

FusionWorks Administrative Portal
03/28/16



Contents:

Login 3

Add Bulk Users 5

Admin Users 6

Add User 9

Modify User 13

Find MAC Address 24

Modify Hunt Groups 25

Modify Call Centers 27

Modify Auto Attendants 30

Custom Contact Directories 34

Schedules 35

View CDRs 37

View Users 39

View Numbers 40

View Change Logs 41

Logout 42

LOGIN

1. Open your Internet browser, go to: <http://execportal.fusionuc.net>
2. Enter your login ID and password provided by Fusion.



Customer Support

For Cisco IP Phone support, MAC orders and other support related issues including opening a Service Ticket, please login to the Support Portal.

Username

Password

For login assistance or to speak with a representative, please contact Fusion Support:
Support
 1-866-746-4435 option 1
support@fusionconnect.com

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3. Login
4. Select your group name from the drop down menu.



5. You will automatically be directed to the Main Self Admin Portal Menu.

fusion

SP: DEMO12345 > GroupId: DEMO12345

Welcome Susan
[\[Logout\]](#)

- Add Bulk Users
- Admin Users
- Add User
- Modify User
- Find MAC Address
- Modify Hunt Groups
- Modify Call Centers
- Modify Auto Attendants
- Custom Contact Directories
- Schedules
- View CDRs
- View Users
- View Numbers
- View Change Logs
- User Guide



ADD BULK USERS

Add multiple users at once.

1. Click on the "Add Bulk Users" tab.

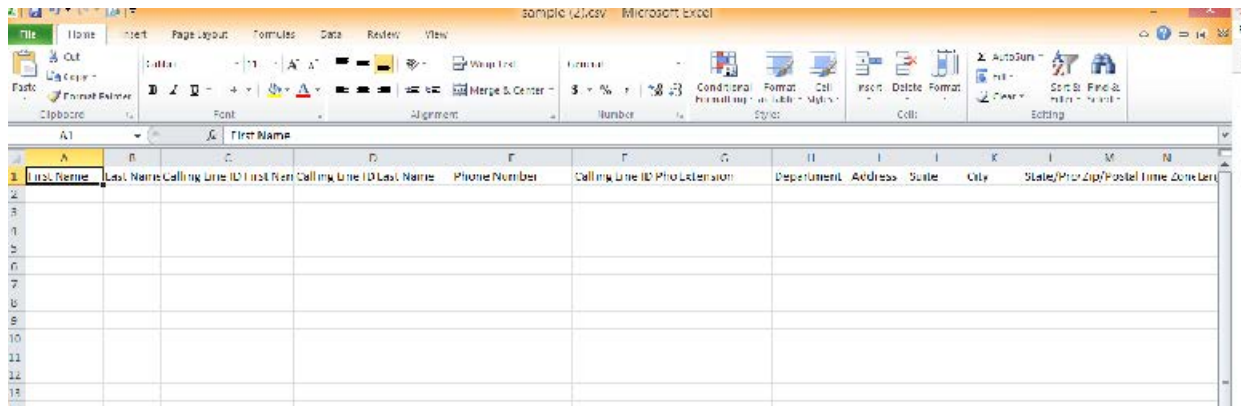


Add Bulk Users

Filename Browse...

[Click here](#) for a sample user template

2. Click 'Click here' to download the sample user template.



3. Enter new user information directly into the template and save.

A	B	C	D	E	F	G	H	I	J	K	L	M	N		
First Name	Last Name	Calling Line ID	First Name	Calling Line ID	Last Name	Phone Number	Calling Line ID	Phone Extension	Department	Address	Suite	City	State/Province	Zip/Postal Code	Time Zone
Janet	Doe	Jan	Doe	7036211234	7036211234	1234	Sales	13921 Park Center Drive Drive	200	Herndon	VA	20171	Eastern		
Mark	Smith	Mark	Smith	7026211235	7026211235	1235	Support	13921 Park Center Drive Drive	200	Herndon	VA	20171	Eastern		

4. Upload the Excel spreadsheet.

ADMIN USERS

Can view, modify, or disable users

1. Click on the "Admin Users" tab to select a user to view, modify or disable.

A rectangular button with a grey gradient and rounded corners, containing the text "Admin Users" in white, bold font.

Administrators

Select Admin to view or modify

[Click here to add new Admin](#)

2. Admins can modify other admins permissions by checking the permission option box. They can also change the username/name, passwords, email addresses and disable the user.

Administrators

Select Admin to view or modify
 Smith, Joe (jsmith)

Disable User
 Username * Password
 Name * Email Address *

Service Provider
 BVXCUSTMR

Groups *

Available Groups

- BVXMARKET
- BVXSEATTL

Current Groups

- BVXCUSTMR

Permissions *

Basic Info	<input checked="" type="checkbox"/>	Passwords	<input checked="" type="checkbox"/>
Phone Device	<input checked="" type="checkbox"/>	Hotelling	<input checked="" type="checkbox"/>
Call Control	<input checked="" type="checkbox"/>	BLF	<input checked="" type="checkbox"/>
Modify Hunt Group	<input checked="" type="checkbox"/>	Add Users	<input checked="" type="checkbox"/>
Modify Users	<input checked="" type="checkbox"/>	Modify Call Center	<input checked="" type="checkbox"/>
Modify Auto Attendant	<input checked="" type="checkbox"/>	Modify Custom Contact Directory	<input checked="" type="checkbox"/>
Modify Schedule	<input checked="" type="checkbox"/>	View CDRs	<input checked="" type="checkbox"/>
View Users	<input checked="" type="checkbox"/>	View Numbers	<input checked="" type="checkbox"/>
View Change Log	<input checked="" type="checkbox"/>	Admin Users	<input checked="" type="checkbox"/>

3. Once permissions are selected, click "Submit" to review changes then "Complete" to save changes.

✕

Please confirm the settings below and click Complete to process your modifications.

■ = Value Changed
■ = Invalid Value

<div style="background-color: #00FF00; width: 100%; height: 100%;"></div> <p>Permissions</p>	<ul style="list-style-type: none"> Basic Info Passwords Phone Device Hoteling Call Control Modify Hunt Group Add Users Modify Users Modify Call Center Modify Auto Attendant Modify Custom Contact Directory Modify Schedule View CDRs View Users View Numbers View Change Log Admin Users
--	---

4. To disable a user, place a checkmark in the "Disable User" box under the user's name.

Disable User	<input checked="" type="checkbox"/>
Username *	<input type="text" value="jsmith"/>
Name *	<input type="text" value="Joe Smith"/>

5. Choose "Submit" to confirm request then click "Complete" to save.

✕

Are you sure you would like to delete administrator "Joe Smith" ?

ADD USER

1. Select "Add User" from the Admin Portal Menu



2. Enter in NEW USER's information

- First Name
- Last Name
- CallerId First Name (This is what will appear on phone display screens when user is called or places an internal call.)
- CallerID Last Name (This is what will appear on phone display screens when user is called or places an internal call.)
- Email Address
- Department (If associated with any)
- Address (Physical Street Address)
- Suite (Optional)
- City
- State
- Zip
- Phone Number (If user has a direct dial number assigned)
- Caller ID Number (This is the Phone Number that will appear on phone display screens when the user is called or places a call internally or externally.)
- Extension (This can be the same as the last few digits of the phone number. For example, the phone number is 703-621-1234; the extension is 1234. But can also be different from the phone number, if needed. For example, the phone number is 703-621-1234 but the extension is 1000.)
- Device/Phone Type (Select from drop down menu)
- MAC Address
- Service Pack (See your contract for service pack definitions and costs.)
- Third Party Voicemail (to be selected if user will use a voicemail system other than Fusion's)

User Add

First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Calling Line ID First Name *	<input type="text"/>	Calling Line ID Last Name *	<input type="text"/>
Email Address *	<input type="text"/>	Department	<input type="text"/>
Address	<input type="text"/>	Suite	<input type="text"/>
City	<input type="text"/>	State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>	Time Zone *	<input type="text"/>
Language	<input type="text"/>	Location	<input type="text"/>
Phone Number	<input type="text"/>	Calling Line ID Phone Number *	<input type="text"/>
Extension *	<input type="text"/>	Custom Contact Directory	<input type="text"/>
Device Type *	<input type="text"/>	MAC Address	<input type="text"/>
NOTE: Not all phones listed are supported			
Service Pack *	<input type="text"/> <ul style="list-style-type: none"> Basic Feature Package C3 - Advanced Feature Package w/ Personal Mobility Package C3 - Basic Feature Package C3 - Unified Messaging Feature Package Common Area Feature Package Fax Feature Package 		
Device Access User Name	<input type="text"/>	Device Access Password	<input type="text"/>
Voice Messaging	<input checked="" type="radio"/> Yes <input type="radio"/> No	Polycorn Phone Services	<input checked="" type="radio"/> Yes <input type="radio"/> No
Calling Line ID Policy	<input checked="" type="radio"/> User <input type="radio"/> Group		

4. Click on the "Confirm Settings" button.

5. Review details to create the user.

Please confirm the settings below and click Complete to process your modifications.

- - Invalid Value
- - Value Changed

First Name	Jennifer
Last Name	Haizlip
Calling Id First Name	Dr
Calling Id Last Name	Haizlip
Email Address	jhaizlip@haizlip.com
Department	
Address	1234 Main St
Suite	
City	New York
State	New York
Zip	12210
Time Zone	America/New_York
Phone Number	7036216528
Caller Id Number	7036216528
Extension	6528
Device Type	Polycom VVX 500
MAC Address	
Service Pack	Enterprise Line
Third-Party Voice Mail	True

6. Click the "Complete" button.

DO NOT HIT BACK BUTTON DURING ADD USER UPDATE! DOING SO WILL CAUSE YOU TO LOSE INFORMATION AND CANCEL USER CREATION!

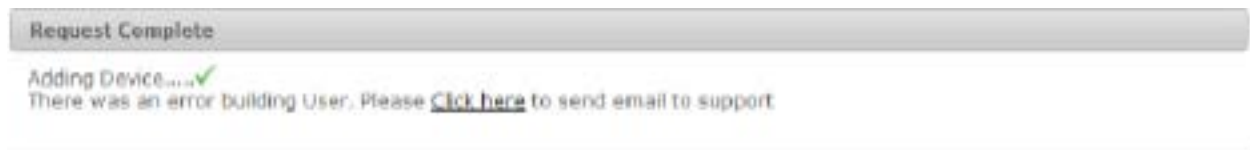
Note: You will receive confirmation that user was created.



Reminder: Please save this important information as this is the ONLY time the User and Portal Passwords will be displayed!

1. User Password = Web Portal Password
2. Portal Password = Voice Portal (Voicemail) Password

NOTE: If you receive an error message while building a user, "Click Here" will send an email to support. DO NOT MODIFY THE SUBJECT STRING. THIS IS USED TO PROCESS THE REQUEST.



MODIFY USER

1. Click "Modify User" from Admin Portal Menu
2. Enter any portion of a user's name or phone number in the "Search" field

User Modify

Search By Name or Phone Number

7035551234x1234 - Seat2, Demo

7035551235x1235 - Seat1, Demo

3. Select the user then click "Search". Modifications can be made to each tab listed. (Some tabs may not be accessible to all admins, based on the permissions of the admin making modifications.)

User Modify

Search By Name or Phone Number

Basic Information | Address Information | Speed Dial B | Speed Dial 100 | Voice Management | Passwords | Hoteling | Phone and Device Information

Call Control | Busy Lamp Fields

Basic Info

<p>* Last Name <input type="text" value="Seat1"/></p> <p>* Calling Line ID Last Name <input type="text" value="Seat1"/></p> <p>Calling Line ID Phone Number <input type="text" value="7035551234"/></p> <p>* Email Address <input type="text" value="demo@example.com"/></p>	<p>* First Name <input type="text" value="Demo"/></p> <p>* Calling Line ID First Name <input type="text" value="Demo"/></p> <p>* Time Zone <input type="text" value="America/New_York"/></p> <p>Department <input type="text"/></p>
--	---

A. Basic Information – Can modify the user’s basic information. Click “Confirm Settings” to save.

- Last Name
- First Name
- Calling Line ID Last Name
- Calling Line ID First Name
- Caller ID Phone Number
- Time Zone
- Email Address
- Department (if associated with any)

User Modify

Search By Name or Phone Number

Basic Information | Address Information | Speed Dial B | Speed Dial 100 | Voice Management | Passwords | Hoteling | Phone and Device Information

Call Control | Busy Lamp Fields

Basic Info

<p>* Last Name <input type="text" value="Seat1"/></p> <p>* Calling Line ID Last Name <input type="text" value="Seat1"/></p> <p>Calling Line ID Phone Number <input type="text" value="7035551234"/></p> <p>* Email Address <input type="text" value="demo1@example.com"/></p>	<p>* First Name <input type="text" value="Demo"/></p> <p>* Calling Line ID First Name <input type="text" value="Demo"/></p> <p>* Time Zone <input type="text" value="America/New_York"/></p> <p>Department <input type="text"/></p>
---	---

B. Address Information – Can modify user's address information.

- Address
- Suite (optional)
- City
- State
- Zip

User Modify

Search By Name or Phone Number

Basic Information	Address Information	Speed Dial 8	Speed Dial 100	Voice Management	Passwords	Hoteling	Phone and Device Information
Call Control	Busy Lamp Fields						

Address Information

Address	<input type="text"/>	Suite	<input type="text"/>
City	<input type="text"/>	State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>		

Click "Confirm Settings" to save.

C. Speed Dial 8 – Create pre-defined numbers by assigning a one digit speed code for easy dialing. Click “Confirm Settings” to save.

User Modify

Search By Name or Phone Number

Speed Dial 8

Speed Code	* Phone Number / SIP-URI	Name
2	7035551234	ABC Corporation
3		
4		
5		
6		
7		
8		
9		

D. Speed Dial 100 - Create pre-defined numbers by assigning two speed codes for easy dialing. Click “Confirm Settings” to save.

User Modify

Search By Name or Phone Number

Speed Dial 100

Upload Speed Dials (will not work in IE 9 or earlier) No file selected. [Click here for a sample template](#)

Speed Code 100	* Phone Number / SIP-URI	Description	Remove Speed Dial
01 ▾	<input type="text" value="7035551234"/>	<input type="text" value="ABC Corporation"/>	✕

*NOTE: There’s an option to upload Speed Dials from a CSV file or Excel Spreadsheet.

E. Voice Management - Record messages for calls that are not answered within a specified number of rings or for busy calls. Can also set email notification for newly received voicemails. Click "Confirm Settings" to save.

User Modify

Search By Name or Phone Number

Basic Information | Address Information | Speed Dial 8 | Speed Dial 100 | **Voice Management** | Passwords | Hoteling | Phone and Device Information

Call Control | Busy Lamp Fields

Voice Management

Voice Messaging/Support: On Off

- Send All Calls to Voice Mail
- Send Busy Calls to Voice Mail
- Send Unanswered Calls to Voice Mail

When a message arrives...

- Use unified messaging
 - Use Phone Message Waiting Indicator
 - Forward it to this email address

Additionally...

- Notify me by email of the new message at this address
- Email a carbon copy of the message to
- Transfer on '0' to Phone Number

F. Passwords – Reset user’s passwords. Click “Confirm Settings” to save.

User Modify

Search By Name or Phone Number

Basic Information	Address Information	Speed Dial 8	Speed Dial 100	Voice Management	Passwords	Hoteling	Phone and Device Information
Call Control	Busy Lamp Fields						

Passwords

Reset Web Password Reset Voice Mail Password

- Reset Web Password = Broadsoft Web Portal Password
- Reset Voice Mail Password = Voice Portal Password

***NOTE: IF RESETTING PASSWORDS, AFTER SELECTING “CONFIRM SETTINGS” PLEASE SAVE THIS INFORMATION AS THIS IS THE ONLY TIME THE RESET PASSWORDS WILL BE DISPLAYED!**

G. Hoteling - Allows a guest user to log into a host's phone profile, enabling the following:

- Host phone to ring when guest user's profile is called.
- Voicemail indicator light will be associated with the guest user's voicemail instead of the voicemail associated with the phone's native (host) voicemail.
- All outbound calls will carry the guest user's caller ID information instead of the information associated with the phone's native (host) profile.

User Modify

Search By Name or Phone Number

Basic Information Address Information Speed Dial 8 Speed Dial 100 Voice Management Passwords **Hoteling** Phone and Device Information

Call Control Busy Lamp Fields

Hoteling

Hoteling Host Active

Hoteling Guest Active

Hotel Host

- Hotel Host (must check box)
- Hotel Active (must check box)

NOTE: The host phone can be any provisioned Fusion phone (a "spare" phone specifically set up for hoteling or another user's phone with hotel host enabled). The host phone must be provisioned as "Hoteling Host Active" = True. The guest phone must be provisioned as "Hotel Guest Active" = True and the "Hotel Host" drop down menu must be populated with profile of the host phone in order for hoteling to work. This can also be completed by the users via the User Online Portal or via the Voice Portal, but completing this via the Self Admin Portal is easiest.

H. Phone and Device Information

User Modify

Search By Name or Phone Number

Basic Information	Address Information	Speed Dial #	Speed Dial 100	Voice Management	Passwords	Hoteling	Phone and Device Information
Call Control	Busy Lamp Fields	Shared Call Appearances					

Phone Number Information

Phone Number * Extension

Device Information

* Device Type

MAC Address Service Pack

Reset Device

Unified Messaging Feature Package
Hosted Voice Feature Package
Hosted UC Feature Package

- Can view or modify phone number and extension of user
- Can view or modify Device Type & MAC Address (if necessary)

NOTE: If a MAC address already exists within your group, the system will provide an error message and will not complete the MAC address change. If this occurs, contact Fusion Support for assistance.

I. Call Control – Forwarding Calls & Do Not Disturb

User Modify

Search By Name or Phone Number

Call Control

Basic Information
Address Information
Speed Dial 8
Speed Dial 100
Voice Management
Passwords
Hoteling
Phone and Device Information

Call Control
Busy Lamp Fields

Call Control

<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Call Forwarding Always Active	Calls Forward to phone number / SIP-URI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Call Forwarding Busy Active	Calls Forward to phone number / SIP-URI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Call Forwarding No Answer Active	Calls Forward to phone number / SIP-URI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Call Forwarding Not Reachable Active	Calls Forward to phone number / SIP-URI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Do Not Disturb	

- **Call Forwarding Always Active:** Forwards calls to a phone number or extension always. In this instance, the phone will not ring and will always forward to the destination number not matter the status of the physical phone. Set “false” to “true” and enter forward to number.
- **Call Forwarding Busy Active:** Forwards calls to a phone number or extension when you’re busy. In this instance if the user is on an active call, any incoming calls will forward to the destination number entered. Set “false” to “true” and enter forward to number.
- **Call Forwarding No Answer Active:** Forwards calls to a phone number or extension if you’re not in the office. In this instance, the phone will ring no matter the status of the phone, but will not end in your voicemail if unanswered. Instead, the call will forward to the destination number entered. Set “false” to “true” and enter forward to number.
- **Call Forwarding Not Reachable Active:** Forwards calls to a phone number or extension. In this instance, the phone will not ring unless because the phone is not operational due to equipment/internet issues or a power outage. The call will then forward to the destination number. Set “false” to “true” and enter forward to number.
- **Set profile to “Do Not Disturb”.** In this instance, the phone won’t ring and will always route calls directly to voicemail.

I. Busy Lamp Fields - Provides the ability to see the status of other internal phones displayed on their phone.

User Modify

Search By Name or Phone Number:

Basic Information Address Information Speed Dial 8 Speed Dial 100 Voice Management Passwords Hoteling Phone and Device Information

Call Control **Busy Lamp Fields**

Busy Lamp Fields

Available Users

- Seat1, Demo
- Seat2, Demo

Monitored Users

- Seat2, Demo

1. Click and drag the desired "Available User" to the "Monitored Users" column.
2. Click "Confirm Settings" to complete.

*NOTE: It may be necessary to reboot the phone if line appearances aren't immediately displayed on the phone's screen and/or sidecar.

FIND MAC ADDRESS

1. Click on “Find MAC Address” from the admin portal menu

Find MAC Address

2. Enter the first few characters or an entire MAC address in the “Search by MAC Address” field then click “Search”.
3. The MAC address associated with a user will be displayed.

Find MAC Address

Search By MAC Address

Phone Number	Extension	First Name	Last Name	Device Type	MAC Address
7035551234	1234	Demo	Seat2	Polycom VVX600 Video SBC	0001A2345B67

*Note: If you do not have a complete MAC address ID, you may enter the first few characters. This will produce a list of all phones in your organization that begin with these characters.

MODIFY HUNT GROUPS

1. Click on “Modify Hunt Groups” from the admin portal menu



2. Select the hunt group from the drop down menu

Hunt Group

3. Choose the Huntgroup from the drop down menu that needs to be modified

Hunt Group

4. This will display the “Settings” and “Agents” tabs that can be modified.

Settings Agents

Settings

Name	<input type="text" value="Main Hunt"/>	Phone Number	<input type="text" value="None"/>
Group Policy	<input type="text" value="Simultaneous"/>	* Forward Seconds	<input type="text" value="0"/>
Forward No Answer	<input checked="" type="checkbox"/>		
Forward to Number	<input type="text" value="7035551234"/>		
Allow Call Waiting on agents	<input type="checkbox"/>		
Allow members to control Group Busy	<input type="checkbox"/>		
Enable Group Busy	<input type="checkbox"/>		

Confirm Settings

5. Can modify fields listed:

A. Name (Modify the Huntgroup Name)

B. Policy (Select a ring plan/call flow from the drop down menu.)

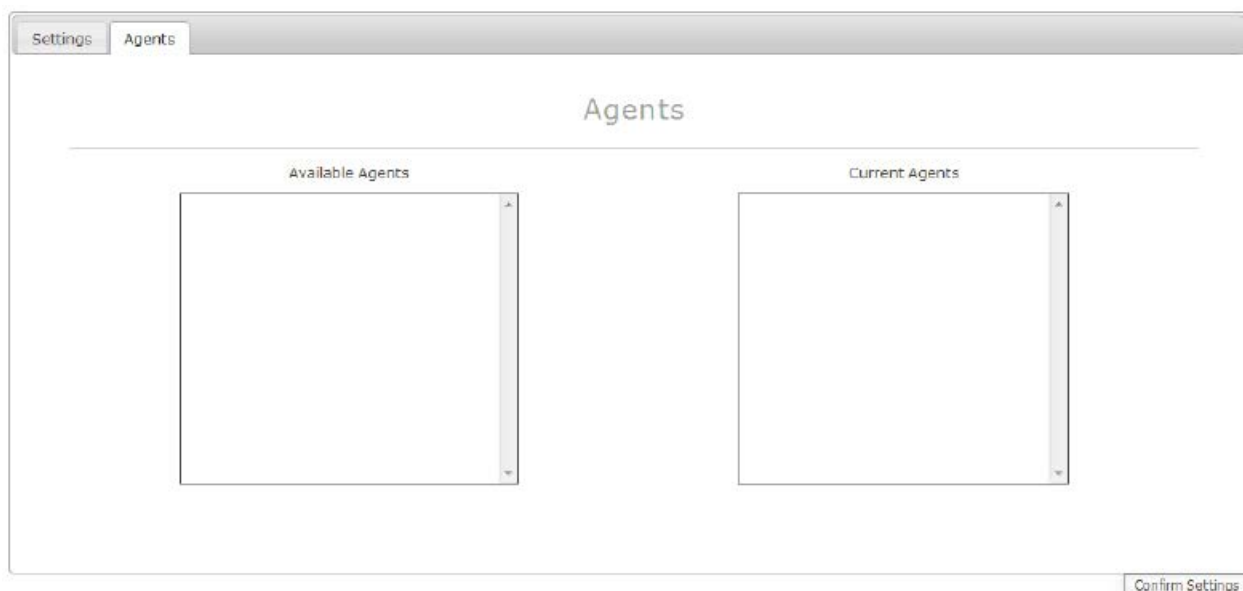
- Circular – Will ring next user in a predetermined list. This type will consider the last person that answered a Hunt Group call and route a new call to the next person on the list.
- Regular - Will ring 1st person on the list. Each new call that comes in will start with the 1st person on the list.
- Simultaneous - Will ring all users in the Hunt Group at one time. We do NOT recommend this solution, as this generates (1) call per user in your Hunt Group at one time and can impact your circuit utilization, which can also impact your voice quality. Carefully consider the number of users in your Hunt Group before selecting this option.
- Uniform - Will ring the user that has gone the longest amount of time without receiving a call (sometimes called Longest Idle).

C. Forward No Answer - Will forward the Hunt Group to another phone number or extension if the Hunt Group does not answer before the “Forward Seconds” timeframe has ended.

D. Forward Seconds - This is the time a call will stay in the Hunt Group before forwarding to the “Forward to Number”. (If specified)

E. Forward-To Number - This is the forwarding destination of the Hunt Group, and can either be a phone number or an extension.

F. Agents Tab - Admins can move agents from available status to active status or from active status to available status by dragging agent from “Available Agents” column to the “Current Agents” column or vice versa.



G. Click “Confirm Settings” to save changes

MODIFY CALL CENTERS

1. Click “Modify Call Centers” from the admin portal menu

Modify Call Centers

2. Choose the Call Center to modify from the drop down menu

Call Center CustomerService ▼

3. Select a tab to modify

Settings | Disposition Codes (Group) | Disposition Codes (ACD) | Unavailable Codes | Unavailable Codes Settings | Agents

Call Center Info

Call Center Name	CustomerService	Phone Number	2163730966
* Group Policy	Uniform ▼	* Queue Length	150 ▼
Allow Escape Digit	<input type="checkbox"/>	* Escape Digit	0 ▼

Confirm Settings

SETTINGS

A. Call Center Name & Phone Number

B. Group Policy (Select the order of ringing/call flow from the drop down menu).

- Circular – Will ring next user in a predetermined list. This type will consider the last person that answered in the Hunt Group and route a new call to the next agent on the list.
- Regular – Will ring 1st person on the list. Each new call that comes in will start with the 1st person on the list.
- Simultaneous – Will ring all users in the Hunt Group at one time. *We do NOT recommend this solution as this generates (1) per call user in your Hunt Group at one time and can impact your circuit utilization which can also impact your voice quality. Carefully consider the number of users in your Hunt Group before selecting this option*
- Uniform – Will ring the user that has gone the longest time without receiving a call (sometimes called Longest Idle)

- **Weighted** – Will ring user the admin has set parameters for. For instance John's parameter is set for 75% and Jane's parameter is set for 25%. John would receive the bulk of the calls while Jane would receive fewer calls.

C. **Queue Length** – Amount of calls the queue can hold

D. **Allow Escape Digit** – gives the caller the option to press a digit to leave the queue

E. **Escape Digit** – select the number you'd like to use for callers to leave the queue

DISPOSITION CODES

Allows admin to create codes for agents to identify phrases or words then assign during a call. They can be created for the Group as well as for the ACD.

Settings | Disposition Codes (Group) | Disposition Codes (ACD) | Unavailable Codes | Unavailable Codes Settings | Agents

Call Disposition Codes (Group)

Add Code

Code	Description	Remove Code
------	-------------	-------------

Confirm Settings

Settings | Disposition Codes (Group) | Disposition Codes (ACD) | Unavailable Codes | Unavailable Codes Settings | Agents

Call Disposition Codes (ACD)

Add Code

Code	Description	Remove Code
------	-------------	-------------

Confirm Settings

UNAVAILABLE CODES

Allows admin to add codes for agents to use when they are unavailable to answer a call.

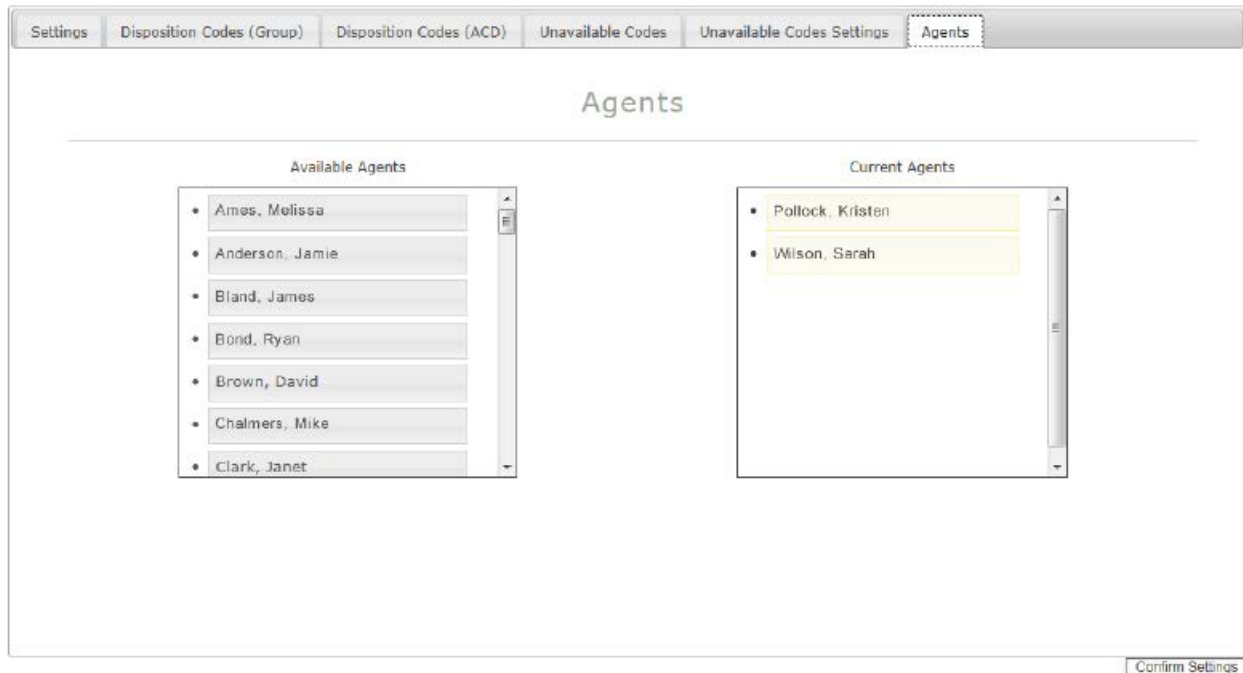
Code	Description	Remove Code
Break	Break	Remove
Lunch	Lunch	Remove
Training	Training	Remove

UNAVAILABLE CODES SETTINGS

Allows admin to create unavailable codes for agents to use when they're not able to answer a call.

AGENTS

Allows the admin to move agents to an active status by dragging “Available Agents” to “Current Agents”.



Click “Confirm Settings” to complete request.

MODIFY AUTO ATTENDANTS

*NOTE: Auto Attendant changes will immediately impact your call flow!

1. Click “Modify Auto Attendants” from admin portal menu



2. Choose the Auto Attendant to modify from the drop down menu (Basic or Standard)



3. Select a tab to modify: Settings, Business Hours Menu, After Hours Menu, Holiday Menu or Sub-Menus.

BASIC AA

Basic Info

* Auto Attendant Name: Auto Attendant Type: Basic

Phone Number: Extension:

* Calling Line ID Last Name: * Calling Line ID First Name:

* Time Zone:

Business Hours Schedule: Holiday Schedule:

* Dial By Name Entries:

[Confirm Settings](#)

STANDARD AA

Basic Info

* Auto Attendant Name: Auto Attendant Type: Standard

Phone Number: Extension:

* Calling Line ID Last Name: * Calling Line ID First Name:

* Time Zone:

Business Hours Schedule: Holiday Schedule:

* Dial By Name Entries:

[Confirm Settings](#)

A. Auto Attendant Name – Modify the name of Auto Attendant

B. Auto Attendant Type

- Basic Auto Attendant – gives the admin option to make changes to your business and after hours menus
- Standard Auto Attendant – gives the admin the option to make changes or create a holiday menu as well as sub-menus.

C. Phone Number/Extension – This is the phone number and/or extension the Auto Attendant is tied to

D. Caller ID Last Name: This is the Last Name that will appear on the phone display screen

E. Caller ID First Name: This is the First Name that will appear on the phone display screen

F. Time Zone

- G. Business Hour Schedule – Allows you to choose the schedule where calls will route to during business hours.
- H. Holiday Schedule – Allows you to choose which holiday schedule calls will route to during an office holiday.
- I. Dial by Name Entries – Allows you to choose how callers search the directory by name for an employee.

BUSINESS HOURS MENU

Key	Action	Description	Action Data
0	Transfer To Operator	group operator	Phone Number 0658
1	Transfer With Prompt	Hunt Group	Phone Number 9391
2	Transfer With Prompt	Felix	Phone Number 0656
3	Transfer With Prompt	Sarah	Phone Number 0669
4	Transfer With Prompt	Terri	Phone Number 0659
5	Transfer With Prompt	Ellen	Phone Number 0664
6	Transfer With Prompt	Larry	Phone Number 0660
7	Transfer With Prompt	Larry	Phone Number 0660
8	Transfer With Prompt	Debbie	Phone Number 0696
9	Transfer With Prompt	voicemail	Phone Number 1111
*			
#			

- A. Business Hours Menu – Allows you to create a series of menu options that directs callers during open office hours to a user, a hunt group or to hear an announcement i.e. directions to your office or information regarding your company.
 - Enable first-level extension dialing – allows caller to dial an extension at anytime
 - Action – specifies how the call will be handled (transfer with/without prompt, transfer to operator, name dialing, extension dialing, transfer to mailbox, play announcement, replay menu and exit).
 - Description – specifies where the call will terminate i.e. receptionist, voicemail system, directions to the office).
 - Action Data – reflects the extension or phone number the call will terminate to (1234 or 703-555-1212)

AFTER HOURS MENU

Key	Action	Description	Action Data
0	Transfer To Operator	group operator	1111
1	Transfer With Prompt	grp vm	1111
2	Transfer Without Prompt	emergency	7035552390
3			
4			
5			
6			
7			
8			
9			
*			
#			

B. After Hours Menu - Allows you to create a series of menu options during closed office hours to direct callers to a user or their voicemail, a hunt group or its voicemail or to hear an announcement about your company.

- Enable first-level extension dialing – allows caller to dial an extension at anytime
- Action – specifies how the call will be handled (transfer with/without prompt, transfer to operator, name dialing, extension dialing, transfer to mailbox, play announcement, replay menu and exit).
- Description – specifies where the call will terminate i.e. receptionist, voicemail system, directions to the office).
- Action Data – reflects the extension or phone number the call will terminate to (1234 or 703-555-1212)

CUSTOM CONTACT DIRECTORIES

Allows admin to create or edit the company directory by adding “Available Users” to the “Current Users” column.

Choose Custom Contact Directory to Modify

Custom Contact Directory --Create New Directory--

Create New Custom Contact Directory

* Directory Name

Available Users

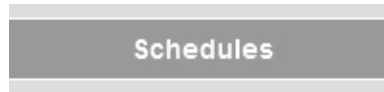
- 2095HG, Hunt Group
- HG, Hunt Group
- Main Hunt, Hunt Group
- MainAA, Auto Attendant
- Voice Portal, Voice Messaging Group
- Voice Portal, Voice Messaging Group
- Voice Portal, Voice Messaging Group

Current Users

SCHEDULES

A schedule is created to change what menu is played during specific hours. Admins have the ability to create, edit and delete an existing schedule.

1. To create a schedule click "Schedules" from the admin portal menu



2. Choose to create a new schedule and give the schedule a name i.e. Easter or Saturday Only and select whether it will be a Holiday Schedule or a Timed Schedule.

Choose Schedule to Modify

Schedule

Create New Schedule

* Schedule Name

* Schedule Type

- Co
- Holiday
- Time
- js

3. Once the schedule is created, confirm settings to review your changes then select complete to save.

After creating the new schedule, an event will need to be created in order to control the timing of the schedule.

4. To create a new event, choose the newly created schedule then choose "Create New Event" from drop down menu.

Event

Create New Event

5. Give the event a name, a start & end date and start & end time, whether it will be an all-day event and if this will be a recurring event.

Create New Event

* Event Name:

* Start Date: * Start Time:

* End Date: * End Time:

All Day Event:

Rekurs:

Every: year(s) on
 Day of
 The of

Start Date: 07/04/2016 (Note: Start Date is always equal to Event Time Start Date value)

End: Never
 After occurrences
 Date

If this event will run all day select "All-Day Event". This will remove the start and end time (if entered). Once selected, choose a recurrence of "Never, Daily, Weekly, Monthly or Yearly". If an occurrence is chosen, the admin will need to define how often and on what day it should occur. Ex. Independence Day is July 4th. This holiday occurs "Yearly", every 1 year on 4th day of July.

The admin will then choose the end date (if applicable). This is used if you would like the event to no longer play after a certain date.

Make sure to click "Confirm Settings" to save your changes.

Start Date: 07/04/2016 (Note: Start Date is always equal to Event Time Start Date value)

End: Never
 After occurrences
 Date

6. To edit or delete an existing schedule choose the schedule from the drop down menu.

Admins can “Edit” the Schedule Name:

* Schedule Name

* Schedule Type

Or “Delete” an existing schedule.

Once the schedule has been deleted the admin will need to delete the event associated with it.

7. Choose the event to delete from the drop down menu then select “Delete This Event”.

VIEW CDRs

Admins have the ability to view call detail reports

1. Click “View CDRs” from the admin portal menu

2. Can enter specific dates, by username, called and/or calling number and/or department. Select "Submit" to produce total stats.

View CDRs

Filters

From Date To Date

User

Called Number Calling Number

Department

Totals for Filters Applied		User	Inbound Count	Inbound Minutes	Outbound Count	Outbound Minutes
Total Outbound	<u>26 calls, 6:39 Minutes</u>	Todd, Tanya	20	0:00	0	0:00
Total Inbound	<u>150 calls, 10:38 Minutes</u>	RCF, Kevin	8	2:53	8	2:53
Total Outbound + Inbound	<u>184 calls, 17:17 Minutes</u>	Auto Attendant, Auto Attendant	1	0:11	0	0:00
Total International	<u>0 calls, 0:00 Minutes</u>	Wittman, Pete	8	3:23	8	0:59
Total Toll Free	<u>0 calls, 0:00 Minutes</u>	Voice Portal, Voice Messaging	9	1:12	0	0:00
Total Dir Asst	<u>0 calls, 0:00 Minutes</u>	RCF, Danny	10	2:47	10	2:47
Total Emergency Asst	<u>0 calls, 0:00 Minutes</u>	Connor, Bill	79	0:00	0	0:00
		Phillips, Derrick	8	0:00	0	0:00
		Cisco, ATA186	1	0:12	0	0:00
		Vacant, Office	14	0:00	0	0:00

3. Clicking on a stat link (Total Outbound, Inbound, etc.), will direct you to a detailed list of the stat. This detailed list can also be downloaded as a CSV file.

[Download as CSV](#)

Outbound

From: 2015-08-01
To: 2015-08-31

Customer Id	Start Date	Start Time	End Date	End Time	Responsible Party	User	Direction	Answer Indicator	Calling Number	Called Number	Country	Duration (mins)
NATIONXA10..	2015-08-31	21:18:48	2015-08-31	21:20:00	+18882222222	RCF, Kevin	Originating	Yes	+18882222222	8138222222		1:28
NATIONXA10..	2015-08-28	13:37:45	2015-08-28	13:37:52	+18882222222	Wilman, Pete	Originating	Yes	+18882222222	+18882222222		0:07
NATIONXA10..	2015-08-27	17:15:22	2015-08-27	17:15:29	+18882222222	Wilman, Pete	Originating	Yes	+18882222222	+18882222222		0:07
NATIONXA10..	2015-08-26	21:17:48	2015-08-26	21:17:57	+18882222222	RCF, Danny	Originating	Yes	+18882222222	8138222222		0:09
NATIONXA10..	2015-08-26	21:17:45	2015-08-26	21:17:46	+18882222222	RCF, Danny	Originating	No	+18882222222	8138222222		0:01
NATIONXA10..	2015-08-25	17:57:37	2015-08-25	17:57:44	+18882222222	Wilman, Pete	Originating	Yes	+18882222222	+18882222222		0:07
NATIONXA10..	2015-08-25	18:31:58	2015-08-25	18:32:04	+18882222222	Wilman, Pete	Originating	Yes	+18882222222	+18882222222		0:06
NATIONXA10..	2015-08-25	20:38:48	2015-08-25	20:38:58	+18882222222	RCF, Kevin	Originating	Yes	81382222222@81382222222	8138222222		0:12
NATIONXA10..	2015-08-22	15:51:47	2015-08-22	15:51:53	+18882222222	RCF, Danny	Originating	Yes	+18882222222	8138222222		0:06
NATIONXA10..	2015-08-21	19:40:23	2015-08-21	19:40:39	+18882222222	RCF, Danny	Originating	Yes	+18882222222	8138222222		0:16
NATIONXA10..	2015-08-21	19:40:21	2015-08-21	19:40:22	+18882222222	RCF, Danny	Originating	No	+18882222222	8138222222		0:01
NATIONXA10..	2015-08-20	21:53:53	2015-08-20	21:54:16	+18882222222	RCF, Kevin	Originating	Yes	+18882222222	8138222222		0:23
NATIONXA10..	2015-08-19	15:20:43	2015-08-19	15:21:01	+18882222222	RCF, Kevin	Originating	Yes	+18882222222	8138222222		0:18
NATIONXA10..	2015-08-18	14:29:27	2015-08-18	14:29:34	+18882222222	RCF, Kevin	Originating	Yes	+18882222222	8138222222		0:07
NATIONXA10..	2015-08-18	20:12:59	2015-08-18	20:13:10	+18882222222	RCF, Kevin	Originating	Yes	+18882222222	8138222222		0:11
NATIONXA10..	2015-08-14	14:26:22	2015-08-14	14:26:35	+18882222222	RCF, Danny	Originating	Yes	+18882222222	8138222222		0:13

VIEW USERS

This view allows an admin to see a list of users associated with the company. This list can also be downloaded as a CSV file.

1. Click "View Users" from the admin portal menu



2. All users assigned to the account are displayed in addition to other important information.

Users List

Limit by Department

[Download as CSV](#)

Not Registered	User Name	User Id	Extension	Device Name	Device Type	MAC Address	Department	Service Pack	Expiration	Type	DND	Fwd To	Remote Office	Remote Number	Polycm Phone Services
**	Demo Seat1	7035551234	1234					Hosted UC Feature Package							
	Demo Seat2	7035551235	1235	0012AB3456CD	Polycm Vvx600 Video SBC	0034EF7891GH		Hosted UC Feature Package	Wed Sep 02 20:57:11 EDT 2015	Primary					

- Can view if the phone is registered or not registered (** = Not Registered)
- The username & user ID
- The user’s extension
- Device name and type
- MAC address
- Department Association
- User’s Service Pack
- Expiration date
- Type of user id (Primary or Shared Call Appearance)
- DND, FWD, Forward to Number
- Remote Office turned on
- Remote Office Number

VIEW NUMBERS

This will allow you to see how all numbers on your account are provisioned. This will not show extension-only profiles.

1. Click “View Numbers” from the admin portal menu



2. All numbers assigned to the account are displayed in addition to number assignment

Download as CSV

Number	Type	User Id	Last Name	First Name	Extension	MAC Address	Department
9733871040	Meet-Me Conferencing	9733871040	Conference Meet Me	Meet-Me Conferencing	1040		
9733871060	User	9733871060	Seat2	Demo	1060	000F28E9AC	
9733871061	User	9733871061	Seat1	Demo	1061	000F28E4E3	
9733871062	BroadWorks Anywhere	9733871062	LONG BRANCH	BroadWorks Anywhere	1062		

*Note: Sorting information can be done by clicking the column header

VIEW CHANGE LOGS

1. Click "View Change Logs" from admin portal menu to view most recent changes to the account. Can also download into a CSV file.

View Change Logs

Change Log

Download as CSV

Show 10 entries

Search:

Date	Module	Entity Name	Username
2015-09-02 13:10:16	Admin Add	ssmith	jthorpe
2015-08-27 14:18:56	Admin Modify	ggreene	jthorpe
2015-08-17 13:45:51	Admin Add	glewis	jthorpe
2015-08-10 15:28:26	Admin Add	rsmith	jthorpe
2015-08-10 14:41:54	Admin Add	jberty	jthorpe
2015-08-10 14:37:17	Admin Add	rfernandez	jthorpe
2015-08-10 14:35:29	Admin Add	gwilliams	jthorpe
2015-07-23 10:05:12		test2, test2	jthorpe
2015-07-23 09:58:13		test2, test2	jthorpe
2015-07-23 09:55:52		test2, test2	jthorpe

Showing 1 to 10 of 140 entries

Previous 1 2 3 4 5 ... 14 Next

*Note: Module column displays what was modified. Clicking here will give extended details of the change.



LOG OUT

1. Click Logout located in top right corner.

Welcome Susan [Logout](#)