UC Cloud Voice Upgrade Addendum

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Contents

Customer Administrator Portal

Welcome to the UC Cloud Voice (UCCV) Customer Administrator Portal Addendum showing our upgraded Admin Portal interface skin. The portal includes supplementary information on setting up and managing your virtual telephone UCCV system that is based on the feature-set assigned by your service provider.

You can navigate the knowledge portal using the icons to the left. Each icon provides links to additional information on the tasks that are embedded within the Customer Administrator Portal (CAP) interface.

Additionally, CAP always provides context-sensitive help wherever you may be in the task-flow.
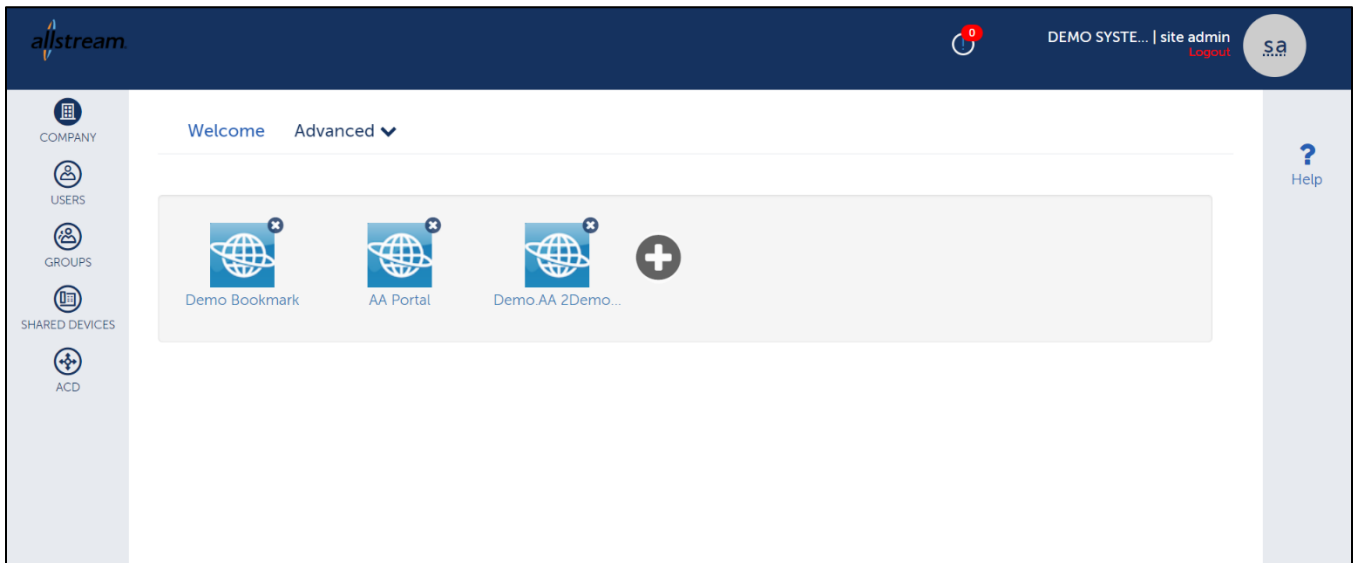
Company

Configure basic settings before creating users, groups, call flows, and auto attendants. Some company settings are prerequisites, for example, you need to set up a general mailbox if you want to create workflows that allow users to leave messages.

Note: Some features described in the following sections may not be available with your configuration.

Create an ACD Path

An Automatic Call Distribution (ACD) path guides incoming calls through an ACD system by specifying the resources used, the order in which they are encountered, and the timing of the steps.

To create an ACD path:

1. Click **Company**.
2. Click **Advanced → ACD Paths**.
3. Click **Add New**.
4. In **Profile**, enter a name and description for the path and click **Next**.
5. In **Programming**, select the detail for the path and click **Next**.
6. In **Skill Groups**, select your primary and overflow groups.

Set Up Business Hours
(NOT AVAILABLE IN ALL CONFIGURATIONS)

Set the hours when your business is open and closed. For example, use the Day setting for the hours that your business is open during the day and the Night setting for the hours that your business is closed at night. If required, use the Alternate setting for any alternate business hours such as during holidays. You will later set how incoming calls are handled based on the time of day.

To set up business hours:

1. Click **Company → Business Hours**.
2. Select a location from the drop-down list.
3. Check the **Apply to all locations** checkbox to set the same hours across all company locations.
4. Select the business hours.
5. Select the hour type and click **Save**.
6. Click **Alternate** to display alternate hours on the calendar (optional).
7. Click **Save**.

Phone Key Templates

Create phone key templates for the phones your company issues. When you add a new user, you will be able to select the key template instead of programming the phone keys each time.

To create phone key templates:

1. Click **Company**.
2. Click **Advanced → Phone Key Templates**.
3. Click **Add New**.
4. Enter a name in the **Template Name** field.
5. Enter a brief description of the template in the **Description** field (optional).
6. Click the key, select the appropriate function from the **Function** drop-down list, and enter a name for the label.
7. Click **OK**.
8. Click **Save**.

2

Set Up Rerouting

Redirect incoming calls to an alternate number or extension. For example, a receptionist might reroute incoming calls to another extension during the lunch hour.

To reroute calls:

1. Click **Company**.
2. Click **Advanced → Call Rerouting**.
3. Enter a name and number for the call reroute.
4. Click **Save**.

Set Up a General Mailbox
(NOT AVAILABLE IN ALL CONFIGURATIONS)

Set up a general mailbox for a specific purpose, for example directing calls to voicemail at night. You can assign employees to monitor the mailbox and they will see their phone message indicator flash.

To set up a general mailbox:

1. Click **Company**.
2. Click **Advanced → General Mailbox**.
3. Click **Add New**.
4. Enter the required information for the mailbox.
5. Click **Save**.

Set Up Business Hours
(NOT AVAILABLE IN ALL CONFIGURATIONS)

Set the hours when your business is open and closed. For example, use the **Day** setting for the hours that your business is open during the day and the Night setting for the hours that your business is closed at night. If required, use the **Alternate** setting for any alternate business hours such as during holidays. You will later set how incoming calls are handled based on the time of day.

To set up business hours:

1. Click **Company → Business Hours**.
2. Select a location from the drop-down list.
3. Select **Apply to all locations** checkbox to set the same hours across all company locations.
4. Select the business hours.
5. Select the hour type and click **Save**.
6. Click **Alternate** to display alternate hours on the calendar (optionalr.
7. Click **Save**.

3

Phone Key Templates

Create phone key templates for the phones your company issues. When you add a new user, you may select the key template instead of programming the phone keys each time.

To create phone key templates:

1. Click **Company**.
2. Click **Advanced → Phone Key Templates**.
3. Click **Add New**.
4. Enter a name in the **Template Name** field.
5. Enter a brief description of the template in the **Description** field (optional).
6. Set up the key functions as follows:
   a. Click the key, select the appropriate function from the **Function** drop-down list, and enter a name for the label.
   b. Click **OK**.
7. Click **Save**.

Set Up Call Rerouting

Redirect incoming calls to an alternate number or extension. For example, a receptionist might reroute incoming calls to another extension during the lunch hour.

To reroute calls:

1. Click **Company**.
2. Click **Advanced→ Call Rerouting**.
3. Enter a name and number for the call reroute.
4. Click **Save**.

Set Up a General Mailbox
(NOT AVAILABLE IN ALL CONFIGURATIONS)

Set up a general mailbox for a specific purpose, for example directing calls to voicemail at night. You can assign employees to monitor the mailbox and they will see their phone message indicator flash.

Welcome   Business Hours   Advanced ✔

New General Mailbox   Cancel   Previous   Next   Save

1. Mailbox Information   2. Monitor List   3. Advanced

To set up a general mailbox:

1. Click **Company**.
2. Click **Advanced → General Mailbox**.
3. Click **Add New**.

4

4. Enter the required information for the mailbox:

Note: After three failed attempts to access a mailbox, a user is locked out and must wait three minutes before it is unlocked.

   a. Name, number, site, and passcode for the mailbox.
   b. Enable **Send voicemail to email** and enter the email address to receive voicemail (optional).
   c. Upload your voicemail greeting.

5. On the **Monitor List** tab, add the employees who will monitor the messages.
6. On the **Advanced** tab, select voicemail settings for the following items:
   a. Select settings for voicemail.
   b. Select **Enable Embedded UM** if you want to have voicemail sent to an email address. Enter email credentials (optional).

Set Up Music on Hold

Provides callers with music or information while they are waiting for a call to be completed. Prerecorded music or information that you upload plays when a caller is on hold or transferred to a busy or ringing line.

To set up Music on Hold:

1. Click **Company**.
2. Click **Advanced** → **Music on Hold**.
3. Select the site.
4. Select **Embedded** as the music source.
5. To add music, select **Upload**, find the music and click the file to upload.
6. Click **Music on Hold** to enable.

Set Up Speed Dials

You can use speed dials to quickly dial phone numbers.

To set up speed dials:

1. Click **Company**.
2. Click **Advanced** → **Speed Dials**.
3. Click **Add New**.
4. Enter a name for the speed dial, speed dial number, and the phone number.
5. Click **Save**.

Users

From the **Users** page you can add, modify and delete users from the system.

Add users by following a series of steps highlighted in the task menu bar. The following image shows that the Administrator is at step 3 of the **Add New** task.

Add a User

To add a user:

1. Click **Users** and then click **Add New**.
    User Profile
2. On the **User Profile** tab, enter the user details. Fields marked with an asterisk (*) are required. Enter a minimum of 4 characters for the username.
3. Click **Next**.
4. On the **Service Plan** tab, click **Select** to choose a phone plan for the User. The chosen plan is highlighted and **Selected** displays.
5. Click **Next**.
6. On the **Service Programming** tab, Select the service details for the user. Fields marked with an asterisk (*) are required.

    Note: If you select a basic plan that does not include voicemail, you can still forward calls to voicemail (Call Handling Rules) however the calls will go to your corporate voicemail.

7. Click **Next**.
8. On the **Phones** tab, from the **Phone Type** drop-down list, select the type of phone for this user.
9. From the **Emergency Response Location** drop-down list, select the location to which emergency call will be sent.
10. From the **Select a predefined key template to be applied to this phone** drop- down list, choose a key template for the primary phone (optional). Phone key templates apply to the primary phone only.
11. Enter the **MAC Address** of the phone (optional).
12. Click **Next**.
13. On the **Advanced** tab, select the call handling rules.
14. Click **Save**.

Modify a User

To modify a user:

1. Click **Users** and then click a user's name.
2. Select the details that you want to modify from the task menu bar, for example **Phones**.
3. Make your changes and click **Save**.

Delete a User

To delete a user:

1. Click **Users**.
2. Click the checkbox next to the user you want to delete.
3. Click **Delete**.

Groups

Groups are typically company departments such as Support, Sales, and Marketing. Organize staff into groups so that there is one number to reach members of the group. For example, you could have a sales team and group their phones together under one directory number.

From the **Groups** view you can add and modify groups or delete them from the system.

Add a Group

Add Groups by following a series of steps highlighted in the task menu bar.

To add a group:

1. Click **Groups** and then click **Add New**.
   Group Profile:
2. Enter a unique name for the group and select the group type. Fields marked with an asterisk (*) are required.
3. Click **Next**.
4. On the **Group Programming** tab, select the location, number(s), and extension for the group.
5. Click the **Enable Voicemail** check box to enable Voicemail and then enter your Voicemail passcode and email forwarding details (optional).
6. Click **Next**.
7. On the **Group Members** tab, use the search box to locate and add members to the group.
8. Select the ring type for the group.
9. Click **Next**.
10. On the **Advanced Settings** tab, select the voicemail settings:
    a. Click **Voicemail Settings**.
    b. Choose the mailbox type, where you want callers forwarded when they dial 0, how long to keep messages before they are deleted, the maximum number of messages to hold in your mailbox, and whether you want embedded U M enabled.
11. Select the call handling rules:
    a. Click **Call Handling Rules**.
    b. Choose options for handling calls when unable to answer, on another call, during the day, at night, and on an alternative night.
    c. Save your settings.

Modify a Group

When you need to add or update group members or settings, click the appropriate tabs on the menu bar. The following image shows that the Administrator is at step 1 of the Sales group tasks.
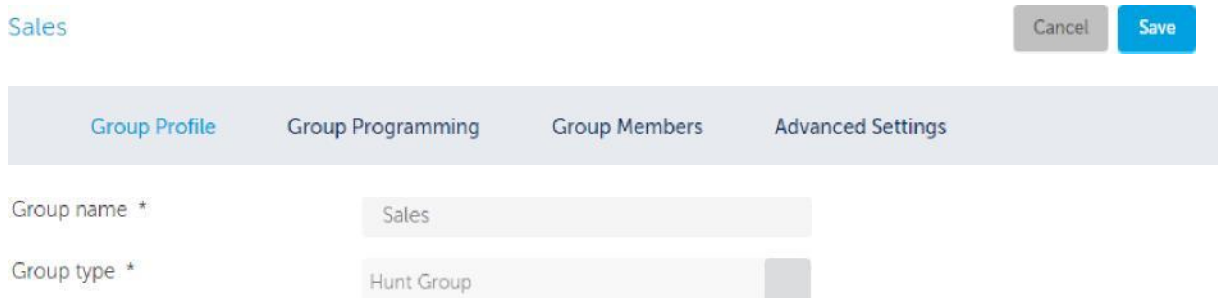
To modify a group:

1. Click **Groups** and then click the group's name.
2. Select the details that you want to modify from the task menu bar, for example **Group Members**.
3. Make your changes and click **Save**.

7

Delete a Group

When you no longer need a group, you can remove it from the system.

	Name	Extension	Direct Numbers	Group	Ring Pattern	Site
	Hunt2	1118	6135551118	HUNT	Circular	local
☑	Sales	1002	N/A	HUNT	Circular	local

Groups (2)   Add New   Delete

To delete a group:

1. Click **Groups**.
2. Click the checkbox next to the group you want to delete.
3. Click **Delete**.

Shared Devices

Shared devices are phones that are shared among multiple users in locations such as lobbies and offices. For example, a desk that is shared by office workers on different shifts with each worker having their own personal phone settings.

To add a shared device:

1. Click **Shared Devices** and then click **Add New**.
2. Fill in the fields and click **Save**.

Note: The MAC address is located on the back of the phone. For example: 01-80-C2-00-00-10.

To change a shared device:

1. Click **Shared Devices** and double-click device you want to edit.
2. Edit the fields and click **Save**.

To remove a shared device:

1. Click **Shared Devices** and select the device.
2. Click **Delete**.