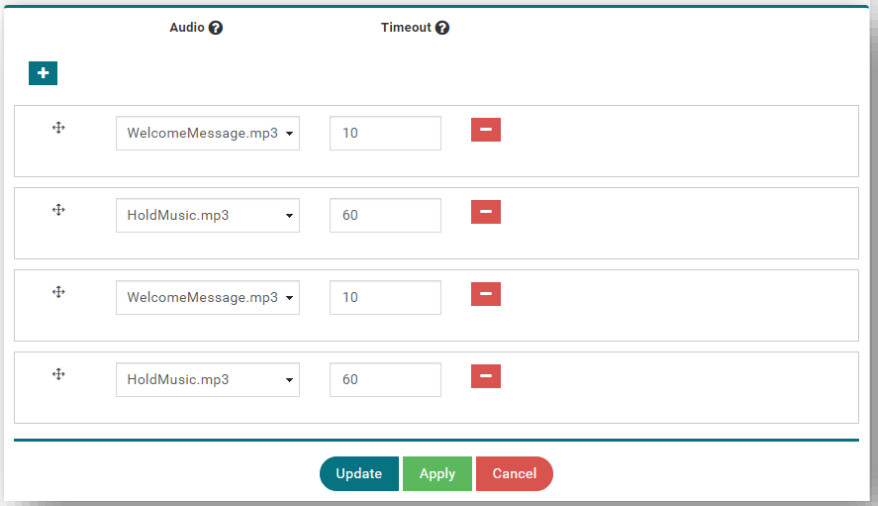
Name: Name of the audio file.

Audio File Type: Specifies whether it is being uploaded from your local machine or a remote URL.

File/URL: The location of the audio file to be uploaded.

Audio Phrase





This page allows you to store and organize your audio phrases. An audio phrase is a combination of existing audio files to create a unique audio file. This can be particularly useful when you want to insert a break-in message during a hold music loop.

Use the button to edit the name of a phrase.

Use the button to delete a phrase.

Use the button to configure which audio files will be played in a phrase.

Use the Add New button to create a new phrase.

After naming the new phrase enter the configuration menu.

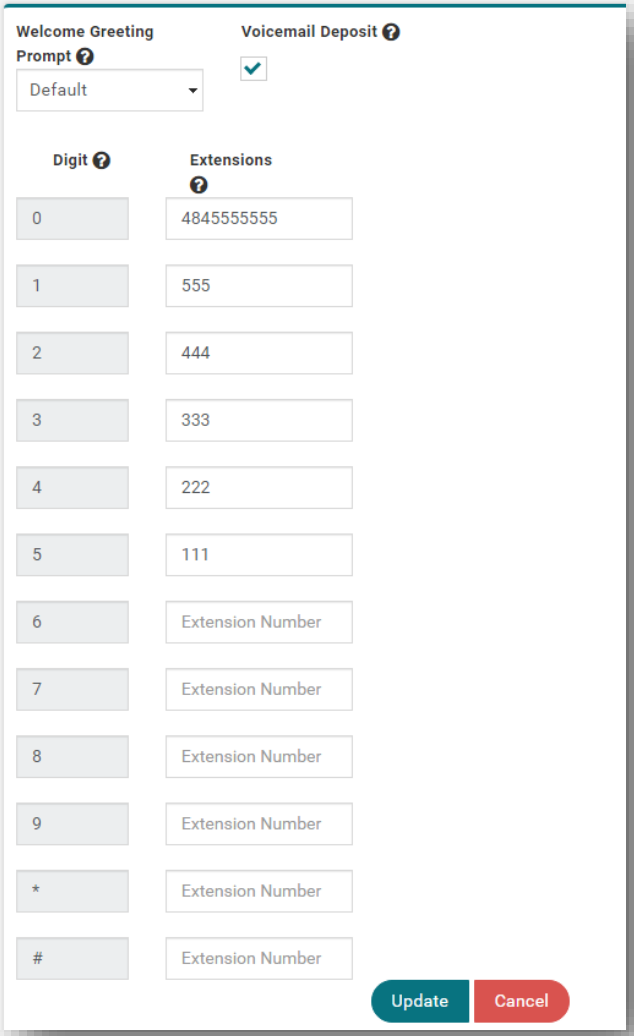
Use the button to add an audio file.

Use the button to remove an audio file.

Audio: An existing audio file on the server.

Timeout: Set the amount of time you'd like the audio to play. If you'd like the entire file to play leave this field blank.

Personal Auto Attendants



Personal Auto Attendants replace the audio of a voicemail box.

Welcome Greeting Prompt: Allows the user to choose what audio will play when a call is missed. Audio files will be stored in the user's audio library.

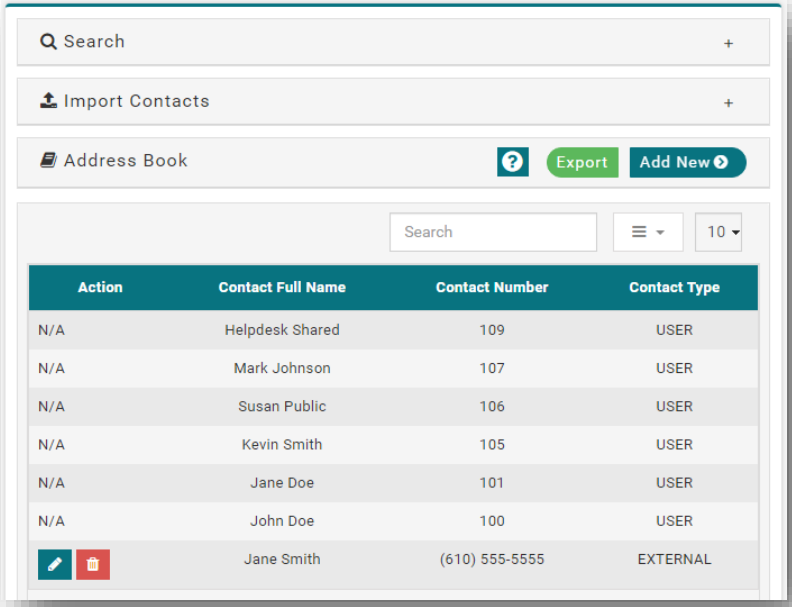
Voicemail Deposit: If checked, the caller will be directed to the user's voicemail box for invalid button presses or on timeout.

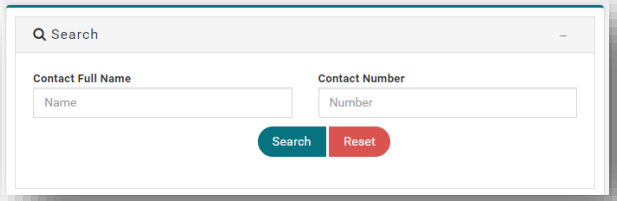
Digit: The digit a caller will press to be transferred to the associated extension.

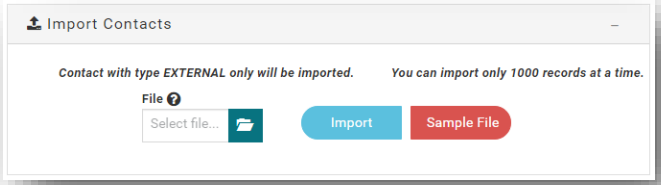
Extension: The destination the call will be transferred to. Either a user's extension or a ten digit phone number can be entered into these fields.

Use the Update button to save any changes.

Address Book Admin Level







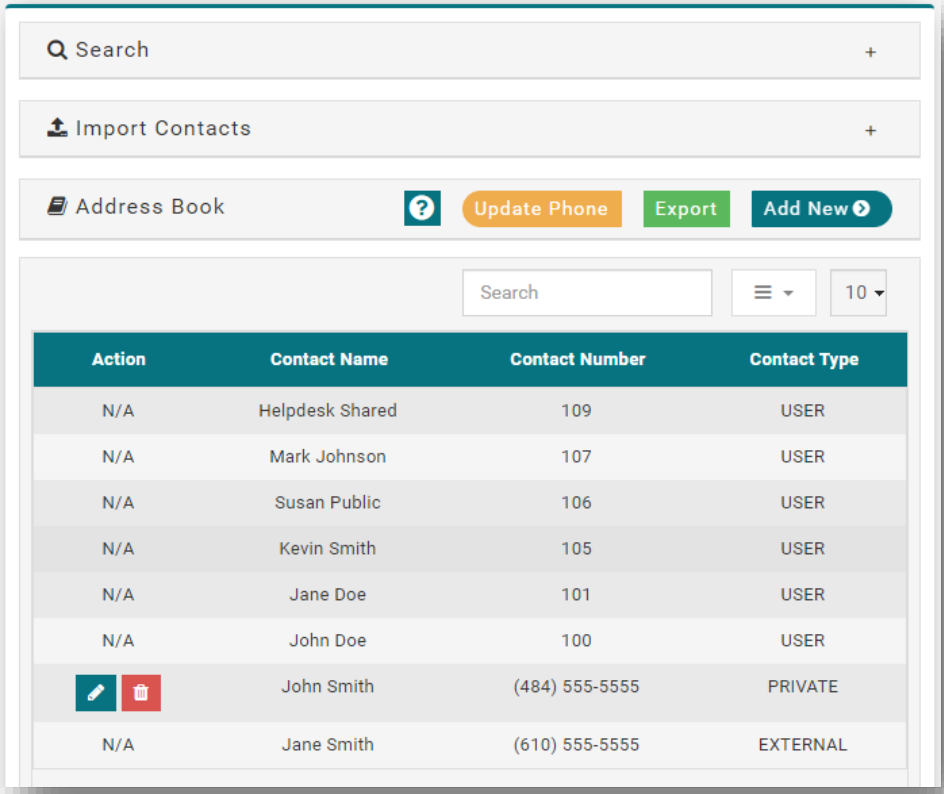
The address book at the admin level allows for contacts to be added for all users. All users on the tenant will be automatically populated into the address book. Ten digit phone numbers are able to be added to the address book and they will appear in all users' contact lists. Contacts in the address book will be listed and show if the contact is a user on the tenant or an external number.

Use the Add New button to add additional contacts. Additional contacts will be added to the bottom of the list. Use the button to edit added external numbers. Use the button to delete external contacts. Users need to be edited on their user page.

Search: The search bar at the top is a drop down that has fields Contact Full Name and Contact Number as shown in the second picture. Enter in either the contacts name or number and use the Search button filter the results.

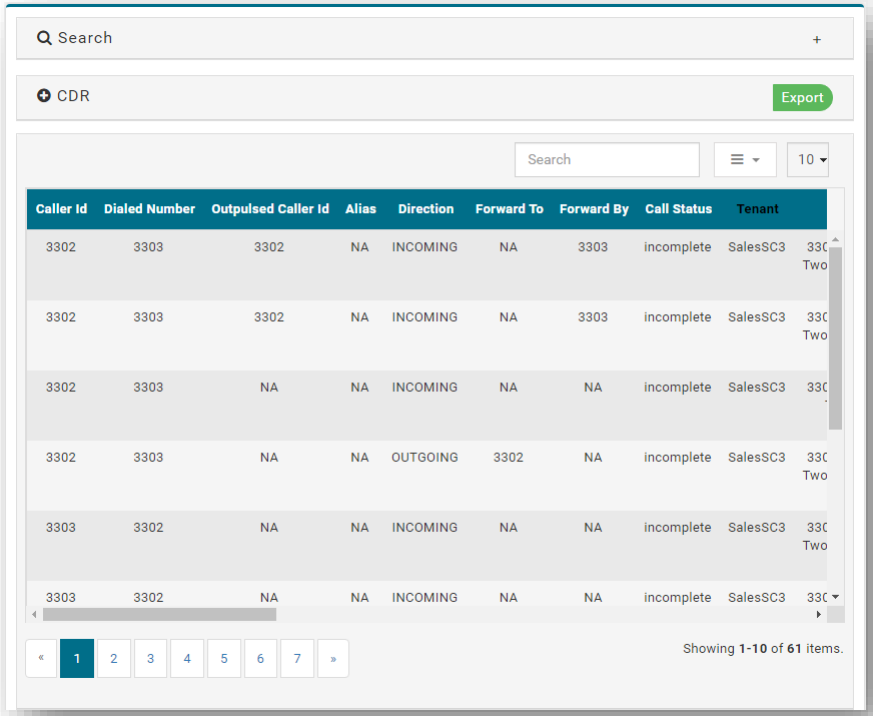
Import Contacts: Additional external contacts can be added en masse from a CSV file. Use the Sample File button to download a sample CSV file showing the proper format. Use the button to browse files to be added. Use the Import button to import the file once chosen.

Address Book User Level



Users' address books are almost identical to the admin address book. They will have the same Search and Import Contacts section as the admin. The users on the tenant will populate automatically into the user address book. Added external numbers from the admin address book will be listed and will not be editable. A user can use the Add New button to add additional contacts to their address book. The contact type will be listed as "Private." Use the button to edit the contact. Use the button to delete contacts. The address book on the physical phone will not be updated until it has received the update. Use the Update Phone button to update the contact list.

Call Detail Records (CDR)



The CDR log page allows you to see, in high detail, every call that is made to or out of your phone system. The search function allows you to search using the below parameters.

Caller ID: The True Caller ID.

Dialed Number: The numbered dialed by the caller, whether inbound or outbound.

Outpulsed Caller ID: The Caller ID seen by the receiving party.

Direction: Specify Inbound or Outbound calling.

Forward By: Specify if this was forwarded by a specific user or service.

Call Status: Specify whether it was a failed, abandoned, or successful call.

User: Specify the user involved.

Date and Time Ranges: The date and time the call may have occurred.

Ring Group Report

Aggregate Data

Answered Calls : 3 **Abandoned Calls** : 3 **Fallback Calls Answered** : 1 **Fallback Calls Abandoned** : 7 **Total Calls** : 14

Ring Group Report Export

Search 10

Ring Group Name	Ring Group Number	Answered Calls	Abandoned Calls	Fallback Calls Answered	Fallback Calls Abandoned	Total Calls
Tech_Support_HG	201	1	1	0	3	5
Sales_RG	725	2	2	1	4	9

The Ring Group Report allows you to see which ring groups were active during the reporting period. Here you can track a few metrics to gain a better understanding of how calls are being handled when routed to the reported ring groups.

Ring Group Name: The name of the reported ring group.

Ring Group Number: The extension of the reported ring group.

Answered Calls: The amount of calls answered by a ring group participant.

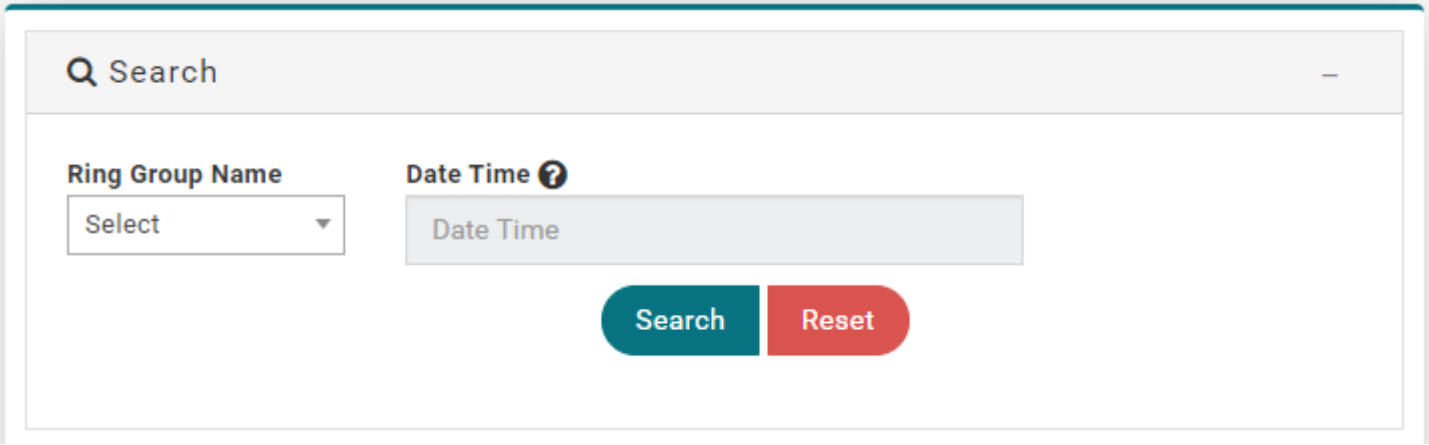
Abandoned Calls: The amount of calls unanswered by either a participant or fallback destination.

Fallback Calls Answered: The amount of calls that rang through the ring group and were transferred to the fallback destination and answered.

Fallback Calls Abandoned: The amount of calls that rang through the ring group and were transferred to the fallback destination and unanswered

Total Calls: The amount of calls routed to the reported ring group.

Ring Group Report: Searching

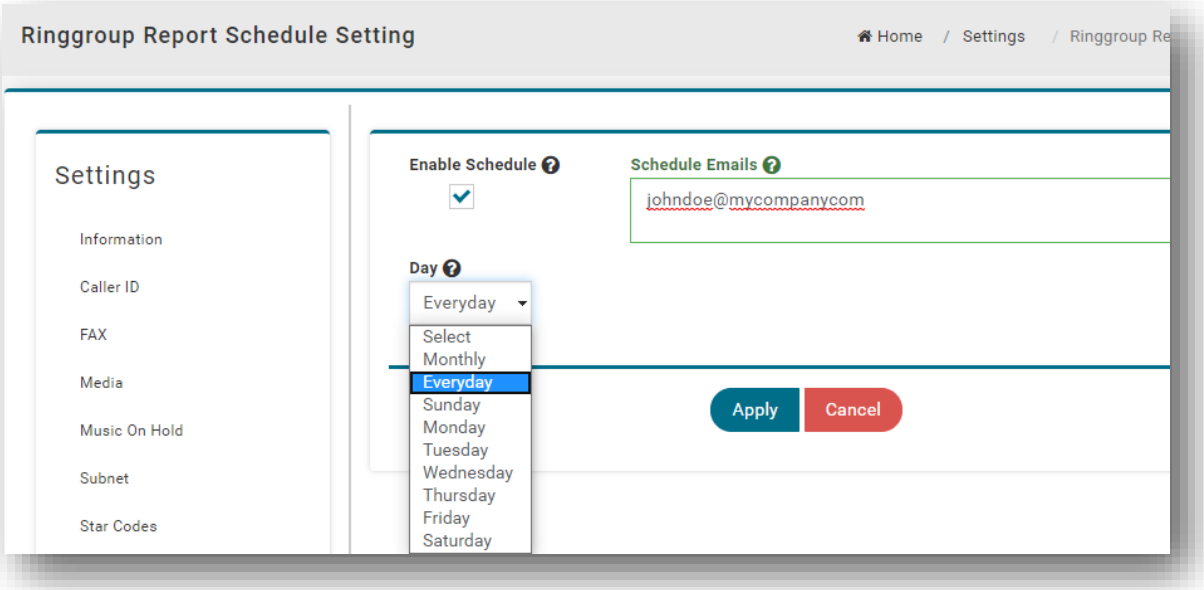


To search for specific metrics you can utilize the search function located in the Ring Group Report section.

Ring Group Name: A drop down that allows you to select the name of the ring group.

Date Time: You can choose a date/time interval as far back as you wish.

Ring Group Report: Scheduling



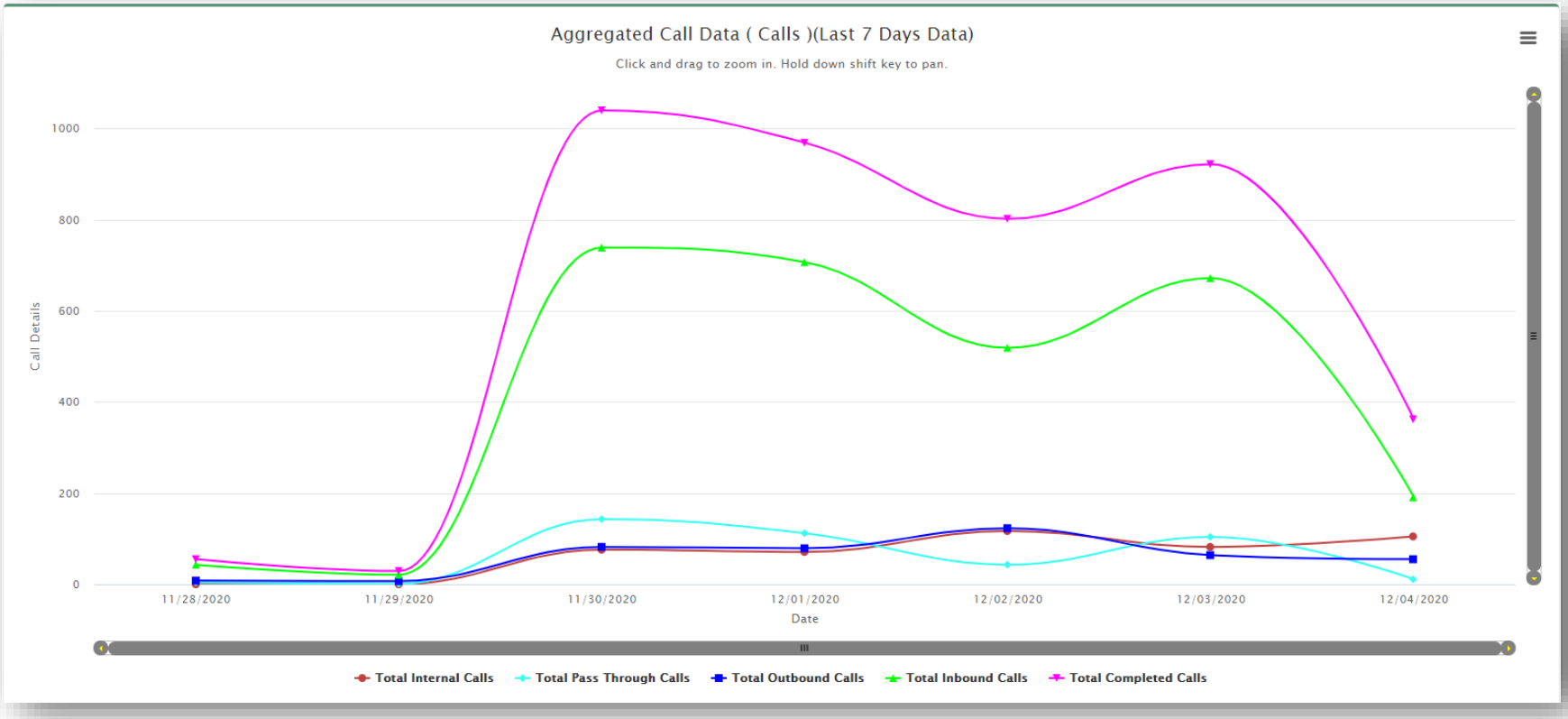
While you are able to pull reports and export them manually. You can also setup an automatic email that contains a daily, weekly, or monthly report.

To navigate to this page simply click the Settings button on the lower left hand corner of the page and scroll to the **Ringgroup Report Scheduling** tab.

In here you can enable the schedule, choose its frequency, and enter the email addresses you wish the reporting to be sent to (Maximum of 5).

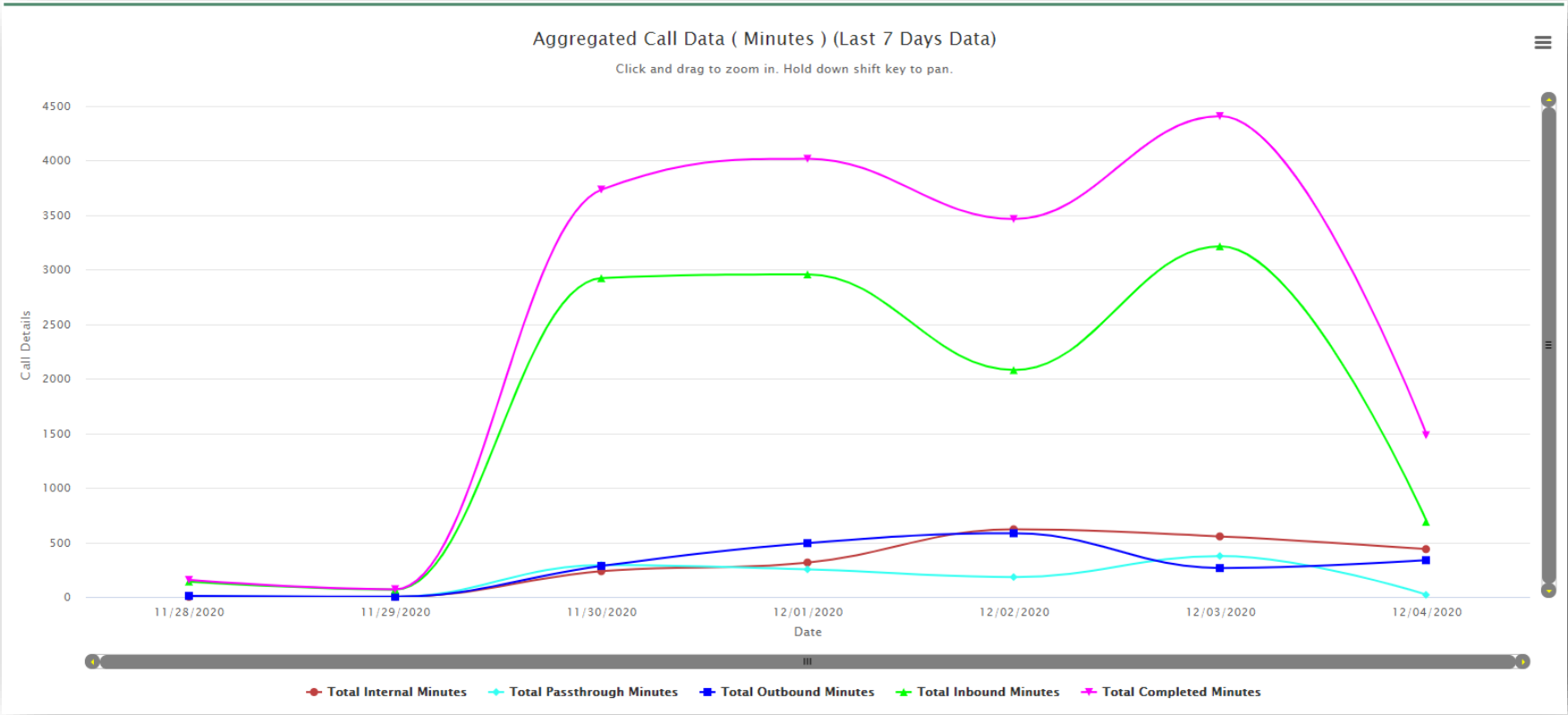
Reports are sent 6:00 AM EST on the selected frequency.

Aggregated Call Data (Calls)



Aggregated Call Data can be chosen under the Dashboard section in the sidebar to see total calls and minutes from the last seven days.
The Y-axis will show the total number of calls and the X-axis shows the date from within the last seven days.
The different totals can be removed from the graph by clicking the symbols (E.g. **Total Completed Calls**) underneath the graph.
Use the button to view the graph in full screen, print the chart, or download the graph as a PNG, JPEG, PDF, or SVG file.
The graph can be zoomed in on by left clicking and dragging across where you would like to see.

Aggregated Call Data (Minutes)



The aggregated minutes is listed just below the total calls graph.
In this example **Total Outbound Minutes** and **Total Completed Minutes** have been removed by clicking on them and they are now grayed out.
The ≡ button will have the same options for the minutes graph as the calls graph.

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