

# Your user portal to Unified Communications

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This guide refers to system software 23.504 and higher.

## Your user portal to the Cloud Communications platform

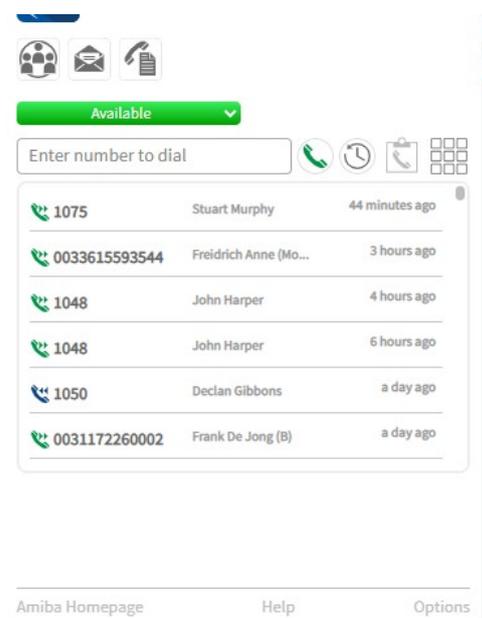
Your personal portal gives you quick and easy access to real time presence of colleagues, click to dial from contacts, chat, SMS, customer messaging on social media channels, call forwarding, voicemail, phone settings, speed dials and video conferences.

There's a link to your user portal in the Welcome Email you get from the system administrator.

## Chrome Extension and click-to-dial

The easiest way to open your portal to the Unified Communications platform is with a Chrome browser extension. Install the Chrome extension on your Chrome browser by clicking on the download link in your Welcome email.

When the extension is added, the extension icon will appear on the top right of the browser page. Click on this and type in the server address (PBX URL) and your username and password. These account details are listed in your Welcome email. Press Save and Login. The Chrome extension will keep you connected to the Unified Communications platform to receive notification of incoming calls and chat messages.

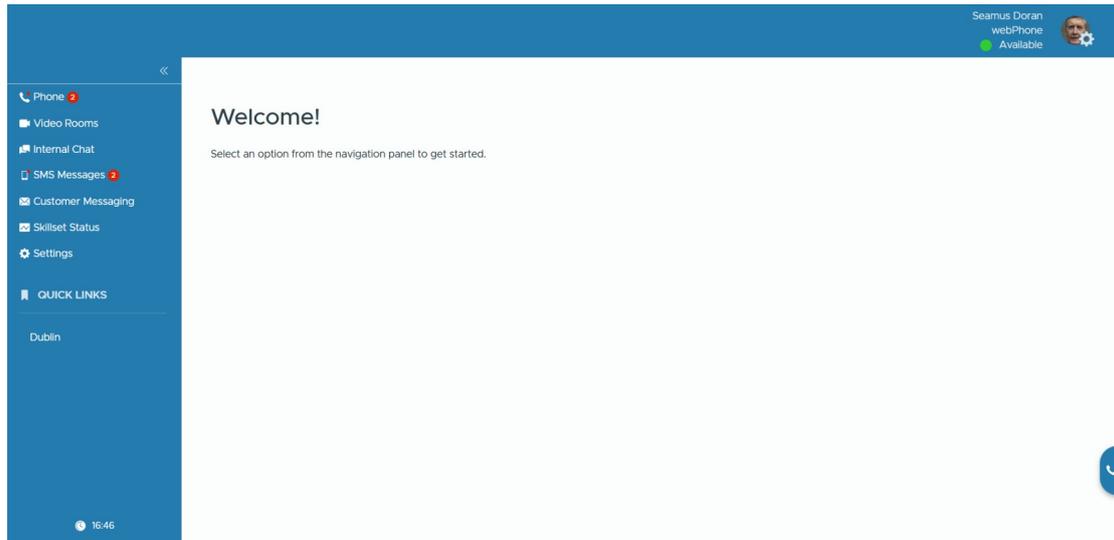


Click on the extension icon to see your recent calls or start a voice call or to go to your personal user portal page.

You can use the Chrome plug-in to highlight numbers on web pages and click to dial.

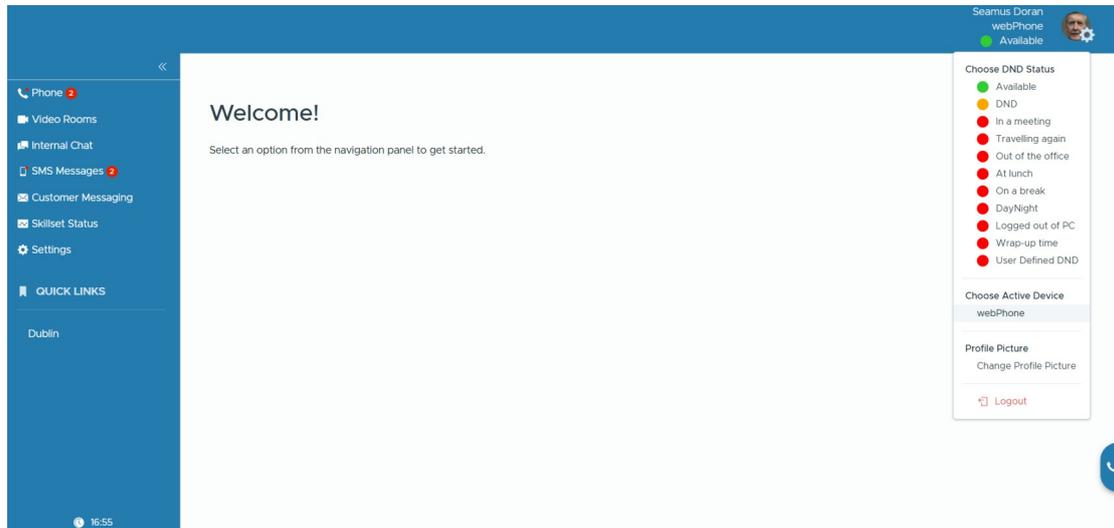
In order to dial a number in a Word doc or similar, copy the number to your Clipboard (Ctrl + C) and then use the Chrome Click-to-dial shortcut.

## Your user portal



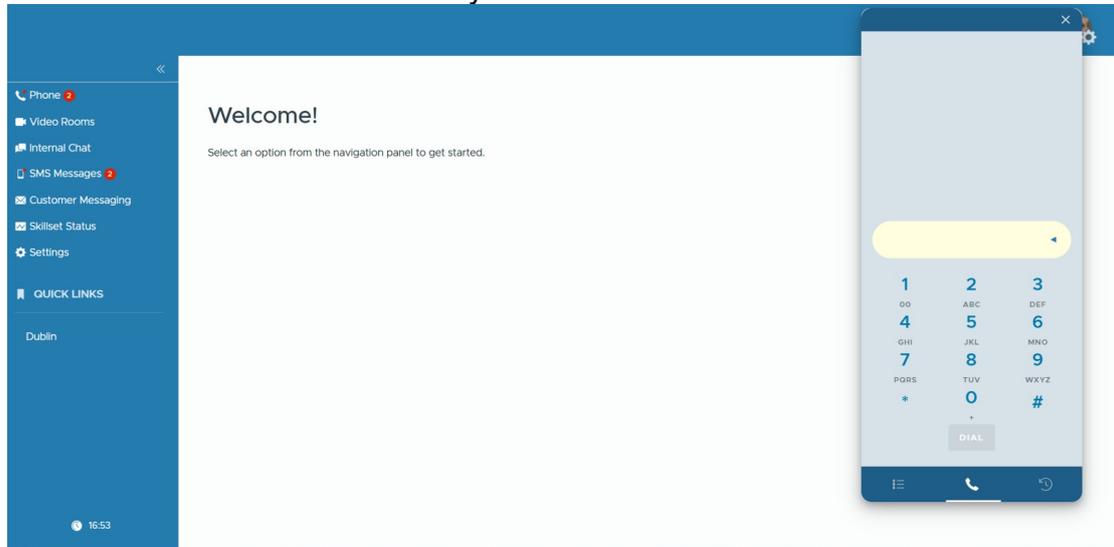
Navigation tabs are on the left. Click the chevron arrows to reduce the tabs to icons. The floating webphone icon is lower right.

Click on the cogwheel in the top right corner to choose your availability status, set your active device and insert/update your profile picture.

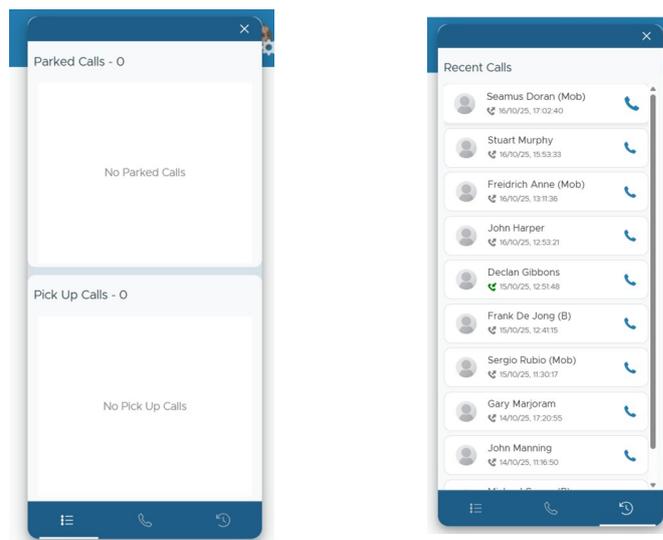


## Floating webphone

Click on the icon on the portal lower right and drag the floating webphone to the most convenient location on your screen.

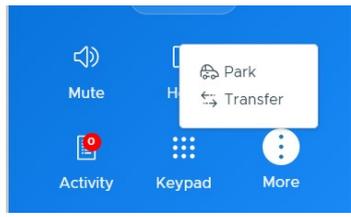


The 3 tabs across the bottom are for Park/Pick up, Dial and Recents.



To make a call you can click on the clock icon, lower right, for the list of recent calls and click on the handset icon.

Alternatively, type the number into the clear box and click enter.

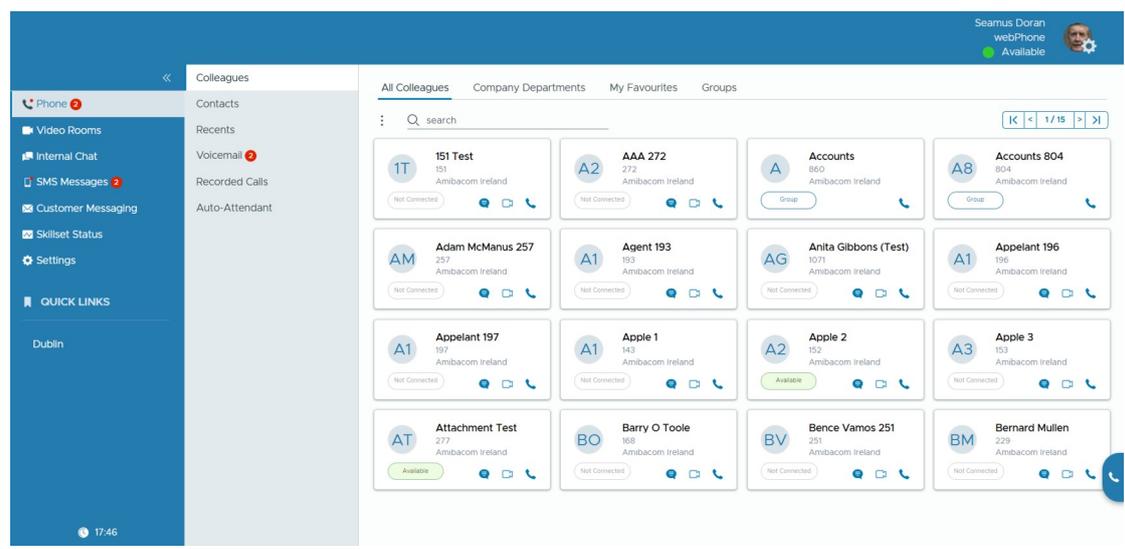


When you are on a call you can use the hold icon (|| symbol) to place the other party on hold or to take a call back from hold.

The Park and Transfer options are under the 3-dot More icon.

Where many calls are active on your phone, the status of each one is displayed individually.

**Navigation tabs on the left**

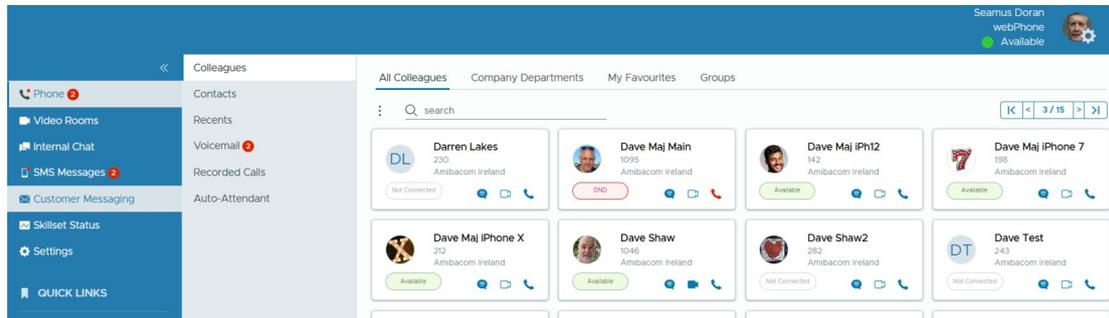


The tabs on the left are for Phone (voice calls and contacts), Video Rooms, Internal Chat, SMS Messages, Customer Messaging (with social media channels), Skillset Status (contact center agents only) and Settings.

**Phone**

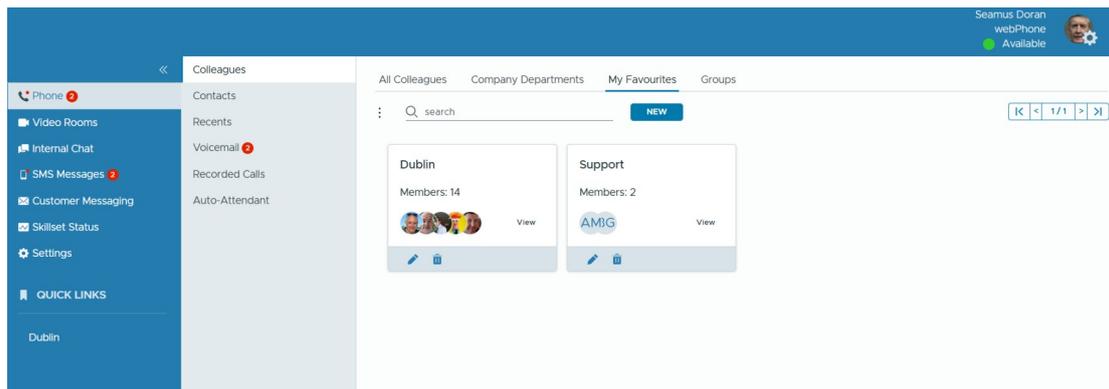
Under Phone, there are tabs for Colleagues, Contacts, Recents, Voicemail, Recorded Calls and Auto-Attendants.

## Colleagues



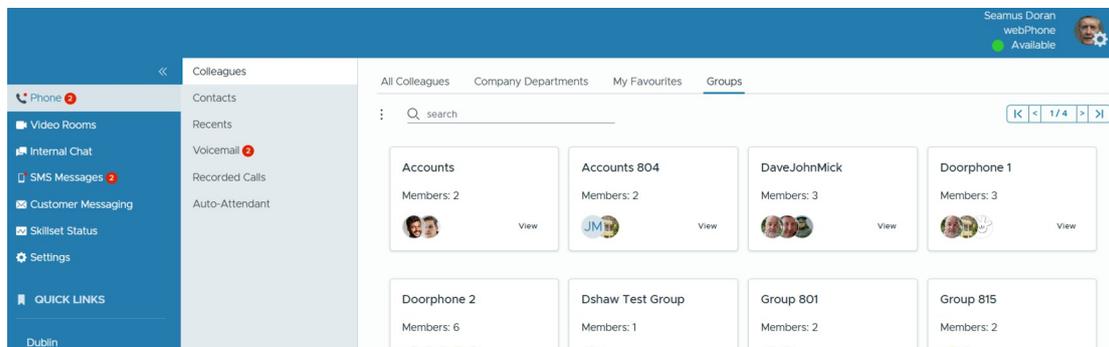
You may click on the message, video or phone icon adjacent to colleagues to communicate. The live status of all system users is indicated on their card. There are separate tabs for Company Departments, Favorites and Groups. Company Departments are assigned by the system administrator. Departments may be pinned as Quick Links to the left navigation panel.

## Favorites



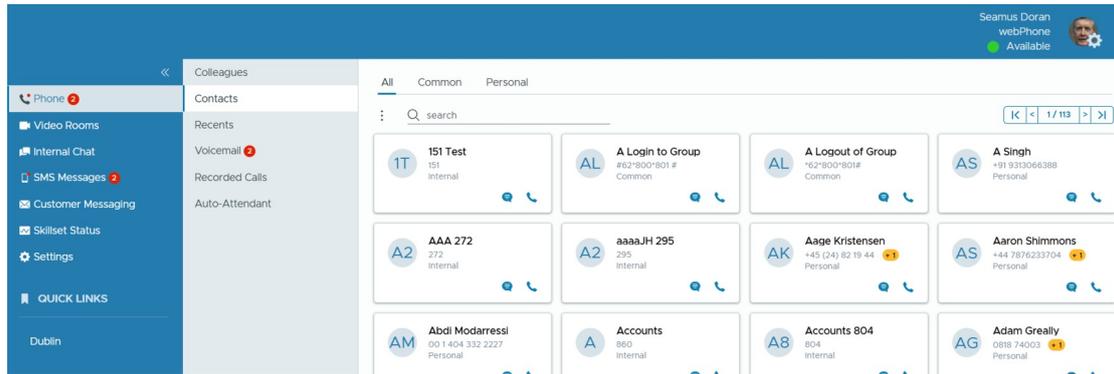
Under Favorites, you can create and name new groups and pin them to the left navigation panel.

## Groups



Groups, assigned by the system manager, may be used for sites. You can pin groups to the left navigation panel.

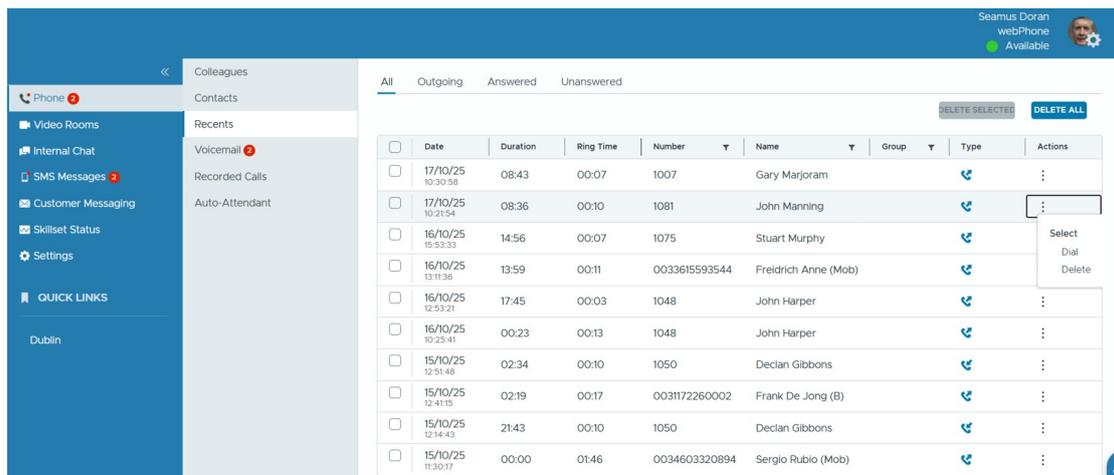
## Contacts



Contacts are external and divided among those common across the entire system and your personal contacts.

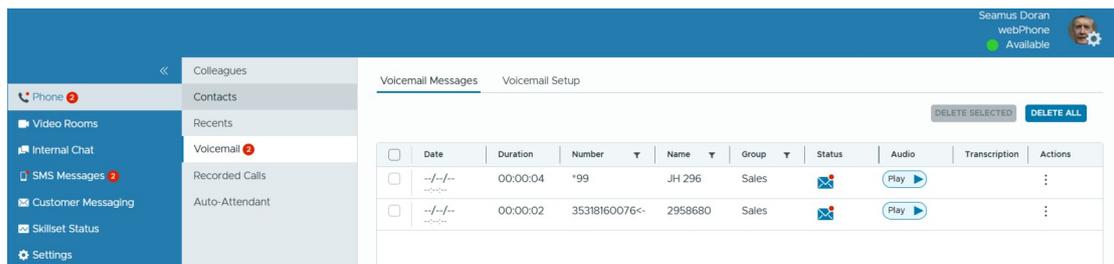
You can add and edit contacts or search by typing a name or number in the search box.

## Recents



Recent calls are displayed. There are sub tabs for Outgoing, Answered and Unanswered calls.

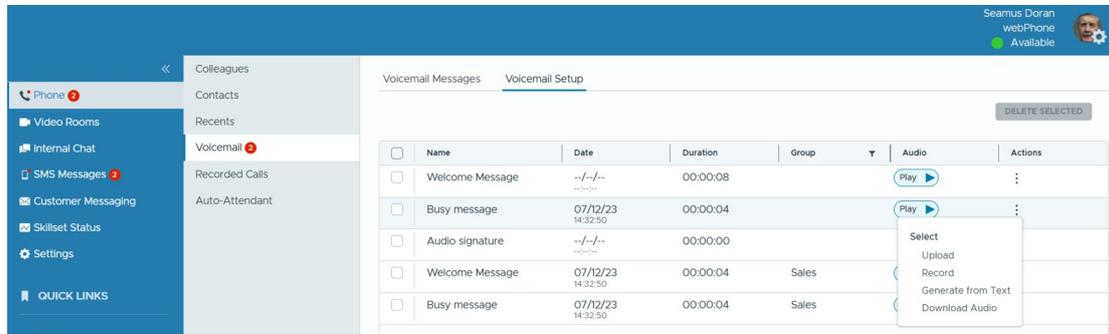
## Voicemail



You can play the audio, view a transcription or download voicemail messages.

The Status of each message is indicated by the envelope symbol, as either new or read (opened envelope).

Click on the 3-dots Action icon on the right, to call back or download the audio.

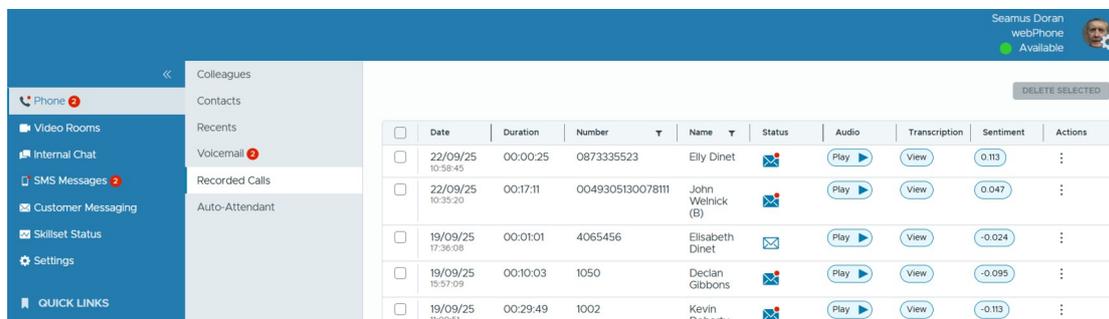


Under the **Voicemail Setup** tab, you can play, record from your own voice, generate from text or upload your Welcome and Busy messages and your audio signature.

Your personal audio signature is a recording of you speaking your own name. It is used in the dial by name feature which allows incoming callers to type your name on the dial pad to connect to you.

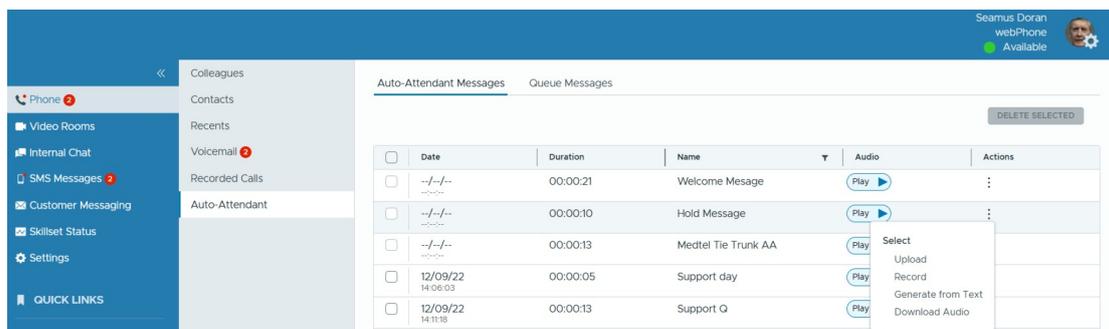
You can also program the messages for each group where you're the leader.

## Recorded Calls

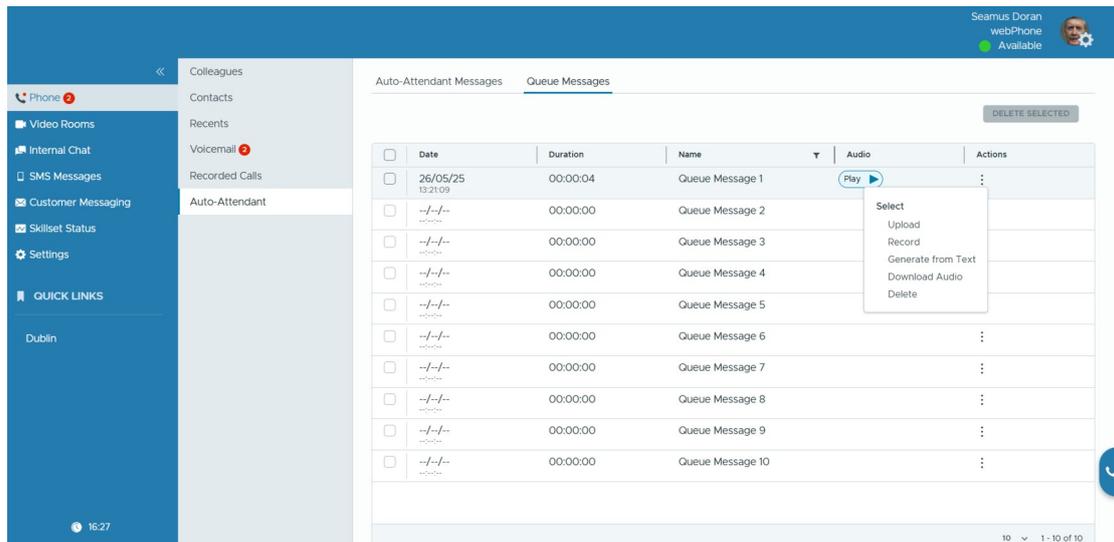


Play back any of your recorded calls. View the transcript and the sentiment analysis.

## Auto-Attendant

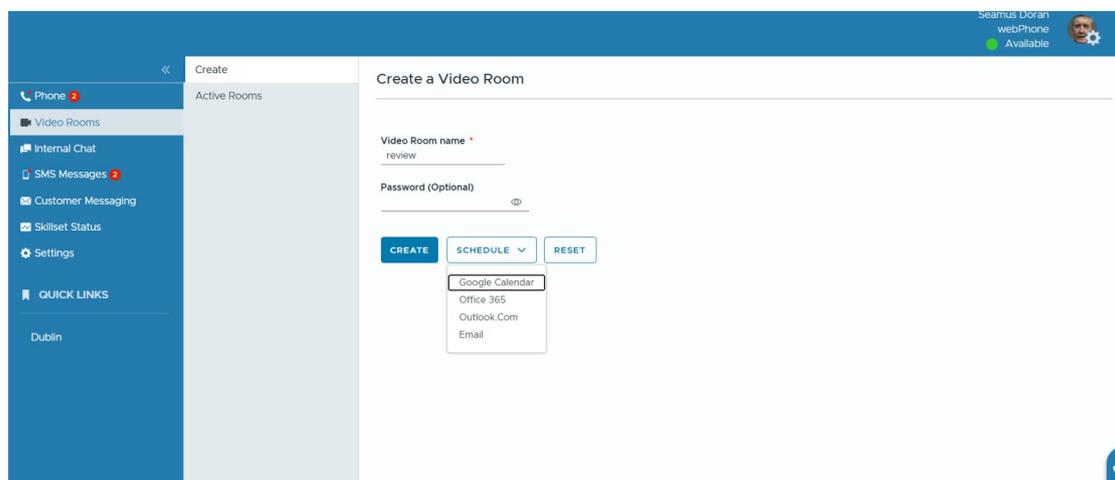


Users with Operator privileges can play and download the audio and upload or record new automated attendant messages, or generate them from text.



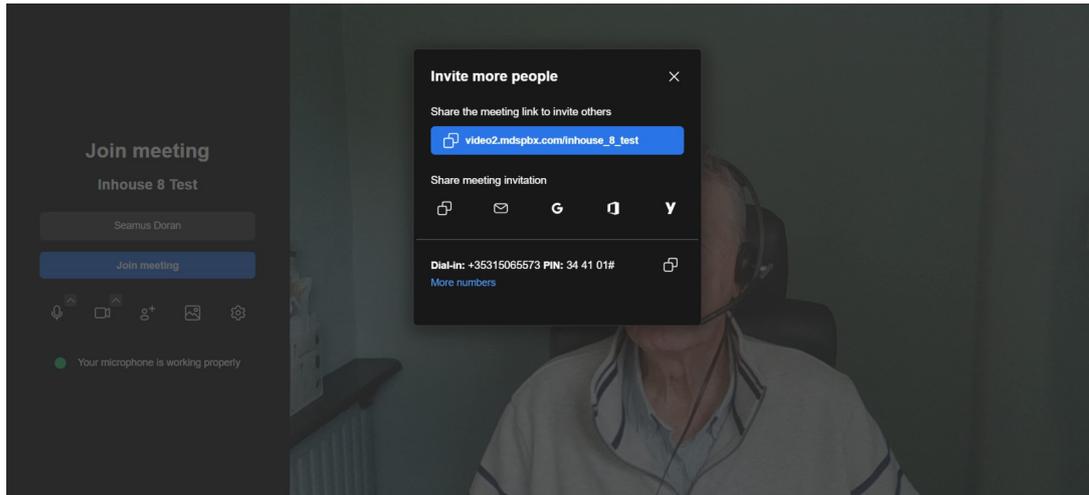
Under the **Queue messages** tab, you can listen to Position in Queue messages. You can also download, delete, upload, record and generate new messages from text.

## Video Rooms



In the Video Rooms menu, under the **Create** tab, enter a Video Room name, click Create for a video room for immediate use. Click Schedule to invite participants using Google Calendar, Office 365, Outlook or email.

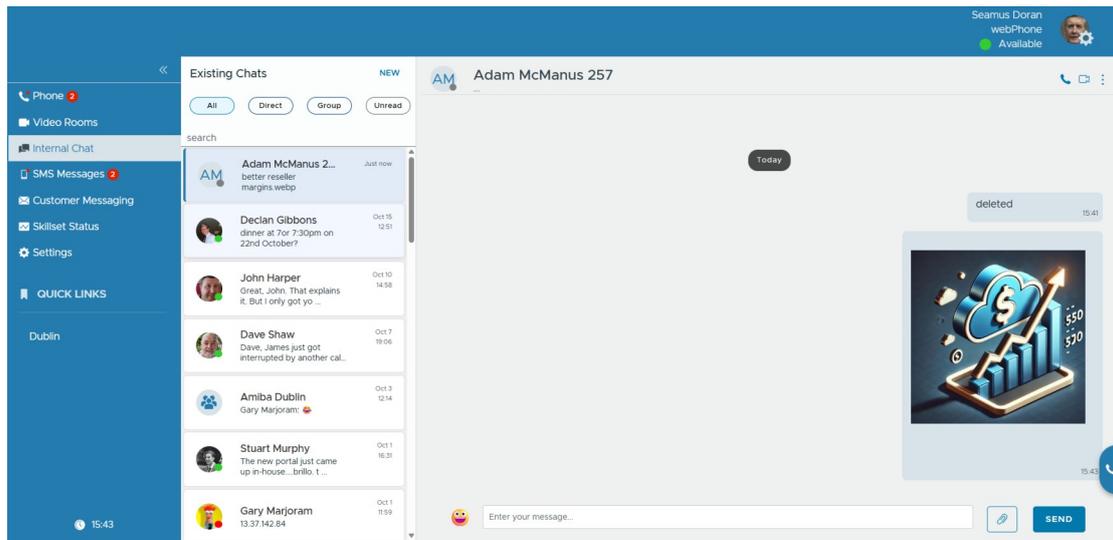
Under the **Active Rooms** tab, there's also an option to view the members and join a meeting already in progress.



Click on the person+ icon to invite participants to an active meeting, and for options to share the link.

Up to 70 participants are accommodated with screen sharing and dedicated chat.

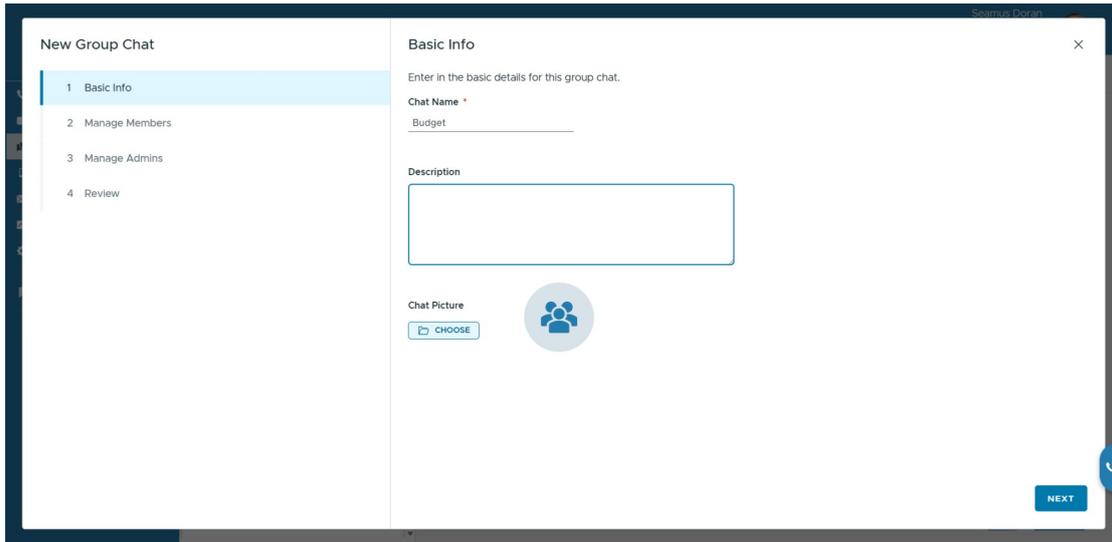
## Internal Chat



To send an internal chat, you can go to the Colleagues page, enter the first letters of the colleague's name in the search box and click on the adjacent chat icon.

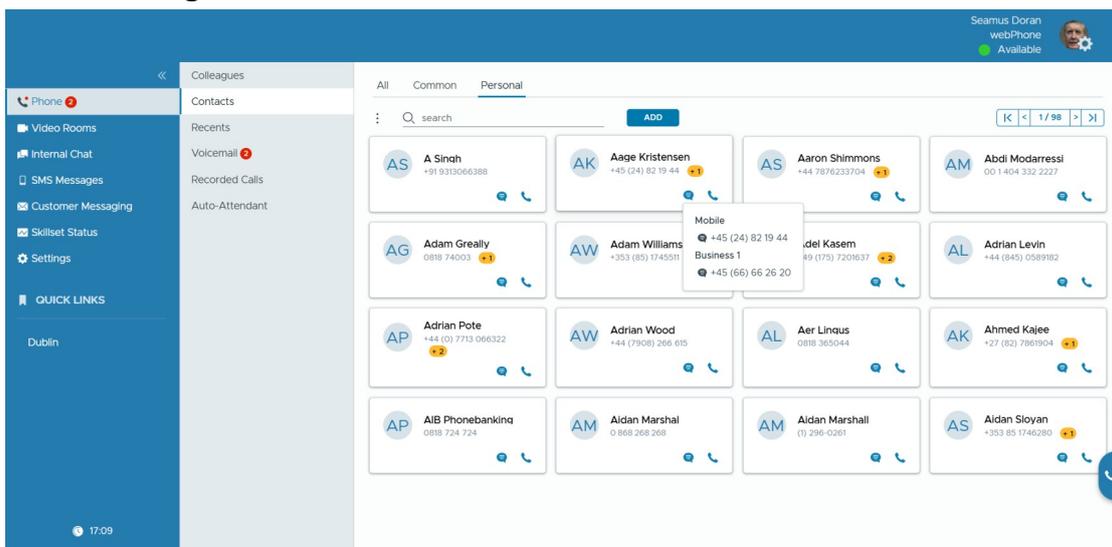
Type the message in the dialog box and enter carriage return to send.

On the Internal Chat page there are tabs for Direct (one-to-one), Group chats and Unread.

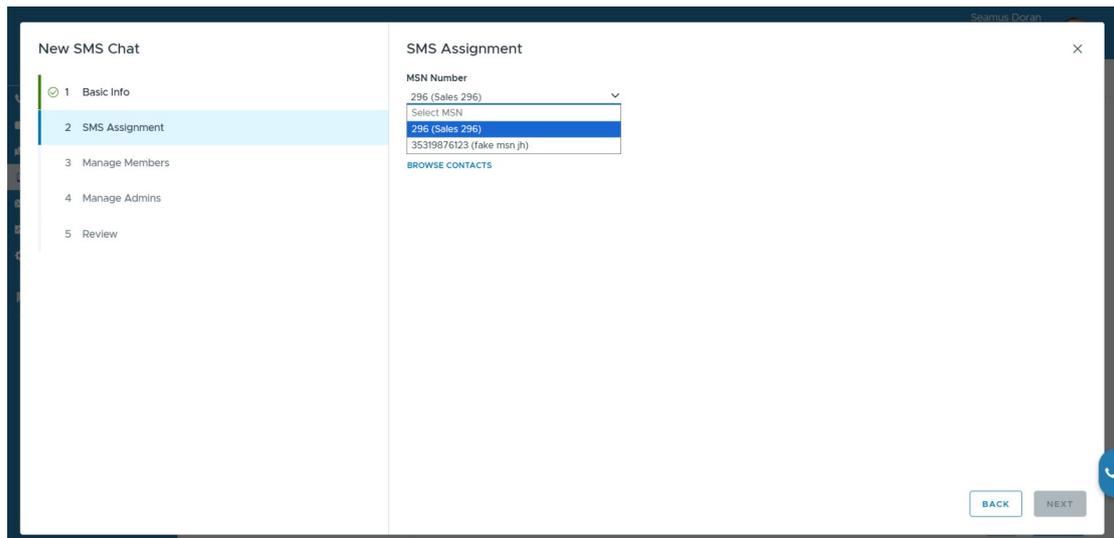


Click on the **New** icon to start a new chat. To set up a new Group Chat, give the group a name, description and icon. Assign members and administrators, review and start messaging.

## SMS Messages



To send an SMS go Contacts, click on the Chat icon at the recipient's name and select the recipient's number. Select the "from" MSN you want to use and click Start New. Enter the message and Send.

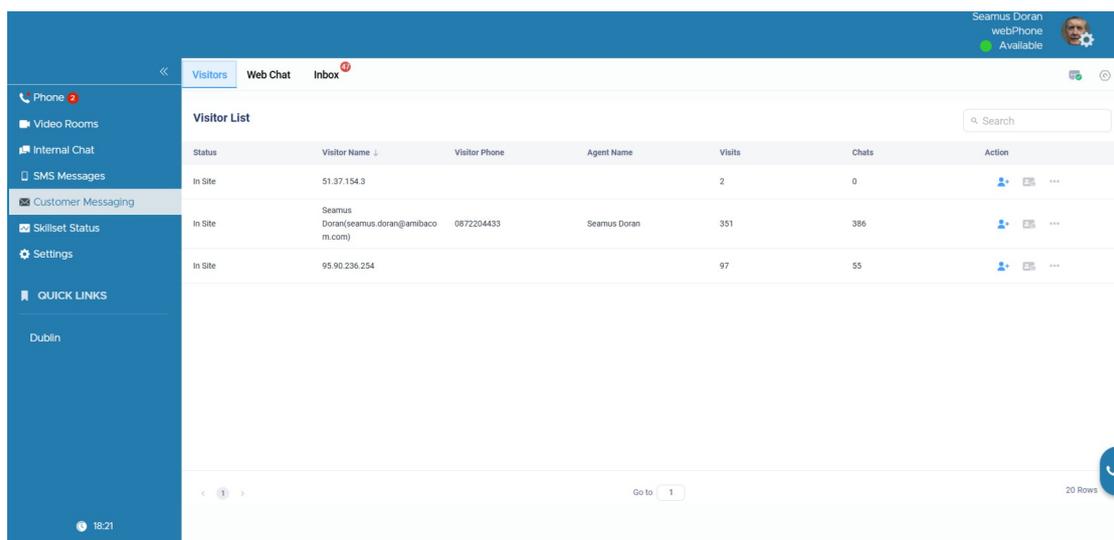


On the SMS Messages page, you can view and add to existing message threads of one-to-one or group messages

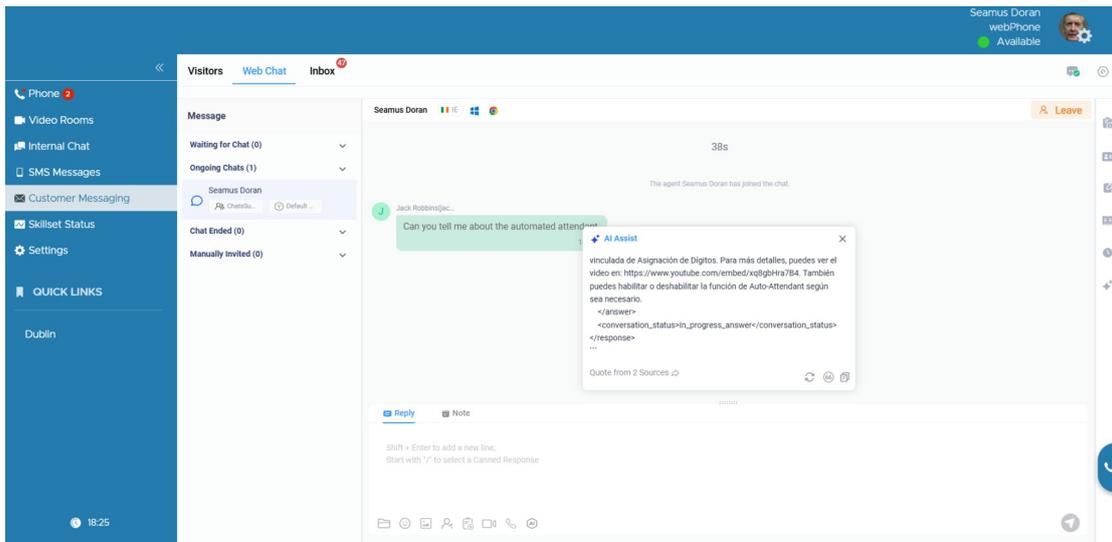
To send an SMS from a new group, enter an SMS group name, assign an outgoing MSN number from the drop-down list and enter the destination number, or select from your contacts. You can add colleagues to the SMS message group and you can assign administrators to the group.

## Customer Messaging

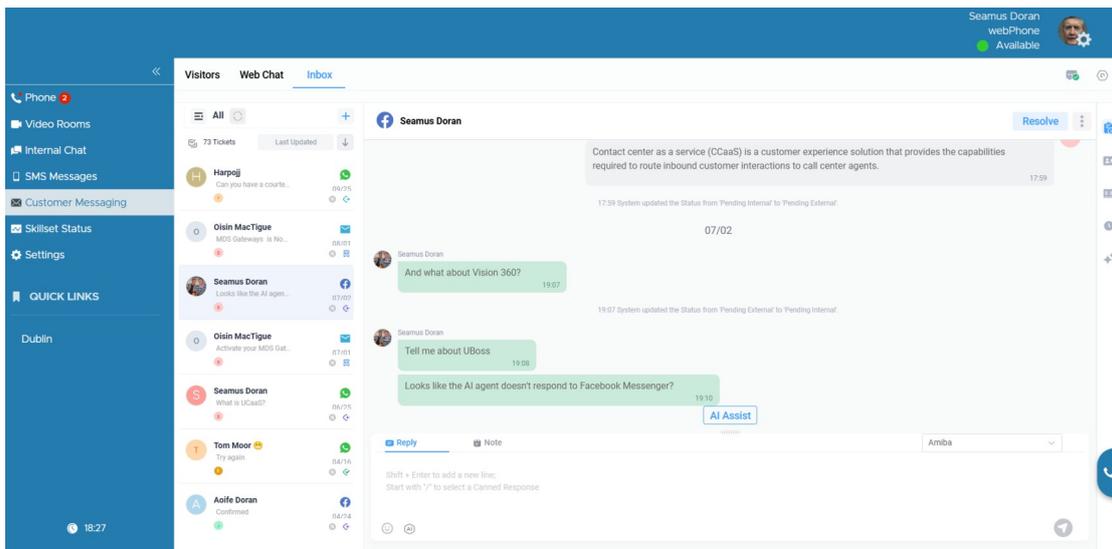
Clicking on Customer Messaging gives access to the Customer Messaging portal where agents can communicate with customers on their preferred social media channels and via the Web chat widget on the company web site. Channels supported may include Facebook Messenger, Instagram, Whatsapp, email and SMS.



Clicking on the **Visitors** tab displays IP addresses and locations of all visitors on your web site and names of those who have activated the Chat button.



Under the **Web Chat** tab, you can message with visitors to your web site.



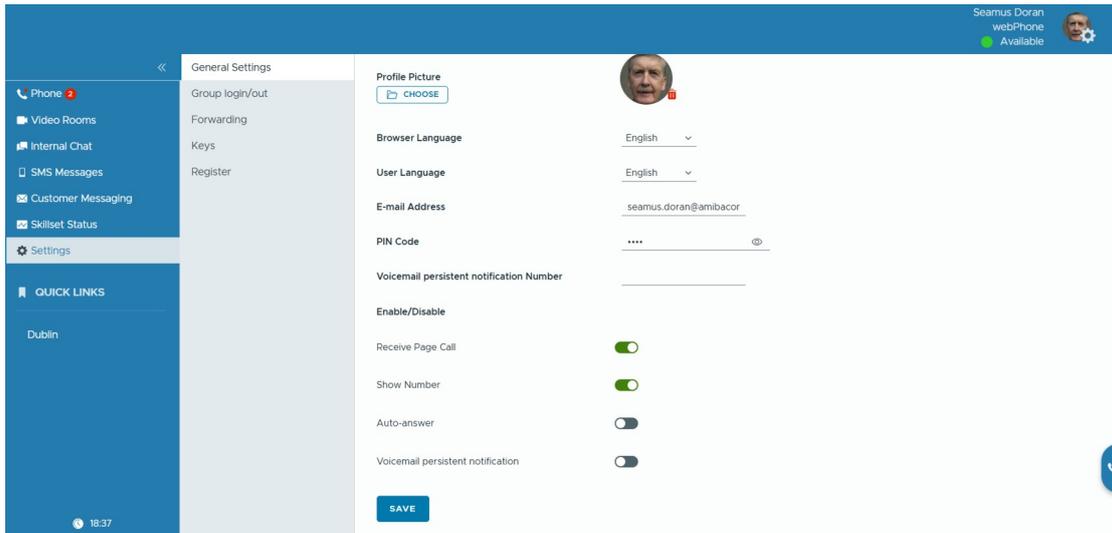
Under the **Inbox** tab, you can message, see history and open tickets through all configured customer messaging channels.

## Skillset Status

The screenshot displays the 'Skillset Activity' dashboard. At the top right, the user 'Seamus Doran' is logged in as 'webPhone' and is 'Available'. The left sidebar contains navigation options: Phone (2), Video Rooms, Internal Chat, SMS Messages, Customer Messaging, Skillset Status (selected), Settings, and QUICK LINKS (Dublin). The main content area is titled 'Skillset Activity' and includes a search bar for skillsets. Below this, there are four skillset cards: 'Sales', 'Operations2', 'Skillset 825', and 'new skillset'. Each card shows 'Agents Available' (1/3 for Sales and Operations2, 1/1 for Skillset 825, and 1/2 for new skillset). The 'Sales' and 'Operations2' cards display call statistics: Total Calls, Answered, Abandoned, Voicemail, and Forwarded, all showing 0. They also feature 'Active Calls' pie charts (showing 'No Active Calls') and 'My Call Stats' (showing 'No Data' and 'Connected Duration - 00:00:00'). Each card has a 'LOGOUT' button.

Skillset Status, for contact centre agents only, displays an overview of each of the skillsets you're a member of. It displays the overall call statistics for each skillset as well as the number of active calls. It also shows your connected time in each skillset and calls handled.

## Settings



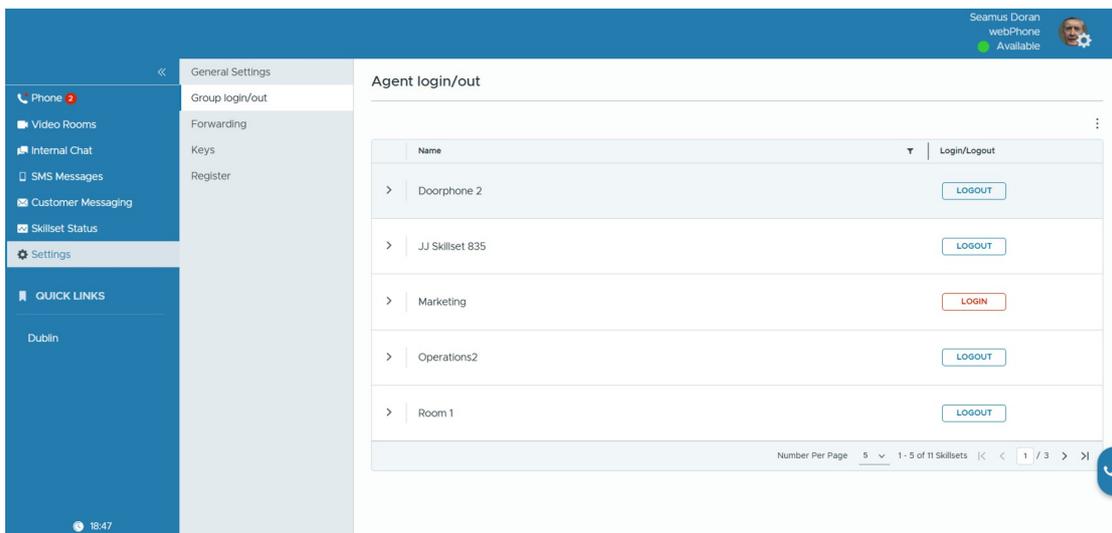
Under the **General Settings** tab, change your Profile Picture, choose the language for your web portal and for other devices on your extension. You can set your email address for voice mail and other notifications from the system. You can set your voicemail PIN.

You can enable receipt of Paging calls from other users of the system.

You can turn on or off you Calling number display on your outgoing calls.

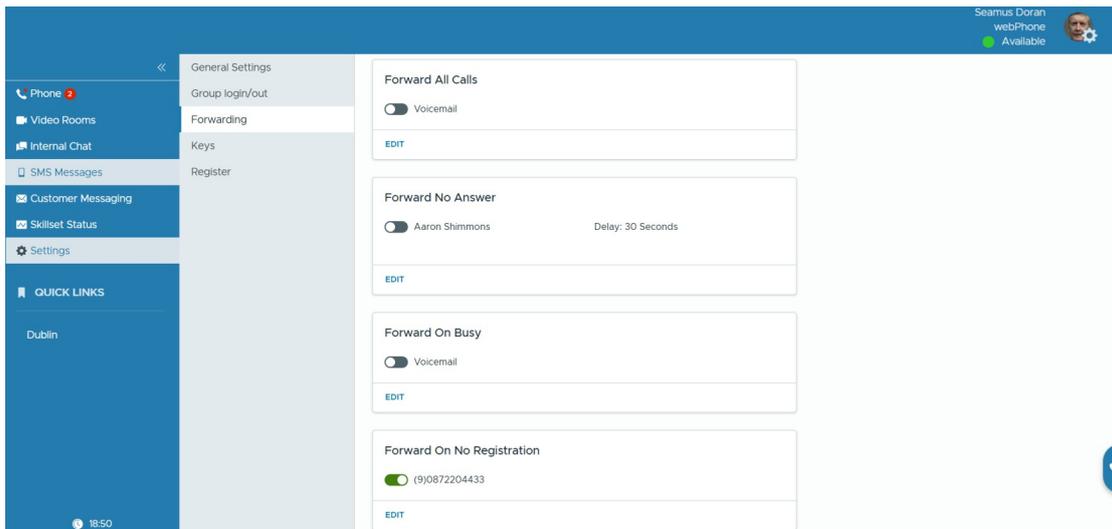
You can activate Auto-answer, for which you'll need an extension phone that can automatically go to handsfree mode.

You can set up Persistent Voicemail notification, to get repeated alerts on voice mail messages that are left for you.



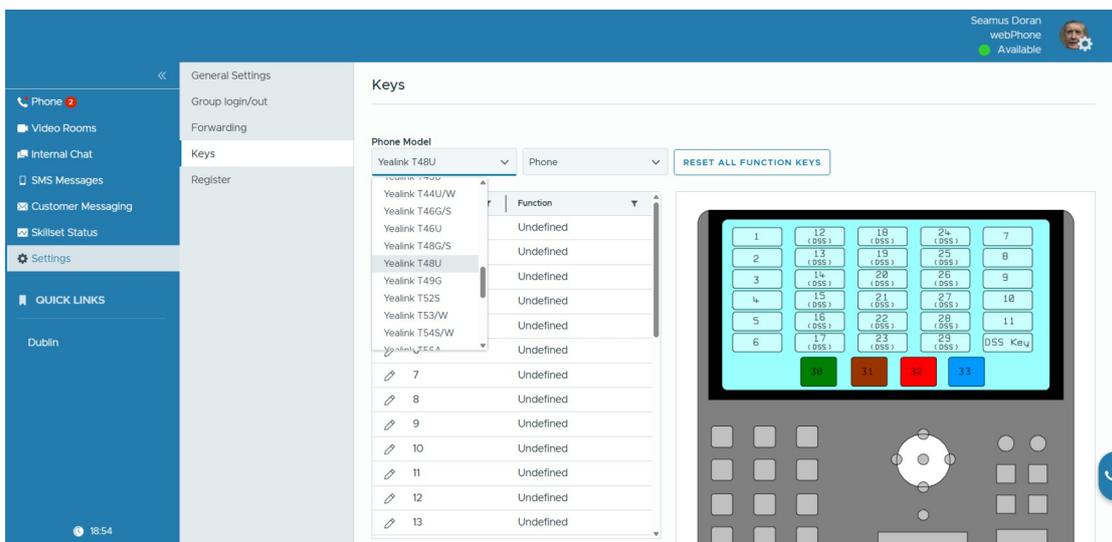
### Log in and out of your groups or skillsets

Under the **Group login/out** tab, you see and toggle your logged-in status to each of the groups or skillsets of which you're a member.



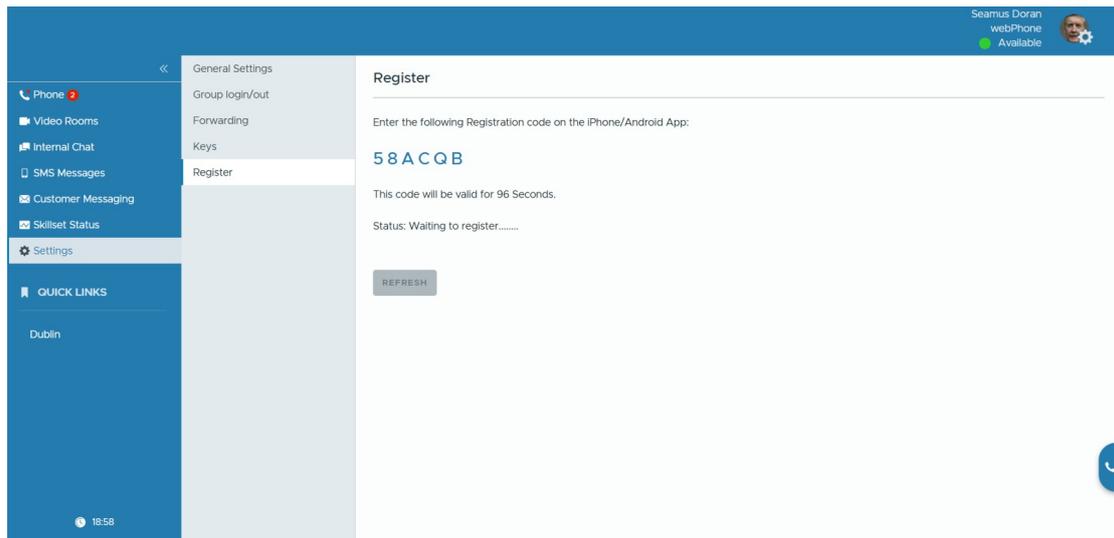
## Set Call Forwarding rules

Under the **Forwarding** icon, you can view and Edit your call forwarding rules.



## Program the keys on your desk-phone

Click the **Keys** tab and choose your Yealink or Polycom phone model from the drop-down list to program the keys on your desk-top phone with speed dial numbers and tasks which you perform frequently. From the drop-down menu, select Keys to display the list of functions that can be assigned to a key.



## Register your iPhone or Android app

Clicking on the **Register** tab allows you to register your iPhone or Android app with the PBX, by entering the pairing code, which remains valid for two minutes.

The smartphone app can be download from the Apple App store or the Google Play Store by clicking on the link in the Welcome email from the system manager.